Who are your legacy prospects really?

How we uncovered prospects using Dataro

Katie May, September 2026

Why Dataro?

Young legacy programme = limited insights

How do you target when everyone could be a legacy prospect?



How Dataro worked with our standard selection process

Our first year testing Dataro's selections

Standard selection criteria:

- Legacy enquirer or intender
- Regular givers and lottery players
- Active donor



The campaign

Called during January 2026 with a telemarketing agency

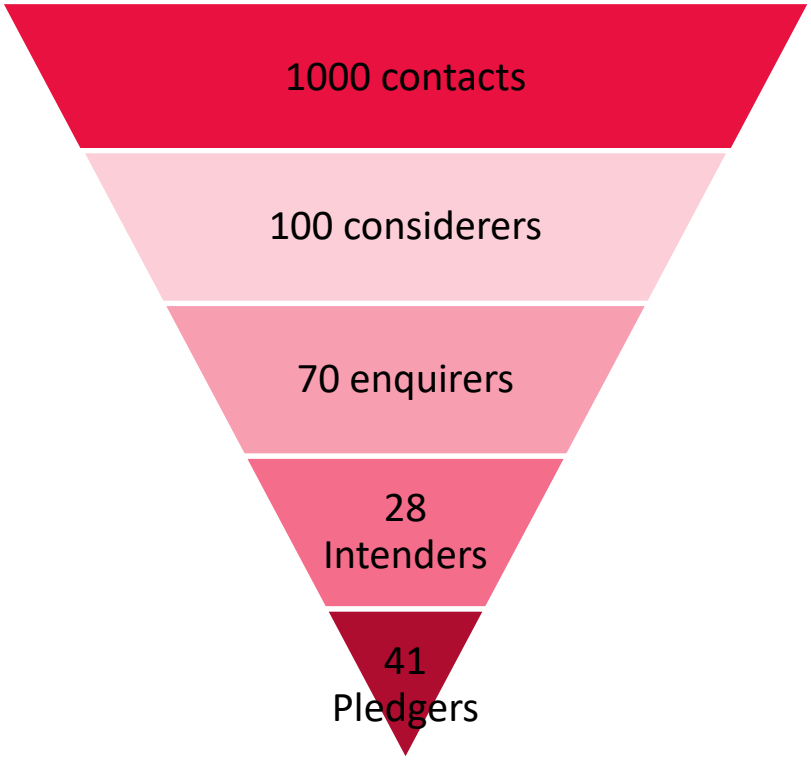
Purpose: To have legacy conversations with our best prospects

Ask: Is leaving a gift in your Will something you would consider?

1000 contacts

Results

Overall 23.9% positive response rate



Best Performing Audiences

- Previous Legacy Enquirers
- Previous Intenders
- Active Regular Givers
- Active Donors

Second major learning alert!

- Deeply lapsed donors

Dataro selection vs. standard

Measure	TBTC Standard	Dataro
Contact Rate	31.9%	37.4%
Positive Outcome Rate	25.6%	18.1%
Considerers	53	48
Enquirers	44	24
Intenders	16	10
Pledgers	19	18

Pledgers uncovered via Dataro selection =



Conclusions

What We Learned

✅ Our selection criteria is successful at uncovering legacy prospects

✅ Dataro's segmentation is also successful at uncovering legacy prospects – prospects that are different from the ones we identify

✅ The most successful approach was combining segmentation processes

✅ The insights we had into what makes a good legacy prospect were valuable but only went so far

Let's look at your legacy brief. Together.

Bring a recent brief - we'll deconstruct it live and show you what it looks like with predictive modelling layered in.

- Bring any live or recent legacy brief
- We'll deconstruct it with you and outline its strengths and weaknesses
- Leave with a refined version, no obligation

INTERESTED?

Email john@dataro.io with the subject line 'Legacy Audit'.

Q&A