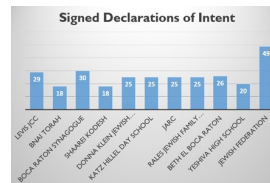
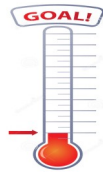


## Tips for a Successful “Final 3” (months to goal)

### For Legacy Program Coordinator

- Consider holding a meeting for team leaders, or full teams, to motivate, inspire, and share ideas
- Consider additional incentives (financial or other) for teams who meet their goals a month early or teams who exceed their goals
- Consider a one month “Challenge” for most new commitments or formalized gifts with a “prize” of extra marketing support, bagel breakfast delivered to organization, gift cards for the team or another creative idea
- Request time on organizational board meeting agendas to share progress, national perspective, and next steps in the program as motivation to reach the goal
- Communicate community progress in a way that each organization can integrate into their board reports
- Increase productive communication with the teams (still no nagging):
  - Will increase accountability
  - Celebrate each success (Ex: when teams meet/surpass goals, successful programs..)
  - Utilize appropriate communication based on individual team needs (phone, email, in-person)
- Utilize a visual to publicize success towards goal or countdown to end of year  
(Ex: Thermometer, Graph, Countdown)



### Encourage Teams to:

- Increase number of conversations
- Follow up with any prospect still undecided
- Capitalize on past marketing efforts by implementing targeted direct mail to long-time donors and follow up with conversations
- Schedule additional team meetings to increase accountability
- Celebrate each success and publicize to the entire team
- Increase accountability with greater communication
- Place an article in newsletter discussing the success of the program to date and goals still to be reached
- Advertise incentive grant to move donors to take action by using the following language: “We have a wonderful opportunity and we need your help! Join our legacy society by (date) and help us receive a \$xxx cash grant. We only need X more Legacy gifts to meet our goal. Contact \_\_\_\_\_”