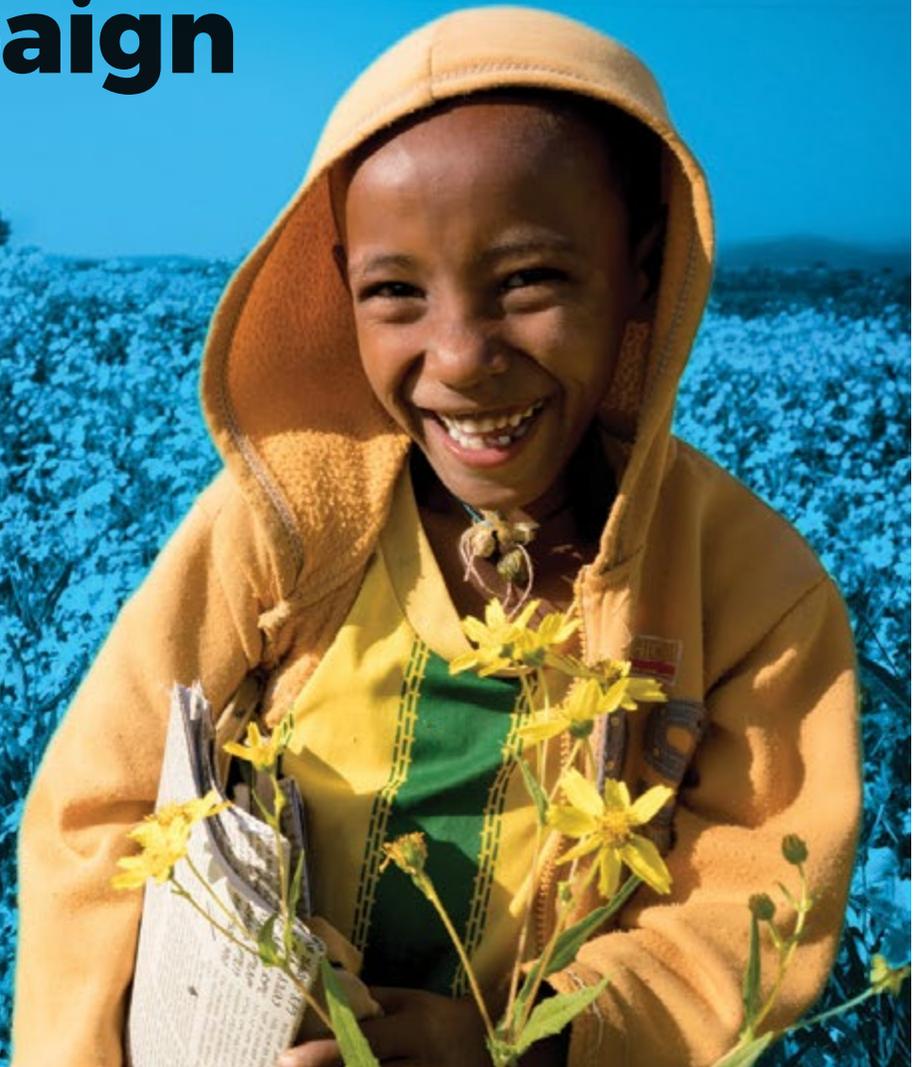


UNICEF Australia recruits over 1,000 potential bequestors through pilot telemarketing campaign

By [Melanie Verges](#), Legacy Fundraising Manager, UNICEF Australia

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FUNDRAISING



A **NEW** bequest approach for UNICEF Australia

Until recently UNICEF Australia's (UA) bequest strategy had taken a fairly traditional approach of direct mail and home visits. However, we wanted to adopt a more proactive way to acquire bequestors and decided to pilot a telemarketing campaign to inspire people to remember UA in their will. If the pilot proved successful, then the plan was to roll it out on a larger scale in 2018 as part of a broader bequest marketing strategy.

The main goal was to reach out to the existing donor base and simply start the conversation of, "Have you thought about how a gift in your will can help children around the world?" And we simply wanted 1,000 people to raise their hand and say, "yes".

A 'handraiser' is a word used by global UNICEF National Committees to speak in general terms of people within the legacy pipeline. UNICEF categorises those interested in leaving a gift in their will into three types:

A **Considerer** – someone who has simply requested more information on how to leave a gift in their will.

A **Committer** – someone who has said they plan to leave a gift in their will, but may not have updated their will yet.

A **Completer** – someone who has already included UNICEF in their will.

An ambitious target of adding 1,000 new handraisers to our pipeline was set, and the calling was scheduled to take place in the second half of 2017.

Four agencies pitched to be our telemarketing partner and we chose Cornucopia Consultancy. Their outbound calling team has extensive experience in charity fundraising and we

were impressed by their bequest campaign track record with other charities like Bush Heritage, Oxfam Australia and Multiple Sclerosis Ltd.

We met with Selar Henderson, the Head of Business Development, and Rosie Lempriere, Client Account Manager, and began to chat about our needs and how we wanted these calls to feel to our donors. They immediately understood the direction we wanted for the campaign, and we had confidence in the approach they proposed.

IDENTIFYING POTENTIAL BEQUESTORS

Before calling could begin, Cornucopia recommended we analyse our donor base to identify those people who would be most likely to consider leaving UNICEF a gift in their will.

Using an affinity scoring system, all donors were ranked on their propensity to leave a legacy gift. Some of the parameters used to rank the donor base included: gender, giving history, giving value and recency, activity level (both frequency of giving as well as other engagement), previous bequest response, if any, and more.

Those with the highest propensity were given a score of 15, while those least likely received a score of 1-3. The decision was made to call the top ranked 6,000 records, i.e. those with a ranking of 15 through to 6. The results of the calling would eventually be cross-referenced against the affinity score to check for evidence of the propensity to leave a legacy gift.

Another important aspect of the telemarketing program was that we wanted to understand more about our donors and how they might react to receiving a phone call from us.

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PRE-ENGAGEMENT DEVICE TESTING

As a pre-engagement device, we decided to send donors a card made of handmade paper that had native daisy seeds embedded in it. We wanted to create a piece of communication that was different and would catch the attention of donors.

The card was designed and printed in Australia with a general greeting from UNICEF Australia. The goal with this stewardship card was not to indicate that we would be calling them in the future, but rather to engage with them.

The card was sent to 3,000 donors to test if a pre-engagement mailer would impact the outcome of the calls. In fact, the card made no difference at all. Every supporter, whether they had received the card or not, engaged very positively over the phone with the callers.

SUPPORTERS RESPOND POSITIVELY OVER THE PHONE

We supplied Cornucopia with lots of UNICEF Australia related materials and the agency created an excellent script that was conversational in nature – exactly how we wanted it to

be. The aim was to make these calls feel like a comfortable conversation about UNICEF's work, and to ask our supporters if they had considered what impact a legacy gift could have for the organisation they already knew and respected.

Phoning was done during the day, primarily between 9am and 6pm, and started in mid-September and ended in late October. We could listen to recordings of the calls and were so excited about what we were hearing. Not only were the callers professional and well trained in how to converse with supporters about legacies, we were hearing that our donors were engaged with UNICEF's mission and global work.

REWARDING RESULTS PAVE THE WAY FOR FUTURE CAMPAIGNS

As this was the first time UNICEF Australia had trialled a telemarketing approach to identify bequest prospects, we were a little nervous about how the campaign would perform and how our donors would react to being phoned.

However, the results were very strong and our supporters were more than happy to engage over the phone.

Approximately 6,400 records were called during the campaign, with a voice contact rate of 48% (of callable records). A total of 1,193 new "handraisers" were identified and added into the bequest pipeline. The average cost per outcome was \$38.76.

The detailed handraiser results were:

- new considerers who asked for more information: 1,018
- new committers who said they intend to leave a legacy gift in their will: 67
- new completors who have already included UNICEF Australia in their will: 108

CAMPAIGN LEARNINGS

The entire campaign was successful for several reasons, one being that we decided to reach out to warm supporters from our donor base who already had an affinity for us. However, the strongest reason I believe the campaign did well was the

calibre of callers and direction from Cornucopia, including the recommendation to undertake the affinity scoring.

Cornucopia took the time to learn about the mission and work of UNICEF Australia and engage our supporters in meaningful conversations. Speaking to supporters about leaving a gift in their will can be a sensitive issue, but the call recordings we heard showcased the understanding that the callers had about this.

Our main challenge was that our donors, especially those who had expressed interest in leaving a legacy gift, were not used to hearing from us in personal ways. We were not sure how they would react to getting a phone call that was not about an upgrade or a conversion, rather a phone call just to chat about why they give to UA and what inspires them and to share a bit about the impact of legacy giving.

If I could do this campaign again I would call more donors. We more than exceeded our goal of finding 1,000 prospects – but imagine if we had had more budget to work with!

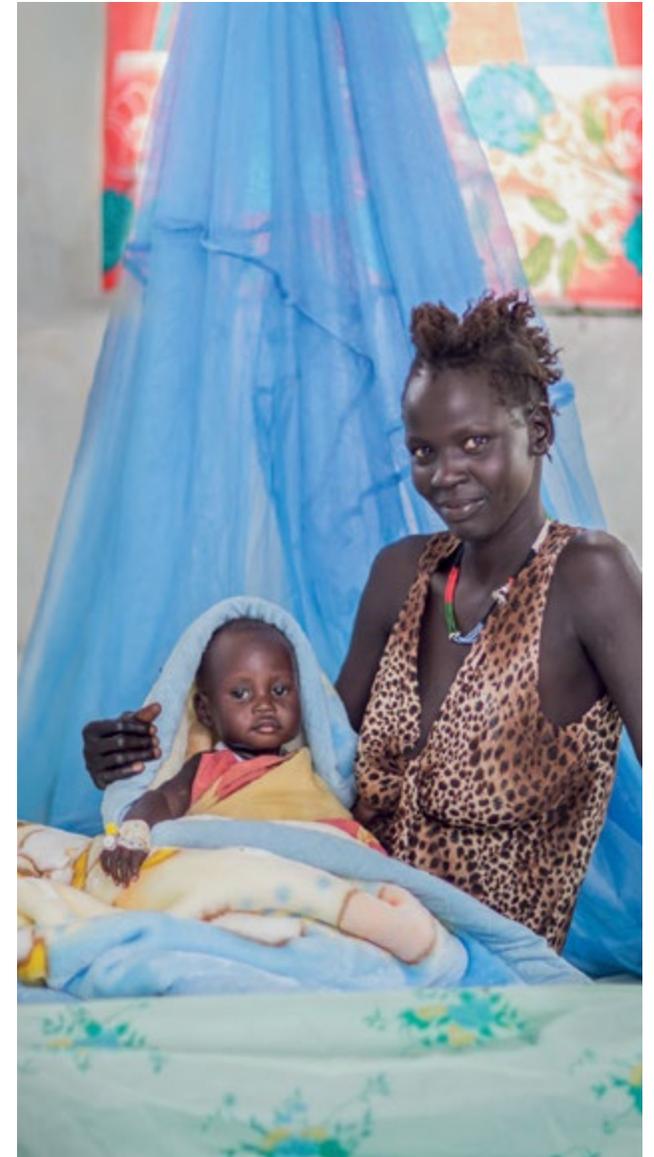
We are planning to work with Cornucopia again this year and are already excited about the outcome. My advice to other charities who are considering doing telemarketing for legacy programs is just do it. Don't wait, find a good telemarketing agency, and call as many records as you can. You will be surprised to hear how your donors are already thinking of their future impact on the causes they hold dear. **F&P**

If you are interested in learning more about how bequest telemarketing might benefit your organisation, please contact Selar Henderson at Cornucopia on 0409 447 896 or email selar.henderson@cornucopia.com.au. Alternatively, contact Rosie Lempriere on rosie.lempriere@cornucopia.com.au.



Melanie Verges

Melanie began her fundraising career a decade ago, and has been specialising in legacy giving since 2012. She became a Sydneysider in 2015 and leads the legacy fundraising team at UNICEF Australia.



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