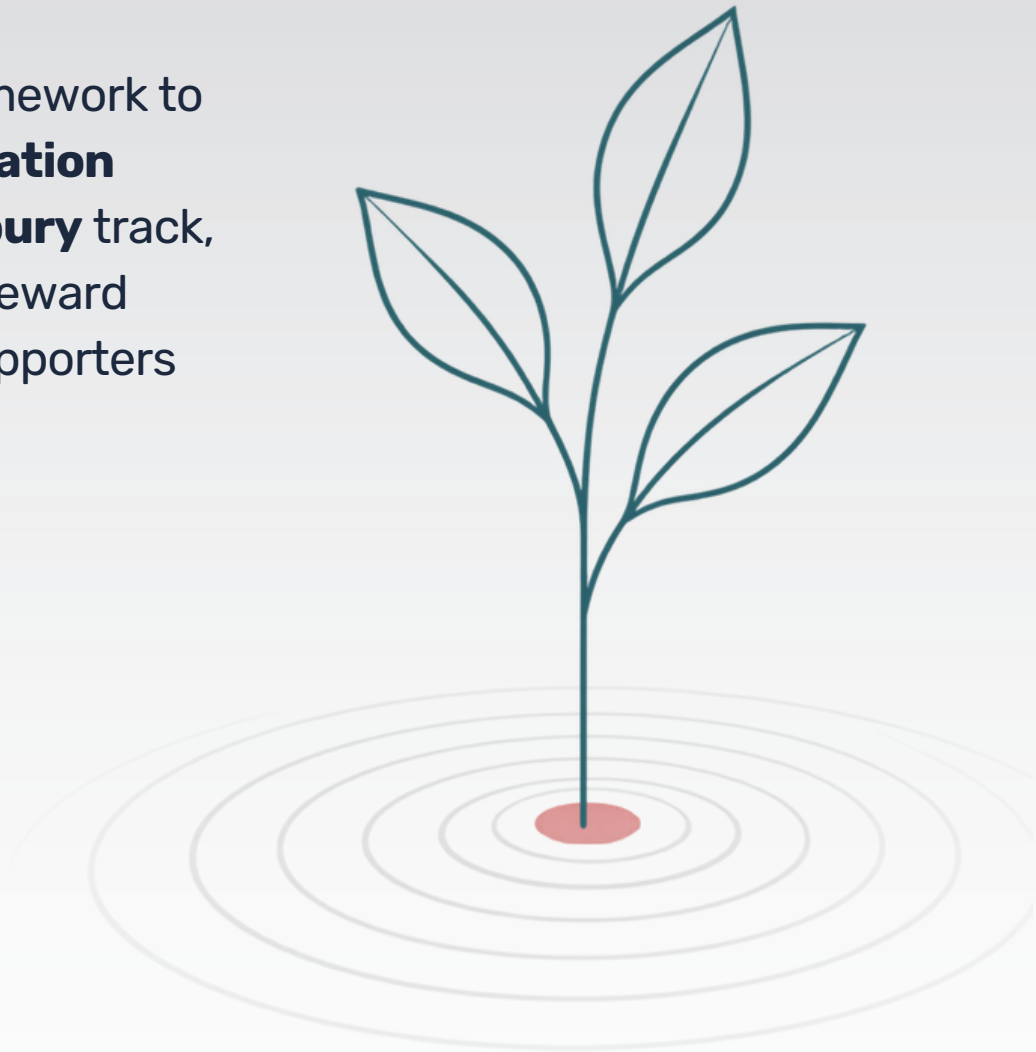
Gifts in Wills CRM & Stewardship Framework

A practical framework to help **Life Education Trust Canterbury** track, manage and steward Gifts in Wills supporters over time.



Prepared by:

Future Impact COLLECTIVE

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View GiW Supporter Communication Templates here

WHY THIS FRAMEWORK EXISTS

This framework is designed to help Life Education manage Gifts in Wills activity in a **simple, practical** and **sustainable** way.

It provides a straightforward approach to tracking supporters, planning stewardship and improving visibility over time.

This framework will help you:

✓ Record Gifts in Wills enquiries and known supporters

✓ Keep supporter information organised and accessible

✓ Plan meaningful stewardship and follow-up

✓ Improve reporting and continuity over time

✓ Reduce reliance on memory or manual workaround

CURRENT CRM & STEWARDSHIP SNAPSHOT

Life Education already has many of the foundations needed to manage Gifts in Wills well.

By introducing a simple CRM structure and consistent stewardship approach, supporter relationships can become more visible, easier to manage and more consistently stewarded over time.

Current CRM

VegaWorks

Current GiW Program Maturity

Emerging

Current GiW Tracking

No dedicated structure

Current Stewardship

Informal

CRM TODAY

🟢 Supporter information is stored in the CRM
🟢 Gifts in Wills information is captured where known
🟡 No dedicated Gifts in Wills stages or tracking fields
🟡 Relationship notes and follow-up are managed manually

STEWARDSHIP TODAY

🟢 Known supporters receive thoughtful stewardship
🟢 Strong existing relationships provide an excellent foundation for future growth.
🟡 Stewardship is relationship-led rather than process-led
🟡 No defined stewardship calendar
🟡 Limited visibility and reporting

YOUR PRIORITIES AT A GLANCE

YOUR PRIORITY IS TO:

- **Set up a small Gifts in Wills register** in your CRM
- **Record known supporters and enquiries** in one place
- **Use clear stages to track** where each supporter sits
- **Add next stewardship actions** so follow-up does not get lost
- **Send regular stewardship touchpoints**
- **Review the register** once a quarter

YOU DO NOT NEED TO:

- **Build a complex CRM workflow**
- **Create a separate stewardship program from scratch**
- **Add dozens of new data fields**
- **Contact supporters** constantly
- **Capture every supporter interaction**
- **Wait until everything is perfect before getting started**

A small, well-maintained register with clear next actions and a consistent stewardship rhythm will be far more valuable than a more complicated system that is difficult to maintain.

THE FIVE QUESTIONS TO FOCUS ON FIRST



A well-managed Gifts in Wills CRM should make it easy to answer these five questions:

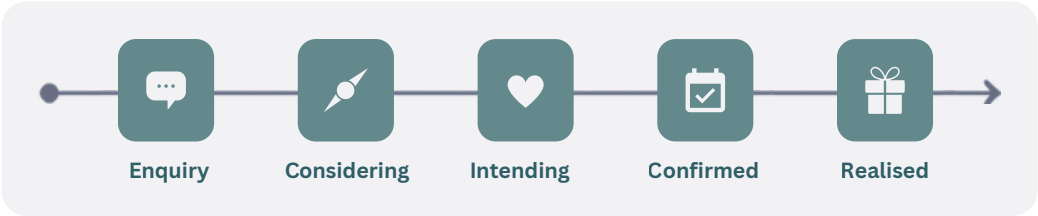
1. Who has enquired about leaving a gift?
2. Who has indicated they intend to leave a gift?
3. Who has confirmed they have left a gift?
4. What should happen next?
5. When were they last contacted?

If you can answer these five questions at any time, you're already well on your way to managing Gifts in Wills relationships consistently.

RECOMMENDED GIFTS IN WILLS SUPPORTER JOURNEY

Supporters typically move through a series of stages before a bequest is realised. Understanding these stages helps organisations engage meaningfully and steward supporters at the right time.

These five stages provide a simple way to track where each supporter is in their Gifts in Wills journey.



Not every supporter will move through every stage.
Some may move quickly.
Others may remain in the Considering stage for many years.

ENQUIRER
The supporter has made an enquiry or requested information about leaving a gift in their Will.

CONSIDERING
The supporter is actively considering a gift and may have questions or need additional information.

INTENDING
The supporter has indicated they intend to leave a gift, but has not formally confirmed this with the organisation.

CONFIRMED
The supporter has confirmed they have included a gift in their Will, allowing the organisation to steward the relationship more intentionally.

REALISED
The gift has been received through the supporter's estate and the focus shifts to estate administration and recognising the impact of their legacy.

The goal is not to overcomplicate the stages, just to use them consistently.

RECOMMENDED GIFTS IN WILLS CRM STRUCTURE

Start by creating a small Gifts in Wills structure within your existing CRM. Most CRMs already support these fields. The exact field names and format can be adapted to suit your existing system.

Recommended core CRM fields:

Field Name	Description	Examples
Gifts in Wills Stage	Tracks where the supporter sits in the Gifts in Wills journey.	Enquirer; Considering; Intending; Confirmed; Realised
Gifts in Wills Source	Records how the supporter first entered the Gifts in Wills pipeline.	Website enquiry, Brochure request, Event, Phone call, Referral, Online Will provider
Last Stewardship Contact Date	Records the date of the most recent stewardship communication or interaction.	[date]
Next Stewardship Action Date	Records when the next planned stewardship activity or follow-up is due.	[date]
Next Stewardship Action	Records the next planned communication or stewardship activity.	Send Annual Report, Thank-you email, Birthday card, Impact update, Phone call
Relationship Owner	Identifies the staff member responsible for managing the supporter relationship.	[Name of team member]
Recognition Preference	Records how the supporter wishes to be recognised for their future gift, where known.	Anonymous; Happy to be thanked privately; Happy to be recognised publicly; Not yet discussed
Gifts in Wills Relationship Notes	Captures key conversations, motivations, communication preferences and other useful relationship information.	Prefers email communication; long-term volunteer; interested in education programmes; enjoys receiving printed newsletters.

View GiW Supporter Communication Templates here ›

MANAGING GIFTS IN WILLS SUPPORTERS

Use this simple workflow whenever someone enters or progresses through your Gifts in Wills journey.

1. Complete the eight core CRM fields
2. Update their Gifts in Wills stage
3. Record the next stewardship action
4. Upload any Tutor correspondence or supporting documents

Don't worry if you don't have every detail. Record what you know now and update the information over time.



Enquiry

When someone enquires:

- Set stage to: **Enquirer**
- Send Enquirer communication - view here
- Update next stewardship action

Considering

When someone is actively considering a gift:

- Set stage to: **Considering**
- Send Considerer communication - view here
- Update next stewardship action

Intending

When someone indicates they intend to leave a gift:

- Set stage to: **Intending**
- Send Intending communication - view here
- Update next stewardship action

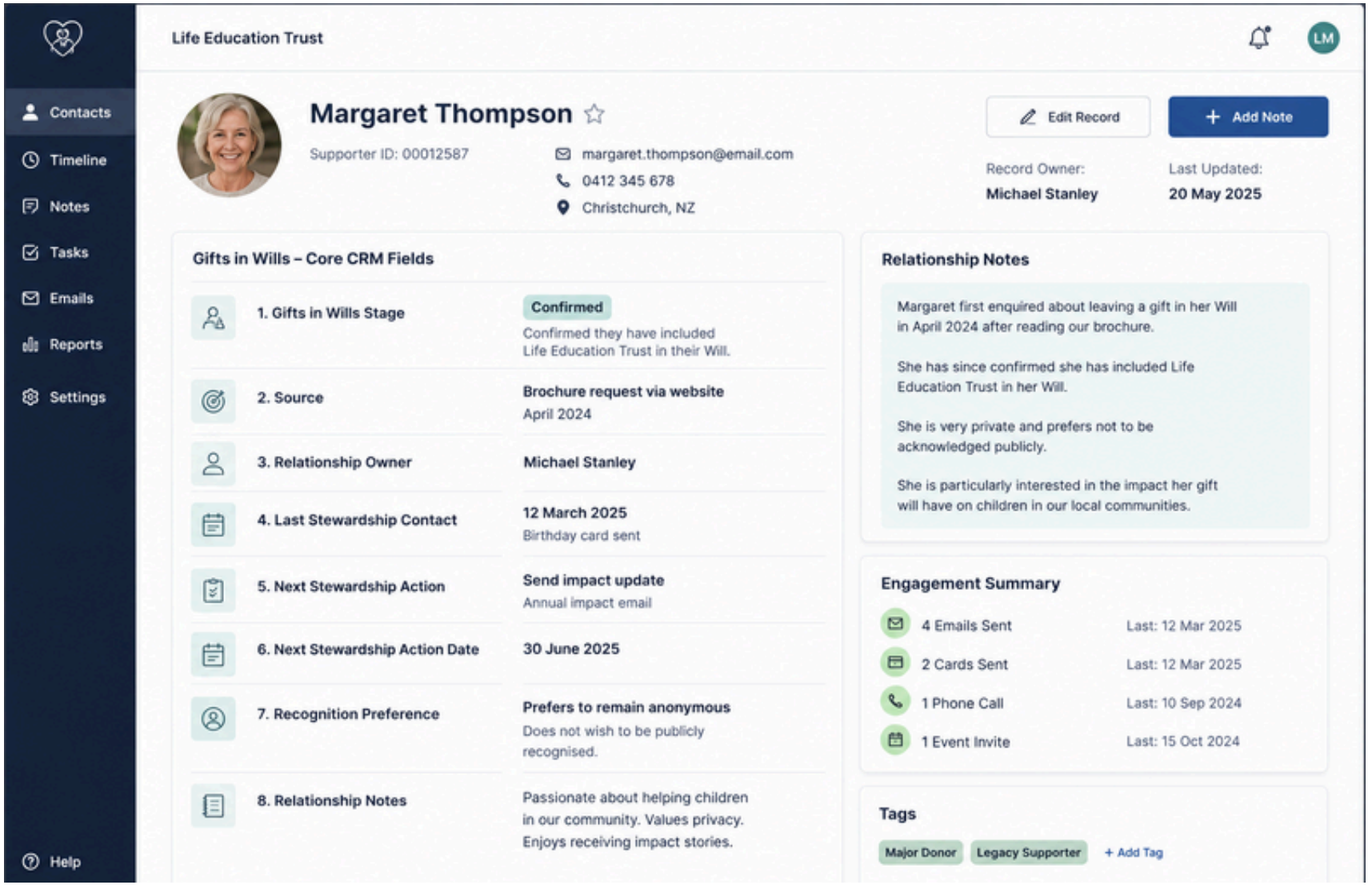
Confirmed

When someone confirms a gift:

- Set stage to: **Confirmed**
- Send Confirmed communication - view here
- Update next stewardship action and add to annual stewardship calendar

EXAMPLE GIFTS IN WILLS CRM RECORD

This example shows how a Gifts in Wills supporter record might look once the recommended CRM fields have been completed.



RECOMMENDED STEWARDSHIP JOURNEY

Thoughtful stewardship is built through meaningful, well-timed communication. The recommendations below provide a simple approach for each stage of the Gifts in Wills journey.

During the person's lifetime:

GIW Supporter Type	Goal	Suggested Annual Stewardship Activities
ENQUIRER	Respond	• Send a thank-you/acknowledgement email (See Enquirer email) • Subscribe to newsletter (if not already)
CONSIDERING	Build confidence	• Schedule annual check-in by email or phone (see Considerer email) • Subscribe to newsletter (if not already)
INTENDING	Acknowledge and Nurture	• Schedule annual check-in by email or phone (see Intender email) • Subscribe to newsletter (if not already) • Send impact/annual report
CONFIRMED	Recognise and Nurture	• Schedule annual check-in by email or phone (see Intender email) • Subscribe to newsletter (if not already) • Send impact/annual report • Send a birthday card (if DOB known) or year-end thank-you • Invite the supporter to a supporter event

RECOMMENDED STEWARDSHIP JOURNEY

Thoughtful stewardship is built through meaningful, well-timed communication. The recommendations below provide a simple approach for each stage of the Gifts in Wills journey.

After a gift is received:

REALISED	Honour the Legacy	• Thank the executor and/or family where appropriate • Manage estate administration promptly and professionally • Record the realised gift and key relationship insights in the CRM • Celebrate and share the impact of the gift internally where appropriate

A simple process for charities

If your charity does not currently have a process for this, start small.
A practical process could look like this:

1. Identify which supporter categories you will track, starting with confirmed bequestors.
2. Create a system trigger for when a confirmed bequestor is marked as deceased.
3. Add the person to a probate checking list.
4. Check for probate every six months.
5. If probate is found, contact the solicitor or purchase the will.
6. Record the outcome in your system.
7. Use the data to better understand your Gifts in Wills pipeline.

This process helps your charity move from assumptions to evidence.

Source: Bequest Assist 2026

EXAMPLE 12-MONTH STEWARDSHIP JOURNEY

A simple stewardship approach

This example shows how a confirmed Gifts in Wills supporter might be stewarded over a 12-month period.

Rather than creating a separate stewardship program, build on existing supporter engagement activities you already have and add one or two personalised touchpoints throughout the year.

Existing supporter engagagement activities:
✓ Quarterly newsletters
✓ Annual supporter event

Plus two additional Gift in Will touchpoints per year:
✓ Personal annual check-in
✓ Christmas card or year-end thank-you



Margaret Thompson

CONFIRMED GIFTS IN WILLS SUPPORTER

This calendar shows an example of planned stewardship activities for Margaret over the next 12 months.

Thank you for building a legacy of hope.

CRM SUMMARY

- **Stage**: Confirmed
- **Relationship Owner**: Michael Stanley
- **Recognition Preference**: Prefers to remain anonymous
- **Preferred Contact**: Email
- **Next Action**: Send Newsletter
- **Next Action Date**: 28 May 2026
- **Notes**: Values privacy and the impact her gift will have on children in our local communities.

MONTH	STEWARDSHIP ACTIVITY	PURPOSE	STATUS
FEBRUARY	**Newsletter** Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	Scheduled 28 Feb 2026
MARCH	**Personal Check-In Call** Phone Margaret for a personal check-in and thank her for her support.	Maintain a personal connection and answer any questions.	Scheduled 20 Mar 2026
MAY	**Newsletter** Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	Scheduled 28 May 2026
JUNE	**Invitation to Supporter Event** Invite Margaret to an upcoming supporter event (in person or online).	Deepen engagement and strengthen her connection with our mission.	Scheduled 20 Jun 2026
AUGUST	**Newsletter** Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	Scheduled 28 Aug 2026
NOVEMBER	**Newsletter** Send our quarterly newsletter with updates and impact stories.	Keep Margaret informed and connected with our mission and impact.	Scheduled 27 Nov 2026
DECEMBER	**Christmas Card / End of Year Thank You** Send a Christmas card and personal thank-you to close the year.	Express gratitude and warm appreciation for her ongoing support.	Scheduled 18 Dec 2026

YOUR 12-MONTH IMPLEMENTATION ROADMAP

Focus on a few practical improvements at a time. Small, consistent steps will build a stronger Gifts in Wills program over the next 12 months.



0–3 MONTHS

BUILD THE FOUNDATIONS

✓ Set up the eight core Gifts in Wills CRM fields
✓ Record all known Gifts in Wills supporters
✓ Add a next stewardship action for every known GiW supporter
✓ Send one stewardship touchpoint to all known GiW supporters

3–12 MONTHS

STRENGTHEN RELATIONSHIPS

✓ Follow the recommended stewardship approach
✓ Keep supporter records up to date
✓ Introduce a simple quarterly CRM review
✓ Include Gifts in Wills in regular supporter communications
✓ Capture new enquiries as they arise

FINALLY..PROGRESS MATTERS MORE THAN PERFECTION!

You don't need to implement everything at once.
Focus on a few practical improvements at a time.

It provides a straightforward approach to tracking supporters, planning stewardship and improving visibility over time.

Over the next 12 months, your priority is simply to:

✓ Create a simple Gifts in Wills structure in your CRM.
✓ Record known supporters and enquiries consistently.
✓ Plan the next stewardship action for each supporter.
✓ Build on the existing supporter engagement activities you you already have.
✓ Review your Gifts in Wills relationships every quarter.



Remember!
A well-managed Gifts in Wills program isn't built through complicated systems.
It's built through consistent relationships, thoughtful stewardship and small actions taken over time.