



# Legacy Intelligence

IDENTIFY and ENGAGE

focus your fundraising with the UK's  
most powerful legacy prospecting service



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strategy and fundraising consultants

# identify...

## ...potential legacy prospects

Your legacy marketing campaign is probably your most cost-effective investment in your organisation's fundraising future. It calls for a delicate and sophisticated approach. Reliable, factual information on where to focus your efforts is hard to obtain.

### Legacy Intelligence has been created to help increase the return on your legacy marketing and is exclusively available through Action Planning.

It will give you:

- access to the **LEGACY PROSPECT DATABASE™**, a unique resource developed with our partners, **Prospecting for Gold**, combining property value, shareholding and life-stage information on 1.6 million people
- advanced data analysis software
- the skills, experience and consultancy support of Action Planning

The database contains 1.6 million records of individuals with houses worth over £400,000 with information including:

- their age
- type and value of house
- how long they have lived there
- whether they are likely to have dependents
- substantial investments or liquid assets

The database is continually being refreshed to ensure that the data we use for your screening is as up to date as possible.

We can screen your donor and contact lists against the Legacy Prospect Database to identify those of your supporters who have the potential to make a significant bequest to your cause. Our sophisticated data manipulation software enables us to analyse the results and select data based on any variable you choose, ensuring that you get the data you need, at the time you need it.



We can provide Legacy Intelligence screening services at various levels of detail to ensure that you have the right depth of information on each person:

#### **Screen and analyse your database:**

Identify and prioritise the legacy prospects on your database. **COST:** from £500.

**Tags:** A marker to upload onto your database which identifies that the individual is a legacy prospect.

**COST:** £2.50 per name.

**Basic Snapshot:** An overview including house value indicator and life-stage information.

**COST:** £5.00 per name, reducing to £2.50 if tag has been purchased.

**Enhanced snapshot:** All the information in the basic snapshot, as well as information on liquid assets such as shareholdings. **COST:** £10.00, reducing to £5.00 if basic snapshot has been purchased.

All charges listed are subject to VAT

engage...

## ...and recruit legacy prospects

Once we have identified those of your supporters who are most able to leave a significant bequest to your cause, we can work with you to convert these legacy prospects to pledges.

We help you to plan your approach as part of a wider legacy marketing strategy. We will assess which approach is likely to be the most effective for existing supporters and which additional and enhanced activities should be undertaken to acquire new legators.

Action Planning can help you answer the key questions. What role should direct mail play in your acquisition and conversion of enquirers to intenders and on to pledgers? How does a free wills clinic or scheme fit into your plans? When is it appropriate to buy into a wills advisory service? Does becoming a member of a legacy consortium work? What about advertising in solicitors' guides or your own magazines and newsletters? How do you make the most of events, peer asking or focus groups?

### **Action Planning can maximise your legacy income by:**

#### Reviewing current performance

We will use our experience of many and varied organisations to appraise the health of your existing legacy communication programme. Our review will result in a number of next step recommendations helping you maximise your legacy income.

#### Devising your legacy marketing strategy

We will work with you to define your target audiences and devise a plan to determine how each of those audiences will be approached and nurtured. The plan will include income and expenditure projections which reflect your income targets and the resources you have available to invest.



#### Developing a proposition that works

Action Planning will work up a reasoned, convincing, yet sensitive argument why someone should leave a bequest in their will in support of your cause. This can lead to the development of legacy literature and carefully crafted text for your website, newsletters and other communications.

#### Training your teams to sell legacies

Our bespoke training events will give your staff and volunteers the confidence to promote legacies effectively to small groups of prospects or individual contacts. This training can make all the difference to a legacy campaign and maximise the regional staff networks of national charities.

#### Legacy implementation and management

Action Planning will equip you to implement the strategy or you could contract out to us your complete legacy programme or elements such as campaigns, pledger care programmes, database systems and probate resolution.



### **Next Steps:**

Phone Action Planning:

**020 8642 4122**

or email:

[legacy@actionplanning.co.uk](mailto:legacy@actionplanning.co.uk)

# Move forward with Action Planning

Whatever challenges and opportunities your organisation is facing, Action Planning can help with the next stage of your journey.

As a leading UK consultancy to the not-for-profit sector, we have helped hundreds of organisations to raise capital and revenue funding, recruit key people and plan ahead. We work alongside our clients, helping each to make the journey in their own way, and at their own pace.

Our staff have senior-level third sector experience in a range of disciplines and work as a team to deliver practical solutions to client needs.

We provide a combination of advice and 'hands on' implementation for capital appeals, revenue fundraising and bid-writing, research, strategic consultancy and recruitment for senior posts.

Action Planning operates internationally, both in Europe through our membership of EU Consult and in the United States, where we have an associated office in Boston.

We also work closely with ACEVO and key funders to organise the largest UK events for third sector leaders.



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THE LEGACY PROSPECT DATABASE™ 2008

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