

TOP MARKETING TIPS FOR

# HEALTHCARE ORGANIZATIONS



**Crescendo**

Major & Planned Gifts Marketing

TOP MARKETING TIPS FOR

# HEALTHCARE ORGANIZATIONS



## Crescendo

Major & Planned Gifts Marketing

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This booklet explores effective multichannel marketing strategies for healthcare organizations. By utilizing a range of communication channels, organizations can reach diverse audiences, increase engagement and enhance donor relationships. The following examples highlight successful approaches that can strengthen your gift planning initiatives and drive meaningful support.

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# INTRODUCTION

**Your mission is unique and unlike that of any other nonprofit. Your donors are also special and they support your cause for reasons that are real and personal to them.**

You will want to appeal to your donors with marketing that reflects what your organization is doing today and where it is going in the future.

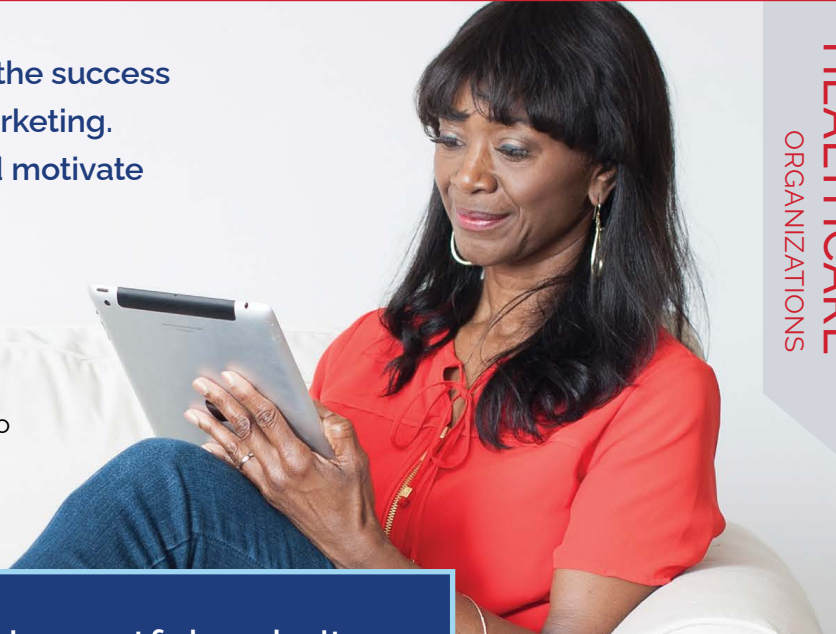
Crescendo will provide you with time-tested marketing concepts that can be customized to help your organization achieve its unique mission.



All of the effective marketing examples in this booklet were created using Crescendo's GiftLegacy Pro subscription with minimal time and effort. If you have questions or need help with your marketing, please contact us. Crescendo can help you develop a strategy that is right for your organization.

A strong online presence is crucial for the success of your organization's gift planning marketing. The goal is to engage your donors and motivate them to support your mission.

Along with your organization's branding, your website can feature articles, videos and donor stories that educate donors about ways to support your cause. Your website also needs to be mobile-friendly so that you can reach more visitors who are using all types of devices.

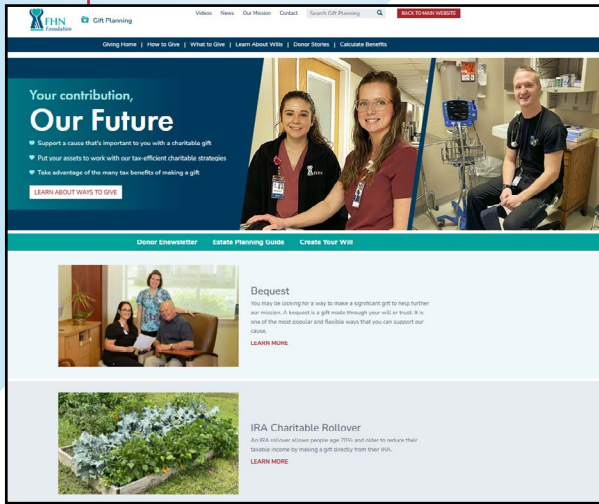


## Best practices for an impactful website to market to your donors:

- ▲ **Use custom images that tell a story.** Show your organization's mission in action and positive impact through your donors' loyal giving efforts.
- ▲ **Create a focused experience.** We recommend a focused gift planning experience for your website visitors. When visiting your branded gift planning website, donors can learn how to give and what to give. Interactive features such as donor benefits calculators and a complimentary wills planner enhance their experience. Mission-related photos and heartfelt stories from donors show generosity benefits and rewards. We include a "Back to Main Website" link so users can easily navigate back to the parent website.
- ▲ **Show the most important topics on the homepage.** This is especially important if you have a campaign focused on a specific gift. This will create entry points for your donors to focus on the pages you want them to visit.
- ▲ **Be consistent with your branding.** You want your visitors to recognize your organization's branding colors and logo on your gift planning website. Create a unified experience for your donors, ensuring a seamless experience between the main website and the gift planning website.
- ▲ **Use content that is readable and easy to follow.** We recommend short paragraphs, headlines and bullet points to make it easy to read and scan your page.
- ▲ **Make clear and concise "call-to-action" words and phrases.** Customize your text to support your mission. This will inspire your donors to take action.

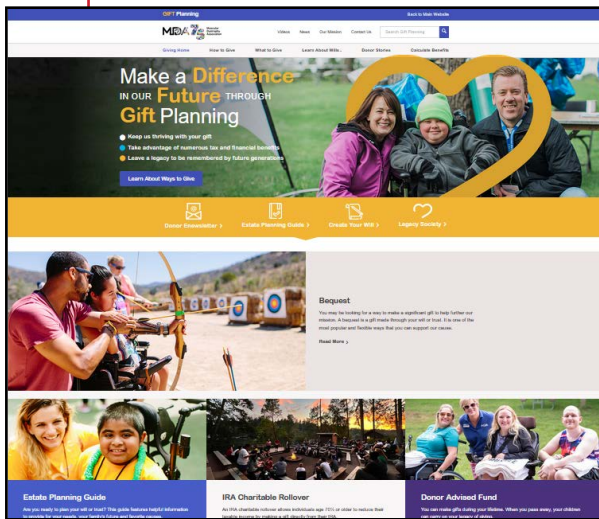
# WEBSITE EXAMPLES

Here are examples of strong websites for healthcare organizations:



## FHN Foundation

offers a dedicated gift planning website with a clean, streamlined navigation experience. A single "Back to Main Website" link provides an easy path for visitors to return to the parent site.



## Muscular Dystrophy Association's

website layout is visually appealing with its branding colors and compelling mission-oriented images.

## Summa Health

includes strong, mission-driven call-to-actions to make it easy for donors to take the next step and begin their gift to their organization.



# COMPELLING EMAIL MESSAGING

Email is one of the best ways to maintain regular contact with your supporters. Effective emails use catchy subject lines that encourage readers to open them and learn more.

Enewsletters should be sent on a consistent basis to steward donor relationships. Your messaging needs to be compelling to promote donor response. In contrast, eblasts are shorter, visually appealing emails focused on specific topics. Both email formats are effective marketing tools to drive traffic to your gift planning website and engage your donors and prospects.



## Best practices for using email messaging for your marketing:

- ▲ **Use custom images** that relate to your email messaging, including showing a specific funding or campaign need, a donor who contributed to your organization, a person or program that was directly impacted by a gift or a meaningful image that pulls on the heart strings of your donors.
- ▲ **Keep your branding consistent** with your organization's colors and logo to help your readers recognize the email is coming from your organization and not a third party. This builds trust with the donor and encourages engagement.
- ▲ **Include "call-to-action" words or phrases**, but keep them short and concise. Make it clear what you are asking of the donor, whether it is a financial gift, serving as a volunteer or ways they can contribute and serve the organization.
- ▲ **Add links to the gift planning website** and/or sign-up pages for upcoming events to make it more convenient for your readers to engage and act in a timely manner.
- ▲ **Focus your email messaging** on one clear topic to perform better. Too much information will overwhelm the reader, discouraging immediate action.

## Popular Email Topics:

- ▲ Specific gift topic or campaign highlight
- ▲ Motivating donor stories
- ▲ Impact stories and testimonies
- ▲ Volunteer opportunities and spotlights
- ▲ Upcoming event and seminar invitations
- ▲ Updated news and recap of important events
- ▲ Estate Planning Guide offer to donors

# EMAIL EXAMPLES

Here are examples of effective newsletter and eblast messaging for healthcare organizations:

**La Jolla Institute FOR IMMUNOLOGY**  
**GIFT PLANNING**

Dear John,

September is National Life Insurance Month, a great time to reflect on financial plans and even consider how you can leave a legacy through philanthropy. Life insurance can be a powerful tool for charitable gifting. At La Jolla Institute for Immunology (LJI), we are dedicated to advancing research towards a future free from disease, and you can play a pivotal role in our mission by naming LJI as a beneficiary of a life insurance policy you no longer need.

If you have a policy that is fully paid-up, or one that you no longer need for its original purpose, consider designating LJI as a beneficiary. It's a simple yet impactful way to support cutting-edge research and contribute to a healthier future for all of us.

Why consider naming LJI as a beneficiary of your life insurance policy?

- Naming LJI as a beneficiary of your policy is straightforward and doesn't require...
- Life insurance policies can offer significant tax advantages. ...state might benefit from reduced...
- ...understand how the immune...
- ...and infectious diseases.

**La Jolla Institute for Immunology's** newsletter effectively highlights "National Life Insurance Awareness Month" featuring valuable information about beneficiary designation gifts.

**HORIZON HEALTH FOUNDATION**  
**Gift Planning**

Dear John,

Getting + Giving the most from your Assets.

Do you own highly appreciated stock or other investments that, if sold, would result in a high tax bill? Are your CDs or other investments producing a lower return or less income than desired? If you are looking for ways to manage your investments, maximize their worth and minimize taxes, there are a number of charitable strategies that can help you achieve your goals.

Here are three options to consider.

- **OUTRIGHT GIFT** One of the easiest ways to lower taxes on an investment is to make a tax deductible gift of the asset to our organization.
- **CHARITABLE GIFT ANNUITY** CDs or other investments that produce little or no income can be exchanged for a charitable gift annuity that makes fixed payments for life.
- **CHARITABLE REMAINDER TRUST** Investments that have appreciated can be used to fund a charitable remainder trust that will generate income and tax savings.

**Horizon Health Foundation's** newsletter highlights three distinct gift models, allowing the organization to connect with donors at various financial stages and with diverse gift planning goals.



**SHARP** Estate Planning Guide Download

**ENDING THE YEAR Well**

Dear Friend,

Did you know that nearly 70% of all Americans do not have a will or trust?

If that is true for you, this year is a wonderful time to start putting your plans in place. Or if you have one, now is the perfect time to review your documents to see if you need an update. A good estate plan does more than ensure that your wishes for loved ones and the organizations you care about will be fulfilled, it also provides protection for you and your assets should you ever become incapacitated.

The Foundations of Sharp HealthCare offer several tools to assist you in creating and maintaining an effective estate plan. Our [new website](#) is dedicated to thoughtful estate planning and offers articles, booklets

**Sharp Health's** eblast emphasizes the importance of creating a will or trust, strategically using the end-of-the-year season to prompt donors to take meaningful action. The eblast includes a downloadable link to Sharp's Estate Planning Guide.

From all of us at Phoenix Children's,  
**HAVE A SAFE AND HAPPY HOLIDAY!**

**Curious about joining our Legacy Society?**

Learn how you can enjoy similar events with like-minded change-driven community members who believe in building a living legacy.

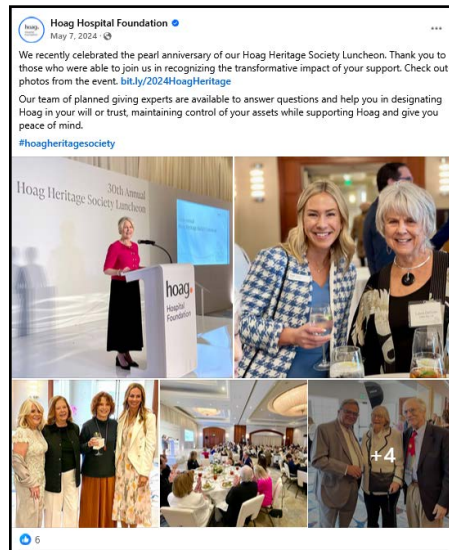
For more information, please visit [pchlegacysociety.com](#), reply to this email or call 602-933-3878. Once again, thank you for your support.

**Phoenix Children's** eblast highlights their Legacy Society while also recapping a recent event honoring its members.

# ENGAGING SOCIAL MEDIA POSTS

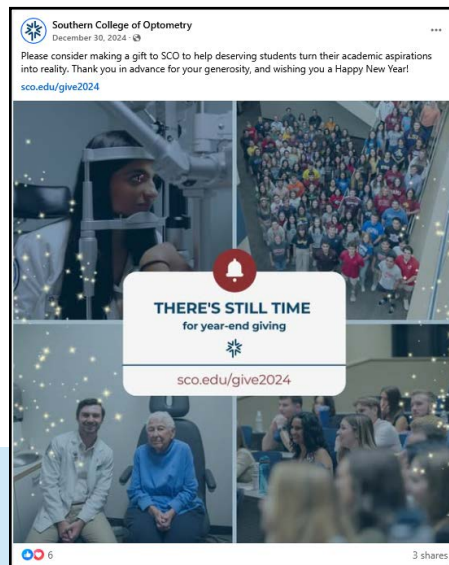
The goal of social media for a nonprofit is to engage and encourage supporters to rally behind your organization's cause. The best social media posts use imagery and video to capture attention, tug on donors' heartstrings and motivate supporters.

Many nonprofits share impact stories, mission-oriented images and videos, donor testimonials and snapshots of staff or beneficiaries.



Social media platforms allow nonprofits to go beyond their existing donor base to reach new supporters, volunteers and advocates. A single compelling post can be seen and even shared by thousands.

If you have a social media calendar, consider creating and scheduling regular posts about the work and mission of your organization.



Inspire action by blending your mission with heartfelt opportunities to give by highlighting the impact of every gift through compelling images and video stories.

# EFFECTIVE PRINT MARKETING

Most nonprofits recognize the value of print marketing. Print is still important for introducing and reinforcing marketing messages. Coupled with electronic marketing, also known as multi-channel marketing, print is highly effective in reaching donors. Many organizations send smaller marketing pieces, such as postcards and inserts, that are effective and less expensive to print.

Traditional print marketing is often used as a follow-up method when a donor requests information on a particular gift topic. The Estate Planning Guide, which can be mailed, emailed or downloaded from your gift planning website, is the most popular print piece according to Crescendo's research.

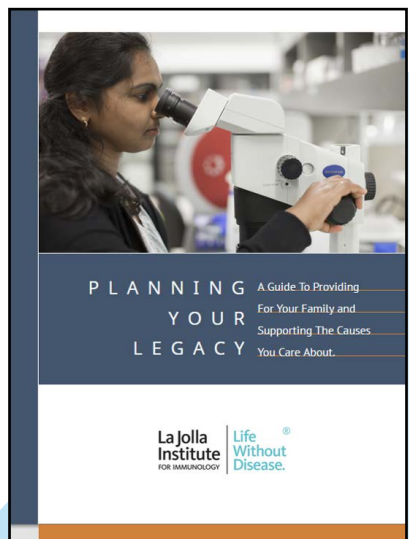
Including QR codes in your print marketing is highly recommended because it bridges the gap between print and online engagement, making it easier for supporters to learn more and take action.



## PRINT EXAMPLES

Here are some examples of effective print marketing for healthcare organizations:

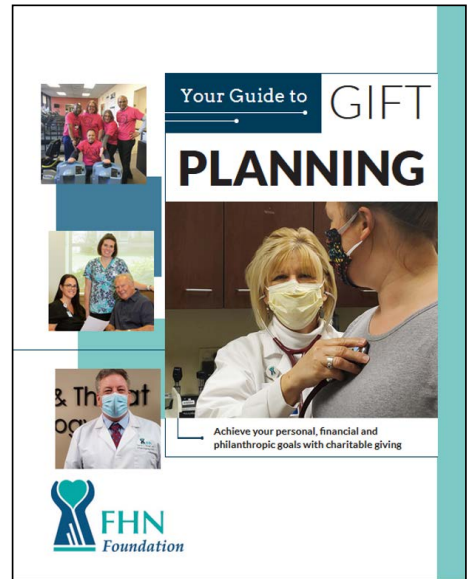
**La Jolla Institute for Immunology's**  
*customized Estate Planning Guide provides information for donors interested in leaving a gift in their will or trust to the organization.*



# PRINT EXAMPLES

## FHN Foundation

helps donors explore meaningful ways to give, making gift planning easier to understand and respond with their customized "Guide to Gift Planning" booklet. It is available as a downloadable PDF or as a printed booklet when conducting personal donor visits.



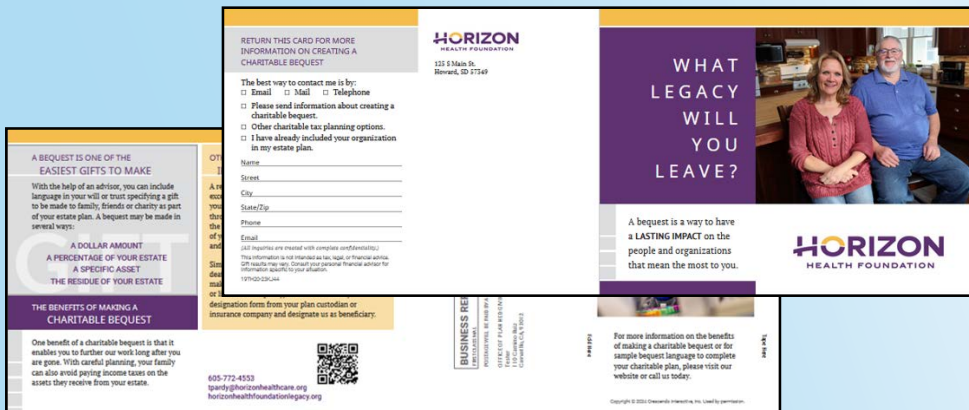
## Glens Falls Hospital Foundation's

customized brochure includes custom images relating to the organization plus resourceful information about planned gifts.



## Horizon Health Foundation's

customized extended postcard focuses on ways donors can make an impact in the community by leaving a planned gift. A reply card is provided for easy response.



# BOOST ENGAGEMENT

## WITH CresSurvey

SHARP Contact Us  [Back to Main Website](#)

≡ Gift Planning Menu

### Give Us Your Feedback

Your feedback will help us stretch every contribution even further so that together we can fulfill our mission and make a significant impact in our community.

[Giving Home](#) > Give Us Your Feedback

#### Are you familiar with Foundations of Sharp HealthCare?

Very Familiar  
 Moderately Familiar  
 Not Familiar

[Next Question](#)

1 of 4

[Privacy Statement](#) | [Privacy Basics](#)

With CresSurvey, you can produce a survey customized for your donors and your organization.

Surveys can enhance connections with your donors, help you better understand your donors' motivations and uncover existing legacy commitments or leads.

### Sharp HealthCare Foundation

*Website survey*

Have we made it easy to give to Foundations of Sharp HealthCare?

Quite Easy  
 Moderately Easy  
 Not Easy

[Previous Question](#) [Next Question](#)

2 of 4

Have we explained to your satisfaction how your donations are used?

Extremely Well  
 Quite Well  
 Somewhat Well

[Previous Question](#) [Next Question](#)

3 of 4

What type of charitable gifts would you be interested in learning more about?

Gifts Made by Will or Trust  
 Gifts of Life Insurance  
 Beneficiary Designation Gifts  
 Charitable Remainder Trusts  
 IRA Charitable Rollover  
 Charitable Gift Annuities

[Previous Question](#) [Submit Survey](#)

4 of 4



# CRESPRO DONOR PROPOSALS



HEALTHCARE ORGANIZATIONS

## THAT INSPIRE GIVING

The CresPro software includes four-page color donor proposals for all major, blended and planned gifts.

Donor proposals are available to GiftLegacy Pro subscribers with a CresPro license. These motivational proposals are fully customizable, allowing you to insert your logo, branding colors and mission-related images that resonate with your donors. Additionally, you can edit the text and save the proposal as a high-quality PDF to send electronically or to print for your one-on-one donor meetings.



## MASTER GIFT CASE



**Support SCO**

**About Southern College of Optometry**

For more than 90 years, **Southern College of Optometry** has continued to lead the profession of optometry because of our commitment to quality clinical education, encouragement of lifelong learning, and the dedication of SCO graduates to serve their patients and communities.

**Your Gift's Impact**

We simply cannot continue to be leaders in the profession without supporters like you. As optometry continues to evolve, it is necessary that SCO have the resources to advance the profession and to ensure that our students prosper.

Your support allows SCO to recruit the best and brightest students who dream of attending optometry school, but have financial obstacles. Once they are accepted and arrive to SCO, your support provides the latest technology and equipment for our clinical programs.

Throughout an SCO student's educational journey, your support allows them to minimize their student debt. This means that once our students are ready to walk across the stage to receive their diploma, they're poised to have unlimited career opportunities with limited debt.

**Contact Us**

Today, approximately 7,000 optometrists worldwide are changing the lives of individuals through quality vision care and service to their communities because they graduated from SCO. We invite you to learn more about ways that your support makes a tremendous difference in the lives of optometry students and strengthens our profession in return.

**SOUTHERN COLLEGE OF OPTOMETRY**

1245 Madison Avenue  
Memphis, TN 38104  
901-722-3217  
scoleagecy.org



This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation. 23P17

### Southern College of Optometry's Master Gift Case

For GiftLegacy Pro subscribers with a CresPro license, the CresPro charitable gift programs also include a Master Gift Case. This is a one-page explanation of your organization's mission and information on why donors should give to your organization. The gift case is customizable with your images, text, colors and logo.

# TOP PROSPECTS IN YOUR

# DONOR ANALYTICS

The Top Prospects Report lists your top prospective donors based on website and newsletter activity.

A suggested gift for the donor is also displayed based on their personal activity. If an individual demonstrates frequent activity, it is one of the strongest indications of interest in your organization and its mission.

Score	Name	Last Page Visited	Visit Date	Gift Model
100.0	Donor 1	eNewsletter Preferences	10/05/2010	WillRequest
100.0	Donor 2	Planned Giving Home	10/11/2010	Unitrust
100.0	Donor 3	Today's News - Finance News	03/09/2015	Gift Annuity
92.00	Donor 4	Today's News - Savvy Living	02/26/2011	WillRequest
89.00	Donor 5	GiftLegacy Donor Manager - Logout	06/09/2015	WillRequest
89.00	Donor 6	Planned Giving Home	02/06/2015	IRA
82.00	Donor 7	Planned Giving Home	09/20/2010	WillRequest
80.00	Donor 8	Privacy Statement	08/27/2010	Gift Annuity
79.00	Donor 9	GiftLegacy Login Page	01/25/2012	WillRequest
75.00	Donor 10	Today's News - Savvy Living	08/27/2010	Unitrust
75.00	Donor 11	Your Plan Download	09/22/2010	WillRequest
73.00	Donor 12	Privacy Statement	02/28/2015	WillRequest
70.00	Donor 13	Today's News - Finance News	08/27/2010	Unitrust
68.00	Donor 14	GiftLegacy Login Page	12/08/2011	WillRequest
68.00	Donor 15	Planned Giving Home	01/24/2011	Gift Annuity
62.00	Donor 16	Planned Giving Home	01/28/2011	Gift Annuity
57.00	Donor 17	Planned Giving Home	02/01/2011	WillRequest
32.00	Donor 18	Planned Giving Home	01/24/2011	Unitrust
28.00	Donor 19	Today's News - Finance News	01/24/2011	IRA
17.00	Donor 20	Today's News - Savvy Living	02/10/2015	WillRequest
14.00	Donor 21	Today's News - Savvy Living	08/27/2010	WillRequest

## RAISE GIFTS IN JUST A FEW HOURS PER WEEK

As a fundraiser, you want to spend most of your time meeting and talking with donors. If you can find a way to minimize the time spent on marketing and other administrative duties, you will have more time to focus your energies on closing gifts.

Crescendo's GiftLegacy marketing system uses an integrated approach including web, print, email, video, social media and donor surveys. Our goal is to assist fundraisers in educating, engaging and motivating donors to close major and planned gifts.



To help you increase loyal donor engagement and cash gifts in the next quarter, consider enrolling in our CresCoaching class, available at no additional cost to GiftLegacy subscribers.

# SUCCESSFUL MARKETING PLANS

Creating a winning marketing plan for your organization will lead to success. Think about the types of campaigns or initiatives you want to highlight.

You might focus on a different marketing concept or gift offering for each quarter. In developing your marketing plan, you need to also consider the timing for each of your marketing touches and how frequently you will reach out to your supporters. Using a donor survey can also help you evaluate how often donors desire to hear from you.

## MARKETING PLAN EXAMPLE

Here is an example of a marketing plan for a healthcare organization:

*Annual PG Marketing Plan: Bequests, DAFs, CGAs IRA Rollover*

### Campaign Tools – Healthcare Organization Example

#### Annual PG Marketing Plan: Bequests, DAFs, CGAs, IRA Charitable Rollover

Quarterly Mini-campaigns (print mail piece + eBlast + Crescendo eNewsletter + social media post):

- Bequests + Estate Planning Guide Offer – [Month/Year]
- DAFs – [Month/Year]
- CGAs – [Month/Year]
- IRA Charitable Rollover – [Month/Year]
- Crescendo donor eNewsletters – monthly
- Social media posts – monthly
- Annual Impact Report – [Month/Year] – ads on Gift planning and/or donor story spotlight
- Legacy Society Reception – [Month/Year of event date]
- Estate Planning Seminars – quarterly

#### Timing

- 12-month plan (*tentative*): Fiscal Year: [Month/Year] – [Month/Year]

#### Segmentation

- PG/Bequest marketing: Age 40+, Legacy Society, Loyal Donors, Major Gift Donors, Volunteers, Past patients, Families of past patients
- IRA Charitable Rollover marketing: Past IRA Charitable Rollover donors, 70 1/2 or older
- CGA marketing: mid 70's+

Crescendo

Creative Gift Marketing

As you develop your marketing plan, think about the marketing tools, timing and segmentation that would work best for your organization.

## SEGMENTING YOUR MESSAGING

is as important as creating a polished marketing piece. The sample marketing plan includes bequest marketing to donors age 40+, loyal donors, board members and legacy society members. IRA charitable rollover and charitable gift annuity marketing is segmented for donors age 70+, which fits the demographics for these gifts.

As a healthcare organization, you have a unique mission and branding that can be reflected in your marketing.

## We Can Help

If you would like to learn more about Crescendo's GiftLegacy marketing services and how to use our products, please contact us at 800-858-9154 or visit [crescendointeractive.com](http://crescendointeractive.com).

Our team is happy to help you develop a marketing strategy to achieve your goals.



# Crescendo

Major & Planned Gifts Marketing



[crescendointeractive.com](http://crescendointeractive.com)