


Legacy Loop

Partner session - 26th March 2025





Welcome. Come on in,
and bring your imposter
with you...

A bit about me

- Worked in fundraising since I was 18
- For several different charities and causal areas, across nearly all income streams
- Now work Agency side and freelance
- **I LOVE LEGACY GIVING**
- I often feel out of my depth.
- But that, I have learned, is OK and **VERY COMMON**

So what is Imposter Syndrome?

*“the persistent inability to believe that one's success is deserved or has been legitimately achieved as a result of one's own efforts or skills.”**

**<https://languages.oup.com/google-dictionary-en/>*

Who can struggle with Imposter Syndrome?

EVERYONE.




What causes this?

- Bad management - the feeling put on you by others that you're not good enough
- Overworked staff - when you have to pick up something else that may not be your "bag" but you do it anyway
- Burnout - as above!!
- Fear of success
- Fear of failure
- Perfectionism - enough is never good enough...
- Emotional complexity of legacy giving
- Working with "professionals" such as solicitors

Two BIG ones for me

→ KPIs

→ Instant gratification



In your groups - have a chat. Be vulnerable if you are willing, and respect one another.



Think about:

- Do you have a line manager that understands the long lead-time for legacy activity to come to fruition?
- Do you feel stuck in the day to day?
- How do you manage success? What KPIs are you using, if any?
- Have you felt imposter syndrome before? What did you do to overcome it?

Example KPIs - engagement

KPI Category	KPI Name	Tracking Method	Suggested Visualization
Engagement	Website Traffic to Legacy Pages	Google Analytics	Line Graph
Engagement	Time Spent on Legacy Pages	Google Analytics	Bar Chart
Engagement	Download Rate of Legacy Materials	Website Form Tracking	Funnel Chart
Engagement	Email Open Rate (Legacy Campaigns)	Email Marketing Reports	Bar Chart
Engagement	Click-Through Rate (Legacy Campaigns)	Email Marketing Reports	Bar Chart
Engagement	Event Attendance (Legacy Webinars)	Event Registration Data	Bar Chart
Engagement	Social Media Engagement on Legacy Giving Posts	Social Media Insights	Pie Chart
Engagement	Survey Responses on Legacy Awareness	Survey Tools (e.g., Typeform)	Bar Chart

Example KPIs - Conversion

KPI Category	KPI Name	Tracking Method	Suggested Visualization
Conversion	Number of Will-Writing Inquiries	Inquiry Form Submissions	Bar Chart
Conversion	Number of Wills Started Online	Will-Writing Platform Data	Line Graph
Conversion	Will Completion Rate	Will-Writing Platform Data	Funnel Chart
Conversion	Percentage of Wills Including a Legacy Gift	Will-Writing Platform Data	Pie Chart
Conversion	Consent Rate for GDPR Opt-In	CRM Data	Pie Chart
Conversion	Follow-Up Conversion Rate	CRM Data	Bar Chart
Conversion	Legacy Donor Retention Rate	CRM/Legacy Donor Database	Line Graph

Example KPIs - Financial

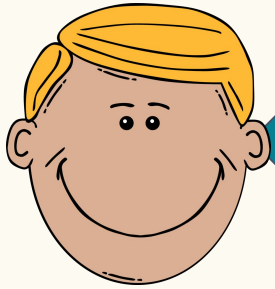
KPI Category	KPI Name	Tracking Method	Suggested Visualization
Financial Impact	Number of Confirmed Legacy Pledgers	CRM/Legacy Donor Database	Bar Chart
Financial Impact	Estimated Value of Future Legacies	Legacy Pledge Forms	Bar Chart
Financial Impact	Average Gift Size	CRM/Finance Reports	Bar Chart
Financial Impact	Percentage of High-Value Legacies	Finance Reports	Pie Chart
Financial Impact	Ratio of Cash vs. Residuary Legacies	Finance Reports	Pie Chart
Financial Impact	ROI of Legacy Marketing Campaigns	Marketing Spend vs. Pledges	ROI Line Chart
Financial Impact	Number of Bequests Received Annually	Annual Financial Reports	Bar Chart

Example KPIs - Long-term

KPI Category	KPI Name	Tracking Method	Suggested Visualization
Long-Term Performance	Legacy Pipeline Value	CRM/Financial Data	Bar Chart
Long-Term Performance	Year-on-Year Growth in Legacy Pledges	Yearly Legacy Reports	Line Graph
Long-Term Performance	Percentage of Bequests Realized Annually	Financial/Legal Team Reports	Funnel Chart
Long-Term Performance	Conversion Time from Awareness to Pledge	CRM Tracking	Bar Chart
Long-Term Performance	Number of Solicitors & Will-Writing Partners Engaged	Partnership Tracking	Pie Chart
Long-Term Performance	Market Share of Legacy Giving	Sector Benchmark Reports	Comparison Bar Chart

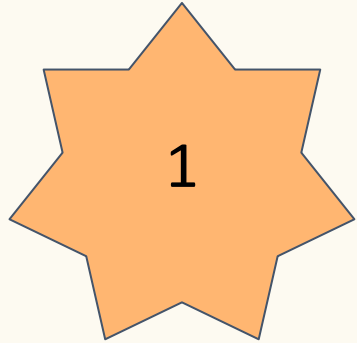


Managing up (and sideways and possibly up another level...)

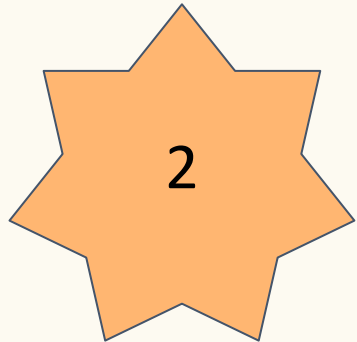


YOU

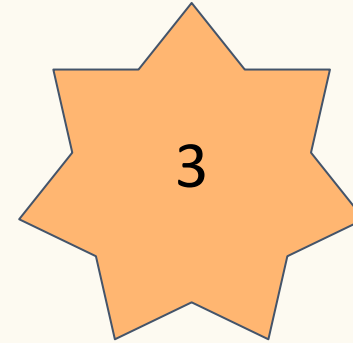
Top tips:



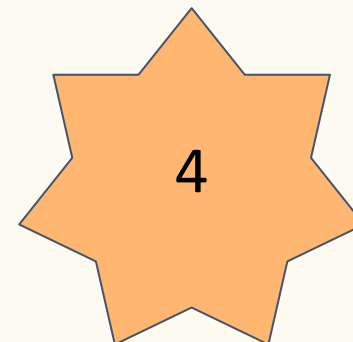
Spend your time with like-minded folk - i.e. this group, the CIOF's SIG, RAC, etc.



Legacy income takes YEARS.



Push back on meaningless KPIs



Be kind to yourself



Find me on
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