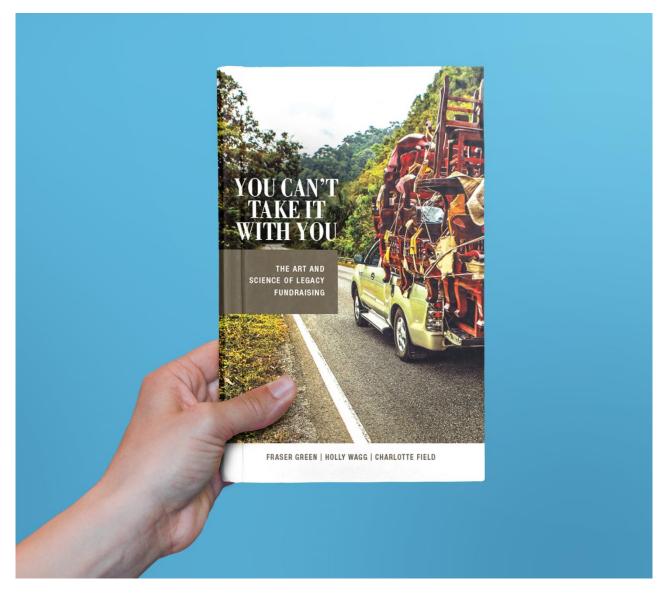


## Hello!





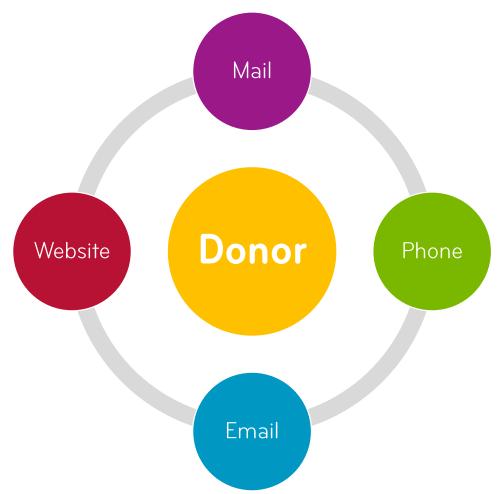
**Charlotte Field**Philanthropic Counsel, Digital Specialist













# Email



## **Email**



- Real-time engagement
- Effective drip marketing
- Especially relevant to a Boomer audience
- Two types:
  - Identification
    - feed your pipeline
  - Persuasion
    - cultivate your pipeline



## Identification



- Develop a survey to:
  - Qualify newly-generated leads
  - Identify leads hiding in your email list
- The first step in an automated journey, based on the donor's legacy stage



## Cultivation

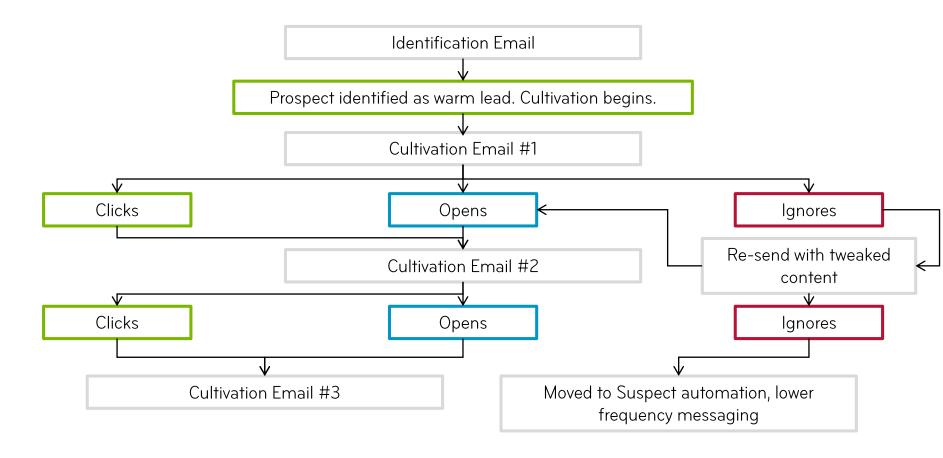


- Remain top of mind
- Connect cause + org + gift in will + impact
- Integrated closely with other tactics





## A Digital Donor Journey



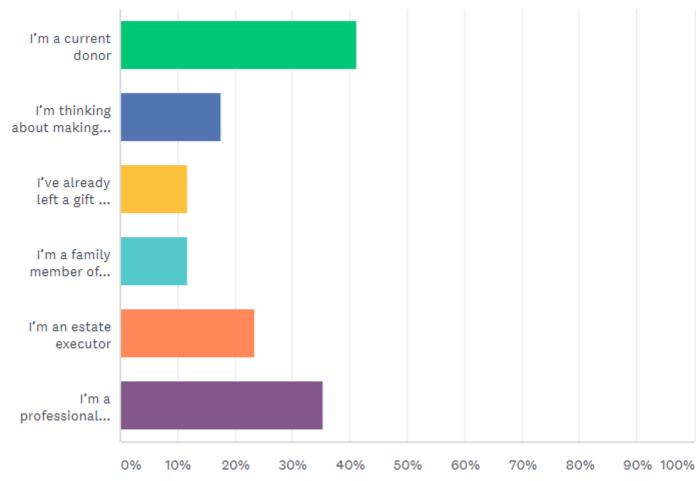


# Website



## Audiences









- Speak to both: Develop content for both prospects + professionals!
  - Professionals want your legal name, registration number, contact info
  - Prospects want persuasion, impact, and connection
- Considering user experience: Make legacy content easy to find and easy to navigate
- Capture attention: Write for search!



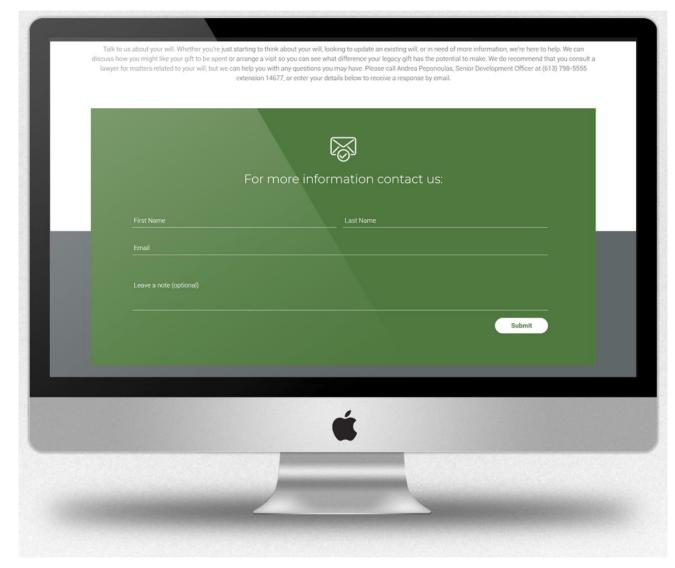


## Lead Generation



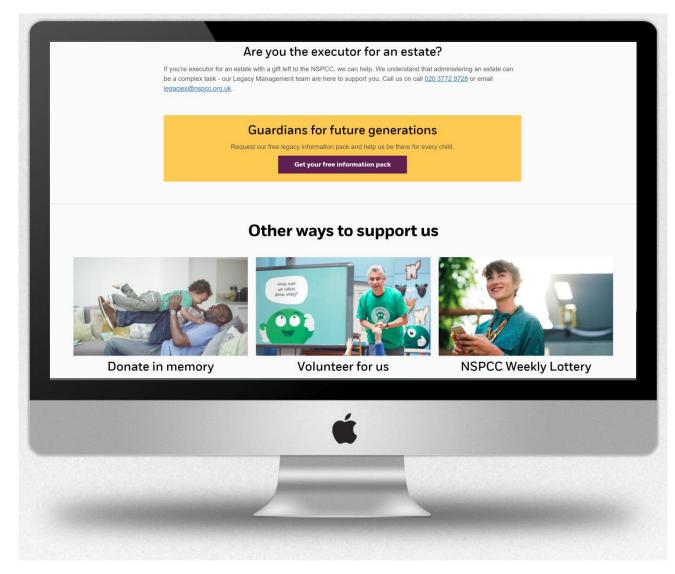
- Form-based works best
- Gather emails and feed the pipeline
- Drop new leads straight into an identification email





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