






**BELIEVE**  
IN LEGACY GIVING!

**TED LASSO-ING**  
**Your Digital Planned**  
**Giving Strategy**

At **GREATER GOOD STRATEGY** we help good-for-the-world  organizations  and brands drive awareness, action, and social change 



**"TAKING ON A CHALLENGE IS A LOT  
LIKE RIDING A HORSE, ISN'T IT?"**

**IF YOU'RE COMFORTABLE WHILE  
YOU'RE DOING IT, YOU'RE PROBABLY  
DOING IT WRONG."**



**Do you have legacy giving  
on your website?**

HOLLY HULL MIORI



# The Good(stein) behind Greater Good Strategy

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**Listen.**

LISA LEPSON, THE FORWARD

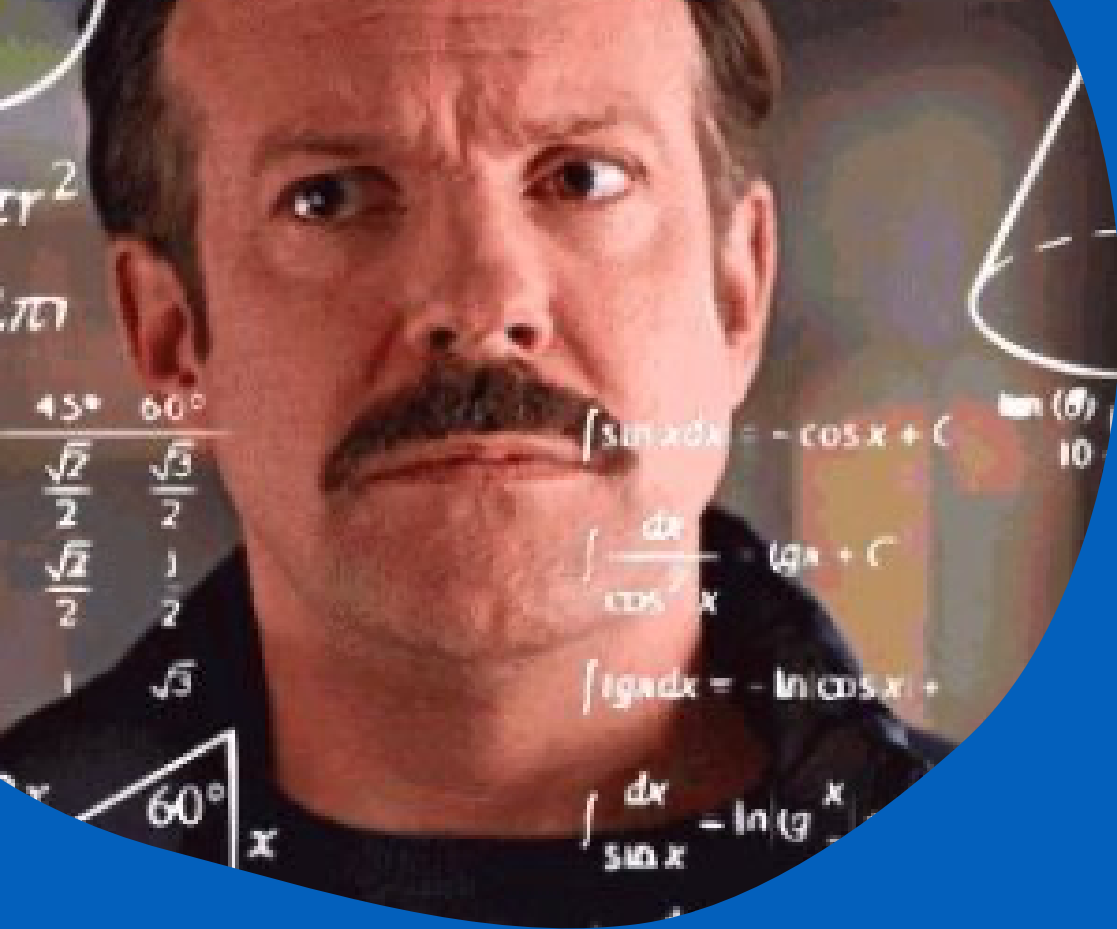
# Why Ted Lasso?

## Why Planned Giving?



### What makes Ted Lasso a great metaphor?

- Team-building + donor cultivation
- Planned giving is long-term, heart-led strategy



# Digital + Donor Engagement

- Donor life stage and preferred communication styles
- Importance of meeting donors where they are
- 85% of donors research a nonprofit's website, and 70% visit their social media profiles before making a donation (according to the 2024 Generational Giving Report by Bloomerang)





# Building Authentic Relationships Online

*(LASSO STYLE)*

**BE CURIOUS,  
NOT JUDGMENTAL.**

- Active listening, kindness, and storytelling
- Email sequences, social media presence, personalized video
- Creating a culture of gratitude and belief



**People respond best to stories about someone they identify with. Target donors with stories of other donors who are in a similar life stage. Not every story should feature a Boomer in the sunset of their life!**

MICHELLE SHEFTER, FREEWILL

# Website Tactics to Inspire Legacy Giving



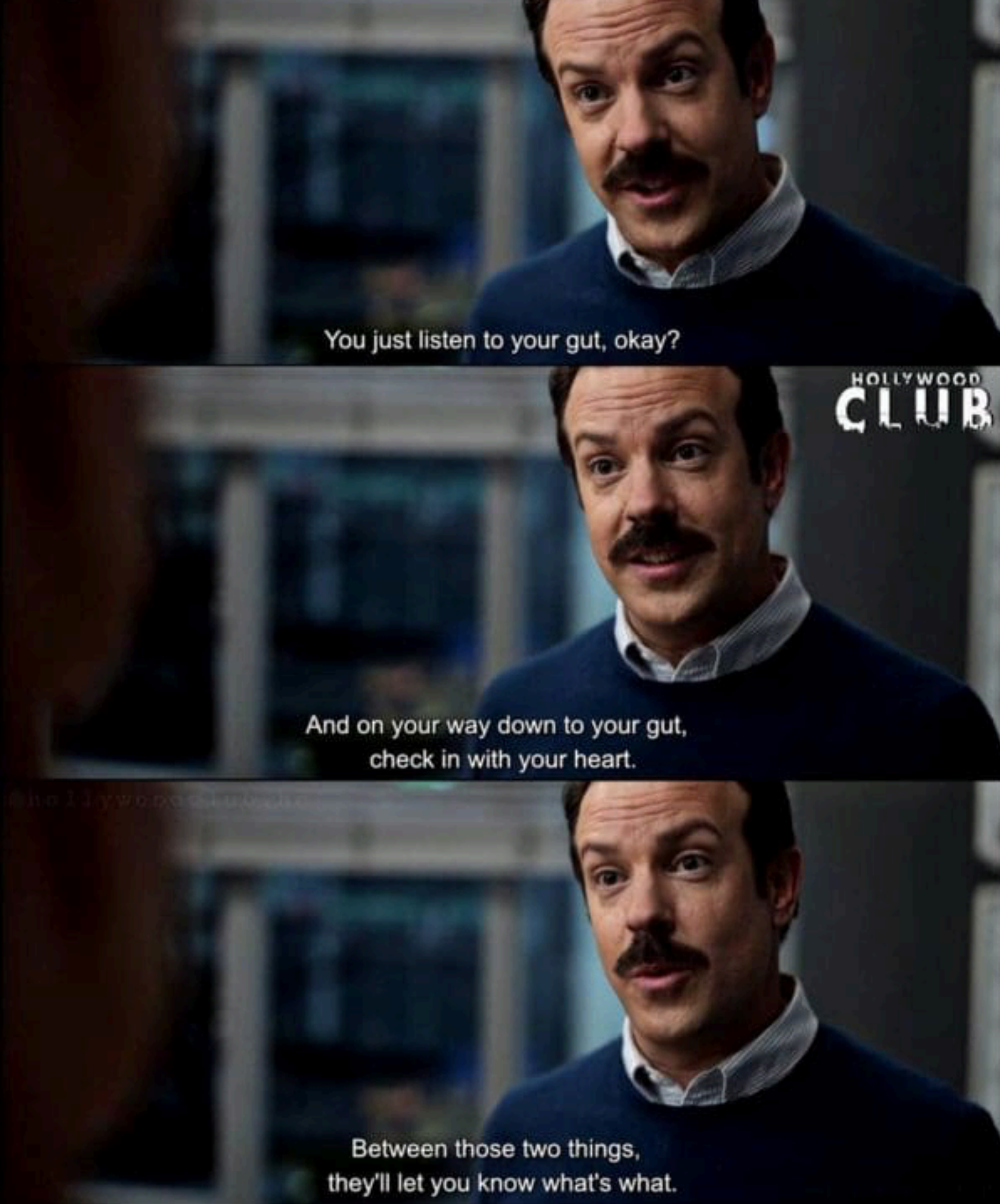
- Website optimization for planned giving info
  - Pop-ups
  - Dedicated page
  - Option on donate forms
- Legacy intent forms
- Testimonials and donor stories (especially video!)

# Not Just a Campaign



- Think about legacy content as a consistent content theme throughout the year, not a special one time campaign
- Keep legacy giving as a standing agenda item in all digital interactions. This means:
  - Social
  - Web
  - Direct mail
  - In person at events
  - Email





# Turn Donors into Lifelong Supporters

- Stewardship plans for legacy donors
- Creating community (*e.g., legacy societies*)
- Celebrating commitments digitally and meaningfully
- [Check out this example from EDF!](#)



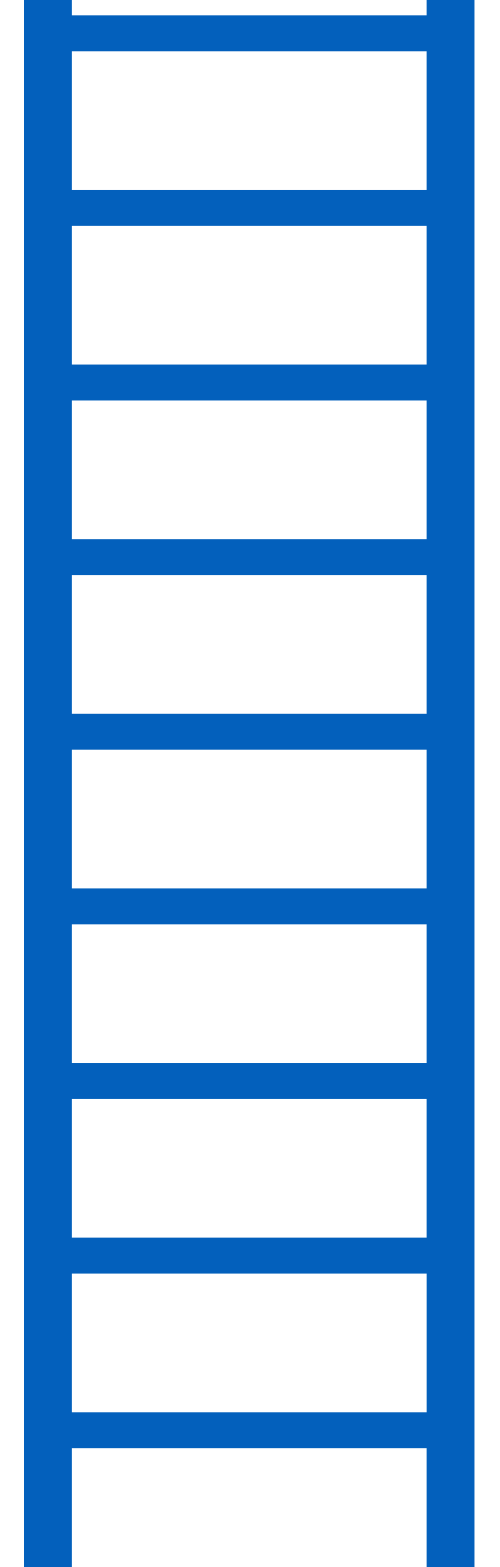
**If we can tell a story that started long before they were here, and continues long after they're gone, but includes them in a beautiful future, that's a successful and compelling story.**

PETER GENUARDI, SEE THE STARS

What's email segmentation got to do with it:

# Sample Engagement Ladder

- **Joins** list!
- **Gets excited** because of impact stories and some data!
- Makes a **first donation**!
- **Feels wildly appreciated** and makes a second gift!
- **Feels connected** because of a cultivation series and multichannel outreach!
- Becomes a **monthly donor**!
- Builds **personal relationships** with organizational staff!
- Gets approached about **legacy giving**!





# Resources + Examples

- [GGG resources](#)
- [Practivated](#)
- [FreeWill](#)
- [DAFinitive](#)
- [Nonprofit Technology Network](#)
- [N Street Village](#)
- [VoteRiders](#)
- [Environmental Defense Fund](#)
- [The Forward](#)
- [Why Bad Presentations Happen to Good Causes](#)

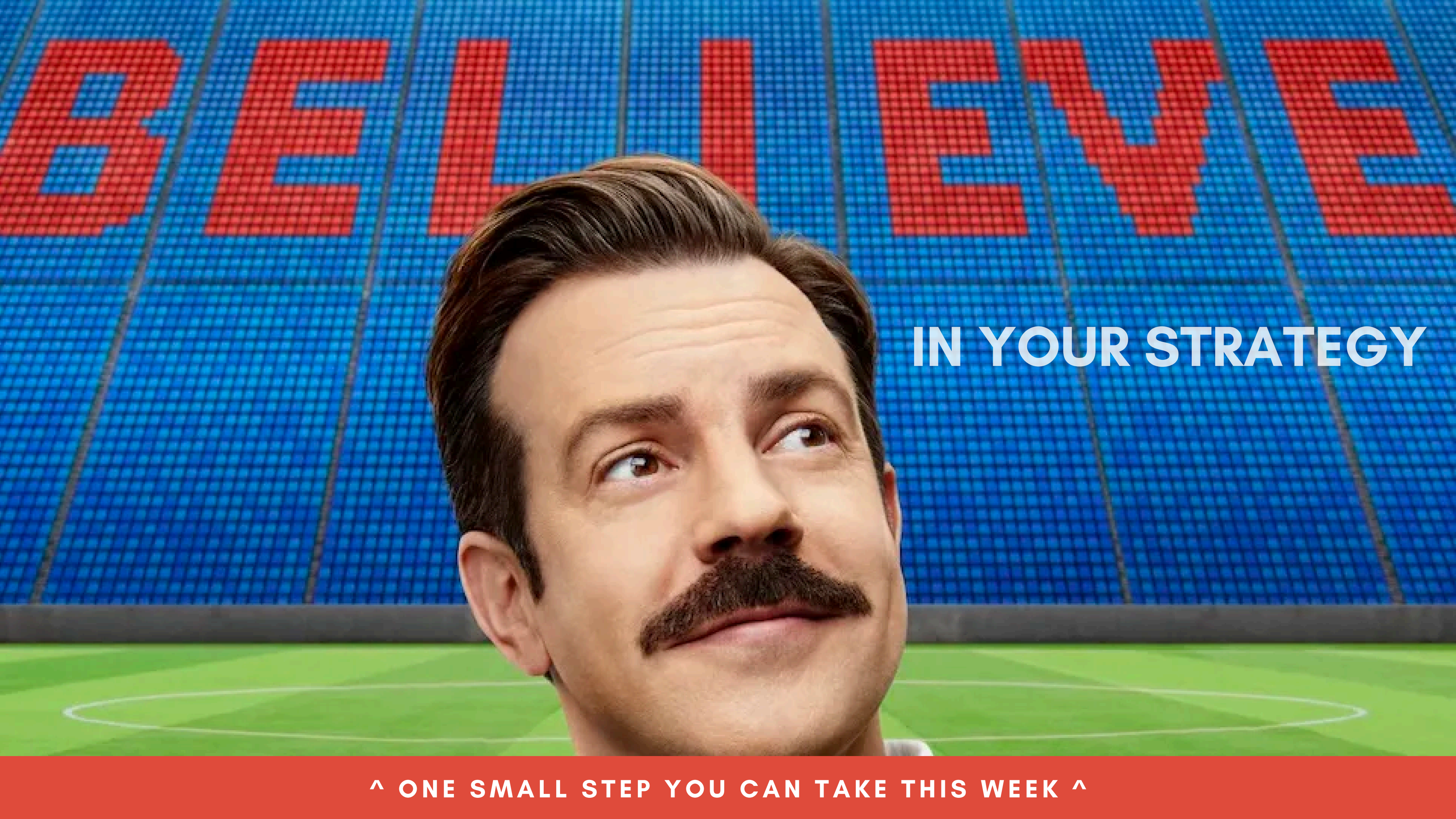




# If you remember nothing else...



- ➔ One ask per email!
- ➔ Digital IS part of your legacy strategy.
- ➔ Unsubs are not bad.
- ➔ Omnichannel is the jam.



**IN YOUR STRATEGY**

**^ ONE SMALL STEP YOU CAN TAKE THIS WEEK ^**





**SO, I SPOKE TO THE OWNER OF THE SUN**



**YOU SPOKE TO GOD?**

GREATER  
**GOOD**  
STRATEGY

**Let's stay  
in touch!**

EMILY GOODSTEIN

Founder + CEO

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