Being Heard
Understanding Principles of Persuasion and Communication

The best gift plan in the world is worthless if it isn't remembered and doesn't move a donor to action.

There are many important elements to gift planning success. Knowledge of various gift planning vehicles helps us understand the different ways to help a donor maximize his or her giving. Marketing efforts help potential donors see themselves as capable of making significant gifts. Donor societies and other stewardship helps keep deferred gifts in place and encourages additional support.

However, all of these activities can be depend on effective messaging. More specifically, we can increase our planned giving success by developing a basic understanding of <u>what</u> messages to deliver – what is persuasive – and <u>how</u> they can be most effectively delivered – what is remembered.

How we make decisions

Head or heart? Great thinkers have been debating for thousands of years as to whether reason guides human behavior, or whether it is passion and intuition.

Plato argued that humans are rational creatures that find success when they tame their passions in favor of their rationality. English philosopher David Hume wrote in 1739 that reason should, instead, serve passions. Thomas Jefferson thought that reason and sentiment guide behavior equally.[1]

Recent research suggests evidence for Hume's position.[2] In *The Righteous Mind: Why Good People Are Divided by Politics and Religion*, psychologist Jonathan Haidt cites a variety of experiments to illustrate that behavior is largely directed by intuition with only some influence by reason. To illustrate how intuition and reason interact, he uses the metaphor of an elephant – representing intuition – being ridden by a person – representing reason. Reason is able to guide intuition, but only up to a point. To persuade people, you ultimately must talk to their "elephant."[3]

Why is this important to planned giving?

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[1] Haidt, Johanthan, *The Righteous Mind: Why Good People are Divided by Politics and Religion* (2012), pp. 29-36.
[2] *Id.,* p. 29.
[3] *Id.,* pp. 52-58.

Given the ease with which charitable gift planners can deliver “rational” messages (tax savings, life income benefits, deferred giving, etc.), psychologists remind us that behavior is more likely to be guided by passions and intuitions.

This is not to say that rational messages should be ignored. For example, recent research by philanthropy scholar Russell James indicates that mentioning tax benefits when talking about planned giving increases a donor’s interest.[4]

Rather, this “rider on an elephant” metaphor is a useful reminder to focus our messages on the passions and intuitions of our donors. This means more mission-focused messages in mass communications. This also highlights the importance of quality qualification visits in which a gift planning officer asks strategic questions to better understand the nature of our donors interests so we can “find their elephant.”

A useful framework for finding an individual donor’s “elephant” can be found in the book *The Seven Faces of Philanthropy* by Russ Alan Prince and Karen Maru File. The categories of giving styles that it defines – altruist, communitarian, devout, dynast, investor, repayer, socialite – can provide a useful starting place for developing a message that aligns with a particular donor’s intuition.[5]

The study of family dynamics is also useful. As observed by renowned philanthropic adviser, Charles Collier, emotional systems within a family can affect estate planning and philanthropy.[6] Understanding the core family issues – “family ‘elephants’” – may be critical in developing messages that are consistent the underlying values and goals that guide a donor’s behavior.

What to Say - Elements of Persuasion

Finding the donor’s “elephant” – his or her core passions and intuitions – is essential to developing the appropriate message. Research also suggests that certain types of messages are persuasive to the “elephant.”

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[4] “Golden Nuggets from Ivory Towers: Recent Powerful Research Impacting Gift Planning,” Bryan Clontz and Russell James, JD, PhD, 2014 National Conference on Philanthropic Planning.

[5] *See* Prince, R. and File, K., *The Seven Faces of Philanthropy* (2001).

[6] *See* “A ‘Family Systems’ Approach to the Estate Planning Process,” Charles W. Collier, *American College of Trust and Estate Counsel Journal*, vol. 30, pp. 146-49 (2004). *See also* Collier, Charles, *Wealth in Families* (2nd ed. 2008).

Psychologist Robert Cialdini has observed that certain principles influence people's openness to complying with a request.[7] Many of the principles identified by Cialdini - commitment and consistency, social proof, scarcity / loss aversion, authority, liking – along with the principle of contrast[8] affect how we develop our messages. Given that these principles can affect behavior automatically,[9] understanding them is important to insuring that ideas of potential interest to our donors are actually considered.[10]

Commitment and Consistency

People want to be consistent with their behavior. Once we have committed to a position, there tends to be a strong desire to behave in a manner that is consistent with that commitment.

One experiment designed to test this principle involved asking residents of a suburban neighborhood to display a large sign in their yard encouraging drivers to drive carefully because of children at play. The sign was large enough, and unattractive enough, that only 17% of the houses in the control group agreed to display the sign. For some of the residents, though, a two-step process was used. First, these residents were asked if they would display a small, unobtrusive window sign promoting careful driving in the neighborhood. Two weeks later, they were asked if they would display the same large, unattractive sign offered to the control group. Of this second group of households, 76% percent displayed the sign in their yard. Once a household had demonstrated their commitment to promoting safe driving (such as through the small window sign), they were significantly more likely to engage in other consistent behavior – such as displaying a large, unattractive sign.[11]

This principle is critical in determining what questions we want to ask prospective gift planning donors. Questions that uncover a donor's commitment to certain ideas increase the chances they will hear a message from your charity that aligns with their interests, and act accordingly. Why does a donor support your charity? What societal issues concern your donor? Why does a donor think the work of your charity is important? What prior events have shaped your donor's life? When a donor hears himself or herself state that an issue is important, he or she is more likely to behave in a manner that is consistent with that statement.

[7] Cialdini, Robert, *Influence: The Psychology of Persuasion* (revised 2007), p. xiii. An additional principle, reciprocity, is not discussed here, as it deals more with actions than with communications. Reciprocity is the concept that people are more willing to do things for your when they are reciprocating for things you have done for them.

[8] *Id.*, pp. 11-14.

[9] *Id.,* pp. 1-8.

[10] Given the automatic nature of the principles Cialdini discusses, it can be easy to imagine situations where someone would attempt to use these principles in an unethical effort to get someone to do something against their interest, such as buy a product they do not need. While we cannot change principles of human behavior, good ethics require that our messages are grounded in an alignment with a donor's philanthropic and personal interests.

[11] *Id.,* pp. 72-74.

For example, when a donor states early in a relationship that he or she is concerned about student's access to higher education and is troubled by the increasing student loan debt burden, this donor will be more open to considering a solicitation for need-based scholarships than a donor who has not expressed such a commitment.

Social Proof

Why do comedies on television have laugh tracks? Can't we figure out what's funny on our own?

Television producers discovered long ago that a show is perceived to be funnier when the audience hears other people laughing.[12]

At work is the concept of social proof. People tend to believe an idea when they see evidence that others also believe in the idea.

Social proof is a reason that a public listing of legacy society donors is so important. When a prospective donor sees others who have made a deferred gift, the donor is more open to considering making his or her own deferred gift.

Similarly, social proof is a reason that testimonials and donor stories are so important. Seeing another person with whom a prospective donor can identify – perhaps due to similarities in situation or due to personal connections – that has already made a gift will make the prospective donor more open to considering a gift.

Scarcity / Loss Aversion

People fear loss more than they value gain.[13] For example, consider the story of "new Coke." After extensive taste tests, Coca-Cola determined that they needed to change its nearly century-old formula. However, even though blind tests had demonstrated a preference for the new formula, customers revolted. The negative feedback was so strong that Coca-Cola had to bring back the old formula and eventually discard "new Coke."[14]

Why did this happen? Customers perceived a sense of loss. All of the memories associated with having an "old Coke" with loved ones and at happy occasions were at risk of

[12] *Id.*, pp 114-17.
[13] Kahneman, Daniel, *Thinking Fast and Slow* (2011), pp. 282-86.
[14] Cialdini, R. et al., *Yes! 50 Scientifically Proven Ways To Be Persuasive* (2008), pp. 144-49

being lost. Customers' actions demonstrated that they did not want to lose those memories even at the prospect of gaining a drink scientifically shown to be preferred.

Recognition that people fear loss more than they value gain is important in determining what our message should be. How a message is framed can make a difference in whether it is heard. For example, look at the following statements:

- Consider a gift to fund this naming opportunity, before someone else takes it.
- Make a gift annuity now, before rates go down.
- Endow your annual gift with a bequest, or you will lose the chance to have your legacy felt forever.
- Consider a lower payout rate for your charitable remainder trust, or you will lose the chance for your gift to fund as many scholarships in the future.
- Consider donating your unneeded vacation home, or you will lose the chance to allow our charity to help you simplify your life.

Each could be framed differently. However, by framing these messages in a way that utilizes the principle of loss aversion, we maximize the opportunity for them to be heard by our donors.

Liking

Even new gift planning officers intuitively know that our message is more likely to be favorably received if a donor likes us. We know that if we are pleasant with our donors and look to find connections as we build relationships, our donors will be more open to listen to what we have to say.

The principle of liking guides not only how we behave but the messages that we deliver. People naturally want to associate with things they like. For example, a study of college campuses showed that a higher number of school sweatshirts were worn on the Monday after that school won its football game the preceding Saturday than if the school lost.[15] After the famous 1980 U.S. Olympic hockey team upset of the Soviet Union, ticket scalpers were getting a hundred dollars for a pair of used ticket *stubs* – presumably so people could say that they were a part of sports history.[16]

[15] Cialdini, *Influence,* p. 199.
[16] *Id.*, p. 201.

Donors want to associate themselves with causes that make them look good. Our role is to find ways that allow them to do so. Stories of our charities' impact allow donors to show others of the good work that their gifts are promoting. Favorable rankings allow our donors to perceive themselves as supporting excellence. Publicity of our charities' success allows our donors to share in the attention. By promoting reasons for our donors to be associated with our charities, we will be better able to have our messages heard.

Authority

People generally have a strong desire to obey authority. In a famous case, volunteers cast as teachers in a learning experiment felt compelled by the experiment director to punish wrong answers of a test subject by supposedly delivering increasingly powerful electric shocks. Even though they were free to stop the experiment at any time, a surprising number of volunteers delivered punishments that they were led to believe were causing great pain, and potentially lethal damage, to the test subjects. (No actual shocks were ever delivered.)[17]

Given how powerful authority can be, it must be considered when developing our messages so that they can be heard. For example, consider a campaign to build a new wing on a hospital. Many objective reasons may be readily available as to the necessity of the project – shortage of available beds, the need for more equipment, etc. However, the reasons for the project are more likely to be heard when delivered by the hospital's chief executive officer.

Actual authority is not necessary in order for this principle to work. Fundraisers, who will be viewed as insiders, can be perceived as an authority on the mission of the charity. Gift planning officers will be perceived as knowledgeable of gift planning – even if their actual knowledge is modest. To illustrate, consider the number of celebrities that are used in advertising. Cialdini notes the advertising success of an actor who starred as a medical doctor in a popular television series. Even though there was no rational reason to pay attention to this actor, the association with his television character enabled him to have success promoting the health benefits of a recently developed caffeine-free coffee.[18]

Recognizing the existence of this phenomenon will help us insure that we appeal to authority when appropriate to help gain the attention of our donors.

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[17] *Id.,* pp. 208-15.
[18] *Id.*, p. 220.

Contrast

Why does Best Buy display enormous high-definition televisions that few of its customers could buy? Because it wants its customers to be more open to consider a more modest television that it has in stock.

This is the contrast principle at work. The first of two items anchors perceptions. How the second item is perceived depends on the item that preceded it. If it is fairly different, the perception of difference may be greater than the reality.[19]

If Best Buy did not display the high-priced television, its more modest-priced television risks being perceived as expensive when compared to an economy model.[20]

Understanding this principle may be important in presenting a donor with options. The order in which two choices are presented can heighten the perceived difference – making one option appear especially attractive, or especially unattractive. Acknowledging this phenomenon is important to insure that a choice is not presented in a manner in which it unintentionally appears unfavorable.

Consider the comparison between a revocable will bequest and an irrevocable gift annuity. Mentioning the bequest first makes a donor more likely to have a stronger perception of the revocability and the flexibility of the gift. Mentioning the gift annuity first makes a donor more likely to have a stronger perception of the benefits of annuity payments and income tax savings.

While a donor's choice will still be grounded in his or her preferences (how many Best Buy customers really buy the expensive television?), the order of presentation anchors a donor's perceptions – highlighting one feature over another. A bequest's revocability may receive greater focus if it is mentioned first. A gift annuity's income stream may receive greater focus if it is mentioned first.

How to decide an order of presentation will depend on each situation. Being aware of this phenomenon, though, is important to serving your donors and your charities well.

[19] *Id.*, pp 11-14. *See also* Kahneman, *Thinking*, p. 119-28.
[20] Cialdini, et al., *Yes!,* pp. 38-41 (Williams-Sonoma breadmakers).

How to say it – making messages memorable

Why do urban legends persist? Even though they are false, they continue to be repeated, spreading virally.

In *Made to Stick: Why Some Ideas Survive and Others Die*, professors Chip Heath and Dan Heath point out that urban legends – like other "sticky" messages – have many attributes that make it easier for people to remember. Such messages are:

Simple
Unexpected
Concrete
Credible
Emotional
Stories

While a memorable message does not have to have every attribute, the more it has increases the chances that it will be remembered.[21]

Simple

Political strategist James Carville once said, "If you say three things, you don't say anything."[22] In order to memorable, a message must be simple.

Merely being succinct is not sufficient. Proclaiming "my charity is good" is unlikely to secure new gifts.

Heath and Heath define a "simple" message as something more: one that conveys the core concept while also being compact.[23]

Finding the core of a message means reducing the idea to its most basic element. The Army talks about the Commander's Intent. During a mission, what is the single most important objective that must be accomplished? Journalists talk about avoiding "burying the lead." What is single most important element of a story, so that a reader will understand the story if he or she reads nothing else? To illustrate, Southwest Airlines' core value was being "THE low-fare

[21] Heath, C. & Heath, D., *Made to Stick: Why Some Ideas Survive and Others Die* (2008), pp. 14-18.
[22] *Id.*, p. 34.
[23] *Id.*, p. 46.

airline." All business decisions had to align this with this value. If a decision (such as to add a salad option to the menu) did not serve this core value, it was not adopted.[24]

Being "compact" means more than being succinct. It means using *schemas* – generic properties associated with a concept or category – to quickly communicate a new idea. This allows more complex ideas to be communicated with a minimum amount of words, thereby making the idea easier to remember. To illustrate, Heath and Heath review how the movie industry quickly evaluates new projects:

> *Speed* was "*Die Hard* on a bus." *13 Going on 30* was "*Big* for girls." *Alien* was "*Jaws* on a spaceship."[25]

Given the numerous gift options available and the complexity of those options, charitable gift planning is an area that can benefit greatly from "simple" messages – ones that are both core and compact.

Consider the two gift options that you might discuss with a donor. Which is likely to be remembered?

You may be interested in… …a charitable remainder trust. It is a separately-invested trust that pays either a fixed or variable amount to you for your life or a period of up to twenty years and provides you with a tax deduction today and benefits our charity in the future.	You might be interested in… … a gift that pays you back.

The first example is certainly the most descriptive. But is it the most effective? Are the details it includes – "separately-invested," "trust," "fixed or variable payments," "your life or a period of up to twenty years" – essential to the donor grasping the core of what a charitable remainder trust is? Or does this example "bury the lead"?

Note how the second example focuses on the core of what a charitable remainder trust is. Also note how it uses schemas. A donor knows what a "gift" looks like – an irrevocable transfer to charity that may produce tax benefits. A donor knows what it means to be "paid back" – the donor will receive money as a result of doing something (in this case, making a gift).

[24] *Id.*, pp. 25-33.
[25] *Id.*, pp. 53-60.

Heath and Heath note how proverbs are good examples of messages that are "simple" – core and compact.[26] Consider a quote from Warren Buffett: "Someone is sitting in the shade today because someone planted a tree a long time ago."[27] While it refers to his investment philosophy, is there a better "simple" message that conveys the importance of planned giving?

Unexpected

To stick, a message needs to get our attention and keep our attention. Surprise gets our attention. Interest keeps our attention.[28]

Surprise works because our brains have evolved to pay attention when it detects something different.[29] Being able to respond quickly to the most serious threats or the most promising opportunities helped our ancestors survive.[30]

To illustrate the effectiveness of surprise in conveying a message, consider stories about outstanding customer service from the retailer, Nordstrom. They are memorable because they are different from our expectations of typical customer service:

> The Nordie [Nordstrom employee] who ironed a new shirt for a customer who needed it for a meeting that afternoon;
> the Nordie who cheerfully gift wrapped products a customer bought at Macy's;
> the Nordie who warmed customers's cars in winter while they finished shopping;
> the Nordie who made a last-minute delivery of party clothes to a frantic hostess;
> and even the Nordie who refunded money for a set of tire chains – although Nordstrom doesn't sell tire chains.[31]

Similarly, consider the above description of a charitable remainder trust – "a gift that pays you back." An additional element that makes this phrase effective is the element of surprise. Gifts typically do not pay us back. Offering a gift option that is different from our experience gets our attention.

Interest keeps our attention because we experience discomfort when we have a gap in our knowledge. Why do we stay up too late watching a bad movie? A gap has opened up in our

[26] *Id.*, pp. 47-48.
[27] Kilpatrick, Andrew, *Of Permanent Value: The Story of Warren Buffett* (1998), p. 802.
[28] Heath and Heath, *Made to Stick.*, pp. 65.
[29] *Id.*
[30] Kahneman, *Thinking*, p. 35.
[31] Heath and Heath, *Made to Stick*, p. 73, citing Jim Collins and Jerry I. Porras, *Built to Last: Successful Habits of Visionary Companies* (1994), p. 118.

knowledge – what will happen to these characters? how will the story end? Even though the movie may not be particularly good, we will invest time to close this gap in knowledge.[32]

Similarly, college football telecasts grew in popularity once broadcasters learned how to provide enough backstory and context so that a knowledge gap was created. With background on the rivalries, the history, and the local fans, more of the audience began to care who won. The success of this approach can be seen by how ubiquitous these techniques have become in sports programming.[33]

Our planned giving messages can benefit in the same manner. For example, consider a direct mail piece sent years ago from the University of Denver. The outside of the piece showed a nametag on the lapel of person attending a function. On the nametag was inscribed "Hello, my name is … Rich."

We ask ourselves: Who is Rich? Why am I receiving this? Is he attending an event? What is the event? What is going on?

The inside of the card closes the curiosity gap. It reads, "You don't have to be Rich to make a gift to the University of Denver."

By creating a curiosity gap and using a surprising play on the word "Rich," the University of Denver has conveyed the idea that anyone can make a planned gift through a message that is far more likely to be remembered.

Concrete

Heath and Heath offer the following exercise:

> Remember the capital of Kansas
> Remember the first line of "Hey Jude"
> Remember the *Mona Lisa*
> Remember the house where you spent most of your childhood
> Remember the definition of "truth"
> Remember the definition of "watermelon"

How did it feel to remember these different items? Remembering "watermelon" may have evoked numerous memories – a grocery store display, a fruit buffet, a grandparent's porch, a farmer's market, a picnic. Remembering the definition for "truth" may have required more

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[32] Heath and Heath, *Made to Stick.*, pp. 84-88.
[33] *Id.*, pp. 89-92.

work. While everyone knows on one level what the definition is, it may take effort to construct it.[34]

Memory has been compared to Velcro. Just like a Velcro pad, the more "hooks and loops" that can connect will mean the firmer connection a memory will have. It is no surprise, then, that nouns and actions have more connections than abstractions. Nouns and actions evoke multiple senses – images, smells, sounds, feelings, tastes – that provide more connections and make it easier to remember.[35]

Thus, sticky messages will look to provide more descriptive nouns and actions than abstractions. Consider the challenge faced by The Nature Conservancy in California in 2002. There was more environmentally endangered land in California than the Conservancy could purchase. The Conservancy could buy conservation easements, but the more abstract nature of this concept is harder to promote on the scale necessary to achieve the Conservancy's goals. Moreover, the numerical goals – number of acres, percentage of California's land – were so large as to lack meaning and motivation. To make goals more concrete, the Conservancy set a goal of preserving specific landscapes – specific areas that could be described and visualized. For example, an important set of hills east of Silicon Valley was named the Mount Hamilton Wilderness. This concreteness enabled the Conservancy to build the support it needed, helping it secure a large grant to protect the Wilderness.[36]

How easy is it for a donor to remember what a "charitable remainder trust" is? How about "a gift that pays you income"?

How easy is it to remember what a "bequest" is? How about a "a gift after your lifetime"?

How easy is it to remember that a symphony needs an endowment? How about a symphony's need for funds to insure the community can always hear live classical music?

Planned giving can be abstract. Finding more descriptive language making our ideas more concrete can help our messages be remembered.

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[34] *Id.*, pp. 109-11.
[35] *Id.*
[36] *Id.*, pp. 100-04.

Credible

It is not enough for our messages to be heard. In order for people to be willing to act on our messages, they must believe them. This requires finding a source of credibility.[37]

Credibility can come from external sources. Some external sources are easy to spot. Planned giving messages are often believed more when the messenger is someone having "planned giving" in their title. The needs of a charity are often believed more when expressed by person with a title of leadership in the charity, or by a recognized expert in the area.

There are other sources of external credibility. Experience can often be a powerful source. For example, one of the most successful anti-smoking campaigns featured the story of a smoker dying from emphysema.[38] Similarly, a donor who creates a gift annuity can provide a powerful example of how such a gift works for her. A needy student can provide a powerful example of the value of scholarship support.

Credibility also can come from internal sources. Details inside our message can be a powerful tool in enhancing credibility. The more details that are shared in a story, the more the story is likely to be believed. In an experiment, researchers simulated a trial over whether a mother was fit to retain custody of her seven-year-old child. The same number of arguments was constructed for each side. The only difference was the level of detail offered in support of one side or the other. In one group, the arguments supporting the mother's position had vivid, yet irrelevant, details about her worthiness while the arguments had no supporting detail (e.g., the type of toothbrush with which she made him brush his teeth at night). The other group heard the reverse, with vivid, yet irrelevant, details about her unworthiness (e.g., the school nurse staining her uniform with medicine while cleaning the boy's unattended scrape).

The details proved to make a difference. Because the vivid details supporting her worthiness made it easier for the jurors to visualize her worthiness, they were significantly more inclined to find in her favor.[39]

Similarly, sharing details with our donors can make a difference with how our donors perceive us. For example, explaining how a gift of stock works can enhance the credibility with which our donors perceive us. They may not recall the details of how a gift of stock works. However, they will remember our ability to recall such details, making them more likely to believe that we have knowledge that could help them with their giving.

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[37] *Id.*, p. 163.
[38] *Id.*, pp. 135-36.
[39] *Id.,* pp 138-39.

Sharing planned giving details can be a risky proposition, as it risks violating the need to make a message simple. However, when judiciously used, details can bolster our message by bolstering our credibility.

Emotional

If we want people to remember our ideas and take action, then we must make them care about our ideas.

Perhaps the most basic way in which an audience cares is its self-interest. However, it is not enough to show features that help the audience. As mail-order advertisers have learned, you must spell out the benefit – "what's in it for you."[40] For example, planned giving officers shouldn't talk about "charitable deductions;" instead, we should talk about "paying fewer taxes." We shouldn't talk about a gift establishing an endowment for the town library; instead, we should talk about how a gift will keep buying new library books for generations of town residents.

We care more when a message appeals to our self-identity. An anti-littering campaign had success by appealing to Texans' rugged self-image with the slogan "Don't Mess With Texas."[41] An Army mess hall in Iraq consistently outperformed peers by viewing itself as responsible not for food, but for morale.[42]

Similarly, university giving appeals can resonate when combined with class reunion challenges, as alumni identify with their classes and want them to succeed. Local charities can boost their message by appealing to the community's character in helping out neighbors. Giving societies can increase the resonance of their message if there is a message or person connected with the charity with which potential donors can identify.

Perhaps the most powerful way to make donors care about our messages is to humanize them. As Mother Teresa said, "If I look at the mass, I will never act. If I look at the one, I will."[43]

For example, consider a video put together by the University of Virginia Health System several years ago. The core of its message was that it excels in severe pediatric health care. However, rather than cite the number highly-renowned specialists or show its state-of-the art equipment, it depicts a story of a mother and son. With no dialogue, we see a boy playing

[40] *Id.*, pp. 177-79.
[41] *Id.*, pp. 195-99.
[42] *Id.*, pp. 186-87.
[43] *Id.*, p. 165.

football without a care in the world. We then see images of doctors, x-rays, and a worried mother. We see the boy's head being shaved and covered with a bandana before he enters the hospital. We then fast forward to a football stadium on a glorious fall afternoon. We then see a strong young man suiting up for the game – when he puts on the same bandana we saw moments ago. As he prepares to run onto the field, we see him looking up at his mother. We see her in the stands looking down at him with both joy and relief. The final caption: "UVA Health: We're for first borns, and second chances."

By inviting the audience to experience a parent's worry and the resulting joy from a successful medical treatment, we remember that the University of Virginia is a place to consider for really difficult children's health cases.

As we craft messages, it is important to remember the words of communications consultant Andy Goodman:

> Numbers numb, jargon jars, and nobody ever marched on Washington because of a pie chart.[44]

Stories

Stories are invaluable in making messages memorable. They hold our attention, because they create gaps in our knowledge that we find painful to leave open.[45] Will the hero conquer the villain? Why does the stranger help the neighbor? How does the problem get solved?

Perhaps more importantly, stories make messages memorable by showing us how to act. By allowing our audience to place themselves in a new situation, the audience can simulate for themselves what it is like to make the choices that the story encourages. This creates far more "Velcro" – more memory connection points that increase the chances of the message being recalled at a future time.[46]

Consider the story of a neonatal intensive care nurse who correctly recognized that others – including the chief physician – were misdiagnosing a baby on the verge of death. Her conviction in persuading the team to take a different, immediate action saved the baby's life – and provided a valuable story in both diagnosing this medical condition and in ignoring protocol when lives are at stake.[47]

[44] Goodman, Andy, *Storytelling as Best Practice* (6th ed. 2013), p. 2.
[45] Heath and Heath, *Made to Stick.*, pp. 84-85.
[46] *Id.*, pp. 208-14.
[47] *Id.*, pp. 205-06.

Or, consider the Xerox representative telling the story of how he spent four hours diagnosing a problem of a misleading error code on a copier he was servicing. He could have simply complained about a problem that he had. Or, he could have shared with colleagues a specific warning about the problem he discovered. By walking his work colleagues through his story, though, he enabled them to experience the same problem-solving challenges that he had – giving them more ways to remember the underlying message.[48]

This ability to highlight how to solve a problem is also important when talking with our planned giving donors. For most, philanthropy is a new experience for them. Charitable giving is largely confined to annual gift appeals, charity galas, and Girl Scout cookies. Keeping in mind the many different ways of giving and the different ways a gift can be used can be difficult. Stories can allow our donors to experience how they could take the actions we encourage them to consider.

Perhaps most importantly, stories can provide the necessary inspiration. Consider the story of Jared Fogle. Dieting is a daunting task for most people. Yet Jared was able to lose 245 pounds through a diet of sandwiches at the fast food chain, Subway. While ordinary people may become discouraged by the effort required by other diets, they people can see themselves following Jared's example – just eat at Subway![49]

Similarly, our planned giving donors need to see themselves as capable of making gifts. For many, significant gifts can only be considered by "the wealthy" – however a person defines "wealthy." Stories enable our donors visualize that they, too, can have a profound impact on the causes they care about. This is why donor stories and testimonials are so vital. By seeing how people like themselves can give, our donors can be inspired to do likewise.

[48] *Id.*, pp. 206-208.
[49] *Id.*, pp. 218-24.

Conclusion

Developing messages for charitable gift planning goes far beyond knowledge of gift vehicles or donor demographics. We must strive to understand what our donor's motivations are, and then hone our messages in ways that are proven to help them remember and consider what we have to say.

Only by understanding what it takes for us to *be heard* can we help our donors and our charities achieve their goals.

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Suggested Reading

Cialdini, Robert, *Influence: The Psychology of Persuasion* (revised 2007)

Cialdini, R. et al., *Yes! 50 Scientifically Proven Ways To Be Persuasive* (2008)

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