

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


DALLAS SEMINARY
FOUNDATION

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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



Do not share any personally identifiable data!

Completed transactions only (exclude future pledges).

Individual giving history only (exclude corporate gifts or grants).

Living individuals only.

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!

Living individuals only.

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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



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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

 **Providence**

