

ENGAGEMENT FUNDRAISING SUCCESS STORY

How The University of Texas at Austin is working with MarketSmart to meet its goal of \$1 billion in student support.

In early March 2022, The University of Texas at Austin (UT Austin) publicly launched the *What Starts Here* campaign with a historic goal to raise \$6 billion – one of the largest campaigns of any public university in the country. It includes **a \$1 billion goal for scholarships and student support.**

The challenge.

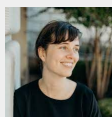
UT Austin's prospect research team had already spent a lot of time and money identifying 30,000 potential qualified leads from their database. But they needed to prequalify them for outreach or help them arrange meetings with gift officers on their own.

After all, **gift officers don't really need identified leads, they need meetings** with people who are passionate about investing in scholarships and student support programs, and ready to talk seriously about a philanthropic partnership.

In late 2020, while still in the quiet stage of the *What Starts Here* campaign, UT Austin turned to MarketSmart to implement our **turnkey, 'done-for-you' engagement fundraising system for prequalifying, automatically cultivating, and prioritizing donors and supporters** for outreach. The system also helps high value donors arrange their own appointments with staff.

UT Austin needed to close major gifts of \$100,000 or more to support its campaign goals and create endowed scholarships. According to Adrienne Leyva, Director of Marketing and Communications, "Our student support goal requires a strong focus on major gifts. **MarketSmart was willing and able to build a customized program to help us identify major giving prospects – and planned giving prospects as well.**"

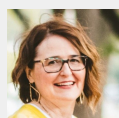
“MarketSmart helps us engage and pre-qualify major donors we wouldn't have prioritized otherwise.”



Eva Mikes
Program Manager



“The emails feel personal.”



Adrienne Leyva
Director of Marketing & Communications



I'm ready for outreach!



The solution.

MarketSmart's System provided a turnkey, 'done-for-you' solution that warms up the best prospects for outreach automatically. It does the time-consuming and tedious cultivation work for fundraising staff **so they can focus their internal resources on landing meetings and building meaningful relationships** with people when they're ready to consider a philanthropic investment.

The MarketSmart system includes four main components:

- **Donor surveys** that uncover why a supporter cares, where they reside in their consideration continuum for giving assets, and much more. This qualitative information helps fundraisers prioritize supporters based on their readiness for outreach;
- **A VIP microsite** that focuses on scholarship endowments while it matches UT Austin's main website design;
- **Automated, personalized cultivation emails** that nurture and shepherd donors;
- **A dashboard and notification system** that prioritizes supporters and donors based on a proprietary algorithm that guarantees a 10-to-1 return on the institution's investment.

UT Austin's development team consists of members from prospect research, major gifts, planned giving, leadership annual giving, project management, and marketing. Using MarketSmart's dashboard and scoring algorithm, **the team can now see who is preliminarily qualified for outreach, and who needs more cultivation.**

The System also handles administrative tasks. Eva Mikes, Program Manager at UT Austin adds, "If a prospect requests information, it is automatically sent to them. The automated functionality MarketSmart provides helps our officers if they are unable to reach out immediately."

MarketSmart's System warms up supporters and donors with targeted yet automated, relevant, and meaningful, emails. Leyva adds, "The emails feel personal. They're all signed by our Senior Director of Principal Gifts. They're so personal that she frequently receives replies thanking her for the email."

MarketSmart's survey initiates the dialogue. Then UT Austin's team can see whether they are ready for more personal, customized attention. **MarketSmart's tech-enabled donor discovery system collects information from prospects. It helps them self-qualify so UT Austin's team spends less time cold calling and going on wild goose chases.**



The results.

Over the last two years of partnering with MarketSmart, a mixture of leadership annual giving, planned giving and major giving frontline fundraising staff at UT Austin have **made calls and visits to more than 700 supporters** from their original identified list of 30,000. Thanks to MarketSmart's engagement strategy and turnkey system, these supporters and donors have self-identified their interest in making major and planned gifts of assets and funding endowed scholarships.

Based on those calls and visits, the UT Austin frontline fundraising team and the prospect research team were able to prioritize engagement based on who told them they were "qualified" or "unqualified." **Now, only the top 500 prospects remain in their pool and the team is operating more efficiently and effectively.**

Numerous endowed scholarship gifts have been sourced from those individuals.

Initially, UT Austin's team only targeted a group of 30,000 that had a gift capacity of at least \$100,000. Then, they lowered the amount to \$50,000 or more and approximately 50,000 more people were invited to take the survey and opt into receive automated cultivation emails. There was **no additional cost to expand the audience** since all of the media used for the initiative was digital.

Mikes explains, "In the first year, we mainly focused on student support. What we realized during last year's program is that MarketSmart includes such great (survey) questions that gauge other interest areas. We can extract other major giving prospects from the leads as well as gift-planning prospects. MarketSmart helps us have a more holistic approach that includes both planned giving and major gifts."

Leyva agrees saying, "MarketSmart is helping us engage and pre-qualify leads that are showing interest in setting up endowed scholarships."

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Adrienne Leyva
Director of Marketing & Communications



TEXAS
The University of Texas at Austin

Conclusion.

Mikes and Leyva are looking forward to a long relationship with MarketSmart. Not only did partnering with MarketSmart help support this initiative, but the relationship is also helping them meet other goals within the University.

Mikes said the real value in the relationship comes through knowing each other well – resulting in more customization and bringing fresh ideas to the table. She and Leyva agree it's important the relationship progresses over the years and isn't just "rinse and repeat."

They said it's not just about the technology. **Leyva and Mikes sing the praises of their Customer Success Manager, Rachel Rosen, and the rest of the MarketSmart team.** They said that Rachel makes everything feel very smooth and she is responsive whenever a need arises, from supporting their initiatives and requests to having meaningful conversations and truly understanding them. Rachel embodies the spirit of teamwork in her support of UT Austin.

Mikes concluded by saying, "MarketSmart helped identify donors that we wouldn't have prioritized otherwise."

About MarketSmart's Engagement Fundraising System.

Fundraisers, nonprofit leaders, and board members come to MarketSmart when they realize their traditional fundraising efforts are no longer working.

We help them implement our 'Engagement Fundraising System' — a powerful 'done-for-you' software and service duo that **helps fundraisers pre-qualify people for outreach and land meetings** with the wealthiest and most passionate supporters when they are ready to involve themselves more deeply with your cause.

Unlike big data or mysterious black box wealth screening services, our System is donor- and supporter-driven. It inspires people to engage, explain why they care and whether they would consider giving assets. Then it **signals when they need help**—so fundraising staff makes outreach at the right times.

This positions your team for success and optimizes your operations. Plus, there's no risk because it comes with a 10-to-1 return on investment (ROI) guarantee.

NO RISK OFFER

**Get 10:1 ROI***
guaranteed or your money back
*For qualified organizations only. Terms & conditions apply.

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"Working with MarketSmart was everything I had imagined it would be and more. This system is simply incredible."

Scott Talbot, Executive Director, Dallas Seminary Foundation



"\$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



"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



"MarketSmart helps you get more meetings with major and legacy donor prospects — so you can be the fundraiser you always wanted to be."

Sheila Schwartz, Principal Consultant, Dwyer Philanthropy

