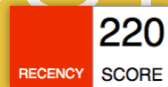


MORE GIFTS LESS WORK LESS COST



The **ultimate** donor prospect qualification, **cultivation and stewardship system** is finally here.

For major and planned gifts



market  smart

We do the marketing. You get the results.

Major & planned gift marketing challenges

Lack of **time**

Not enough **staff**

Tight **budgets**

Travel is time-consuming and expensive

Qualifying prospects is very difficult

Getting an appointment is nearly impossible



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

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








Overcome your marketing challenges

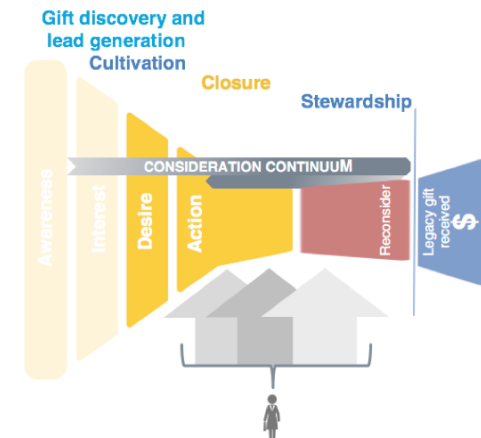




Overcome your marketing challenges

Simple 5-part **strategy**

- 1. Generate leads** 
Get people into the funnel
- 2. Qualify the leads** 
Instantly score and rank them
- 3. Prioritize for outreach** 
Based on capacity & affinity
- 4. Reach out** 
Call and visit with 'outreach ready' leads
- 5. Cultivate the rest** 
Nurture relationships with the others



Put your fundraisers in a position to succeed.

Give them highly qualified leads so they can do what they do best as the other prospects get nurtured automatically.





Overcome your marketing challenges

Return on investment from this strategy

Immediate ROI

10:1

Lifetime value ROI

100:1

No other fundraising initiative comes close



Direct mail acquisition ROI = 1.25 :1
Events/benefits/galas ROI = 2:1

Source: Association of Fundraising Professionals

Proof that it works

PROOF



Proof that it works

PROOF



“

We received a **\$50,000 cash donation immediately.**”



Jill Shapiro Miller
Vice President
Diabetes Research Institute Foundation



Proof that it works

PROOF



“

I called one of the leads today and **wound up closing a \$15,000 CGA** on the phone.

Your system of lead generation, qualification and prioritization **really works!**”



Brian Peterson
Human Rights Watch



Proof that it works

PROOF



“**We’re ecstatic!** We usually receive 2 or 3 DAF gifts each year. But right after the survey we got **10 totaling almost \$15,000** and we haven’t even picked up the phone yet.”



David Bobbitt
President of The SCORE Foundation
Vice President of SCORE Association



Proof that it works

PROOF



“

With your program **we doubled our results at half the cost.**”



Glen Belden
Food for the Poor



Proof that it works



“

Launching a single MarketSmart digital [campaign] led to a **33% growth of our legacy giving program** in one year!”

Ziba Marashia
Director of Major and Legacy Gifts
California State Parks Foundation



Proof that it works



“ Just got an email from someone who **disclosed a planned gift** from the survey last fall. I've been stewarding him since and he's **changing his plans again to leave us EVERYTHING and just sent \$2,000** (he was a \$100 donor).”

Tracy Malloy-Curtis
Former Director of Gift Planning
International Planned Parenthood
Western Hemisphere Region



Now, Account Director
Mal Warwick DonorDigital



Proof that it works

PROOF



“

My thanks to you and your team for your **unorthodox approach**. It's refreshing and, most important, **leads to results**”

Rick Scott
Vice President
Presbyterian Healthcare Foundation

 **PRESBYTERIAN**
Healthcare Foundation



Some other happy customers



Tactics



Tactics



Our process

1. **Generate leads** – Get people into the funnel
2. **Qualify the leads** – Instantly score and rank them
3. **Prioritize for outreach** – Based on capacity & affinity
4. **Reach out** – Call and visit with 'outreach ready' leads

Start with a donor survey



Online landing pages



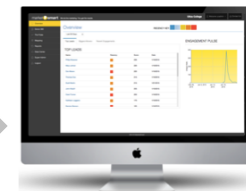
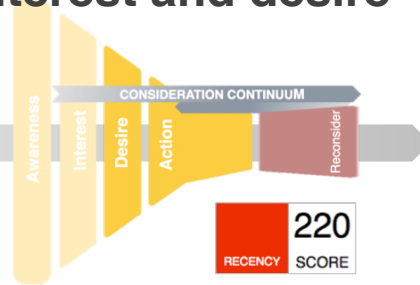
Online opt-in forms or surveys



Nurture the relationships and drive engagement with **automated emails**

5. **Cultivate the rest** – Nurture relationships with the others

Engagement builds interest and desire



Prioritize your outreach with the actionable data in our dashboard



Tactics

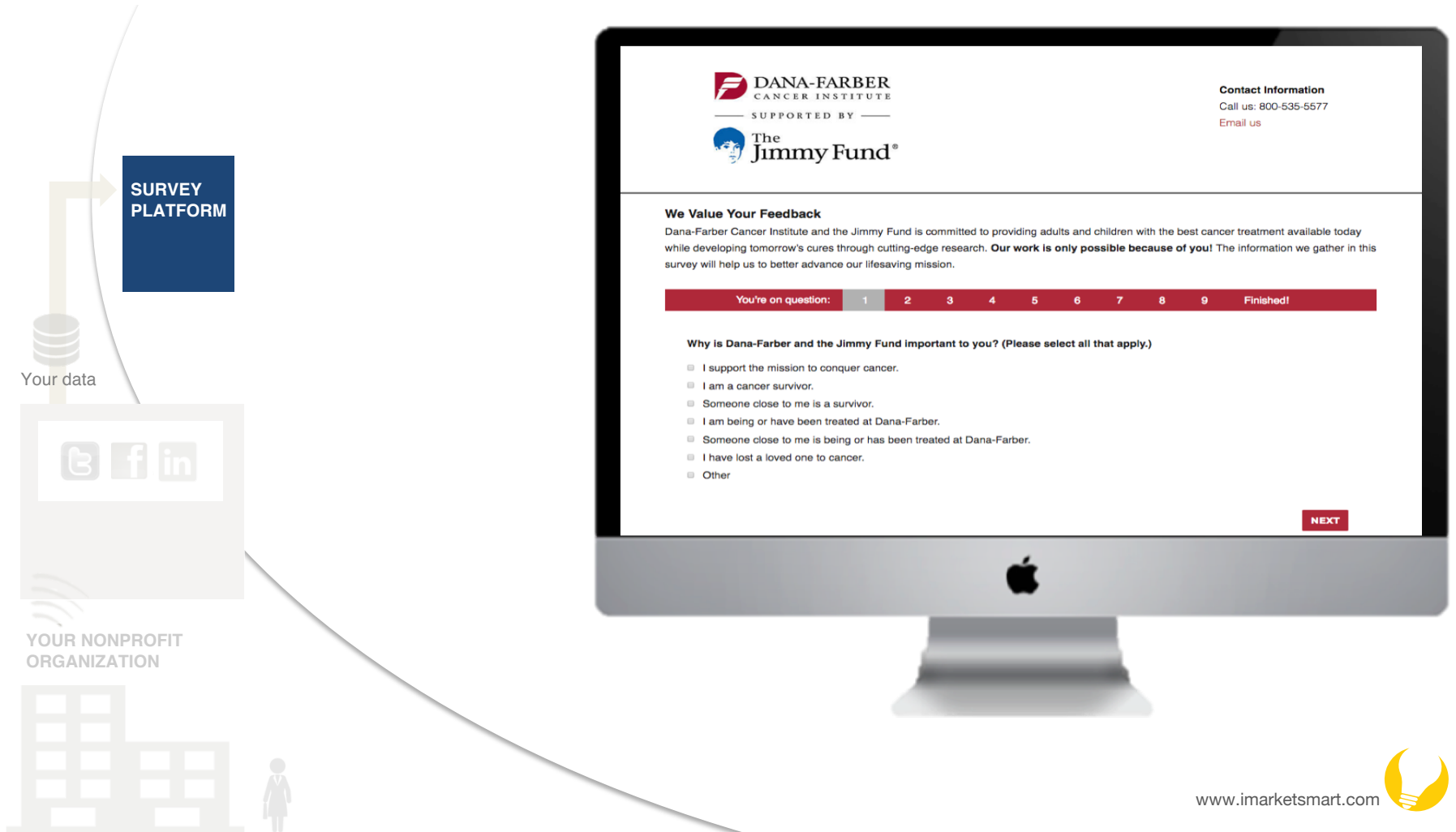
We operate outside of your existing communications



Tactics



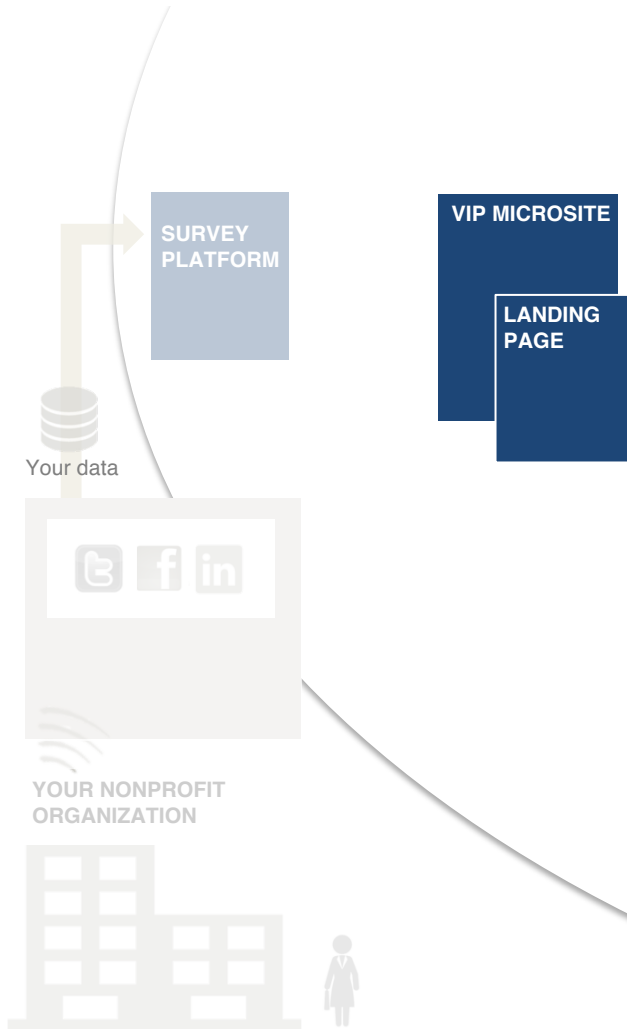
We operate outside of your existing communications



Tactics



We operate outside of your existing communications



Tactics



We operate outside of your existing communications



Tactics



You get:

1. Major and legacy gift **lead generation & legacy gift discovery**
2. Instant **scoring/prioritization** to help you determine who's ready
3. Automated **“drip” cultivation** for leads that aren't ready and mid-level migration
4. Dashboard **reporting** so you can see it working in real-time
5. Valuable information about donors **you simply cannot buy**

Tactics



Plus:

1. You get to see **your entire potential pipeline** easily
2. Supporters who don't want to meet **give by mail, online or with their DAF account**
3. The automated emails and microsite pages help you **see when they are ready**
4. Legacy supporters sometimes **disclose giving vehicles and amounts online**
5. Legacy donors also increase their annual fund giving by **+75%* on average**
6. 7% of respondents **update their contact information** (they update your list for you)
7. Many direct mail donors take the survey online and **give us their email addresses**

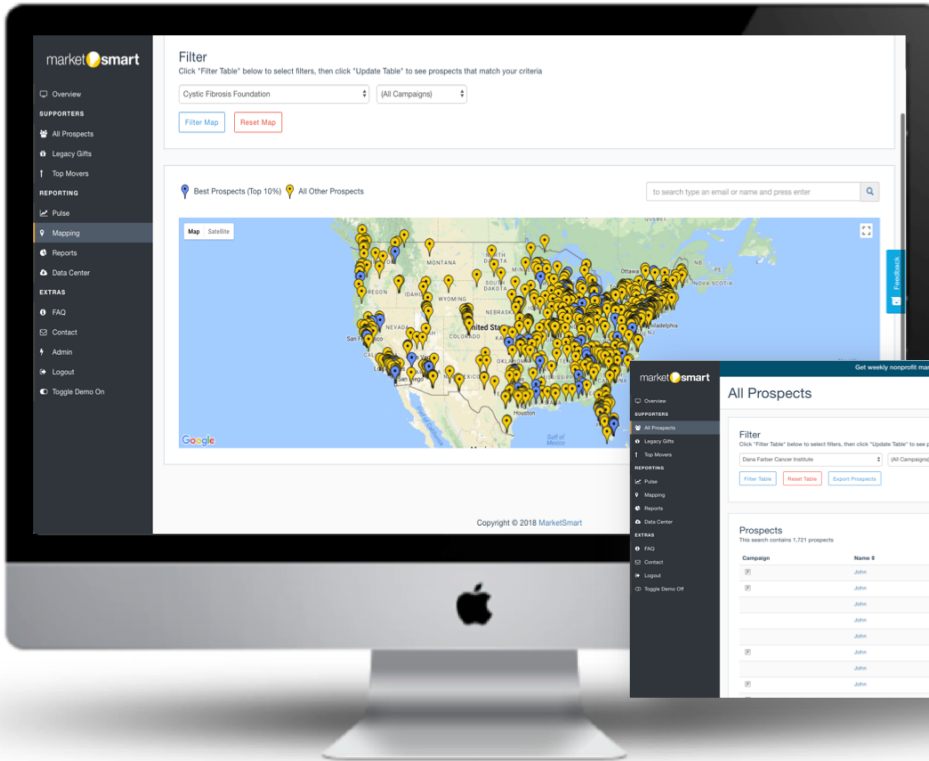
* According to Dr. Russell James' review of 20+ year federally funded longitudinal study begun in 1992 and managed by the National Institute on Aging



Reporting

Reporting

985

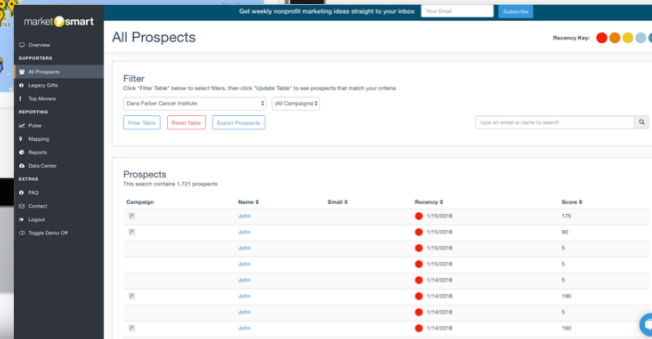


Michael's **click history**:

11/12/12	25	Referred from Facebook, visited website
	25	Clicked on video about mission
	75	Spent 3:15 online
1/30/13	25	Downloaded annual report
	150	Clicked on bequest language
	150	Forwarded bequest language
	150	Downloaded report- How to create a will
2/09/13	50	Google searched for "cure" and found your website
	125	Spent 6:18 online
2/14/13	150	Visited your website and clicked on Contact Us page

Engagement tracking:

- ✓ Who
- ✓ Where
- ✓ When
- ✓ What
- ✓ Frequency
- ✓ Duration
- ✓ And more





Value proposition





Value proposition



Zero-in on your **best prospects**

Be more **efficient**

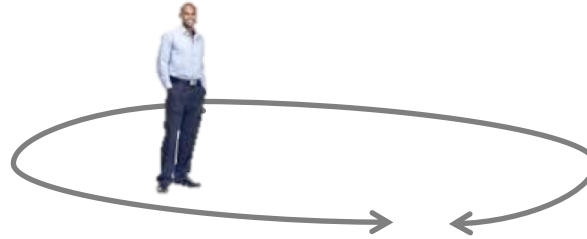
Be more **effective**

Close more gifts— **faster and at less cost**



Value proposition

985



Get a 360° view of each donor

Capture data you cannot buy

Value proposition

Understand each prospect's **passion & interests**

250



375



125



525



985



150



200



425

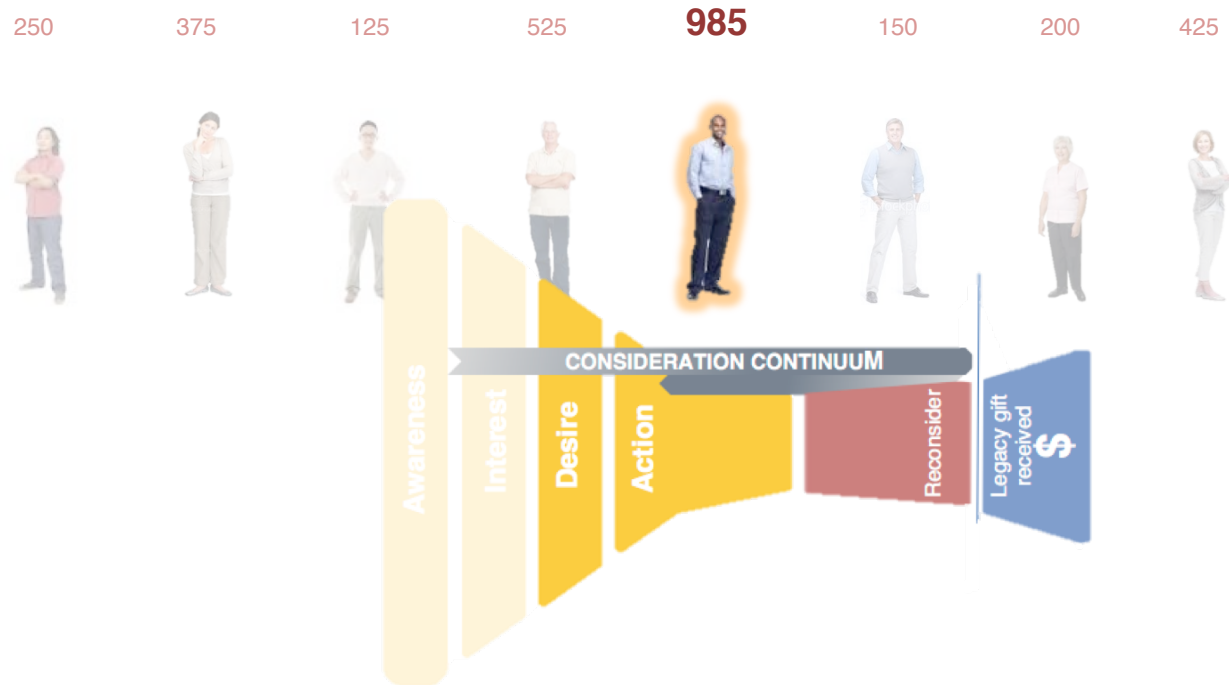


Michael:

Interested. Engaged. Educated.
Passionate about your mission.
Wants to help.

Value proposition

Learn where each donor resides in the **consideration process**





Value proposition

985



Be more focused

Better **profile information** helps you have more meaningful **conversations**

So you close gifts— more efficiently

Value proposition

985



Be more donor-centric

Reach out when Michael is **ready**

11/12/16	25	Referred from Facebook, visited website
	25	Clicked on video about mission
	75	Spent 3:15 online
1/30/17	25	Downloaded annual report
	150	Clicked on bequest language
	150	Forwarded bequest language
	150	Downloaded report- How to create a will
2/08/17	50	Google searched for "cure" and found your website
	125	Spent 6:18 online
2/14/17	150	Visited your website and clicked on Contact Us page



Value proposition



Combat donor overhead concerns

More efficient marketing means
more money will support the mission

After all, isn't that what your donors want?



Value proposition

Effortlessly cultivate relationships and **build trust**

250



375



125



525



985



150



200



425





Value proposition

Multiply your staff's effectiveness



Help one fundraiser perform like nine

Value proposition

Ensure continuity in the event of staff turnover



Automated cultivation helps keep donor prospects engaged when staffing issues arise



Value proposition

Attract and hire top-notch fundraisers



The best fundraisers prefer to work for organizations that support them with highly qualified leads



A blue icon consisting of a semi-circle with radiating lines above a horizontal line with an upward-pointing arrow.

Value proposition

Win praise



Some of our customers have even received raises and promotions after using our system

Results

Results

Email-only major gift survey campaign for a famous museum in Washington D.C.

4,000 emails to major donors

164 responses (4.1% response rate)

Respondents' ages

18.2% **OVER 80**

40.8% **OVER 70**

75.4% **OVER 60**

87.3% **OVER 50**

3 stated they were interested in **making a legacy gift**

16 stated they were interested in **talking face to face or on the phone** with a gift officer

10 stated they were interested giving through a **donor advised fund**

10 stated they were interested giving through a **family foundation or trust**

10 stated they were interested giving **property**

20 stated they were interested giving **assets**

7 stated they were willing to **make a personal introduction** to a friend with similar interests



Results

Email-only major gift survey campaign for a national **animal welfare organization**

10,000 emails to major donors

.....

1,252 responses (12.5% response rate)

.....



257 stated they would consider giving through a **donor advised fund or family trust**

17 clicked on a button for giving via **donor advised fund**

66 clicked to **give online (\$31,000+ raised)**

Hundreds of high quality major gift opportunities generated

33 downloaded information about **planned giving**

5 emailed **bequest language** to an advisor

66 previously **“hidden” or “undisclosed” legacy gifts found**

38 said they were **interested in learning more about planned giving**

Budgeting

Budgeting

Engagement Systems

SYSTEM CORE



Engagement Efforts

EFFORT MENU



Engagement Offers

OFFER MENU

Major and/or legacy gift focus

- o Survey report
- o How do you want to change the world? Your guide for impactful generosity
- o How to give strategically
- o How to talk to family about philanthropy
- o How to find meaning through giving back
- o Finding meaning through giving: A guide for couples
- o CGA FAQ
- o Codicil FAQ
- o Rollover IRA FAQ
- o Sample bequest and beneficiary language sheet
- o Mini-annual report

Infographics

- o Your gifts in action infographic
- o What we did with your donations

Legacy gift focus

- o Getting started
- o Getting organized
- o All about trusts
- o How to create or update a will or trust
- o How to leave gifts of insurance policies or retirement plans
- o Fundamentals of wills and trusts
- o Choosing an estate planning professional
- o Choosing your executor or trustee
- o Creating a plan for your online accounts
- o Easy ways to leave a legacy
- o Make a gift and receive lifetime income in return
- o Gifts that pay you income
- o Ways to give and save
- o Planning with parents in mind
- o Tough conversations
- o Taking control
- o Your will planning toolkit
- o Legacy journal workbook for memoir-maker effort

* All prices are subject to change at any time.



Pilot Package



Survey system

1 survey engagement effort

4 cultivation “drips”



Starting at
\$15,000

Print creative, printing, mailing & postage not included but available

Also ask about:

ENTERPRISE solutions **CUSTOM integrations** **agency services**

Starter Package



Core engagement system



1 survey engagement effort

6 cultivation “drips”



One-time initiation
\$15,000
+ \$3,000/month

Smart Package

MOST POPULAR



Core engagement system



1 survey engagement effort

+

2 more engagement efforts

Ongoing cultivation “drips”



One-time initiation
\$20,000
+ \$6,000/month
3% off if prepaid yearly

Robust Package



Core engagement system



1 survey engagement effort

+

4 more engagement efforts

Ongoing cultivation “drips”



One-time initiation
\$20,000
+ \$8,000/month
5% off if pre-paid yearly

* All prices are subject to change at any time.

Get ready for success

Turn-key system

Outsource your marketing headaches Improve your results For less

You get:

- Strategists
- Copy writers
- Designers
- Technologists
- Web coders
- Project managers
- Project coordinators
- And more



All you need to do is review and approve:

- Copy
- Design

Then you'll have more time to do what you do best:

- Build relationships
- Close gifts



Everyone wins

Your **donors** will be happy

Your **board members** will be happy

Your **staff** will be energized

Your **organization** will
shore up its endowment

Your **revenue**
will increase



At last...

SUPPORT FOR GIFT OFFICERS WHERE THEY NEED IT MOST



Donor-centric fundraising for
donors who deserve it most



**Give your staff the tools
they need to succeed, save
money and improve results.**

Need more information?
Please don't hesitate to contact me.

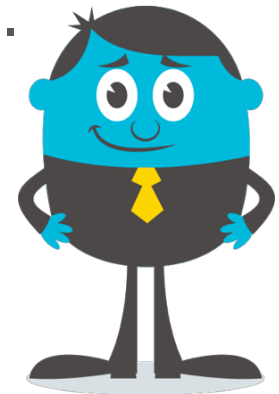
.....
Greg Warner
CEO and Founder
301-289-3670, ext. 174
gwarner@imarketsmart.com



Thank you for considering market  smart.

more major gifts more easily for **less**

The **ultimate**
donor prospect qualification,
cultivation and stewardship
system is finally here.



market  smart

www.imarketsmart.com