Planned Giving & Trust Services

PROJECT: PGTS EXPERIENCE JOURNEY MAP: The Ideal Donor Experience

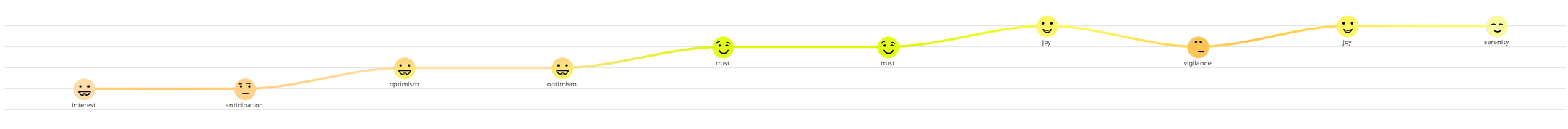
John Donor

John grew up the in Seventh-Day Adventist Church and was educated through the Church's School system thru College where he met his wife.

While on a mission trip building Churches and helping to repair schools, John became interested in the field of Architecture - always desiring to use his skills to 'give-back' to his Church and local community wherever possible.

What keeps John awake at night is that his children are no longer involved in day-to-day church life. He longs to see the mission and insitutiitions of the church continue and thrive and if possible find resonance with his children and grandchildren.

John and his wife have recently been discussing methods to give-back.

	PRE-GIVING	RESEARCH	1ST COMMUNICATION	DIGEST INFORMATION	FACE-TO-FACE	FOLLOW-UP	DECISION	ENGAGE PROS.	EXECUTION	POST-GIVING
John's Story	**Becomes aware of PGTS**	**Motivated to engage with PGTS**	**Connects remotely**	**Assimilates information**	**Meets face-to-face with PGTS**	**Asks follow-up questions**	**Makes prayerful decision to give**	**Meets with allied professionals**	**Documents completed**	**Relationship Management**
John's Goals	Learn more about planned giving and how it works.	Delve deeper into planned giving resources based on marketing awareness campaign.	Timely response (including answering his questions) and accommodation of his schedule for any follow-up meetings.	Assess if all the information that he has been provided can help in making a decision to give.	To validate the merit of PGTS through the representative and to have all the necessary information to make a decision to give.	Ensure there are no gaps in knowledge or understanding.	Finalizes his giving plan and how to maximize tax benefits.	Begin to formalize the decision and layout a roadmap and checklist leading to completion.	Have a clear understanding of the documents and looks to be walked-through the documents before signing.	Be kept up-to-date about how the gift is making an impact and how other gifts are being distributed.
John's Needs	Be clearly informed of the purpose of the products and services offered by PGTS.	Explore if PGTS program supports his unique giving plans and desires - perhaps based on a specific life event. Actively explore solutions to donor's giving needs. This is something that the organization would have to solve and provide you with. For example, if John wants his children to be more engaged with the church, how does making a legacy gift assist with that goal? Where is the correlation? Is there a program or method to engage the children – a gift celebration, a family giving fund, a naming recognition event, etc.?	An emotionally intelligent (EQ) conversation with the PGTS team. The PGTS team must be personable, and cognizant of his needs. The information must also match what John has experienced thus far - this aids trust building.	Based on the information given thus far, he needs to feel confident that PGTS can his giving goals. While most charitable gifts are "unselfish" in nature, it does not mean that the donor isn't still motivated, in part, by personal reasons. Those reasons may include tax savings, peer approval, adding purpose to one's life, joy of giving, modeling behavior to family and friends, etc. While delving into these ares is beyond the scope of this journey map, it is important that fundraisers are well-versed in the needs and goals of donors. Most donors don't have a primary goal and need to give money away (starting point for John's journey). They have a basic understanding of how to give money and can do so at any time. They are also likely giving money away annually already. Any additional giving especially planned giving, will need to get the donor inspired and educated. This is a key role of fundraisers throughout the journey.	That his and his family's best interests are front and center in the PGTS giving experience. A potential giving gap is the church's absence of: endowment giving options, restrictive or designation giving options, a giving menu with dollar amounts, tangible and intangible donor acknowledgment (including program and physical space naming). This part of the donor journey is missing I believe – where the fundraisers and donors customize, craft, and create unique pathways to give (for those donors who fit). Right now, all gifts may default to being unrestricted gifts, whether it is $5,000, $50,000, or $5M.	To feel confident in the process and fully satisfied that all questions have been answered.	To clearly understand the next steps, estimated timelines and the continued role of the PGTS team.	To be at peace with his decision and the knowledge that the PGTS team are connecting him with the rightly qualified professionals.	Receiving copies of all documentation, contact details of key personnel and reassurance of timely follow-ups including how potential future changes will be handled	Stay informed on health of PGTS as an organization and that PGTS are being held accountable to their mission.
Ideal Process	Create a consistent experience across presentations (digital and print), events and marketing campaigns. Early integration of Trust is Key in the Donor's journey. TRUST is a key target and measurement throughout the donor communication process. It is especially important/needed and challenging due to the physical distance between fundraiser's and donors. So, a focused mindset on how to build trust very early in the donor journey is critical. This is partly done through the delivery of materials and communications. There are additional relationship building strategies that may be employed but beyond the scope of this review.	John proactively reaches out to PGTS team. RELATIONSHIP BUILDING should also be an important act and buzzword early and throughout the donor journey. Similar to trust, it is a focused mindset and not just a "service mindset." Some fundraisers mistaken providing service and information with building trust and relationships. They are not synonymous. The current map definitely describes interactions and activities that may be producing trust and relationship building.	PGTS provides verbal information and sends additional materials (either print or digital) to satisfy questions being asked.	Reviews all provided information and conversations and engages in discussions with family and/or trusted advisors.	A face-to-face meeting at a location that works best for John.	PGTS team initiates follow-up communication with John.	John verbally communicates the decision to give and lets the PGTS team know through an already scheduled follow-up communication.	John is provided with a documented action plan outlining next steps including estimated timelines.	Finalizing the decision through legal avenues and delivery of documents to all parties.	Consistent, personalized and sustained communication from PGTS including regular feedback sessions with John to discuss the impact of his gift and/or operations/activities of PGTS.
John's Expectations	Print and digital resources and presentations are clear, informative and match the quality of industry standard media and marketing materials.	More detailed, aesthetically pleasing informational resources are provided, including avenues for connecting and following-up.	Comprehensive and satisfactory answers to his questions.	To feel that most of his critical questions have been answered and next steps are becoming clear.	To feel valued, cared for and respected by the PGTS team and that all critical questions have been answered.	PGTS continues to nurture the relationship.	The next steps in the process are clear and that he has the continued support of the PGTS team at this critical decision-making point	To be hand-held through every step when engaging with the allied professionals.	The final documents must reflect John's desires and that he has been made aware of how he will be approached in follow-up communication including the impact of his gift.	Feeling valued beyond the gift and that John can be of help informing PGTS processes for future generations.
John's Experience										
Quotable Quotes	*"I want to give back to my Church"*	*"How can PGTS help me?"*	*"Really impressed with their expertise and how they understood my unique situation"*	*"I like what I am hearing so far, but I still have questions"*	*"What a remarkable experience - I feel utterly cared for"*	*"I am glad to see how thoughtful they are in helping me"*	*"I feel informed and inspired to make such an impactful gift"*	*"With so many moving pieces, I am thankful for the guidance of PGTS and in I am glad that PGTS finding local legal expertise"*	*"I am thrilled that I can make a difference and that I have been cared for by everyone I have met along the way"*	*"I am grateful for such a ministry as Planned Giving and Trust Services"*
Remember to be Flexible	This journey is "modular." It can be started in different areas, at different times. I.e. a donor may start mid-map and or bounce around between the steps over a good chunk of time. For example, a donor may first pray about the decision to give and then move straight to give me information and how do I execute. Alternatively, a donor may execute the documents first and then notify staff about the gift. Just because a donor may start farther down the timeline, does not mean that those earlier steps (and relationship building and trust) should be bypassed.	With respect to Relationship building, it is important to explore some confirmation of success - i.e. derive some measures of success in the relationship building process before moving to the next phase of the journey.	John's story is an example of ONE donor profile. However, there are other donor motivations that may include: • sense of joy & fulfillment; • yearning to make a difference; • desire to solve a problem; • help achieve a vision or dream; • maintain or build excellence; • remember/honor a loved one; • to simply feel special; • create something that will live on.	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES:	ADD YOUR OWN NOTES: