

ALL ABOUT FUNDRAISING AUTOMATION

How to optimize your fundraising operation with technology



INTRODUCTION



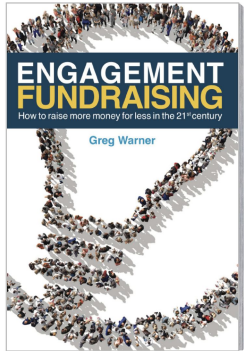
Greg Warner

CEO & Founder

market  smart

<https://imarketsmart.com/>

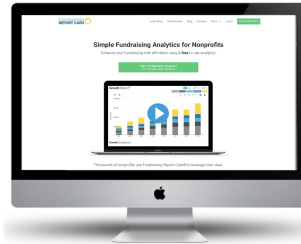
Connect With Me



<https://imarketsmart.com/engagement-fundraising-free-download/>

FUNDRAISING
REPORT CARD 

<https://fundraisingreportcard.com/>




DONOR STORY:
EPIC FUNDRAISING ECOURSE
with Dr. Russell James

dafwidget 

<https://dafwidget.com/>

INTRODUCTION



Greg Warner

CEO & Founder

market  smart

<https://imarketsmart.com/>

Connect With Me
LinkedIn

NO RISK OFFER



Get 10:1 ROI*
guaranteed or your money back

* For qualified organizations only. Terms & conditions apply.

imarketsmart.com



Turnkey
'DONE-FOR-YOU DUO'
software + services

Land **more meetings** with
major donor prospects
when they are **ready** to
talk about gifts of **assets**
and legacy gifts



**BE THE FUNDRAISER YOU
ALWAYS WANTED TO BE**

INTRODUCTION

Housekeeping

Recording & slides will be sent to all attendees & registrants

Questions will be answered at the end of the presentation

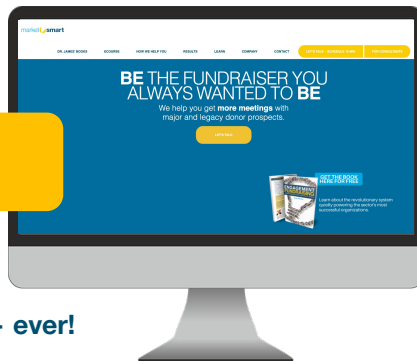


imarketsmart.com

LET'S TALK

Informative & educational

No sales pressure — ever!



INTRODUCTION



Connect With Me
LinkedIn

ALL ABOUT AUTOMATION

How to optimize your fundraising operation with technology



OR-YOU DUO'
+ services

WORK OFFER

at 10:1 ROI'

based on your money back

For organizations only. Terms & conditions apply.

ismart.com



**BE THE FUNDRAISER YOU
ALWAYS WANTED TO BE**

INTRODUCTION

Today's Agenda

Why consider automation?

What you can automate?

3 types of automation?

Where you should start?

My key secrets to success

Case study / results / ROI

Quick explanation  market smart

Q & A

Survey

WHY CONSIDER AUTOMATION?



OPTIMIZE YOU!



- Average caseload size = 142
- Only 1/2 receive personal visits each year
- 52% said they don't have enough time to “get it all done”
- Reported “significant frustration with the time spent setting up and completing qualification visits that did not ultimately lead to gifts.”



WHY CONSIDER AUTOMATION?



QUICK POLL

WHY CONSIDER AUTOMATION?



Describe your level of frustration related to the time you spend working on arranging & completing qualification visits that do not ultimately lead to major gifts
(false positives leading to wild goose chases)?

- Not frustrated at all
- A little frustrated
- Somewhat frustrated
- Very frustrated
- Extremely frustrated

WHY CONSIDER AUTOMATION?



OPTIMIZE YOU!



Be more efficient (more productive/cut costs)

Be more effective (increase ROI)

Be happier (reduce employee turnover)

WHY CONSIDER AUTOMATION?



OPTIMIZE YOU!



‘WARM UP’ THE UNASSIGNED + LAND MORE MEETINGS

Jerold Panas



“harder to get an appointment
than to secure a gift.”

“getting the appointment is
85% of getting the gift.”

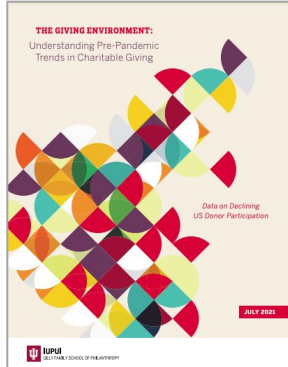
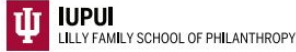
WHY CONSIDER AUTOMATION?

Fundraising is getting harder



WHY CONSIDER AUTOMATION?

Fundraising is getting harder



% share of Americans who donated

ALL SOCIO-DEMOGRAPHIC GROUPS

2000 - 66.2%

2018 - 49.6%

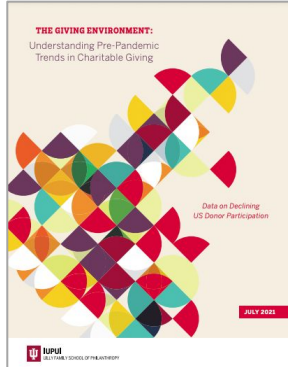
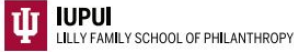


Most of the decline occurred **AFTER** the **Great Recession** (2007-2009)

<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

WHY CONSIDER AUTOMATION?

Fundraising is getting harder



<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

% share of Americans who donated

ALL SOCIO-DEMOGRAPHIC GROUPS

2000 - 66.2%

2018 - 49.6%



Most of the decline occurred **AFTER** the **Great Recession** (2007-2009)

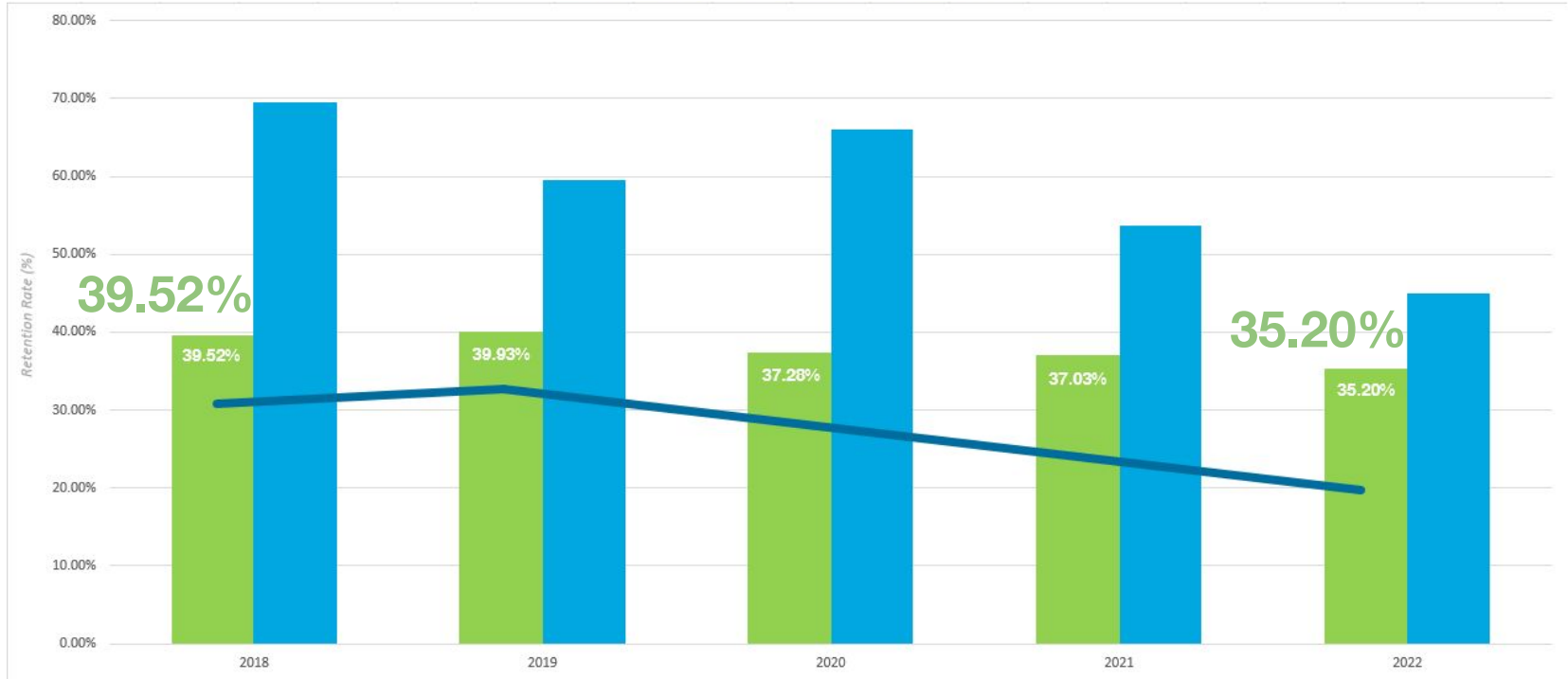
Average \$ amount Americans gave

2000 - \$1,790

2018 - \$1,280



Donors Retained



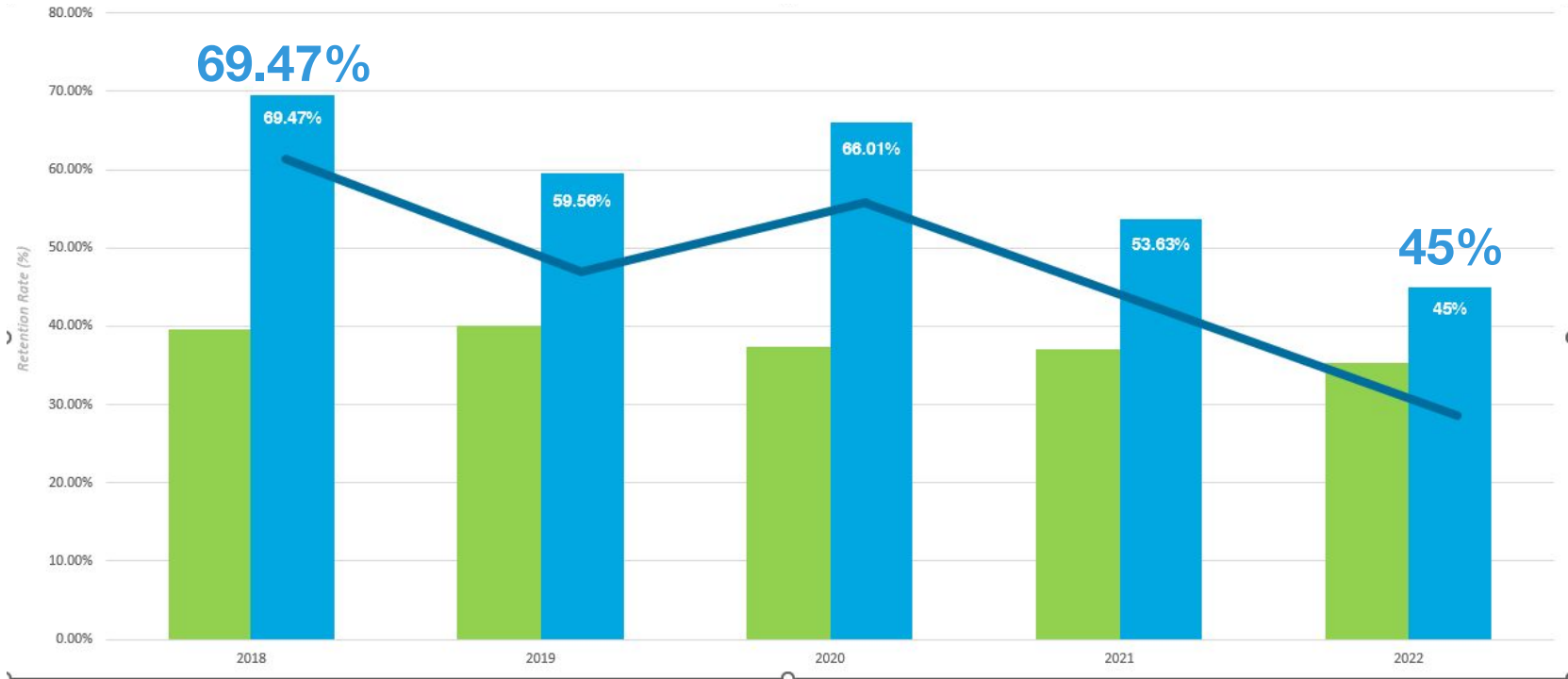
www.fundraisingreportcard.com/benchmarks

**FUNDRAISING
REPORT CARD**



Daily analysis of \$129 billion in charitable giving
using data from 15,000+ organizations

Revenue Retained



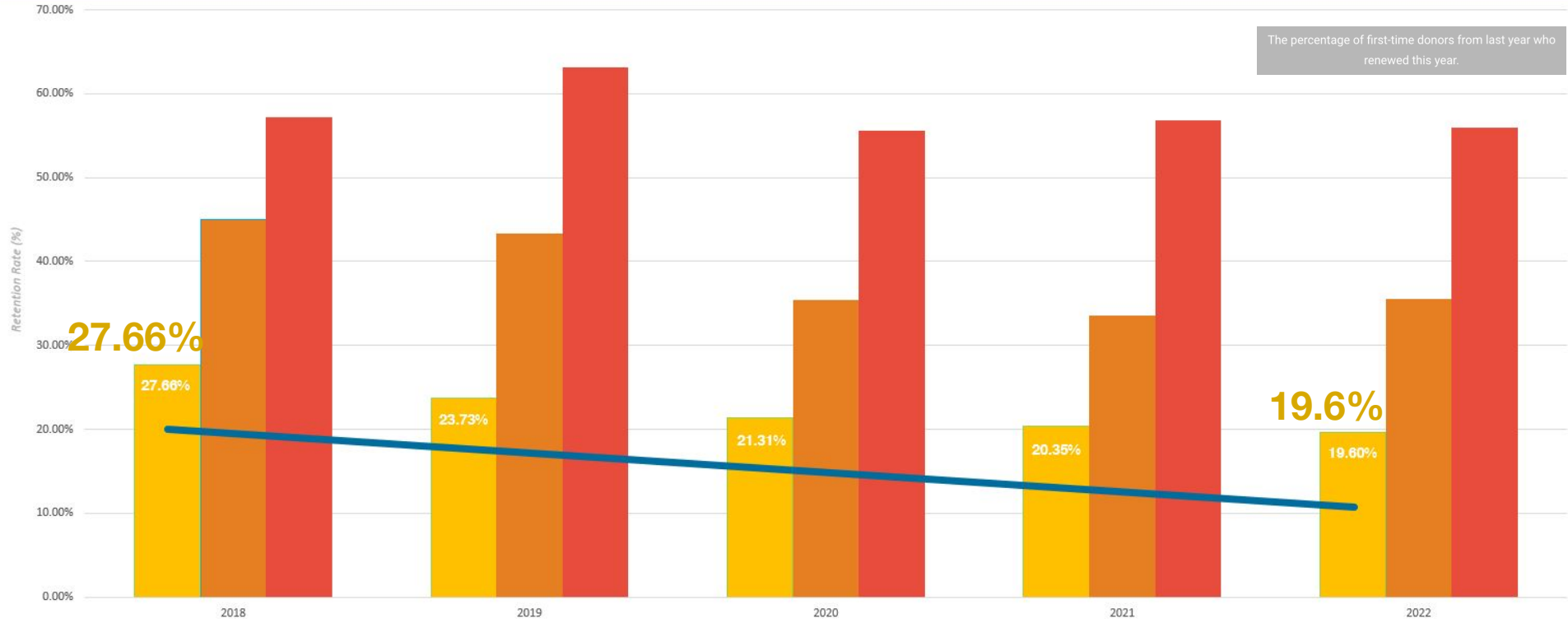
www.fundraisingreportcard.com/benchmarks

**FUNDRAISING
REPORT CARD**



Daily analysis of \$129 billion in charitable giving
using data from 15,000+ organizations

FIRST TIME donor retention

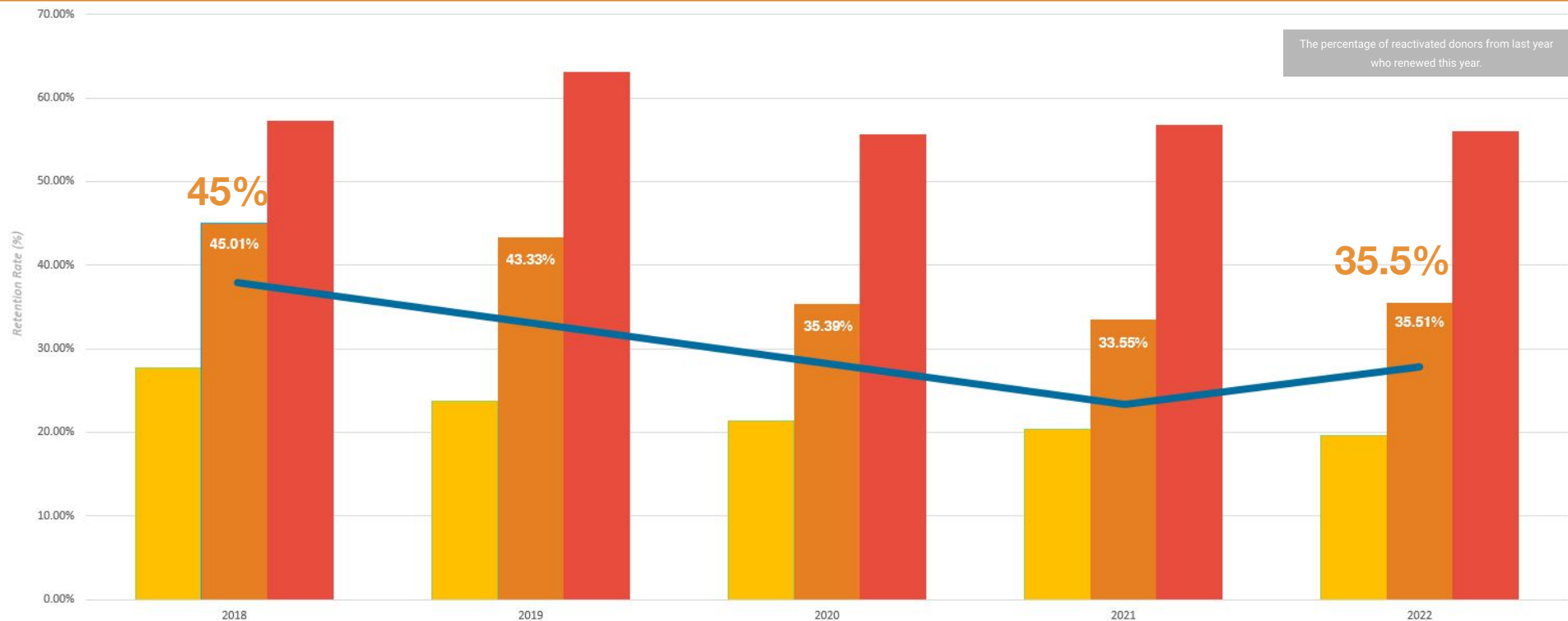


www.fundraisingreportcard.com/benchmarks



Daily analysis of \$129 billion in charitable giving using data from 15,000+ organizations

REACTIVATED donor retention

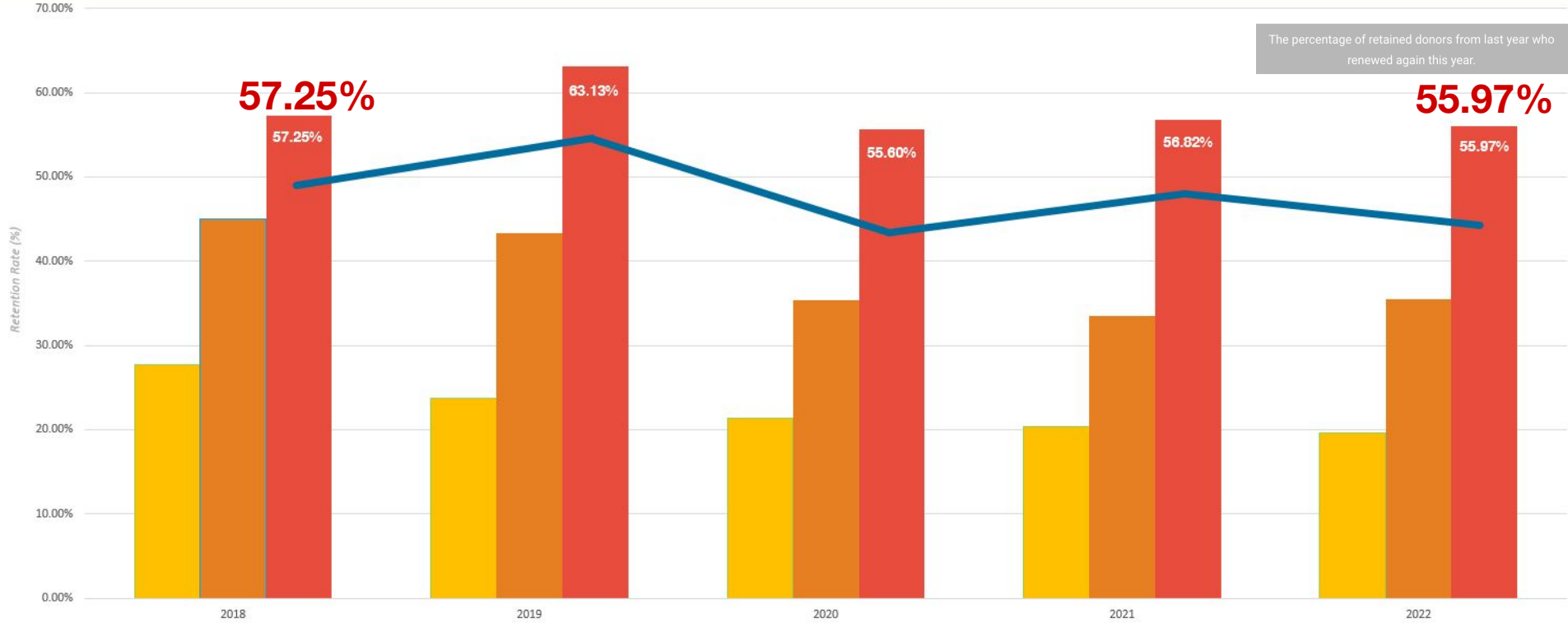


www.fundraisingreportcard.com/benchmarks



Daily analysis of \$129 billion in charitable giving using data from 15,000+ organizations

REPEAT donor retention



www.fundraisingreportcard.com/benchmarks



Daily analysis of \$129 billion in charitable giving using data from 15,000+ organizations

LOW-DOLLAR VS. HIGH DOLLAR DONORS

Under \$100 donors

Under \$100 \$100 to \$250 \$250 to \$1,000 \$1,000 to \$5,000 \$5,000 and up



Over \$5,000 donors

Under \$100 \$100 to \$250 \$250 to \$1,000 \$1,000 to \$5,000 \$5,000 and up



January 2023 Data

www.fundraisingreportcard.com/benchmarks

80/20 rule is now **74/.74**

Donors giving over \$5,000

= **.74%** of an org's donor base
but make up **74.07% (3/4)**
of all donation revenue \$

Donors giving under \$100

= **75.8%** of an org's donor base
but make up only **5.07%** of
all donation revenue \$

January 2023 Data

www.fundraisingreportcard.com/benchmarks

**FUNDRAISING
REPORT CARD** 

Daily analysis of \$129 billion in charitable giving
using data from 15,000+ organizations

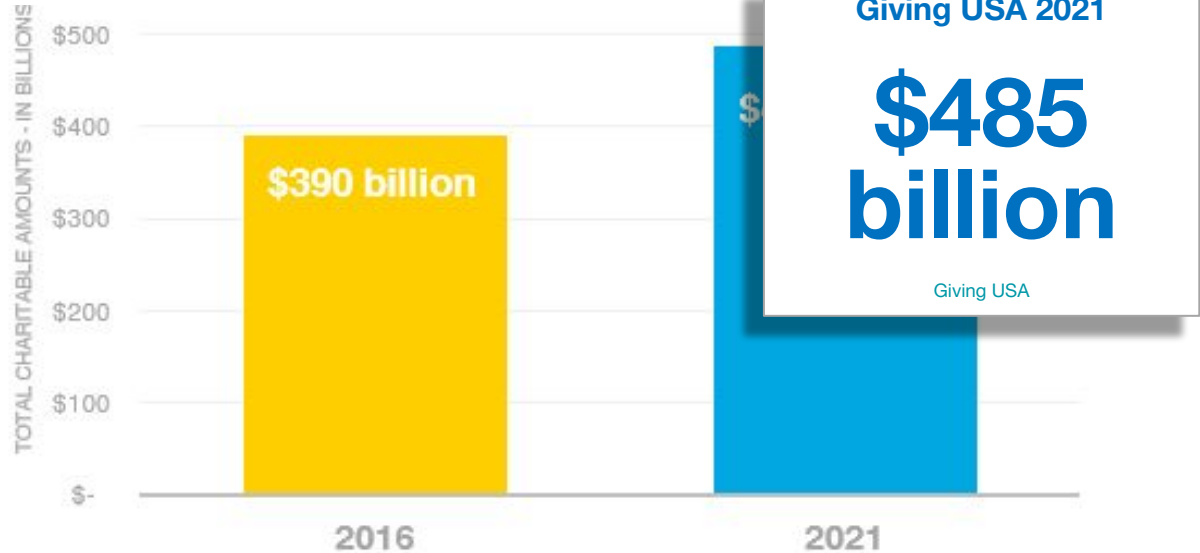
WHY CONSIDER AUTOMATION?

Fundraising is getting harder

Total giving has increased



Donors down
Dollars up



WHY CONSIDER AUTOMATION?

Fundraising is getting harder

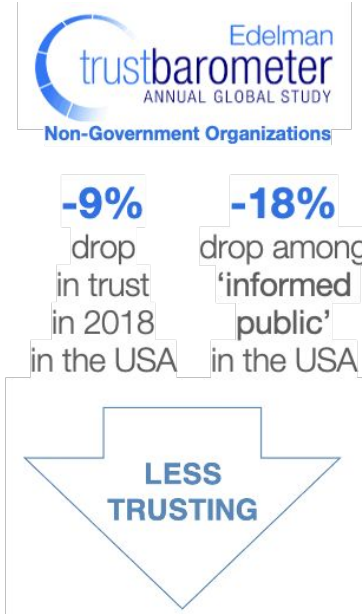
For the first time since 2012 donations decreased



Credit: [Fundraising Effectiveness Project by Giving Tuesday](#)

WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?

Trust! ↓



<https://www.edelman.com/trust-barometer>



WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?

Trust! ↓

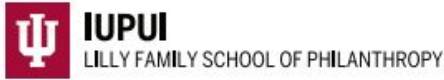
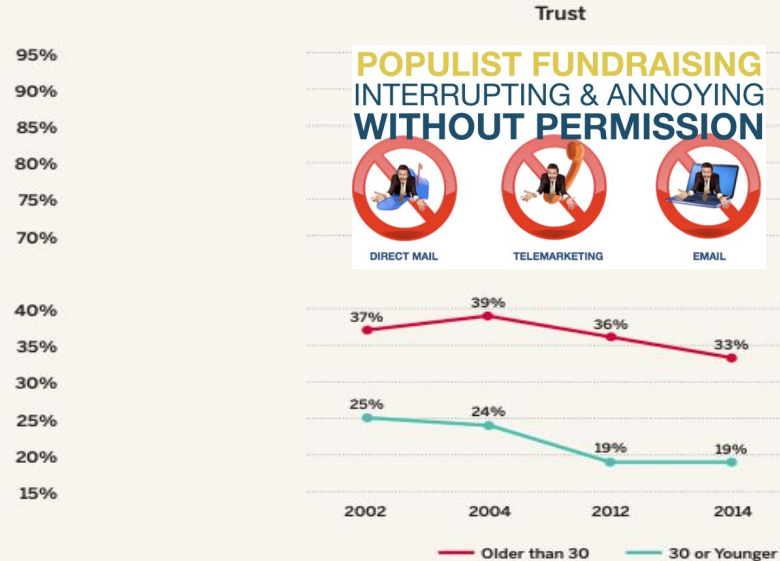


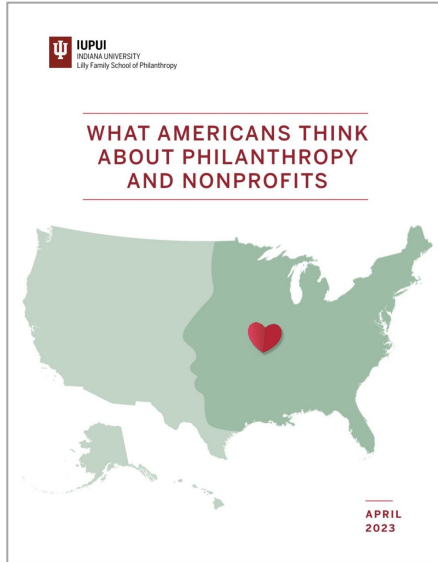
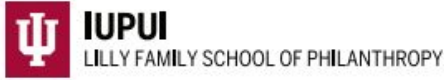
Figure 6. Changes in interpersonal trust and giving participation rates in the GSS



<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

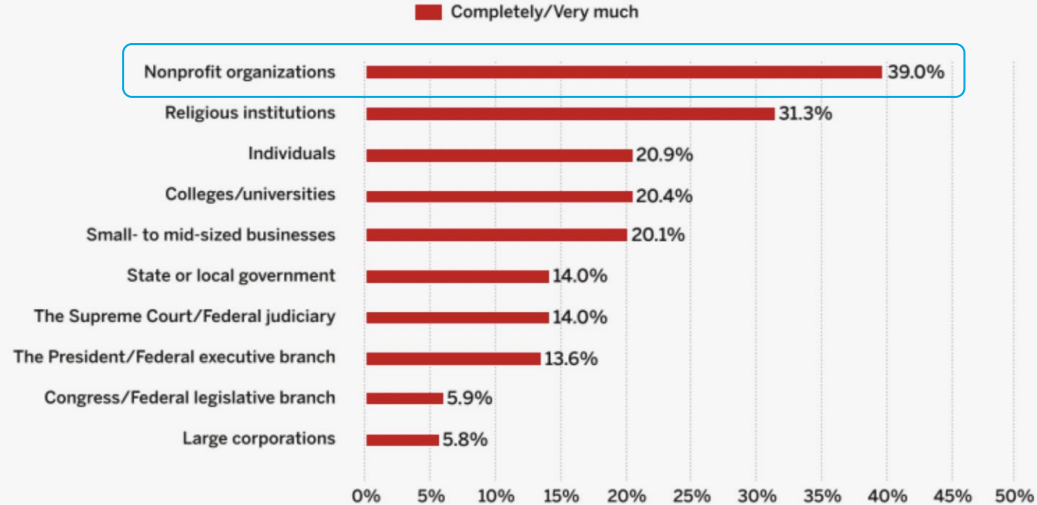
<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?



Trust!

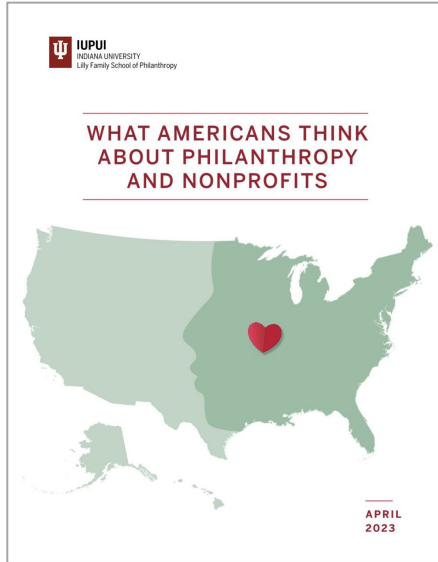
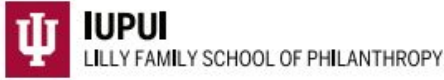
How much do you trust the following entities to generally do what is right?



Note: Respondents who selected "Don't know" were removed.

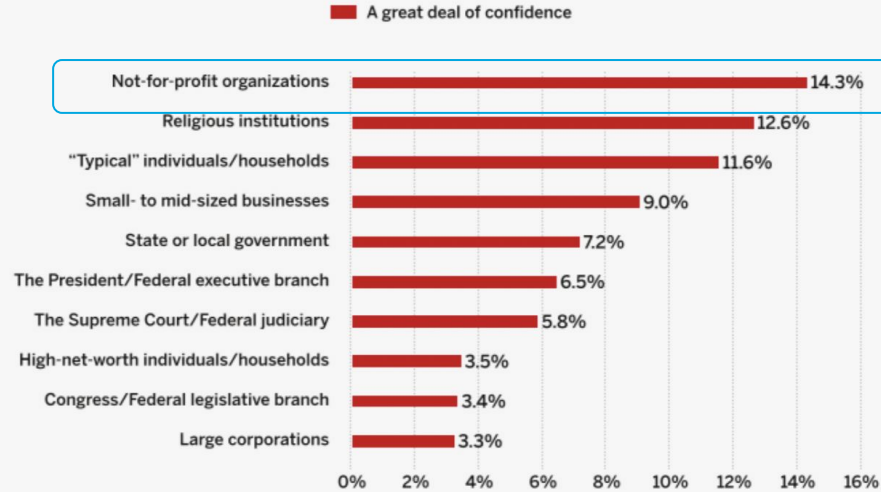
<https://scholarworks.iupui.edu/bitstream/handle/1805/32247/WhatAmericansThinkAboutPhilanthropy.pdf>

WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?

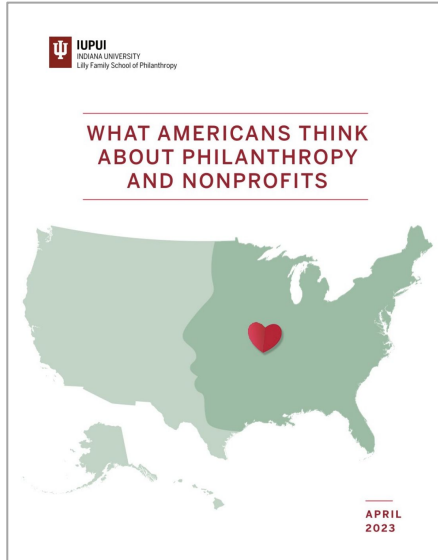


Trust!

How much confidence do you have in the ability of the following groups to solve societal or global problems, now and in the future?

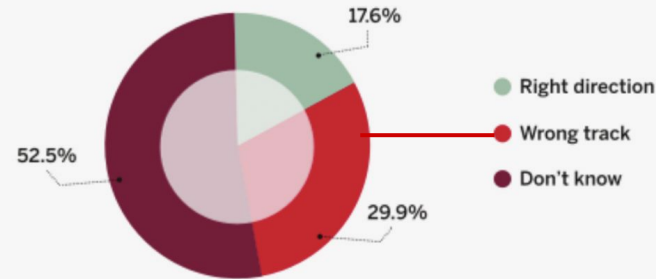


WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?



Trust!

Thinking about the nonprofit and philanthropic sector overall, do you believe things are headed in the right direction, or are they off on the wrong track?



WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?

“Giving is increasing because of **larger gifts from richer donors.** Smaller and mid-level donors are slowly but surely **disappearing** — across the board among all organizations.”



Elizabeth Boris
Chair of the Growth
In Giving Initiative

“Nonprofit organizations in the United States are now being **challenged** by major political, demographic, economic, and technological factors outside of their control, and most organizations find themselves flat-footed, unable to easily adapt.”

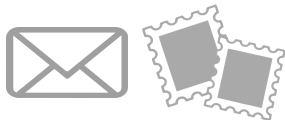


Brian Lauterbach, ACFRE
Vice President of
Programs & Collective
Impact

WHY CONSIDER AUTOMATION?

Fundraising is getting more expensive

Inflation



Acquisition costs are skyrocketing
Staff salaries are increasing



Recession

Low-dollar donors will give less
Major donors will become wealthier

**How can you do more
and raise more
with less?**

**OPTIMIZE YOU
WITH TECHNOLOGY!**



CAUTIONARY TALE



**Had 9,000 stores
at their peak in 2004.**

**Today, they have ONE
store—in Bend, Oregon.**



**NUMBER OF
EMPLOYEES**

85,000

REVENUE

\$6 Billion

**REVENUE
PER EMPLOYEE**

\$70,588



NUMBER OF EMPLOYEES	REVENUE	REVENUE PER EMPLOYEE
85,000	\$6 Billion	\$70,588
8,600	\$20 Billion	\$2,325,581 32X

Netflix leveraged technology to generate over 32 times more revenue per employee than Blockbuster.

Technology is the key to success!

Automation technology is the key to gift officer optimization!

TECHNOLOGY FOR COMMUNICATIONS

Introducing marketing automation software



CRM/DONOR
MANAGEMENT

PEER TO PEER

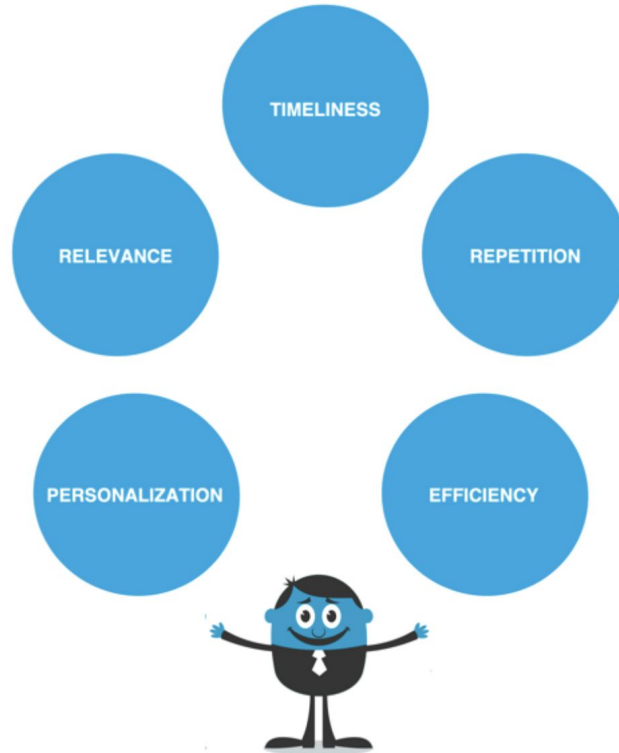
EVENT
MANAGEMENT

OTHER

WHY CONSIDER AUTOMATION?

Fundraising is getting harder

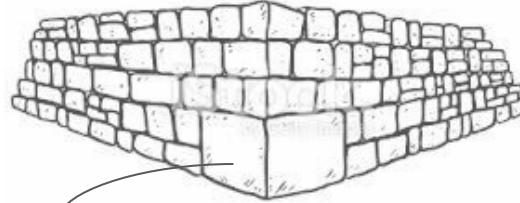
Keys to effective marketing communications



WHY CONSIDER AUTOMATION?

Fundraising is getting harder

RELATIONSHIPS



TRUST

WHAT CAN YOU AUTOMATE?

3 types of automation

WHAT CAN YOU AUTOMATE?

3 types of automation

Basic

Mid-level

High-level

WHAT CAN YOU AUTOMATE?

3 types of automation

Basic

Mid-level

High-level

Set-it-and-forget-it one-off emails

Autoresponders (especially thank you emails)

Supplying giving receipts

WHAT CAN YOU AUTOMATE?

3 types of automation

Basic

Mid-level

High-level

- + Increased personalization
- + Simple 'drip' (triggered) email series
- + Reporting of metrics

WHAT CAN YOU AUTOMATE?

3 types of automation

Basic

Mid-level

High-level



LOW-DOLLAR GIFT
FUNDRAISING
FOCUSED ON CASH

FUNDRAISING
AUTOMATION



WHAT CAN YOU AUTOMATE?

3 types of automation

Basic



LOW-DOLLAR GIFT
FUNDRAISING
FOCUSSED ON CASH

Mid-level



MAJOR & LEGACY GIFT
FUNDRAISING
FOCUSSED ON ASSETS

High-level


Ability to create marketing assets such as landing pages and microsites, and forms

Ability to automatically segment and manage lists in hyper-specific ways

Sophisticated personalization

Dynamic, relevant online content

FUNDRAISING AUTOMATION



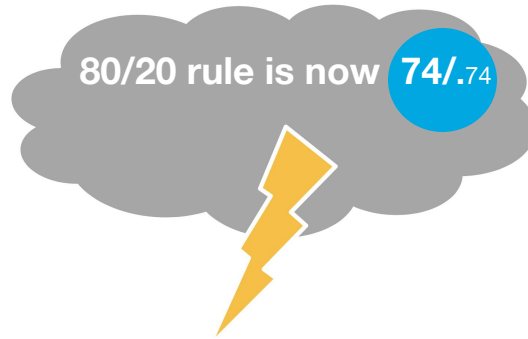
WHERE SHOULD YOU START?

Basic
?

Mid-level
?

High-level
?

Focus on assets, not cash!



January 2023 Data

www.fundraisingreportcard.com/benchmarks

**FUNDRAISING
REPORT CARD** 

Daily analysis of \$129 billion in charitable giving
using data from 15,000+ organizations

WHERE SHOULD YOU START?

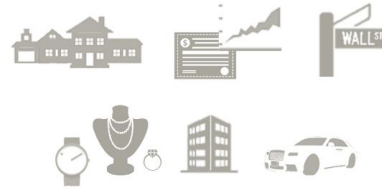
Focus on assets, not cash!

Basic



LOW-DOLLAR GIFT
FUNDRAISING
FOCUSED ON CASH

Mid-level



MAJOR & LEGACY GIFT
FUNDRAISING
FOCUSED ON ASSETS

High-level

Improve how you:

1. Engage major donor prospects
2. Prioritize them for caseloads (portfolios)

REMOVE
MUNDANE,
TEDIOUS AND
TIME-CONSUMING
TASKS FROM
YOUR HIGHLY
COMPENSATED
MAJOR GIFT
STAFF'S DUTIES!

FUNDRAISING AUTOMATION



WHERE SHOULD YOU START?

Focus on assets, not cash!

Where major gift staff excel

- Meeting major donor prospects
- Building relationships
- Facilitating philanthropic giving

What causes failure & high turnover

- Overworking GOs with tedious tasks
- Forcing them to attend meetings
- Making them help with events
- Making them feel undervalued or unappreciated
- **Sending them on wild-goose chases and fool's errands**
- **Forcing them to make cold calls instead of warm calls**

WHERE SHOULD YOU START?

Focus on assets, not cash!

False positives



What causes failure & high turnover

- Overworking GOs with tedious tasks
- Forcing them to attend meetings
- Making them help with events
- Making them feel undervalued or unappreciated
- **Sending them on wild-goose chases and fool's errands**
- **Forcing them to make cold calls instead of warm calls**

WHERE SHOULD YOU START?

Focus on assets, not cash!

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

False positives



What % of newly assigned prospects do you feel are **truly qualified** to be in your major and/or planned gift donor pool?

Only
37%



WHERE SHOULD YOU START?

Focus on assets, not cash!

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

- Only 27% reported that wealth ratings were “quite effective or very effective for focusing on the right prospects.”
- **92% said they stay engaged with donors and prospects by sending personal emails manually**
- Yet over half (55%) said they didn't spend enough time on solicitation
- 42% said they didn't spend enough time on qualification



WHERE SHOULD YOU START?

Focus on assets, not cash!

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

- Only 27% reported that wealth ratings were “quite effective or very effective for focusing on the right prospects.”
- **92% said they stay engaged with donors and prospects by sending personal emails manually**
- Yet over half (55%) said they didn't spend enough time on solicitation
- 42% said they didn't spend enough time on qualification



WHERE SHOULD YOU START?

Focus on assets, not cash!



**SCALE YOUR
CULTIVATION,
QUALIFICATION &
PRIORITIZATION
EFFORTS**

AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Example #1

From: [REDACTED]
To: [REDACTED]
Date: Tue, 12 Jan 2021
Subject: You are defending the natural world

Dear [REDACTED],

I just wanted to say thank you.

You're a wonderful friend and supporter and a true activist for a sustainable future. Thank you for everything you do.

Years from now, future generations will look back and thank you, too, just as we look back in gratitude to those who came before us. We are so grateful for all you do!

Sincerely,

[REDACTED]

P.S. Please remember, my job is to learn about your needs and interests and help connect you with information. Please don't hesitate to get in touch or, if you prefer, [you can always explore more here](#).



[REDACTED],

I've been supporting a host of groups for years--this was the most gracious acknowledgment I ever received--good work!

Tell your supervisor I said to keep you on staff.

Your mother brought you up right!

Hope your new year is off to a good start--and better days ahead,

Many blessings and peace,



AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Example #2

Personalized salutation.

Dear John,

I noticed that you engaged with us recently saying, first, that you:

1. Found intentionally investing in someone's life by spending time in the word, in prayer, and everyday life most valuable to you
2. You are considering a legacy gift to sustain and advance The Navigators' ministry for generations to come.

Personalized based off of what we learn in the respondents survey response.

1-to-1 from a gift officer.

Did you know that there are other Navigators and disciple makers who have already made the decision you're thinking about now? [You can read their stories here.](#)

Blessings!

Brian

Brian Kinney | Gift Planning Officer, CFP®
PO Box 6000 | Colorado Springs, CO 80934
1-888-283-0157
mylegacy.navigators.org

Replies go directly to your inbox.

Call to action to VIP Microsite that is tracked and scored

Different senders based off of geographic region.



AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Example #3

This email expresses gratitude while delivering your CEO's engaging report "from the field." We should continue to use more authentic, personal video reports in future Efforts.

✓ 41.5% Opened

✓ 20% Clicked

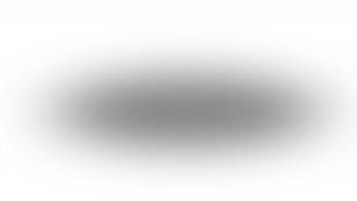
Dear {{ subscriber.name }},

I thought you might like to see this video our President and CEO, Collin [REDACTED] prepared for supporters like you, reporting from the field on the deadly red tide in Florida. [You can watch the video here.](#)

You'll see that Collin isn't just another CEO stuck in the board room. Far from it. He's a hands-on activist working on behalf of conservationists like you every day to protect wildlife and wild places.

{{ subscriber.name }}, thank you so much for standing with us.

Sincerely,



DONATE

P.S. Collin asked that I or another one of our wildlife enthusiasts be your personal connection to the National [REDACTED]. We will occasionally send you stories and updates on conservation issues. If you'd like to send us feedback, please do!

AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Example #4

Nicole, can we chat please?

Jodi Stoken, Child Crisis Arizona <Jodi.Stoken@childcrisisaz.org>
To: ndelgiorno@imarketsmart.com

Wed, Aug 4, 2021 at 8:39 AM

Dear Nicole,

Why is protecting children and serving families in need so important to you?

If you have a moment, I would sincerely like to learn about what inspired you to support our mission and connect you with information about what we're doing here at Child Crisis Arizona on your behalf. Input from partners like you is so valuable, and I would love to hear more about your vision for children, youth and families in Arizona.

I hope you'll reply. Or, you can simply [use this link](#) to schedule a time that is convenient for you to chat. I look forward to hearing from you!

Sincerely,

Jodi Stoken, CFRE, CAP
Chief Development Officer
work 480-834-9424
direct 480-304-9458



[Unsubscribe](#)



Rensselaer

why not change the world?®

**\$4.5 million
donation**

AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Scale your operation



Benefits

- One Gift Officer can perform like 9
- Generate ‘hot’ major donor prospect leads
- Cultivate ‘cool’ prospects > ‘warm’ > ‘hot’
- See where prospects click online to help qualify
- Prioritize your outreach based on who is ‘hot’
- Have the prospects set appointments on your calendar

AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

Retain staff (and attract A-players)

Hard and soft costs you incur every time you look to hire a new major gifts fundraiser:

- **Recruitment costs:** advertising, recruitment firm commissions, interviewing time
- **Training costs:** time spent on-ramping and getting them up to speed
- **Management costs:** your management time is money, too
- **HR costs:** performance plans, onboarding, offboarding
- **Legal costs:** especially because fired workers sometimes sue their former employers
- **Equipment and facility costs:** computers, office, cybersecurity
- **Travel costs:** air, train, car, hotel, dining and per diem
- **Benefits costs:** health insurance, vacations



AGENDA REVIEW

Today's Agenda

Why consider automation?

What you can automate?

3 types of automation?

Where you should start?

My secrets to success

Case study / results / ROI

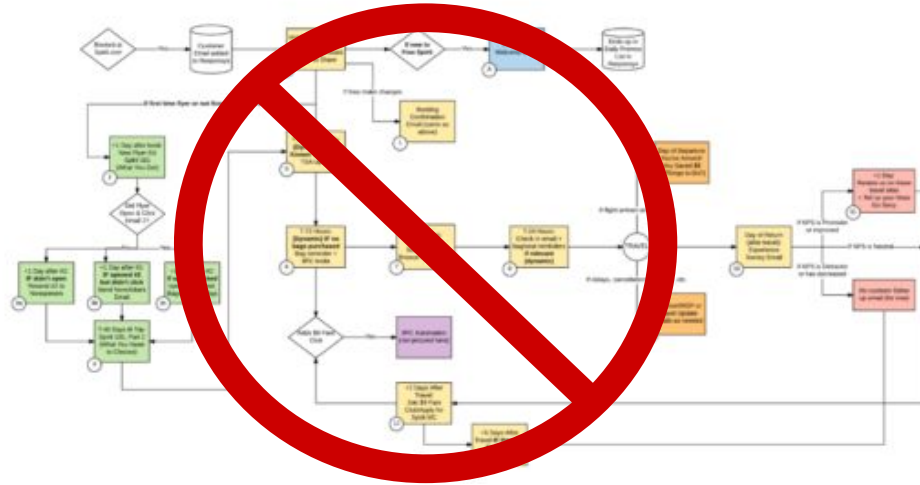
Quick promo

Q & A

TOP SECRETS

TOP SECRET

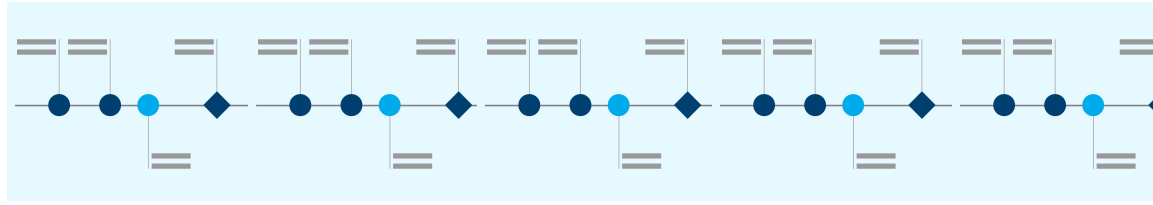
Donor journeys?



TOP SECRETS

TOP SECRET

Donor journeys?

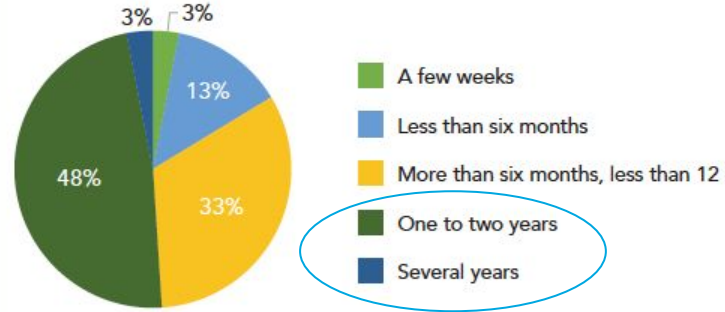


Weeks or months

Months or years



Figure 21: Time from prospect identification to gift close (n = 98)



TOP SECRETS

**TOP
SECRET**



Checklist for automated emails that build trust



**FUNDRAISING
AUTOMATION**

CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“ the best thing we’ve ever done!”

BJ Dorman
Senior Director Legacy Gifts
The Salvation Army



DOING THE MOST GOOD™

CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“

doubled our results at
half the cost”



Glen Belden
Food for the Poor

CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“The results have been amazing.”

Amy Goldman, Vice President of Planned Giving, City of Hope



CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“People are **reaching out to me**,
instead of the other way around!
How refreshing is that!”

Cheryl Smoot, National Assistant Vice President, Individual & Planned Giving



CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“\$60 returned for every \$1 invested and we haven’t even really scratched the surface yet.”

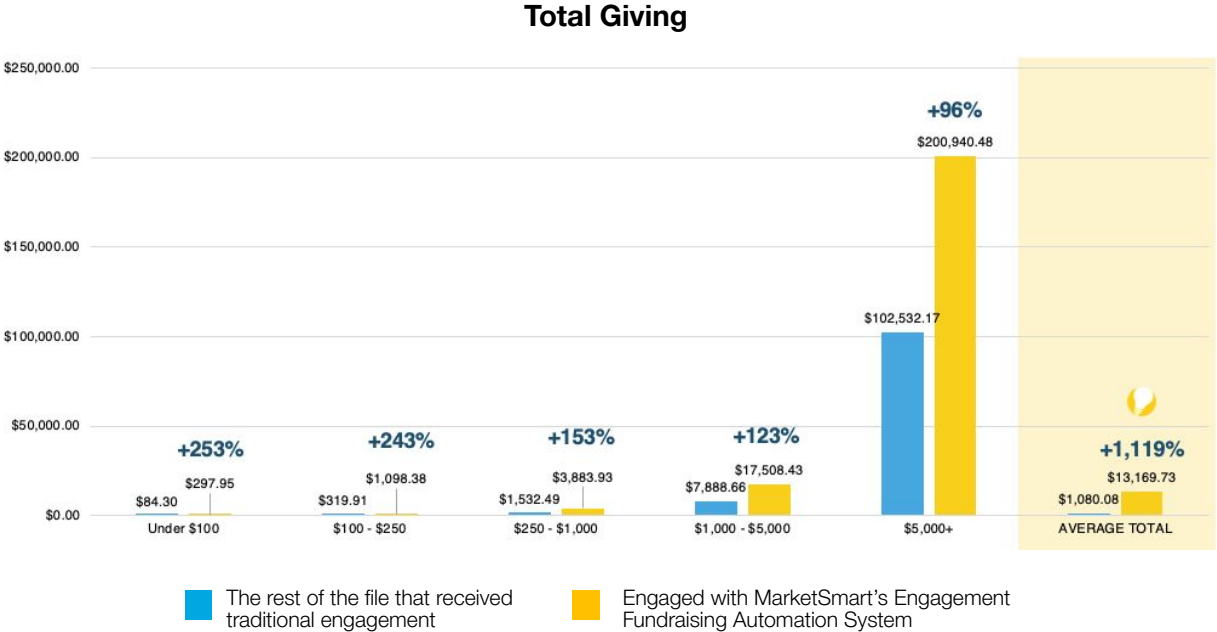
Jonelle Beck, Executive Director of Estate & Gift Planning, University of the Pacific

UNIVERSITY OF THE
PACIFIC

CASE STUDY



TOTAL GIVING

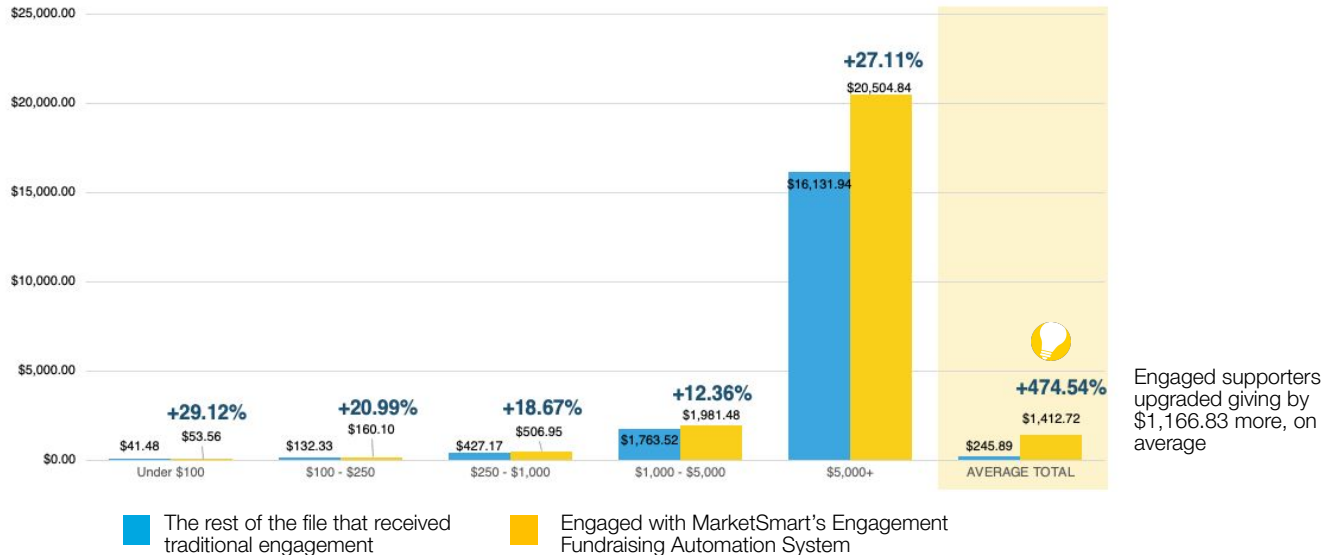


Engaged supporters gave \$12,089.65 more, on average

At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System gave more (+1,119% more on average) than the rest of the file.

UPGRADE \$

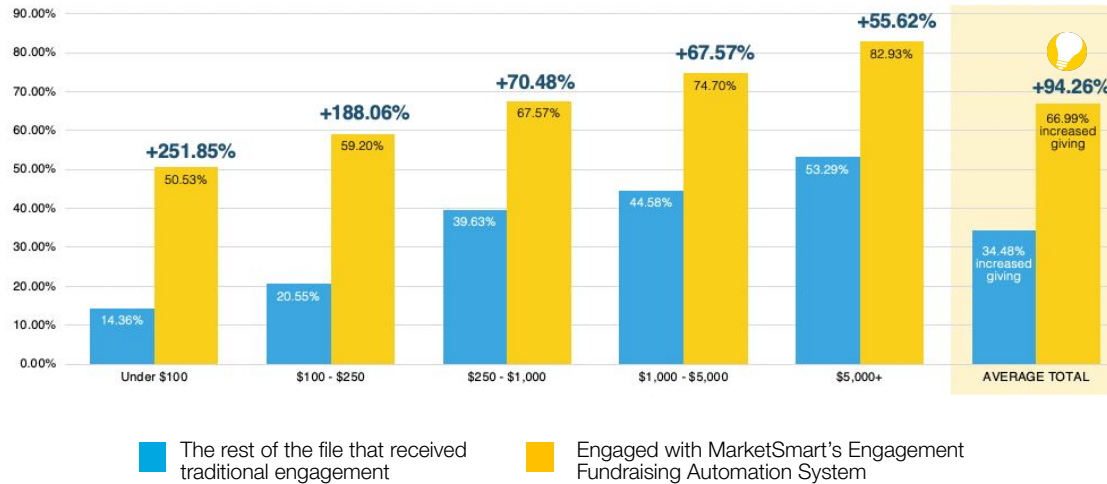
Upgrading: Average Annual Giving Increases



At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System increased their giving by more than the rest of the file (+474.54% more on average).

UPGRADE %

Upgrading: Percent of Supporters with Increased Giving

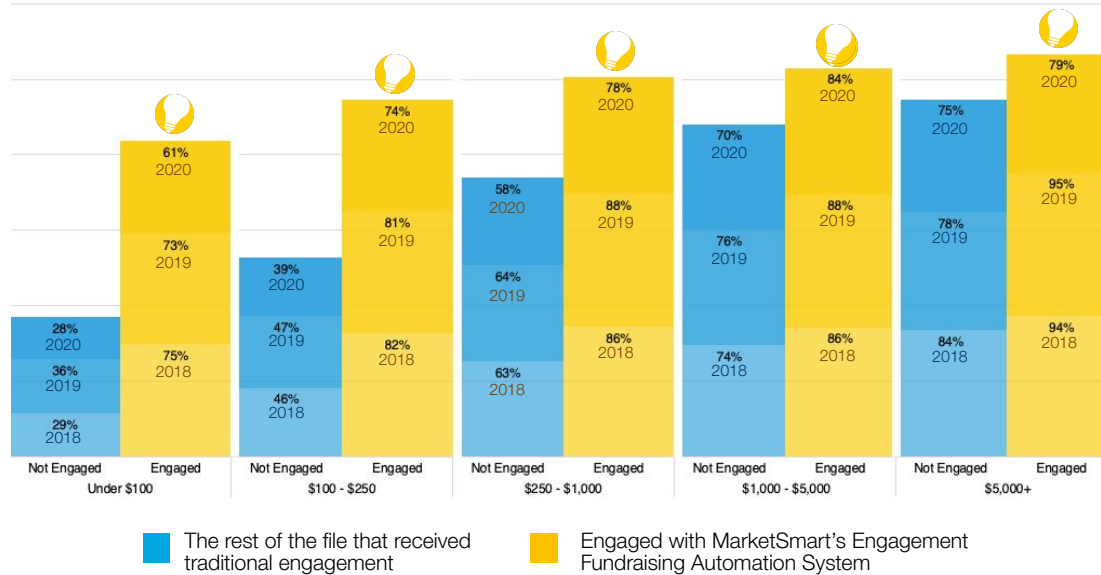


Engaged supporters upgraded their giving at almost double the rate of the rest of the file, on average

At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System upgraded at greater rates (+94.26% greater on average) when compared with the rest of the file.

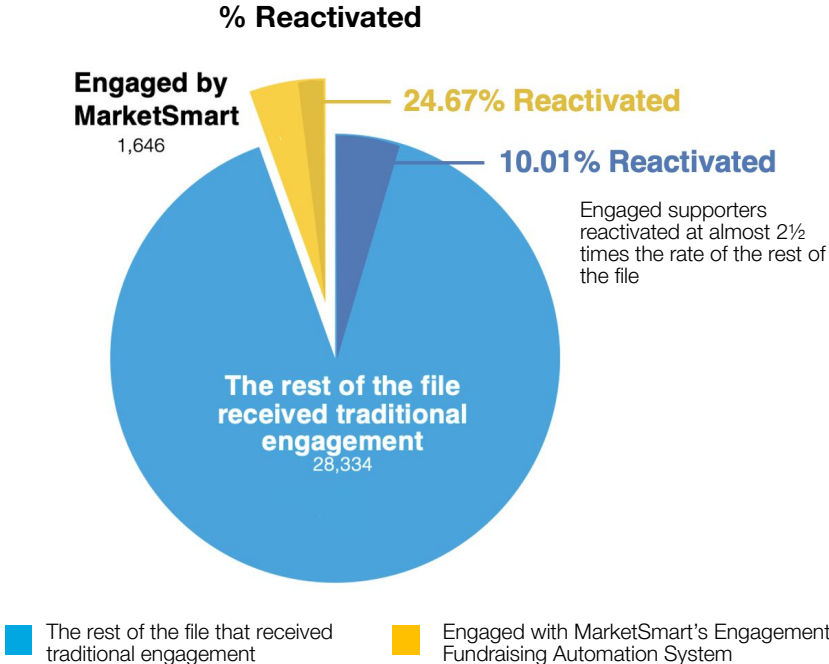
MULTI-YEAR RETENTION

Multi-Year Retention Rates



At every giving level and in every year, individuals engaged by MarketSmart's Engagement Fundraising System retained at greater rates than individuals in the rest of the file.

REACTIVATION %

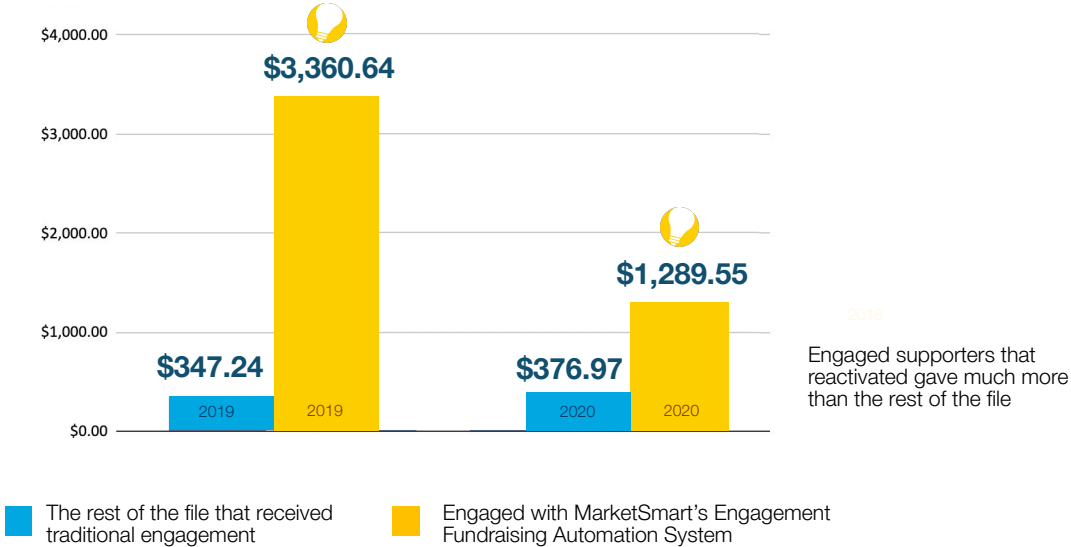


Individuals engaged by MarketSmart's Engagement Fundraising System **reactivated their giving at a higher percentage** compared to the individuals in the rest of the file.



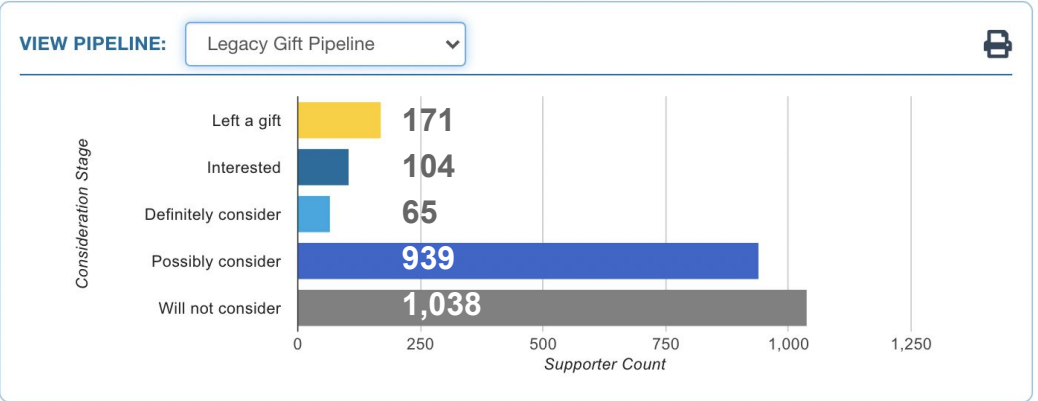
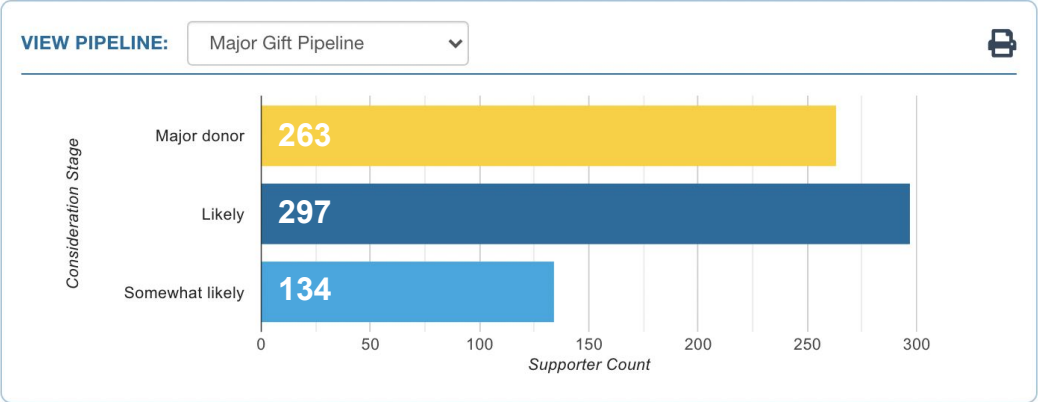
REACTIVATION \$

Average Reactivation Donation



Individuals engaged by MarketSmart's Engagement Fundraising System that reactivated their giving did so while **giving substantially more** than individuals in the rest of the file.

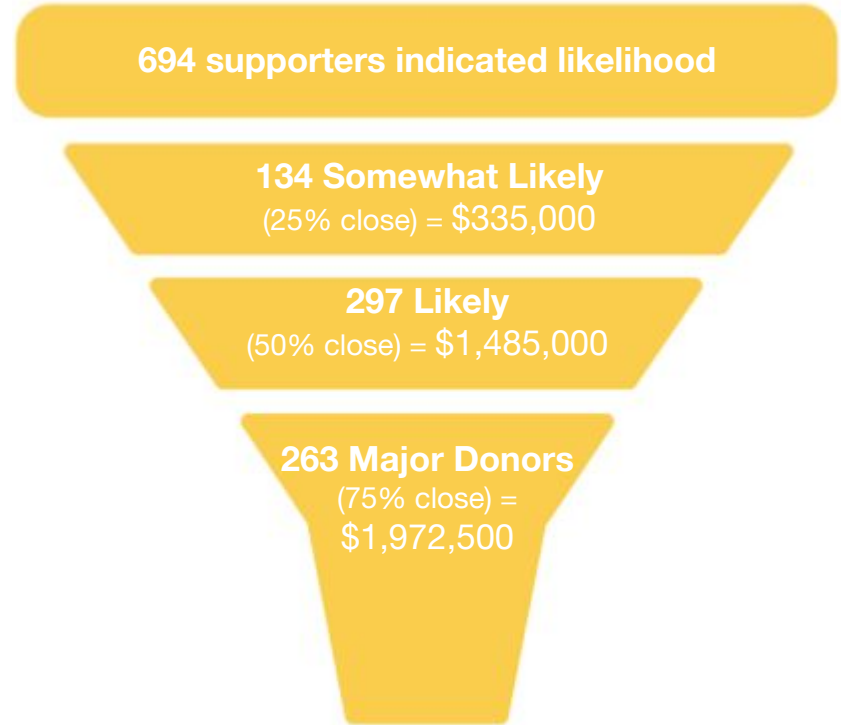
PIPELINE



PIPELINE

Major Giving Potential

This **potential major gift revenue** is based on an estimated \$10,000 major gift amount and conservative close rates.

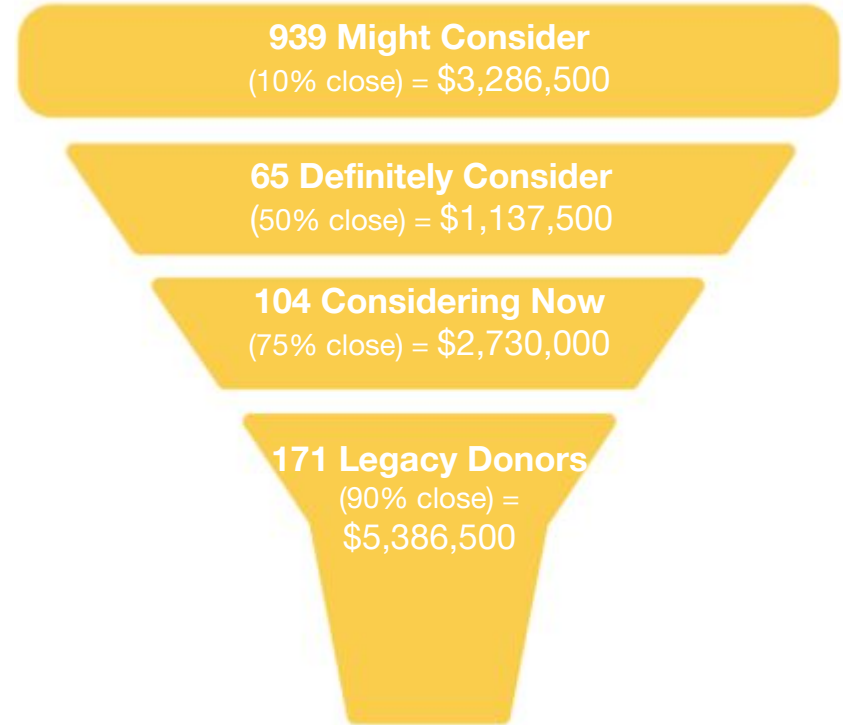


PIPELINE

Legacy Giving Potential

It is generally accepted that the **average bequest amount** in the US and Canada is around \$35,000. Some sectors like healthcare, arts & culture, and higher education report **average** planned gifts 3 to 4 times that amount.*

One supporter documented their gift online and disclosed it's value at **\$250,000**.



*Source: 24 Planned Giving Terms You Should Know. [Blackbaud.com](https://www.blackbaud.com) April 2015 Web. April 2018.

RETURN ON INVESTMENT PROJECTIONS

REVENUE FROM ENGAGED SUPPORTERS

\$21,677,376

Does not include top .05% of donors (outliers)

ENGAGED PIPELINE (potential revenue):

\$16,333,000

Potential major giving funnel revenues if closed = \$3,792,500

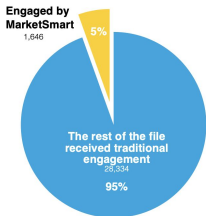
Potential planned giving funnel revenues if closed = \$12,540,500

TOTAL REVENUE FROM ENGAGED SUPPORTERS + PIPELINE =

\$38,010,376

Total investment in MarketSmart (2015 - March 2021) = \$374,883

EXPECTED RETURN ON INVESTMENT = \$101.40 : \$1



IMPORTANT NOTE: THE LARGEST GIFTS WERE NOT INCLUDED
In an effort to normalize the data (reduce skewing), we removed the top ½% (.005) of donors making the largest gifts (approximately 20 per year) thereby eliminating donations of \$100,000 or more.



CONCLUSION

Today's Agenda

Why consider automation?

What you can automate?

3 types of automation?

Where you should start?

My key secrets to success

Case study / results / ROI

Quick explanation market  smart

Q & A

Survey

ABOUT US

Turnkey, 'done-for-you'
fundraising automation



imarketsmart.com

“Warm up the unassigned
for outreach.”

PROSPECT IDENTIFICATION



“**OVERWHELMED** BY THE DATA”



“MOSTLY WENT **UNUSED**”



“DONORS WERE **NOT READY** TO MEET OR GIVE NOW”



“WE NEED MORE **ACTIONABLE INFORMATION** TO
HELP US LAND **MORE MEANINGFUL MEETINGS**
....**NOT MORE DATA!**”

**BE THE FUNDRAISER YOU
ALWAYS WANTED TO BE**



market  smart

imarketsmart.com



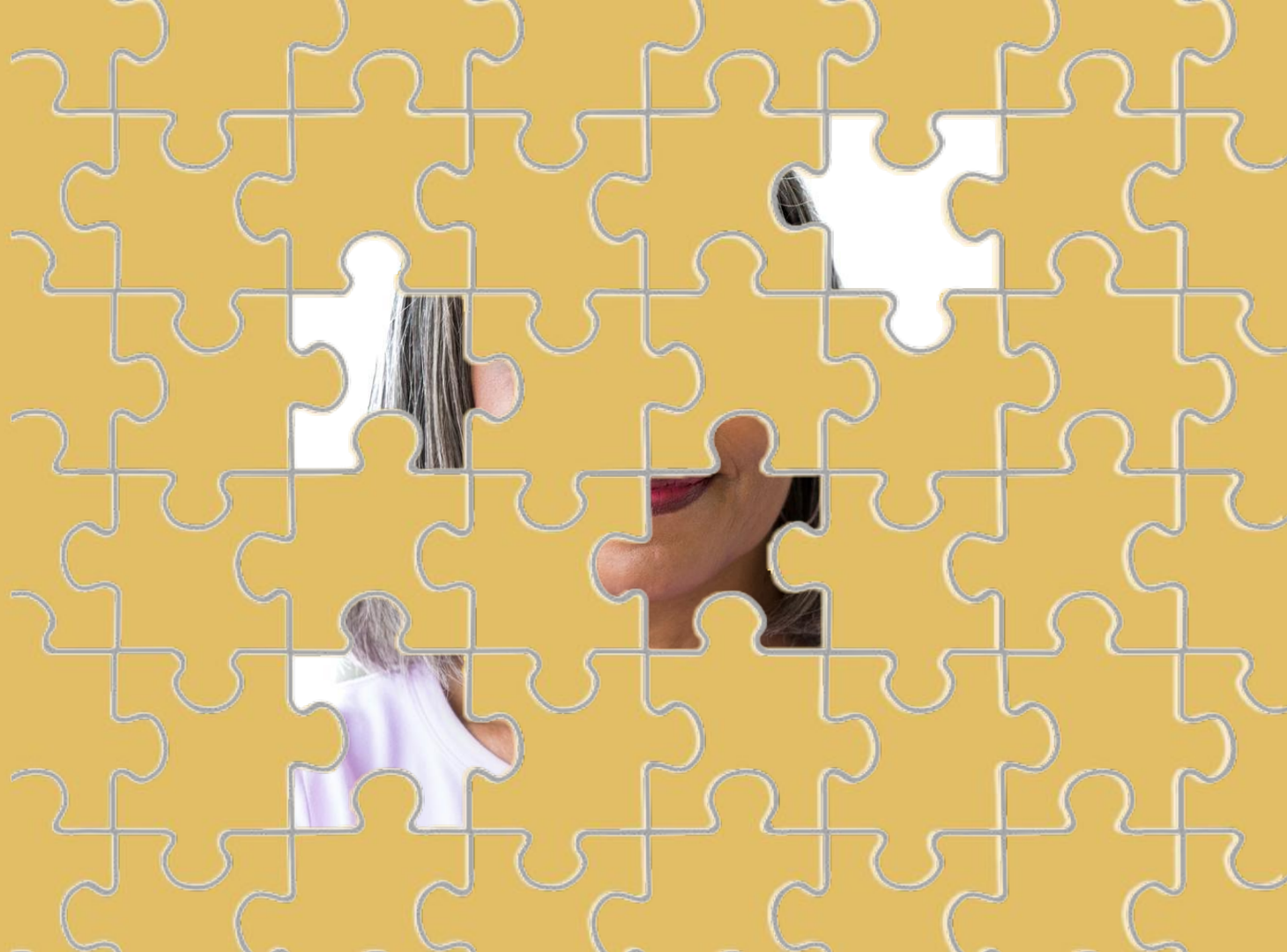
PROSPECT **QUALIFICATION**

who &
why?



**WHY
THEY CARE**



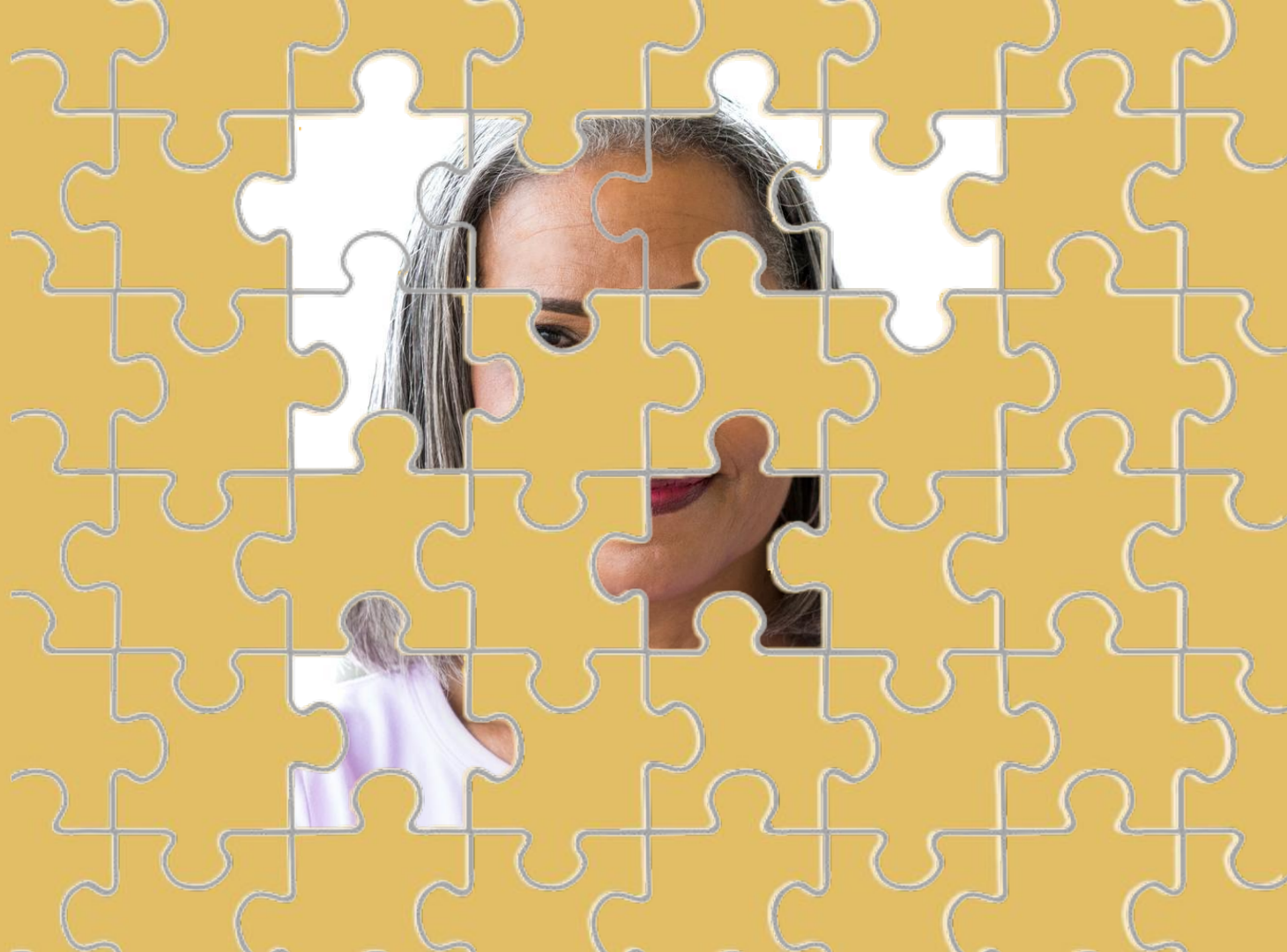


INTERESTS

PASSIONS

**LIFE
STORIES**

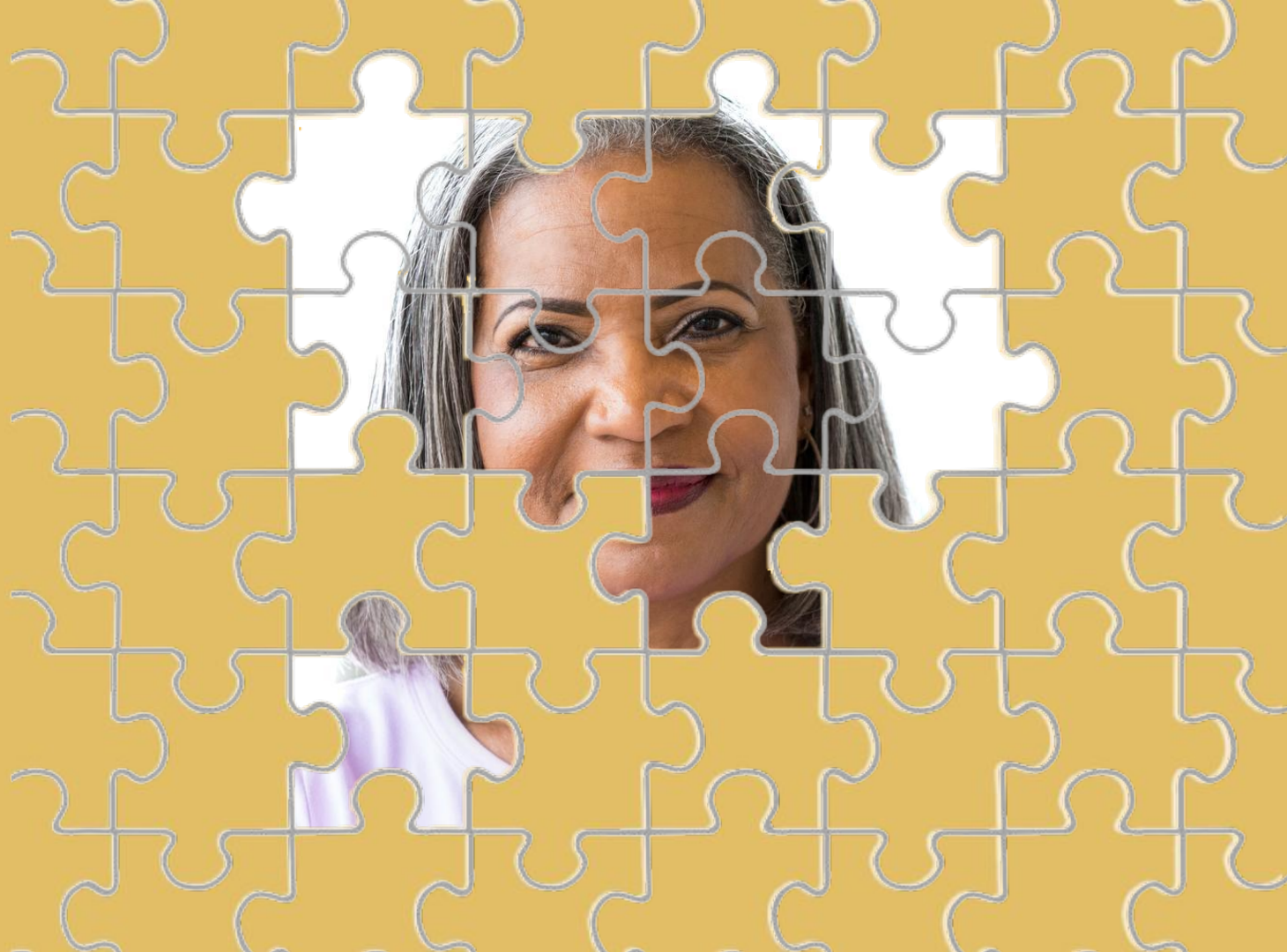






INFLUENCERS RANKING COMMITMENT LEVEL





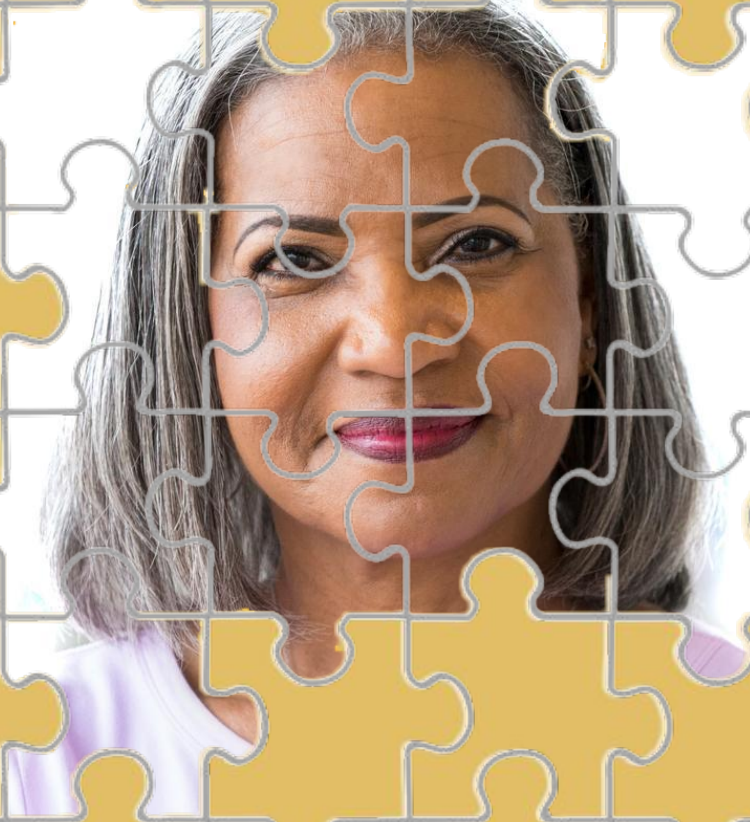
A woman with grey hair is looking through a grid of puzzle pieces. The puzzle pieces are white with grey outlines, set against a solid yellow background. The woman's face is visible through the central pieces, and her back is visible through a piece in the lower-left. The text is overlaid on the puzzle pieces.

**CONSIDERING
NOW**

**MAYBE
LATER**

**ASSETS
OR CASH**





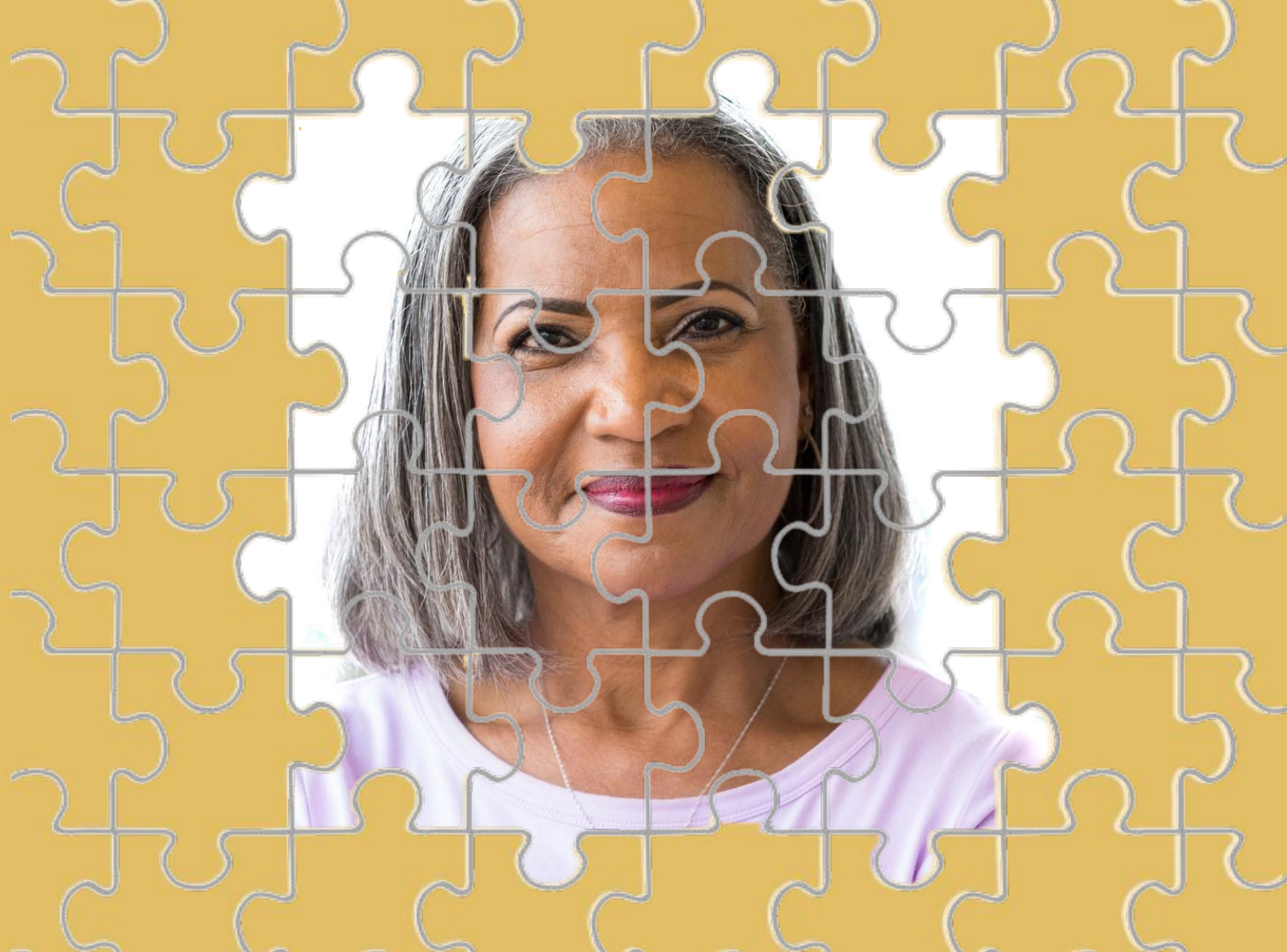


**LEGACY
GIFT**

**WANT
INFORMATION**

**MEET
NOW**





OPT-IN

**UPDATE
CONTACT**

**ARRANGE
MEETING**

**FORWARD
BACKARD**

**FRIENDS'
INTERESTS**

VOLUNTEER

**HAVE
CHILDREN**

**CAPITAL
CAMPAIGN**

**MARRIED/
PARTNER**

CGA

**WIDOW/
WIDOWER**

**ROLLOVER
IRA**

**OLD OR
YOUNG**

**FAMILY
FOUNDATION**

**HIGHLY
EDUCATED**

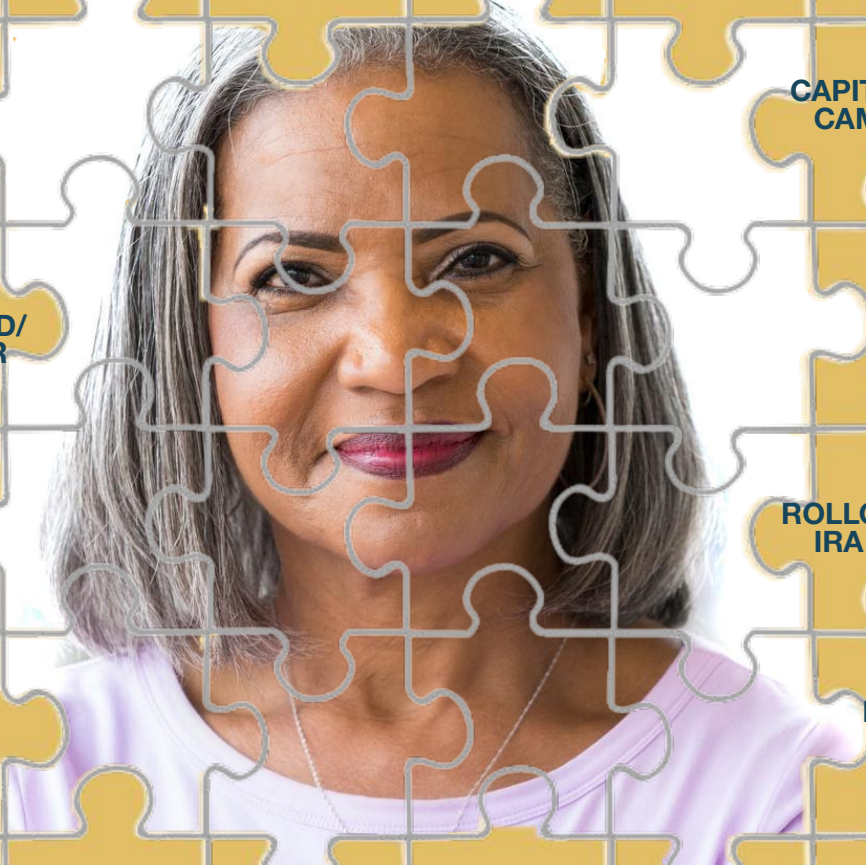
CAREER

RETIRED

**OWN A
HOME**

**VALUE OF
HOME**

DAF



PROSPECT **QUALIFICATION**



**HIGHLY EDUCATED
WIDOW/WIDOWER
CHILDLESS
ATTORNEY**



A PROVEN SYSTEM

Start with a SURVEY



Online landing pages



Online opt-in forms or surveys

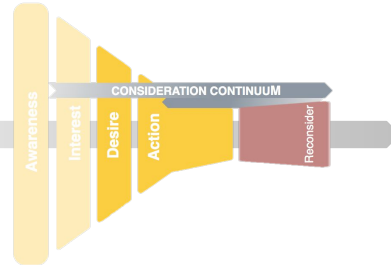
Tech-enabled donor discovery at scale

Automate your EMAILS



Build trust, grow relationships & drive engagement with highly relevant cultivation

Engage with EFFORTS



Increase donor interest & desire with novel, value-oriented efforts

Prioritize with your DASHBOARD



Prioritize outreach based on recency of engagement, passion, interest & capacity



Meet & facilitate giving

A PROVEN SYSTEM

1. Zero-in on people who are **ready** to **engage with you now**



2. Cultivate **tons** of **prospects effortlessly**



Return on investment

Immediate ROI

(Return on investment)

10x

Lifetime value ROI

(Return on investment)

100x

NO RISK OFFER



Get 10:1 ROI*
guaranteed or your money back

* For qualified organizations only. Terms & conditions apply.

imarketsmart.com



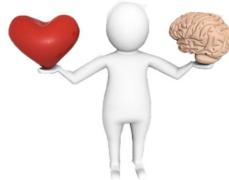
OPPORTUNITY ANALYSIS

100% FREE WITH NO STRINGS ATTACHED



ANALYZE YOUR **TRANSACTIONAL** DATA

Quantities, counts and amounts
along with current lead allocation



MARRY WITH OUR **SURVEY** DATA

Collected from millions of surveys
sent to supporters of
MarketSmart's customers



CALCULATE OUR **FORECASTED** DATA

Reformatted to determine
what is likely to occur



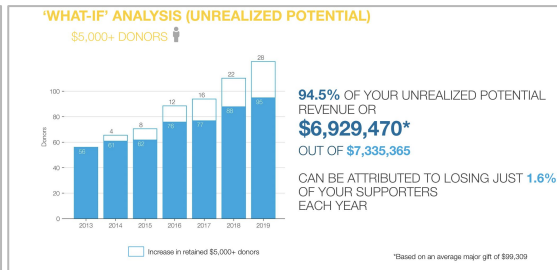
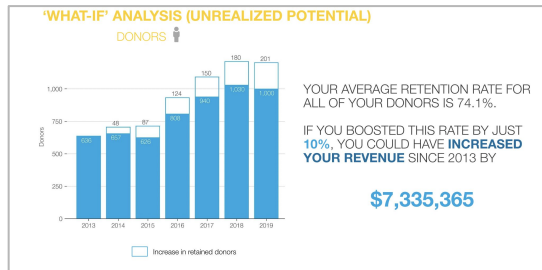
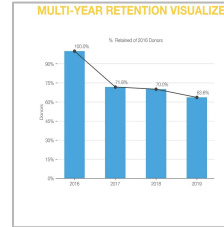
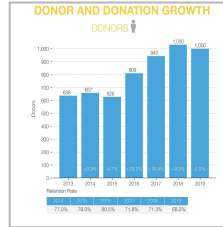
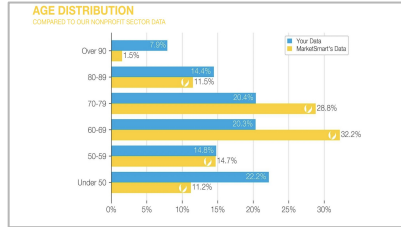
PRESENT YOUR **OPPORTUNITY** & POTENTIAL

Predictions for success in
association with available
media channels



OPPORTUNITY ANALYSIS

WHAT YOU GET



This model simulates the following response rates:

- 5% response rate from email surveys sent to 1,880 donors (94 responses)
- 3% response rate from email surveys sent to 4,000 non-donors (120 responses)
- 7% response rate from print surveys sent to 913 donors (64 responses)

= 278 responses (4.1% response rate)

PROJECTION OF MID-LEVEL AND MAJOR GIVING REVENUE

Variable	Value	Consideration stage	Win rate
Total list	6,793	No interest	0.00%
Response rate	4.10%	Somewhat likely	40.00%
Total response	278	Likely	60.00%
Mid/Major Gift Portion	15.00%	Already do it	75.00%
Average Gift	\$5,000 - \$10,000		
Renewal Rate	80%		

Average gift of \$5,000 = ~\$450,000 from 25 donors (10 year lifetime value)

Average gift of \$10,000 = ~\$900,000 from 25 donors (10 year lifetime value)

PROJECTION OF PLANNED GIVING REVENUE

Variable	Value	Consideration stage	Win rate
Total solicitable list	6,793	No interest	1.0%
Total Email	5880	Deferred interest	15.0%
Total Direct Mail	913	Immediate interest	60.0%
Email Response rate	3.64%	Gift disclosed	95.0%
Direct Mail Response rate	7.00%		
Overall Response rate	4.09%		
Total response	278		
Average Bequest	\$50,000.00		

\$2 Million in deferred giving potential from 40 legacy donors.

YOUR OPPORTUNITY & POTENTIAL

REVENUE PROJECTION SUMMARY & RETURN ON INVESTMENT

Planned Giving revenues = \$2,000,000

Mid/Major Giving revenues = \$450,000 - \$900,000

TOTAL = \$2,450,000 - \$2,900,000*

*Keep in mind that there is MORE opportunity in Danforth's database than outlined in this analysis. The ROI outlined in this analysis is from one pass through of MarketSmart's strategy to ~6,800 supporters in Danforth's database.



ALL ABOUT AUTOMATION

How to optimize your fundraising operation with technology

QUESTIONS?

