

# Segmentation Strategies for **SUCCESS**

By asking yourself what your targeted group needs, you can generate solutions that resonate specifically with them. Flip the page for a breakdown of four key ways you can segment your list, based on the 2017 NMI Healthy Aging Database® study, to help guide you as you prepare targeted marketing materials.

# HOW TO USE YOUR SEGMENTS

## **Gender: Match images and donor stories to the gender you're sending to.**

Studies have shown that when it comes to valuing the opinions of others, we place more weight on those we deem to be most like us. You can also dig deeper into gender differences in planned giving (men, for instance, are more likely than women to have a will).

## **Children in the household: Whether or not donors support young children can suggest their financial pressures and priorities.**

Consider, for instance, a message focused on giving a percentage of assets for those who will want to support their families first. Additionally, use images that reflect the donor's home life.

## **Localization: Use images that show the local area, and language that indicates that donor dollars stay local by calling out the specific city or region that you support.**

For digital marketing, consider the time of day that you send, noting your audience's time zone for the best open rates.

If your nonprofit is national or global in nature, help donors relate to the cause by showcasing how their American dollars are critical to heal a global crisis, or how a problem in another region of the country mirrors problems they've felt at home.

## **Have a will: This key difference in your audience is a critical tipping point for planned giving messaging.**

Those with a will could benefit from content about the ease of a codicil. Messaging for this group is especially critical during transition periods in their life—such as marriage or divorce, the arrival of a new child or grandchild, or a major change in their financial situation—when they are most likely to reevaluate their estate planning documents.

For those on your list without a will in place, provide rationale for creating one and simple step-by-step instructions on how to get started with estate planning.

**GENDER**

**CHILDREN**

**LOCALIZATION**

**WILL**