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RESOURCES

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Planned Giving SWOT Analysis and Goal Setting

A SWOT analysis is a tool designed to help you identify your internal *strengths* and *weaknesses*, and your external *opportunities* and *threats*. By identifying these factors, we can set strategic goals and yield better results.

To analyze your current planned giving program, we've broken the analysis into 5 parts, plus a final goal setting step.

1. Donors
2. Marketing
3. Messaging
4. Engagement
5. Tools

Fill each section out with your team using the questions to guide you. Feel free to pull in other departments when it makes sense (for example, your communications team might be helpful when it comes to messaging and marketing).

Once you've completed steps 1-5, use step 6 to create new goals that you can integrate into your quarterly or annual strategic plans. We suggest using this tool at least once per year.

If you need additional assistance, please reach out!

Abigail Bruins
Director of Business Development
Canopy Resources
888-252-4182
abigailb@canopy-resources.com
www.canopy-resources.com

Part 1: Donors

Use the following questions to help guide your SWOT analysis below. Be sure to stay focused on DONORS for this part.

- How many donors do you have? How many are active?
- Do you have strong and reliable data? Do you have continuing ways to obtain and maintain data?
- What about demographics: age, marital status, children?
- How old is your organization? How long have your most loyal supporters been with you?

STRENGTHS <i>Identify things that are going well</i>	WEAKNESSES <i>Identify areas that need improvement</i>
OPPORTUNITIES <i>Identify areas for growth</i>	THREATS <i>Identify your obstacles, foreseen and unforeseen</i>

Part 2: Marketing

Use the following questions to help guide your SWOT analysis below. Be sure to stay focused on **MARKETING** for this part.

- Are you viewing legacy giving as a story to be told?
- Are you using response devices to connect with the interested?
- How are you measuring the success of your marketing?
- Do you have a strong annual marketing plan?

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Part 3: Messaging

Use the following questions to help guide your SWOT analysis below. Be sure to stay focused on **MESSAGING** for this part.

- Are you messaging leading with inspiration or information?
- Does your webpage provide examples, stories, relatable content?
- Who is your audience? Are they receiving your message?

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Part 4: Engagement

Use the following questions to help guide your SWOT analysis below. Be sure to stay focused on **ENGAGEMENT** for this part.

- How are you talking with donors?
- How often do you follow up?
- Are you missing any hidden major donors?
- How are you thanking and celebrating those who have reported gifts in will?

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Part 5: Tools

Use the following questions to help guide your SWOT analysis below. Be sure to stay focused on TOOLS for this part.

- Do you have resources for specific types of giving?
- Do you have referrals for foundations/financial planners/attorneys?
- Can you provide calculators for planned gifts?
- Can you advise, or refer for advising, on best types of gift planning for your donors?

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Part 6: Identifying Goals

Set 2-3 new goals that are specific to planned giving. Be sure that your goals are measurable, succinct, and realistic. If you're having trouble, refer back to some of the weaknesses and opportunities sections of your SWOT analysis. For each goal, you should have a timeline and 1-2 performance indicators to help benchmark your success along the way. Identify the person from your team who will track your progress and keep the rest of the team on task. These goals should integrate with your strategic plan or visioning plan.

Goal	
Timeline/Deadline	
Performance Indicator	
Task Manager	

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