

# FUNDRAISE SMARTER, NOT HARDER

How to optimize your operation with fundraising automation



# INTRODUCTION



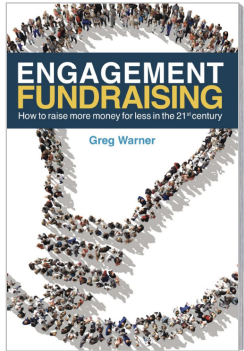
**Greg Warner**

CEO & Founder

market  smart

<https://imarketsmart.com/>

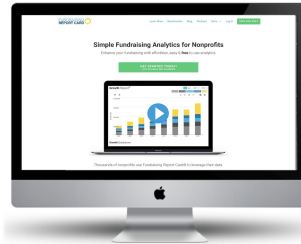
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<https://imarketsmart.com/engagement-fundraising-free-download/>

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/>

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**LinkedIn**



**Shelita G. Bourgeois**  
M.S., CFRE



**“It’s working!**

You should see my pipeline.  
And when I call people,  
they are **ready** to talk.

**You make my job so easy!”**



Turnkey  
**‘DONE-FOR-YOU DUO’**  
software + services



**NO RISK OFFER**



**Get 10:1 ROI\***  
guaranteed or your money back

\* For qualified organizations only. Terms & conditions apply.

[imarketsmart.com](https://imarketsmart.com)

# INTRODUCTION

## Housekeeping

### Recording & slides

Will be sent to all attendees & registrants

### Questions

Will be answered at the end of the presentation



Chat



Raise Hand



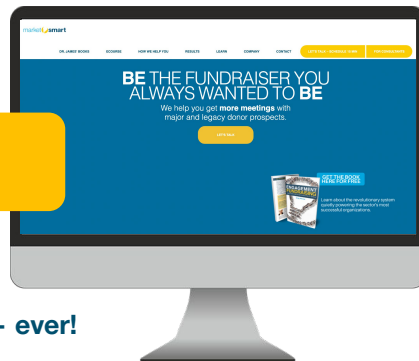
Q&A

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**LET'S TALK**

**Informative &  
educational**

**No sales pressure — ever!**



## INTRODUCTION

# QUICK POLL #1

# INTRODUCTION

## IMPORTANCE OF RAISING MAJOR GIFTS

How important is it for your organization to raise major gifts of assets?

- Extremely important
- Somewhat important
- Not very important
- Not important at all

# 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?



## DO MORE WITH LESS

**Reduce Costs** Increase Efficiency & Productivity

**Add Value** Enhance the Giving Experience

**Drive Better Results**





# WHY CONSIDER AUTOMATION?



**What are your most tedious and time consuming tasks?**

# WHY CONSIDER AUTOMATION?



## CAUTIONARY TALE



Had 9,000 stores  
at their peak in 2004.

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

# WHY CONSIDER AUTOMATION?



NUMBER OF EMPLOYEES	REVENUE	REVENUE PER EMPLOYEE
85,000	\$6 Billion	\$70,588

# WHY CONSIDER AUTOMATION?



NUMBER OF EMPLOYEES	REVENUE	REVENUE PER EMPLOYEE
85,000	\$6 Billion	\$70,588
13,000	\$33.7 Billion	\$2,592,308 <b>37X</b>

**Technology is the key to success!**

**Automation technology is the key to gift officer optimization too!**

# WHY CONSIDER AUTOMATION?



## OPTIMIZE YOU!



Thank you for giving the life-changing gift of safe water. Access to safe water has the power to break the cycle of poverty, to protect and save lives and to make a bright future possible for all.

Your gift helps people like Anisa. Anisa lives in Indonesia, and at 13 years old, is the oldest of three. She loves school. But without safe water or a toilet at home, Anisa spent time gathering water, often prioritizing this over schoolwork. She couldn't relieve herself without worrying for her safety. With your help, Anisa and her family got access to a small, affordable loan and now have water and a toilet right at home.

Thanks to your support, people like Anisa don't have to walk for water anymore.

Here's to you! Together we are changing lives.

From all of us at [Water.org](https://www.water.org), thank you.



# 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.”
- **Only 37%** of ‘identified’ and newly assigned were truly qualified to be in a caseload (2/3 were not qualified)



WHY CONSIDER AUTOMATION?



# QUICK POLL #2

# WHY CONSIDER AUTOMATION?



## WHAT'S YOUR LEVEL OF FRUSTRATION?

### Time spent 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?



## COST OF FRUSTRATION?

### Time spent 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



ChatGPT

# WHY CONSIDER AUTOMATION?



## COST OF FRUSTRATION?



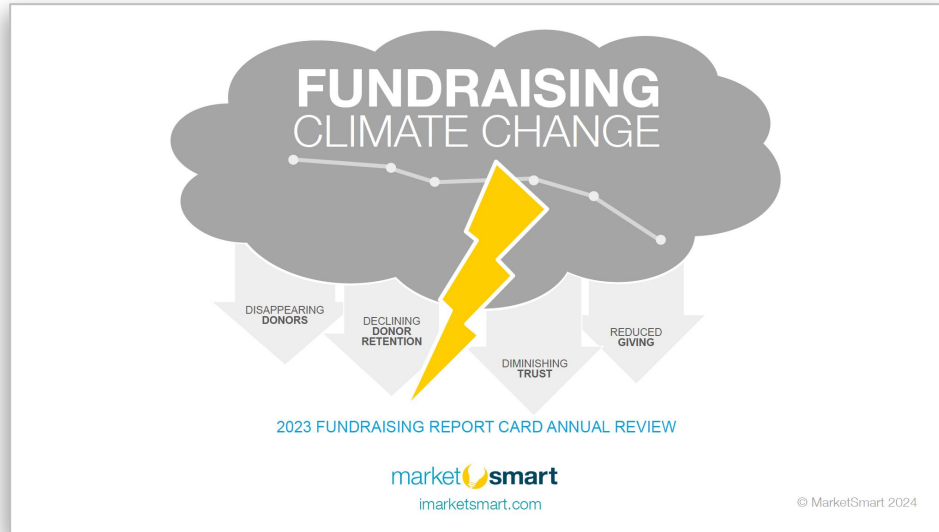
### ChatGPT

Certainly:

1. **Time and Effort:** Qualification visits demand significant resources. When they don't lead to major gifts, it feels like a waste of time and energy.
2. **Resource Drain:** Pursuing unfruitful prospects consumes valuable resources—time, money, and effort—that could be better used elsewhere.
3. **Expectation Misalignment:** When visits with seemingly promising prospects don't materialize into major gifts, it can be disheartening due to miscommunication or misaligned expectations.
4. **Morale and Pressure:** Constantly chasing unproductive leads can lower morale and increase pressure to meet fundraising targets.
5. **Missed Opportunities:** Every hour spent on false positives is a missed opportunity to engage with more promising donors and secure major gifts.
6. **Lack of Support:** Inadequate support in identifying and prioritizing prospects can heighten frustration.

# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder



2023 FUNDRAISING REPORT CARD ANNUAL REVIEW

# fundraisingreportcard.com FREE!

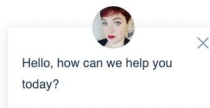
## Simple Fundraising Analytics for Nonprofits

Enhance your fundraising with effortless, easy & **free** to use analytics.

**GET STARTED TODAY!**  
JUST AN EMAIL AND PASSWORD



	A	B	C
1	donor_id	donation_date	gift_amount
2	123456	1/22/05	\$20.00
3	123457	3/15/08	\$250.00
4	123458	5/7/11	\$397.00
5	123459	6/28/14	\$10.00
6	123460	8/19/12	\$5.00
7	123461	10/10/10	\$171.00



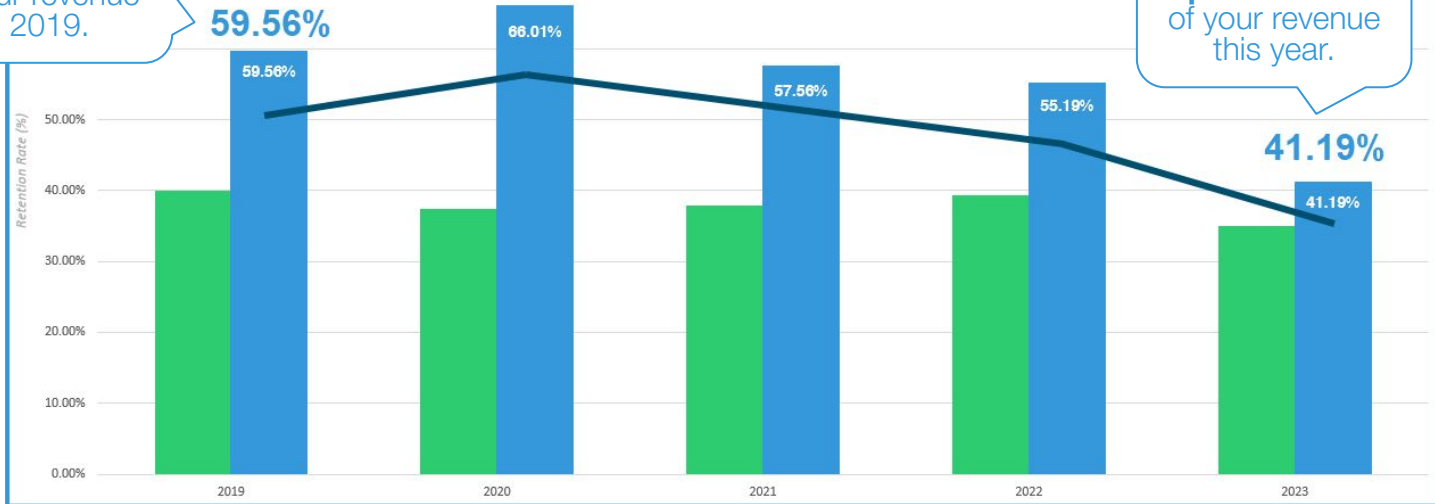
Thousands of nonprofits use Fundraising Report Card® to leverage their data.



## Revenue Retained

You needed to **replace 40.44%** of your revenue in 2019.

You need to **replace 58.81%** of your revenue this year.

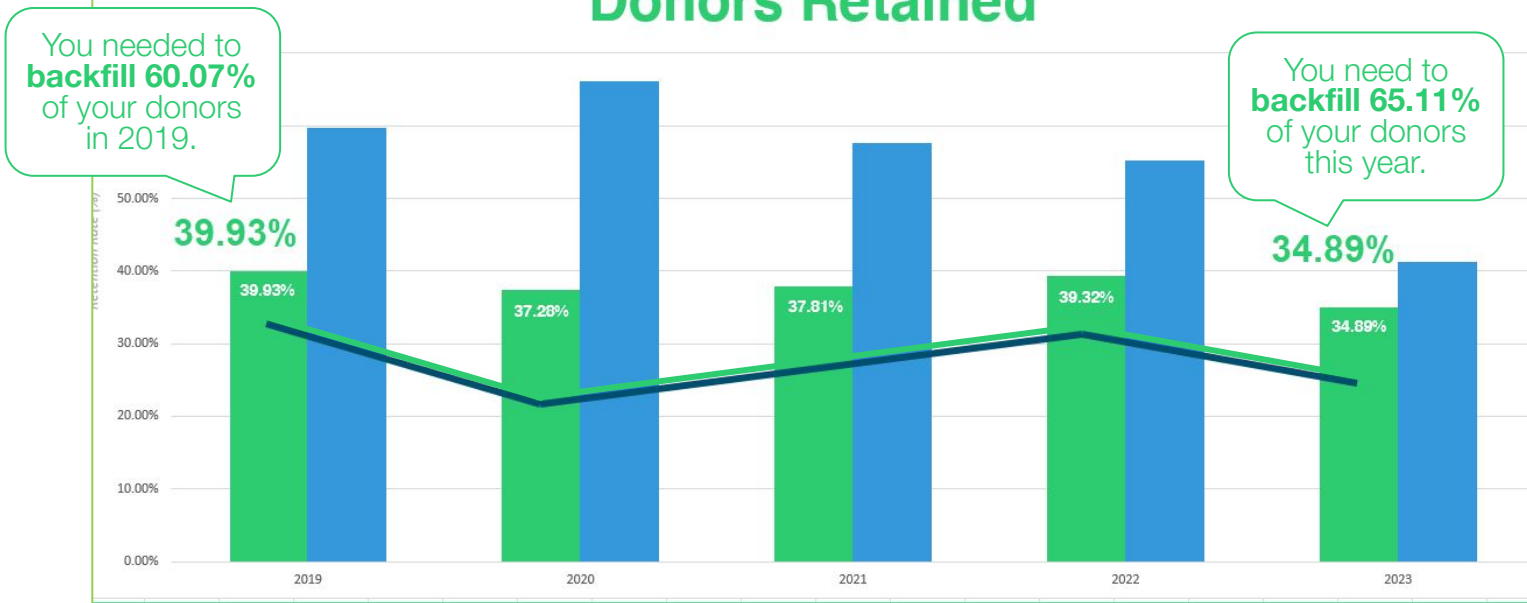


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations

## Donors Retained



[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

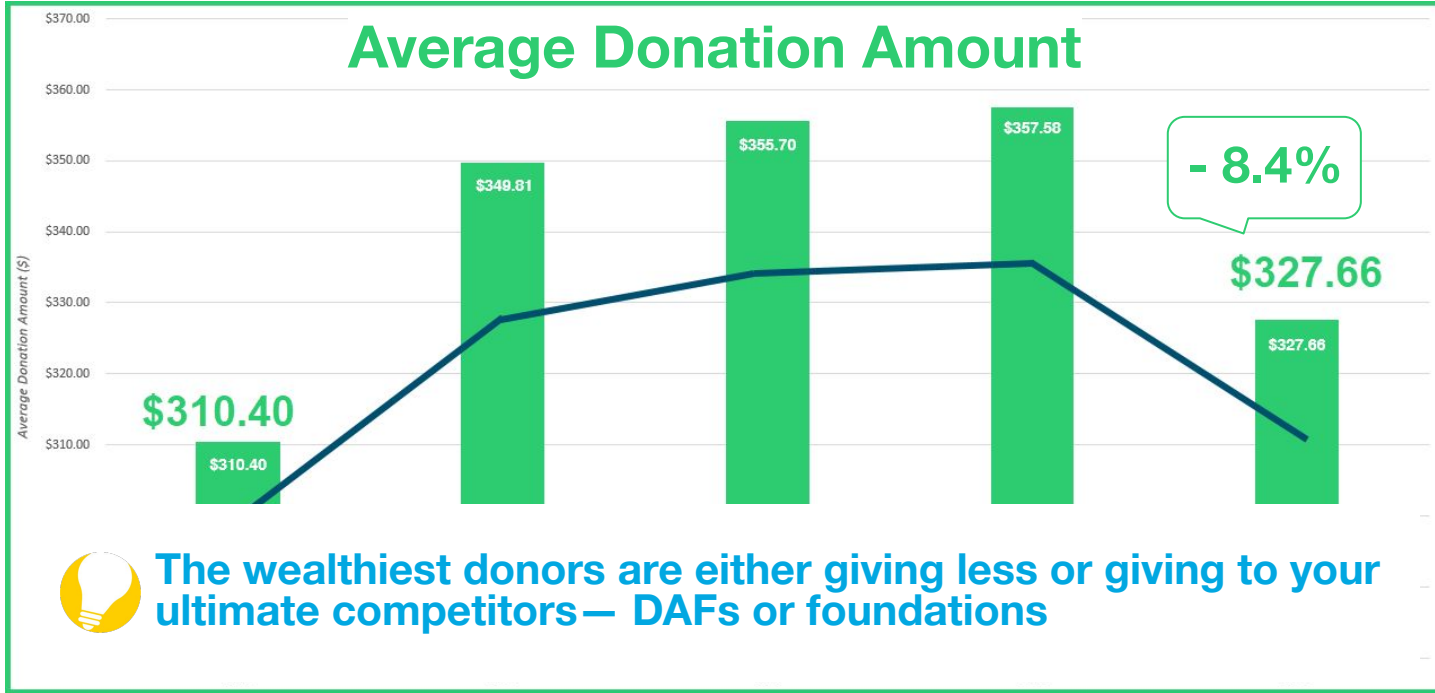
**FUNDRAISING  
REPORT CARD**



Daily analysis of \$145 billion in charitable giving  
using data from 15,000+ organizations



<https://customergauge.com/blog/average-customer-retention-rate-by-industry>



**Core inflation was 3.9 % in 2023.**

Core inflation leaves out volatile food and energy prices,



[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations



**FIRST TIME donor retention**

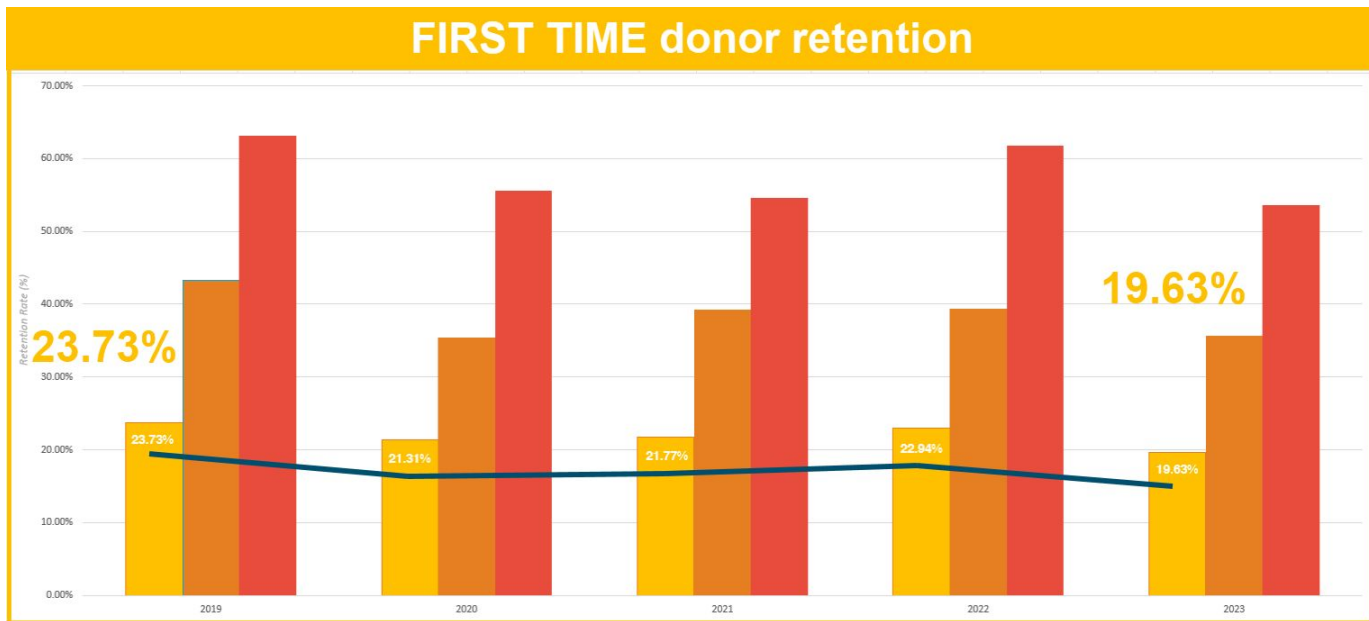
**REACTIVATED donor retention**

**REPEAT donor retention**

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving  
using data from 15,000+ organizations

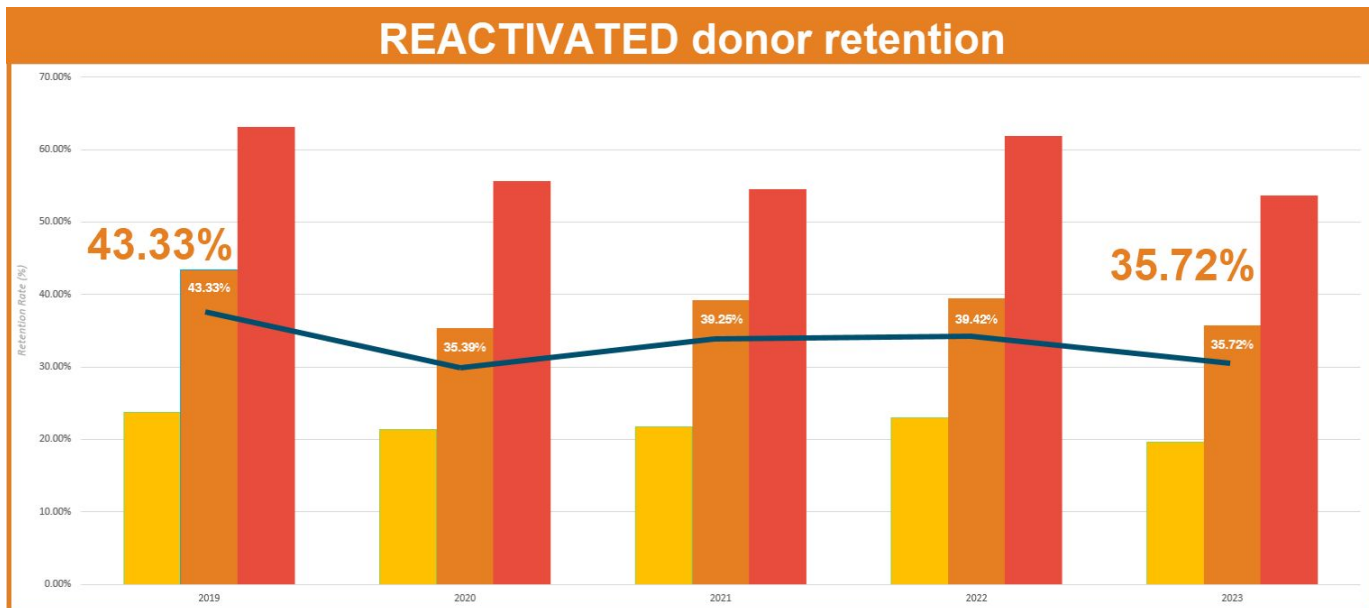


The percentage of first-time donors from last year who renewed again this year.

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations

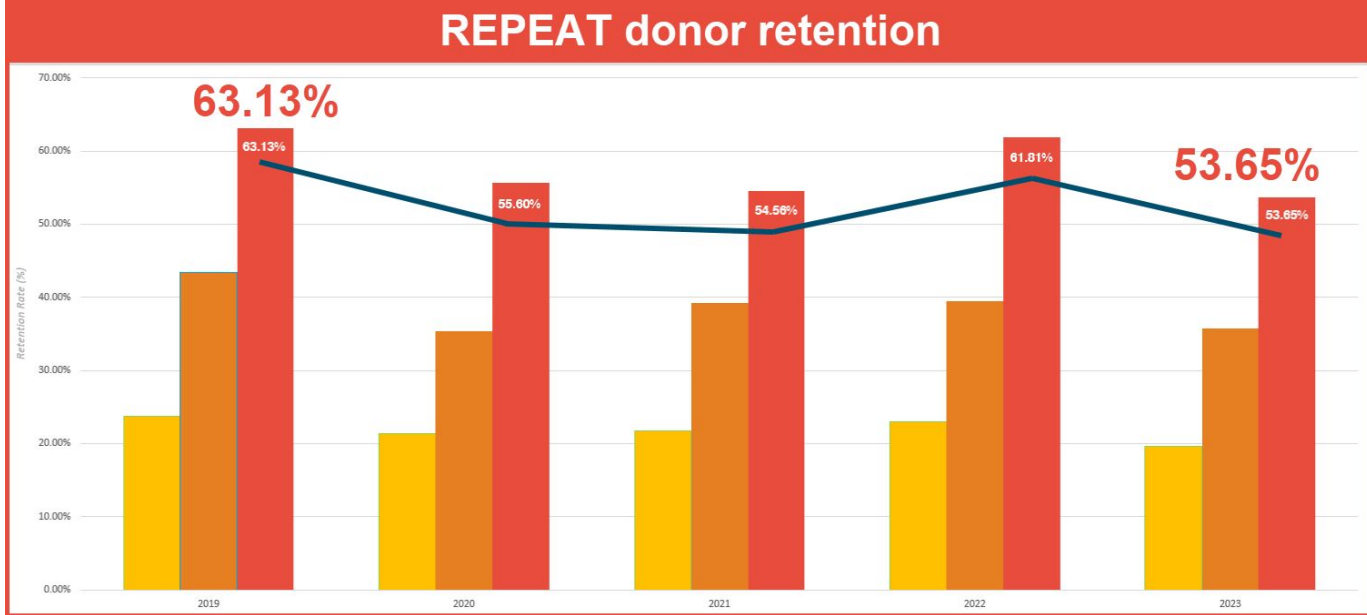


The percentage of reactivated donors from last year who renewed again this year.

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations



The percentage of retained donors from last year who renewed again this year.

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations

Under \$100

\$100 to \$250

\$250 to \$1,000

\$1,000 to \$5,000

\$5,000 and up

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

**FUNDRAISING  
REPORT CARD** 

Daily analysis of \$145 billion in charitable giving  
using data from 15,000+ organizations

Under \$100

\$100 to \$250

\$250 to \$1,000

\$1,000 to \$5,000

\$5,000 and up

Donor Retention Rate

23.24%

September 2020 Data

vs.

Donor Retention Rate

17.88%

January 2024 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

FUNDRAISING  
REPORT CARD 

Daily analysis of \$145 billion in charitable giving  
using data from 15,000+ organizations

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

Donor Retention Rate  
**37.48%**  
**September 2020 Data**

**VS.**

Donor Retention Rate  
**37.75%**  
**January 2024 Data**



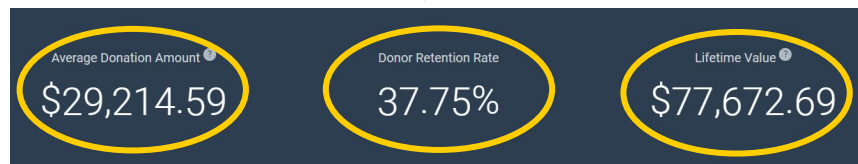
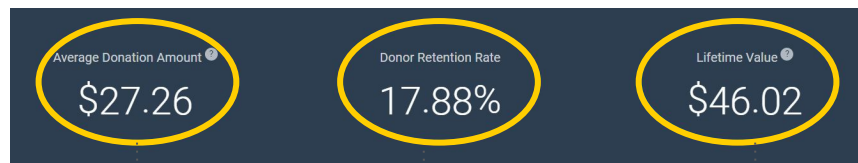
[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



Daily analysis of \$145 billion in charitable giving using data from 15,000+ organizations

# LOW-DOLLAR VS. HIGH DOLLAR DONORS

## Under \$100 donors



## Over \$5,000 donors

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



80/20 rule is now **68/.77**

**Donors giving over \$5,000**  
= **.77%** of an org's donor base  
but make up **68.43%** (**just over**  
**2/3**) of all donation revenue


**Donors giving under \$100**  
= **76.12%** of an org's donor  
base but make up only **6.33%**  
of all donation revenue

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

**FUNDRAISING  
REPORT CARD** 

Daily analysis of \$145 billion in charitable giving  
using data from 15,000+ organizations


# 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.”

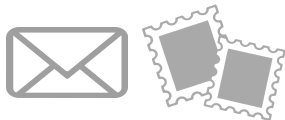


Brian Lauterbach, ACFRE  
Vice President of  
Programs & Collective  
Impact

# WHY CONSIDER AUTOMATION?

Fundraising is getting more expensive

**Inflation**



Acquisition costs are skyrocketing

Staff salaries are increasing



**Recession or Stagflation?**

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!**



# TECHNOLOGY FOR COMMUNICATIONS

## Introducing marketing automation software



CRM/DONOR  
MANAGEMENT

PEER TO PEER

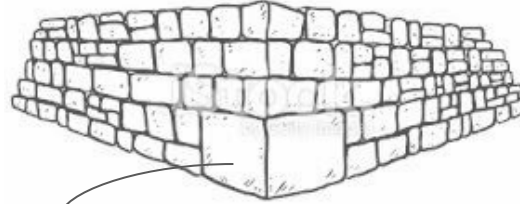
EVENT  
MANAGEMENT

OTHER

# 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

Reminders

Etc.




Thank you for giving the life-changing gift of safe water. Access to safe water has the power to break the cycle of poverty, to protect and save lives and to make a bright future possible for all.

Your gift helps people like Anisa. Anisa lives in Indonesia, and at 13 years old, is the oldest of three. She loves school. But without safe water or a toilet at home, Anisa spent time gathering water, often prioritizing this over schoolwork. She couldn't relieve herself without worrying for her safety. With your help, Anisa and her family got access to a small, affordable loan and now have water and a toilet right at home.

Thanks to your support, people like Anisa don't have to walk for water anymore.

Here's to you! Together we are changing lives.

From all of us at [Water.org](https://www.water.org), thank you.



# 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



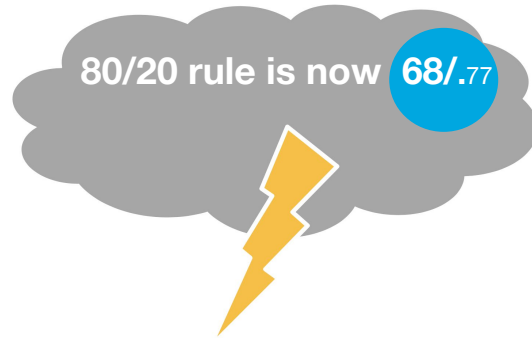
# WHERE SHOULD YOU START?

Basic  
?

Mid-level  
?

High-level  
?

**Focus on assets, not cash!**



Improve how you:

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

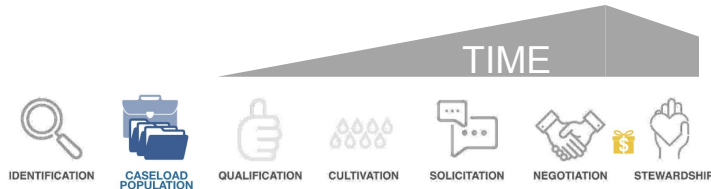
**REMOVE MUNDANE, TEDIOUS AND TIME-CONSUMING TASKS FROM YOUR HIGHLY COMPENSATED MAJOR GIFT STAFF'S DUTIES!**

# WHERE SHOULD YOU START?

## Focus on assets, not cash!

### Where major gift staff excel

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



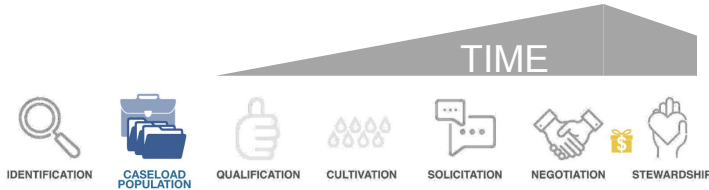
### What causes failure & high turnover

- Overworking GOs with tedious tasks
- Forcing them to attend useless 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

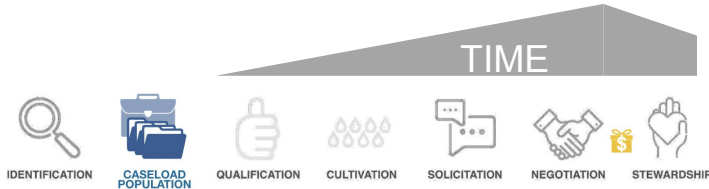
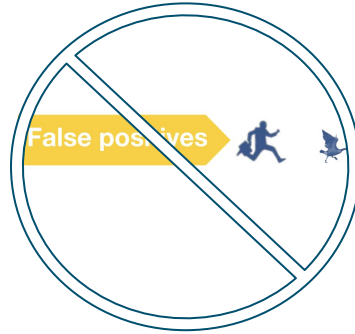


## What causes failure & high turnover

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- **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!



**SCALE YOUR  
CULTIVATION,  
PRIORITIZATION,  
& STEWARDSHIP  
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,

[REDACTED]



# 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  
PO Box 6000 | Colorado Springs, CO 80934  
1-888-283-0157  
[mylegacy.navigators.org](http://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

- ✓ 41.5% Opened
- ✓ 20% Clicked

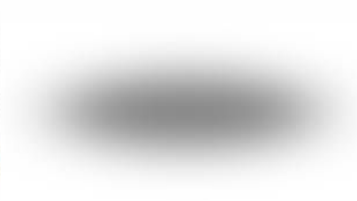
Dear {{ subscriber.name }},

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



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**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**

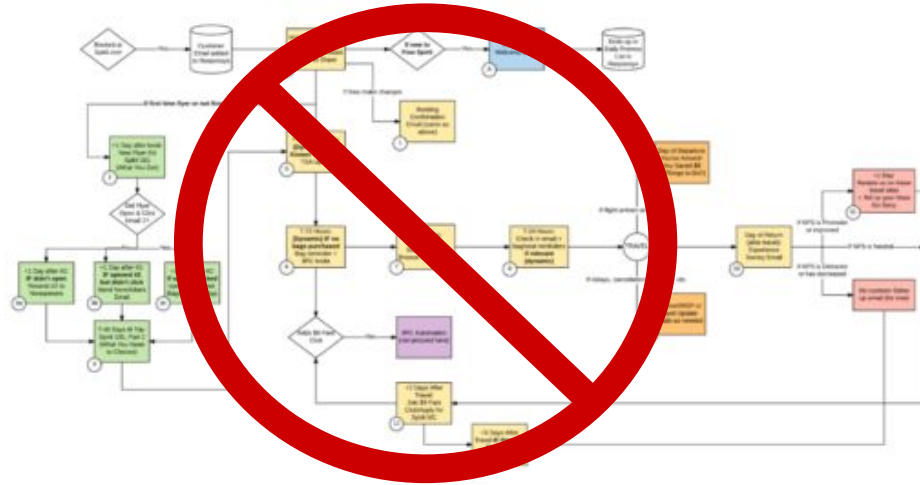
**Q & A**

**Survey**

# TOP SECRETS

**TOP SECRET**

## Donor journeys?

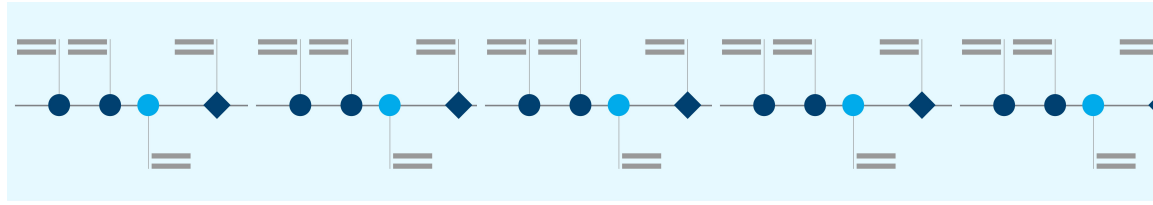




# TOP SECRETS

**TOP SECRET**

## Donor journeys?

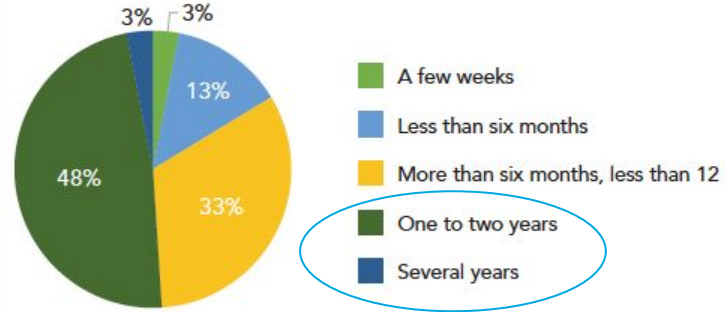


Weeks or months

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?



“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?



Jonelle Beck

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

UNIVERSITY OF THE  
**PACIFIC**

# CAN YOU AFFORD TO INVEST IN AUTOMATION?

## Better question: Can you afford NOT to?



**Brian Powell, '03**

Senior Director of Development  
Institutional Advancement



Enrollment – 2,272

### Donor #1

\$1,450 before  
\$91,649 after

### Donor #2

Approximately \$4,500 before  
Over \$122,000 after

### Donor #3

\$450 before  
\$18,300 after, and recently  
verbally committed to give \$100,000

### Donor #4

\$3,000 before  
\$15,000 after

### Donor #5

\$1,950 before  
\$65,000 after

### Donor #6

\$3,155 before  
\$51,000 after

### Donor #7

\$17,000 before  
\$425,000 after

### Donor #8

\$13,000 before  
\$120,000 after

### Donor #9

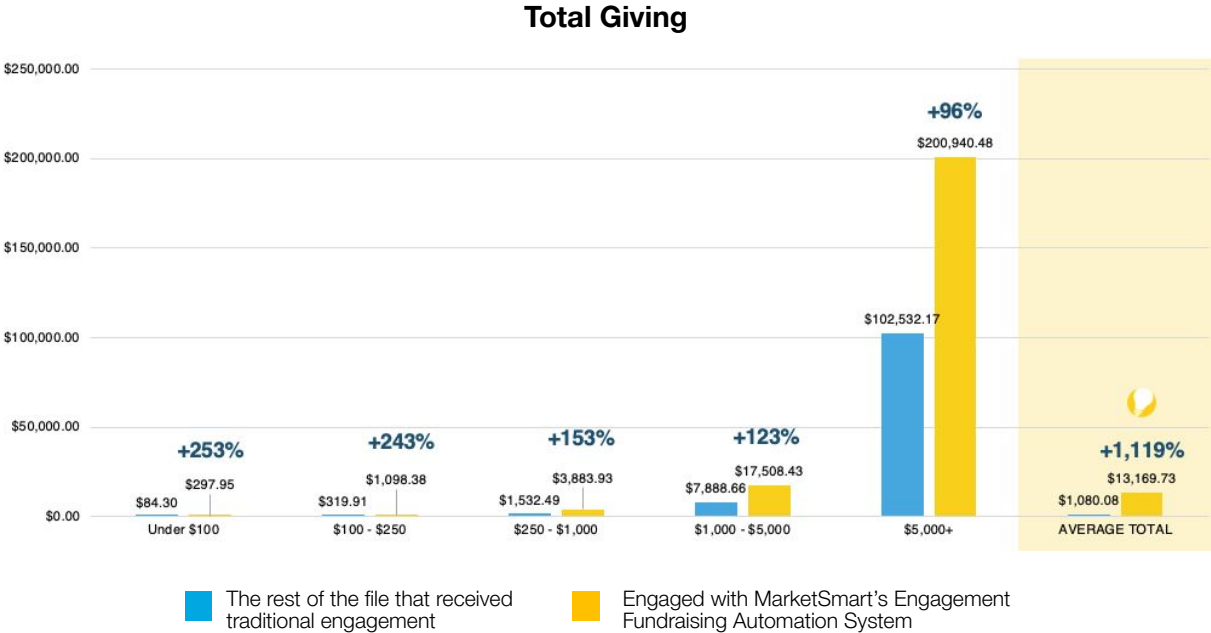
Approximately \$6,000 before  
\$80,000 after

# CASE STUDY





# TOTAL GIVING

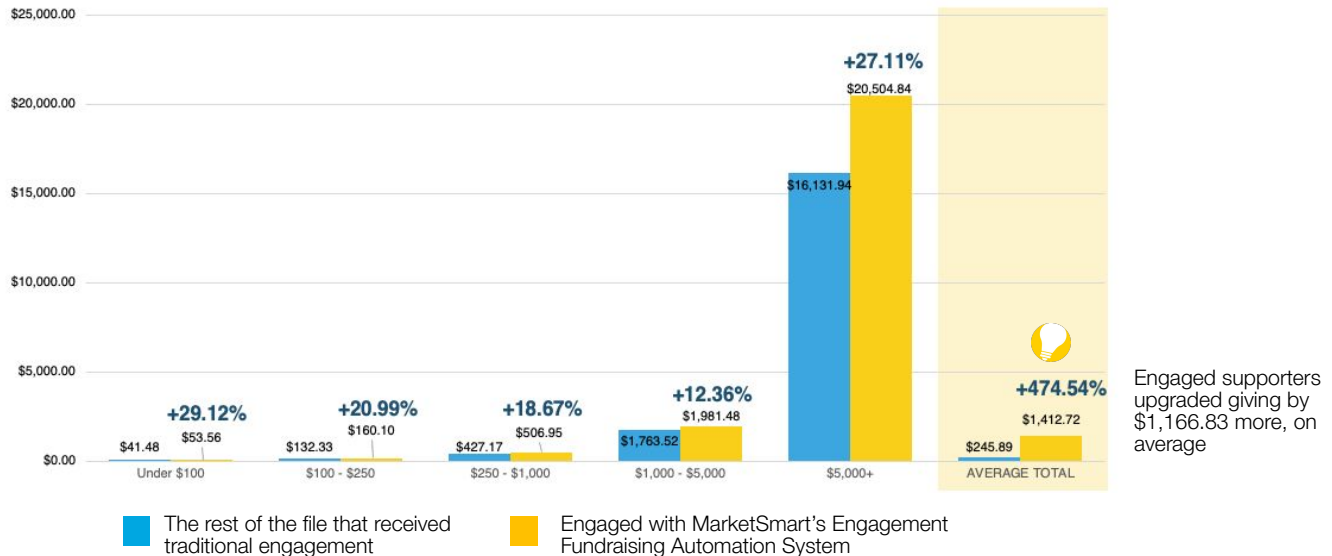


Engaged supporters gave \$12,089.65 more, on average

**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 \$

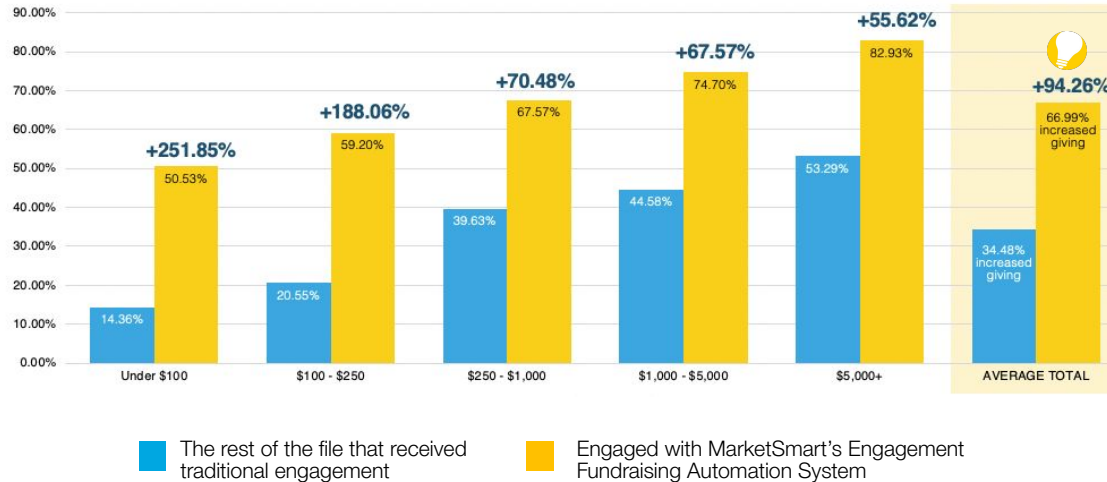
## Upgrading: Average Annual Giving Increases



**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

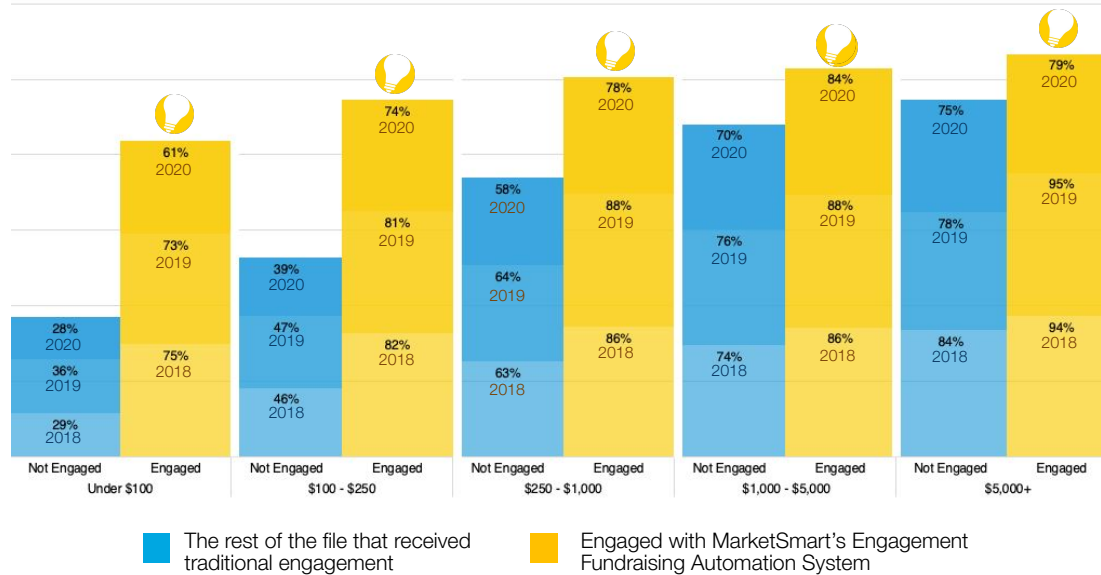


Engaged supporters upgraded their giving at almost double the rate of the rest of the file, on average

**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.**

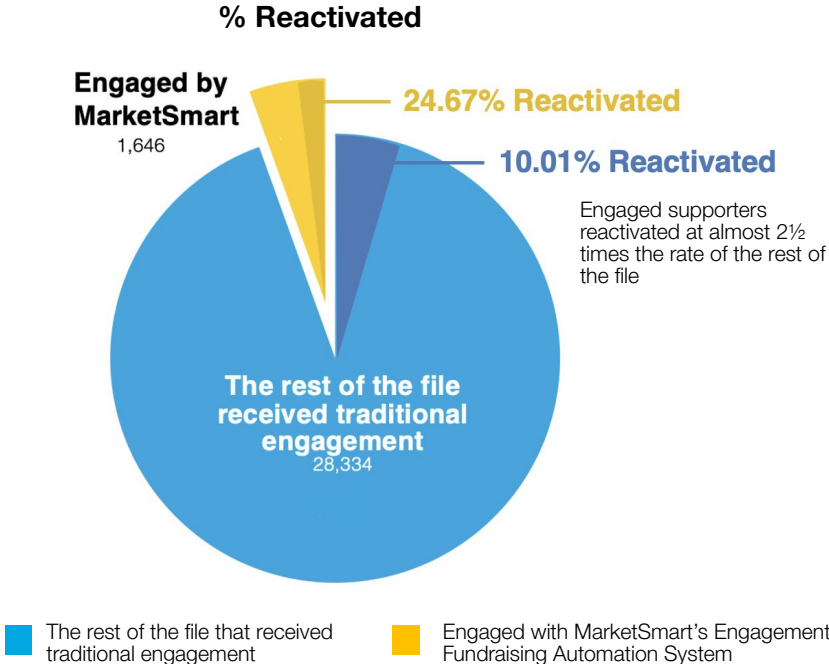
# MULTI-YEAR RETENTION

## 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 %

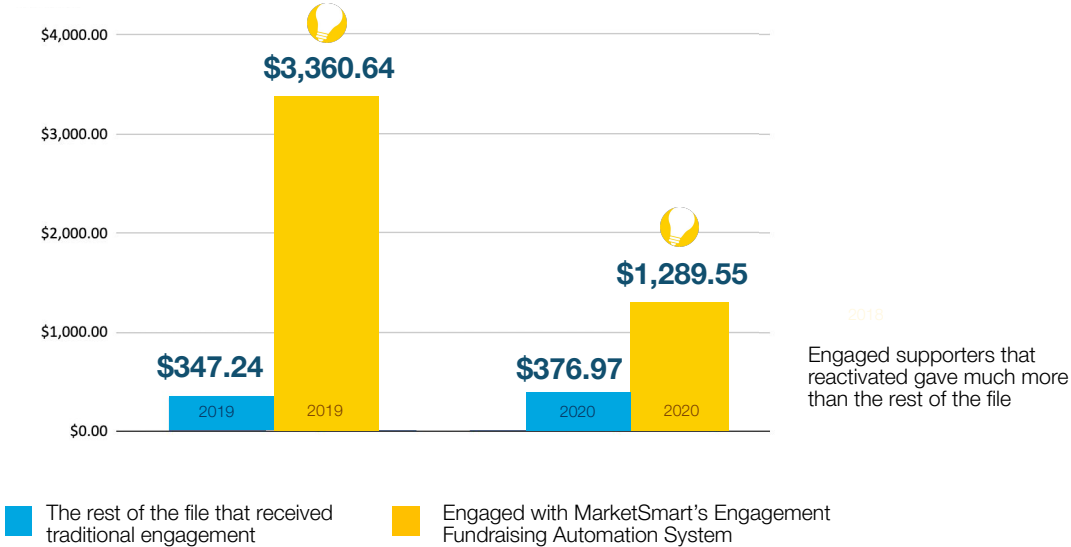


Individuals engaged by MarketSmart's Engagement Fundraising System **reactivated their giving at a higher percentage** compared to the individuals in the rest of the file.



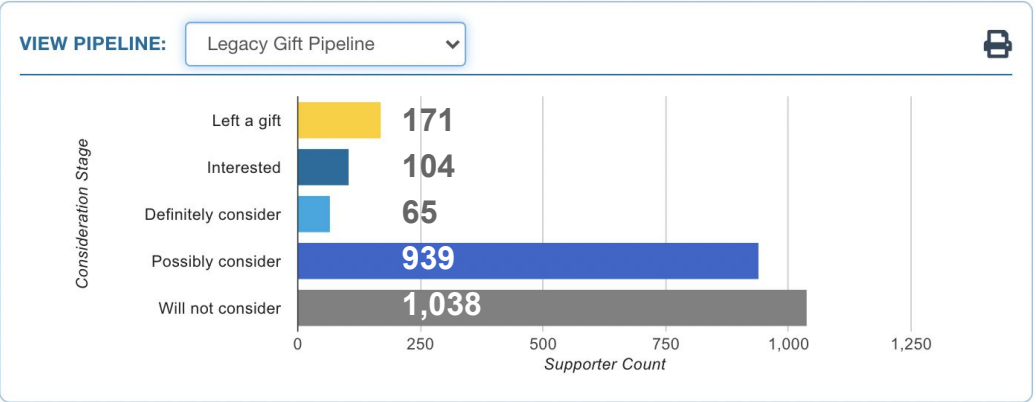
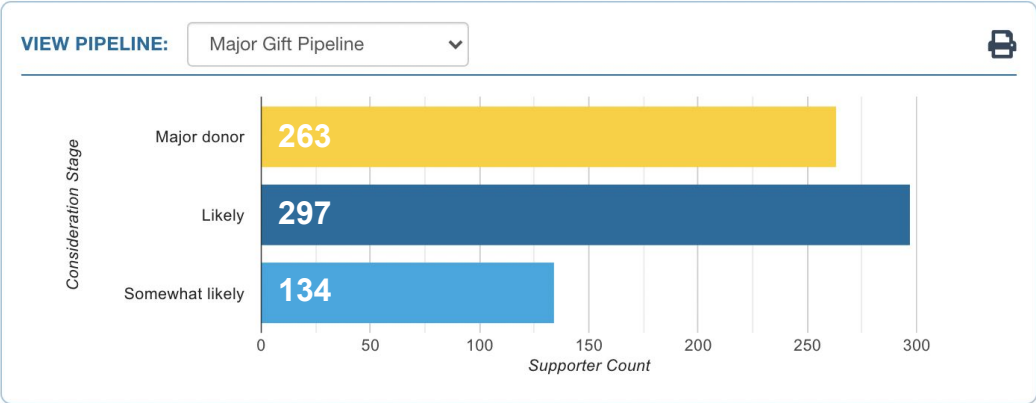
# REACTIVATION \$

### 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.

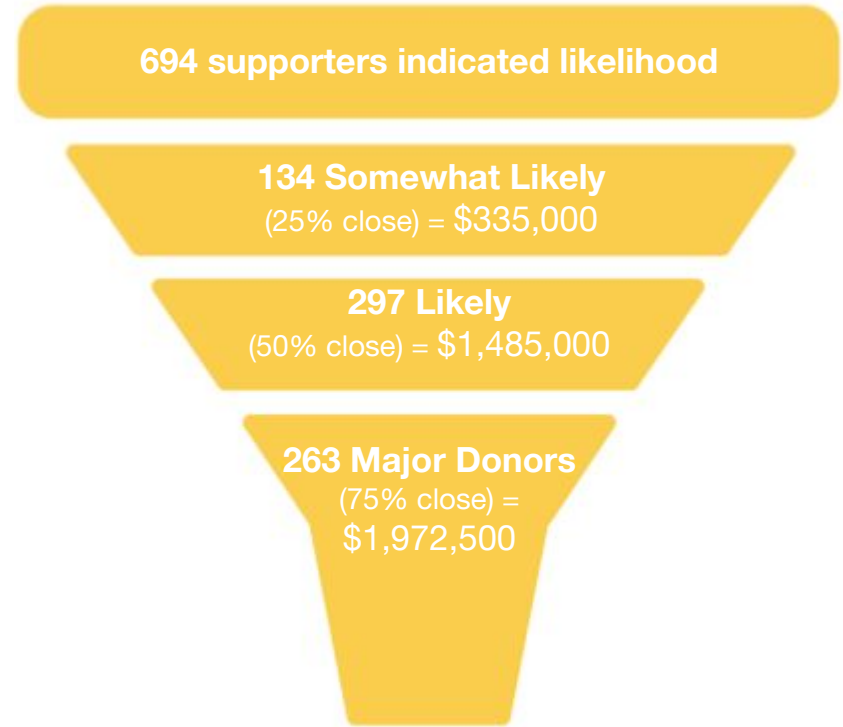
# PIPELINE



# PIPELINE

## Major Giving Potential

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



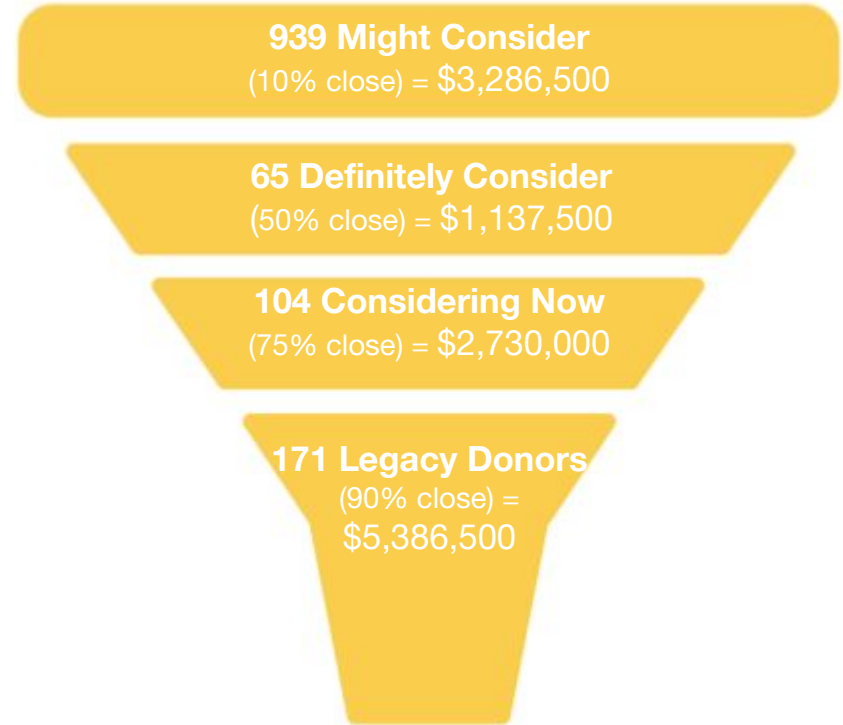


# PIPELINE

## 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

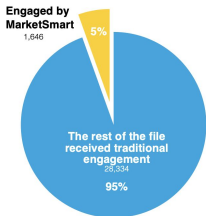
Potential planned giving funnel revenues if closed = \$12,540,500

## 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



YOUR FEEDBACK HELPS  
US IMPROVE FOR YOU

# ABOUT US

Turnkey, 'done-for-you'  
fundraising automation



[imarketsmart.com](http://imarketsmart.com)

“Warm up the unassigned  
for outreach.”

# A PROVEN SYSTEM

## Start with a SURVEY



Online landing pages



Online opt-in forms  
or surveys

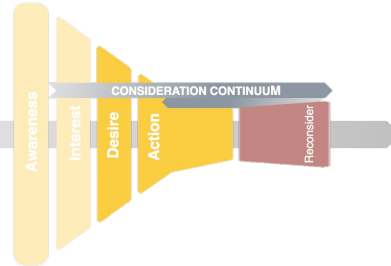
Tech-enabled donor  
discovery at scale

## 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

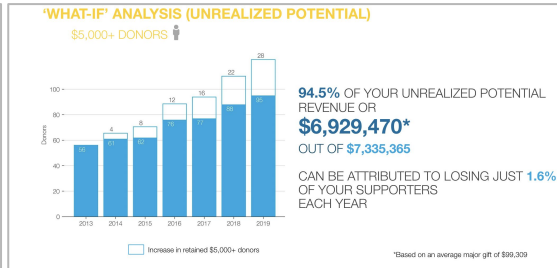
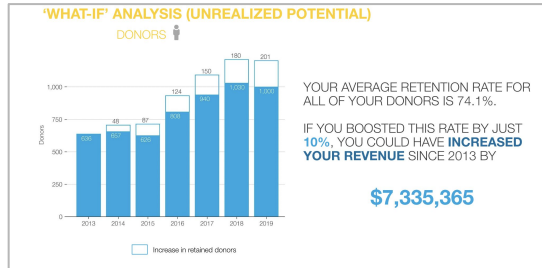
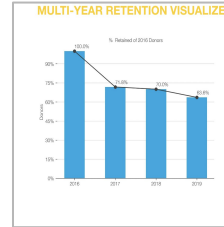
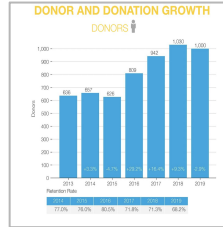
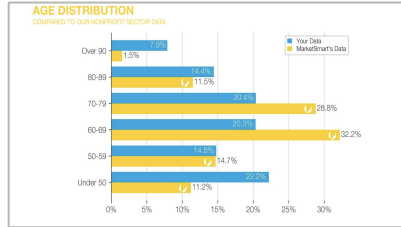
Predictions for success in  
association with available  
media channels





# 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.



# QUESTIONS?



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