

Opportunity Analysis Data Collection Guide

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The Opportunity Analysis helped bring our staff, leadership, and board members together around a solution to one of our key challenges - raising more major and legacy gifts in a cost-efficient way.

KRISTEN BIGHAM

JOFFREY ★ BALLET
CHICAGO



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Hello.

Your organization is considering an alliance with MarketSmart—the donor-driven system that helps fundraisers connect with the right people at the right time.

To help you and your colleagues make the right decision for your organization, we are providing an Opportunity Analysis.

This will help you determine, as a team, if our fundraising platform and 10:1 ROI guarantee are a good fit for your organization.

Our team will be running your donor data through a special algorithm to project your organization's potential fundraising growth after implementing our system. This analysis is completely secure and we only need anonymous giving data, not any personally identifiable information.

By providing this information, you're helping your organization make an informed decision about a partnership that could significantly boost your fundraising efforts.

We appreciate your time and cooperation!



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

SCOTT TALBOT



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1 Upload One File +

Please upload a **single .csv file** containing gift records from the **past 5-8 years**.

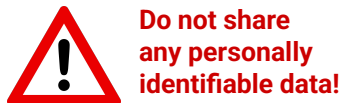
5 years = Minimum; 8 years = Maximum

Required data:

- **Donor IDs:** Your unique donor identifiers
- **Gift Date:** Date of donation; we accept all numeric date formats
- **Gift Amount:** Amount of donation; e.g., \$1,000 or 1000. **Do not include gifts under \$1**
- **Email on file:** Donor has a valid email on file; we accept Y/N, Yes/No, True/False, T/F, or 1/0
- **Address on file:** Donor has a valid physical address on file; we accept Y/N, Yes/No, True/False, T/F, or 1/0

Optional data:

- **Age:** We accept age or can calculate age based on a birth year (YYYY) or date of birth
- **Do Not Solicit Email:** Donor should not receive emailed marketing; we accept Y/N, Yes/No, True/False, T/F, or 1/0
- **Legacy Society:** Donor has disclosed a planned; we accept Y/N, Yes/No, True/False, T/F, or 1/0
- **Managed Prospect:** Donor is assigned to a gift officer; we accept Y/N, Yes/No, True/False, T/F, or 1/0



2 Send One Email

Since giving tends to grow with age, tell us how many **non-donors over the age of 40* you can reach via email**.

These non-donors must have **no giving history** and a **valid email address**.

No age on record? To ensure that they are likely to be over the age of 40, include any non-donors that have been in your database for **at least 10 years**.

No .csv file is needed.



Do not share any personally identifiable data!

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Sample Data Structure

Upload .csv file

We encourage you to provide as many of these data points as possible to help us deliver the most comprehensive picture of your fundraising potential possible.

This donor has multiple gift records

| Donor ID | Gift Date | Gift Amount | Email on File | Address on File | Age | DNS Email | Legacy Society | Managed Prospect |
|----------|------------|-------------|---------------|-----------------|-----|-----------|----------------|------------------|
| A23849 | 12/02/2015 | 1000 | N | Y | 80 | N | Y | Y |
| A23849 | 03/12/2018 | 250 | N | Y | 80 | N | Y | Y |
| A23849 | 07/05/2020 | 3500 | N | Y | 80 | N | Y | Y |
| B34560 | 04/01/2019 | 50 | Y | Y | 35 | N | N | N |
| C38293 | 06/20/2020 | 4300 | Y | Y | 72 | N | N | Y |
| D09990 | 01/03/2019 | 1200 | Y | N | 65 | N | N | N |
| D09990 | 01/04/2020 | 1200 | Y | Y | 65 | N | N | N |
| E283947 | 08/03/2017 | 350 | N | Y | 40 | Y | N | N |

Join the countless nonprofits that have optimized their operations with our Engagement Fundraising System



Contact us

We'll share more testimonials or connect you with our customers



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When you break down the cost compared to the return on investment, working with MarketSmart is a no-brainer.

CHRISTOPHER DUKES

