



Success Story



WKU



# 1 Form. 1 Month. 16 New Planned Giving Requests.

**Western Kentucky University** partners with Capture to connect directly with alumni actively considering a planned gift. As part of a larger engagement strategy, Capture delivered an on-screen estate planning prompt — a Progressive Identification (PID) form — on every page of the WKU alumni website.

The form encouraged every visitor to the alumni site to request more information about three key stages of planned giving:

1. Starting the Estate Planning Process
2. Estate Planning Strategies
3. Designating WKU in My Estate Plans

In the first month of WKU’s campaign, 16 previously unassigned prospects requested follow up about an estate commitment. Each indicated their estate planning stage when reaching out.

- Half were traditional planned giving age and focused on documenting WKU/strategies.
- Half were millennials requesting to start the estate planning process with WKU.

**Why is this significant?** WKU now generates real time leads by delivering the planned giving message on the alumni website — which receives exponentially more organic traffic. Gift officers on campus can now shorten the gift cycle by reaching out directly to prospects actively requesting planned giving guidance. In addition, gift officers no longer need to introduce the estate planning conversation because the conversation has already been started!

**For planned giving engagement,** using on-screen, digital content like PID forms eliminates the challenge of timing the planned giving conversation. No more inefficient outreach to prospects not ready to have the conversation. And, most importantly, donors across the country get the attention they need and deserve.