

## JOB PROFILE: SENIOR LEGACY MARKETING EXECUTIVE

Role:	Senior Legacy Marketing Executive	Date profile last reviewed:	July 2022
Name:		Reports to:	Legacy and In Memoriam Marketing Manager

### MAIN SUMMARY OF ROLE:

The postholder will have a key role in growing the number of legacy prospects on our database and will take the lead on scoping, proposing and implementing recruitment campaigns as standalone activity or to support other non-digital fundraising activity as well as identifying key audiences for a gifts in Wills message.

### KEY ACCOUNTABILITIES/RESPONSIBILITIES:

#### **Legacy Prospect Recruitment**

- Work with the Legacy Marketing Manager on developing and executing our multi-channel legacy prospect recruitment campaigns
- Liaise with external agencies including our creative agency, media agency and printers in developing recruitment campaigns and materials
- Manage responses to supporters for these recruitment campaigns where necessary
- Respond to legacy enquiries within agreed timescales providing relevant information regarding our legacy programme
- Produce and share regular analytical reports measuring campaign performance and impact.
- Ensure all Fund staff are kept up to date on campaigns when appropriate.
- Complete monthly reforecasts, reporting variances with commentary to the Legacy Marketing Manager

#### **Stewardship**

- Add new legacy prospects to our database and welcome them onto our stewardship programme
- Develop a tailored stewardship programme for all prospects who are new to the Fund
- Attend Gifts in Wills events where necessary

#### **Planning & Budgets**

- To assist with implementing the legacy marketing strategy to secure a growing pipeline of legacy considerers and pledgers
- Brief and liaise with external agencies/suppliers (e.g. creative services agency, telemarketing agencies, printers) in the delivery of projects
- Work with the Legacy Marketing Manager to develop annual budgets for legacy recruitment
- Take responsibility for drafting evaluations for each recruitment campaign

#### **Internal Relationships**

- Work with colleagues to ensure legacy supporters receive an optimum experience at all touchpoints across the organisation.
- Champion legacy giving across the organisation, working closely with colleagues to build awareness and support.
- Work closely with the legacy administration manager to ensure data and insight is used to inform marketing campaigns.
- Have an understanding of Charity and Data Protection Regulation legislation including but not limited to, Institute of Fundraising, Charity Digital Code, Fundraising Regulator and Charity

Commission Guidelines.

- Keep abreast of direct marketing trends and practice within the third and for-profit sector.
- Ensure all legacy campaigns reflect the Fund's brand guidelines, aims and objectives.

### COMPETENCIES REQUIRED FOR THE ROLE

Essential	Desirable
<ul style="list-style-type: none"> <li>• Deciding and Initiating Action</li> <li>• Relating and Networking</li> <li>• Presenting and Communicating Information</li> <li>• Writing and Reporting</li> <li>• Delivering Results and Meeting Customer Expectations</li> <li>• Following Instructions and Procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Working with People</li> <li>• Entrepreneurial and commercial thinking</li> <li>• Adhering to Principles and Values</li> <li>• Planning and Organising</li> <li>• Coping with Pressure and Setbacks</li> <li>• Creating and Innovating</li> </ul>

### QUALIFICATION(S), KNOWLEDGE, SKILLS AND EXPERIENCE REQUIRED FOR THE ROLE

#### Academic or Professional Qualifications (or equivalent):

Essential	Desirable
<ul style="list-style-type: none"> <li>• Literate and numerate with a good standard of education</li> </ul>	<ul style="list-style-type: none"> <li>• Membership of the Chartered Institute of Fundraising</li> </ul>

#### Knowledge/ Experience:

Essential	Desirable
<ul style="list-style-type: none"> <li>• Proven experience in managing legacy prospect activity and thorough awareness of key channels</li> <li>• Excellent understanding of digital marketing principles and best practices.</li> <li>• Experience of delivering campaigns.</li> <li>• Proven experience in delivering effective email marketing campaigns with a strong working knowledge of best practice.</li> <li>• Experience of briefing and working with external agencies.</li> <li>• Experience of using a fundraising database.</li> <li>• Experience in creating supporter journeys.</li> </ul>	<ul style="list-style-type: none"> <li>• Experience of using the CARE database</li> <li>• Experience in developing content for different audiences to drive conversion.</li> <li>• Experience of prospect recruitment through television</li> </ul>

#### Skills/Abilities:

Essential	Desirable
<ul style="list-style-type: none"> <li>• Works in a systematic and methodical way.</li> <li>• Excellent oral and written communication skills with a thorough attention to detail.</li> <li>• Follows instructions and adheres to policies and procedures.</li> <li>• Manages time effectively, meets deadlines and prioritises workload.</li> <li>• Works well as part of a team</li> <li>• Writes clearly and succinctly, in a well-structured and logical way.</li> <li>• Adept in the use of MS Office applications</li> <li>• Takes initiative, acts with confidence and works under own direction.</li> <li>• Keeps abreast of digital trends and tools.</li> </ul>	<ul style="list-style-type: none"> <li>• Strong interpersonal skills, relating well to people at all levels.</li> <li>• Creative flair, with the ability to spot a good story or opportunity.</li> </ul>

**Other Requirements:**

- Travel to other Fund and UK locations (as appropriate).
- Such other duties that occasionally arise, which fall within the purpose of the post.

**Signature**

I confirm this job profile has been drawn up with my full involvement and accurately reflects the responsibilities of the role.

Postholder's Signature:

NAME:

Line Manager's Signature:

NAME:

Date: