

Building a Legacy Supporter Journey:

Overcoming the challenges for small to medium charities.

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DipM MCIM

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Hi




Humane
World for
Animals


Book Aid
International


woodgreen
Helping pets and their people


Sheffield
Hospitals
Charity


orbis


humanimal trust
ONE Medicine, caring for humans and animals


The ROYAL
MARSDEN
Cancer Charity


Education
Support


TST
TEACHING
STAFF
TRUST
YES when it matters most


ageInternational


The
Pituitary
Foundation


GREENPEACE
AFRICA
People
Action
Solutions

Part 1

Meet Jane

The challenge of revealing the right insights



Pledge

Commit

Nurture

Awareness

Stirring



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Conversions	Actuals	Budget
No. of enquirers	267	250
> to pledgers	1	6



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Identity

Who am I and who do I want to be?



Core belief

Supporter’s role

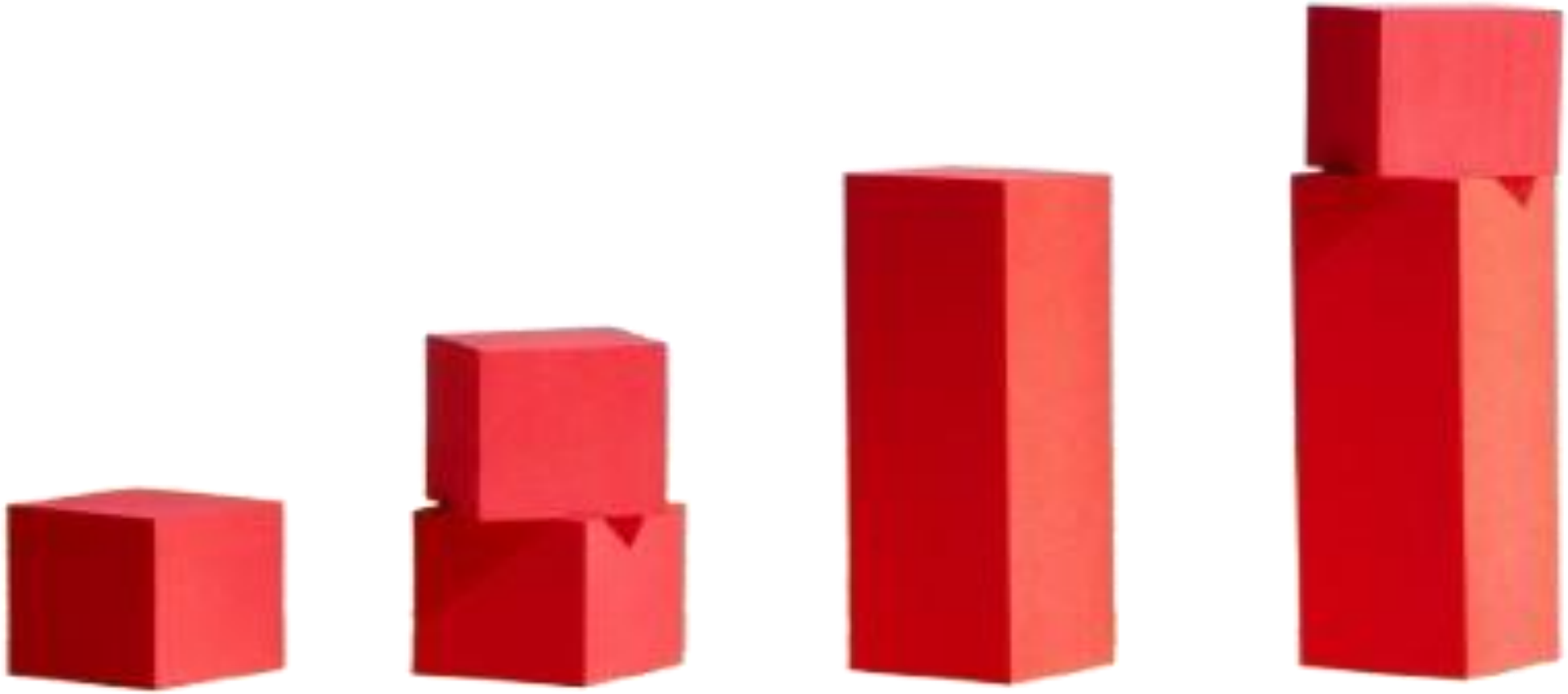
Charity’s role





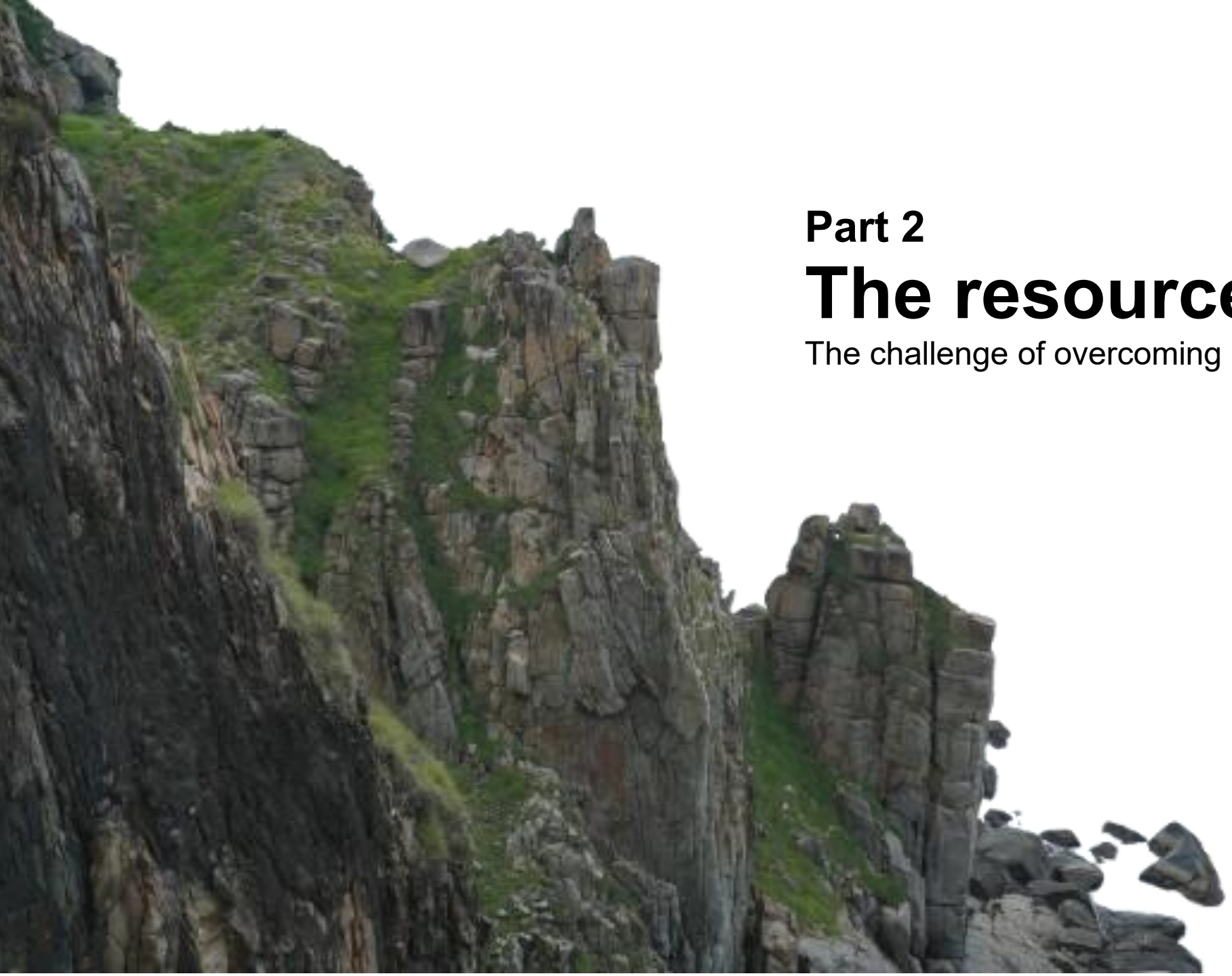
Our job is to affirm their identity across the supporter journey.

Allow identity to **develop** across the journey.



Legacy pledger base grew from 1,134 to 2,107.





Part 2

The resource challenge.

The challenge of overcoming resource constraints.

Help teachers who are facing financial hardship with grants.



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Treat resources as something that can be built incrementally as a journey develops



3 lads and a global app



Can we get just 3 people to pay to stay in our own apartment.





Building the journey with small steps helped develop the resources.

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Don’t be scared to fail fast. That’s the whole point.

Potential growth of a pipeline worth £250,000 per year



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Part 3

A legacy journey belongs to everyone.

The case of learning the hard way.











Core belief

Supporter’s role

Charity’s role



Give staff the knowledge and skills to recognise and handle legacy opportunities.



Help them create the opportunities to engage in conversations.



Give staff a reason to believe the conversation is worthwhile.

Training staff, creating opportunities and motivating staff creates a domino effect.



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“People will never forget how you made them feel”.

Maya Angelou

