



FEATURING

MARKETSMART FOUNDER & CEO - GREG WARNER

INSIDER PRESENTATION

How to **grow your consulting practice, smooth-out income peaks & valleys, and build residual income streams**

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INSIDER PRESENTATION

HOW TO GROW YOUR CONSULTING PRACTICE

MARKETING FOUNDATION



FEATURES

- ✓ Experience
- ✓ Certifications
- ✓ Advanced degrees
- ✓ Honors / awards
- ✓ Etc.

BENEFITS

- ✓ Raise more money
- ✓ Build better board
- ✓ Improve retention
- ✓ Grow major gifts
- ✓ Etc.

- Develop your case
 - Why hire you?
 - What is your niche?
 - Features + Benefits = Value

- Gather testimonials (social proof)

- Produce case studies (feature results)

- Get a database – build a list
 - Export LinkedIn contact emails & personal emails (i.e.- Gmail contacts)

- Establish social media presence

- Get a web site & landing page

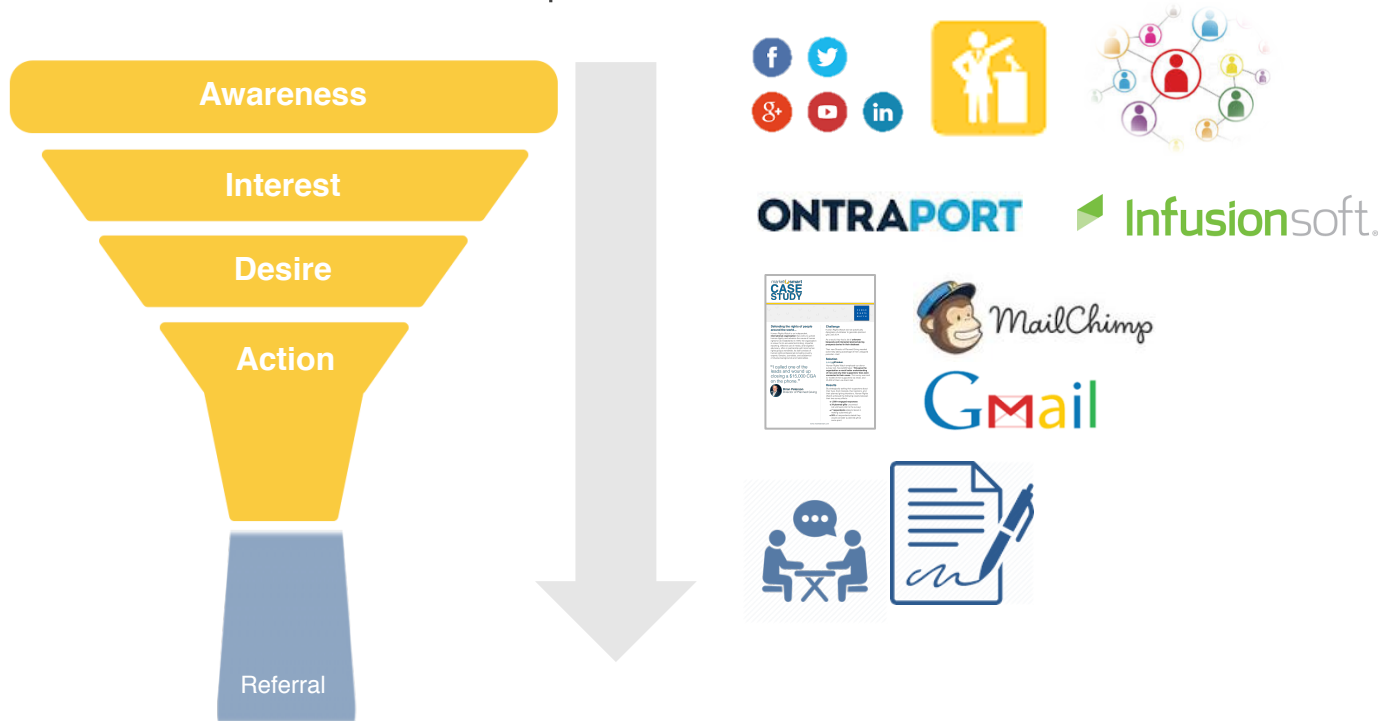
- Email tool

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HOW TO GROW YOUR CONSULTING PRACTICE

UNDERSTAND

- ✓ Your marketing funnel
- ✓ Your client's consideration process



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HOW TO GROW YOUR CONSULTING PRACTICE

GIVE BEFORE YOU RECEIVE TO BUILD AWARENESS AND TRUST

LAW OF RECIPROCITY

- ✓ Give until it hurts
- ✓ Give with no expectations
- ✓ Give so they feel guilty 😊



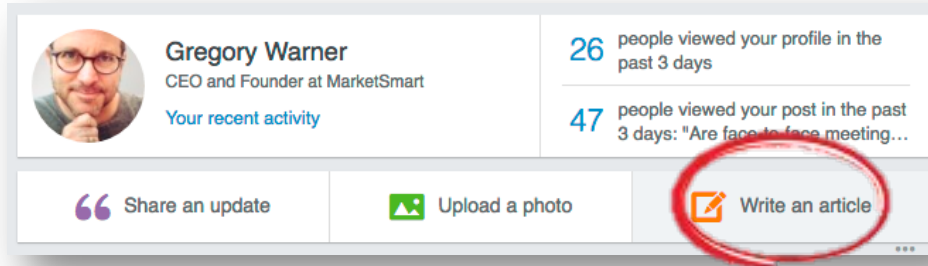
INSIDER PRESENTATION

HOW TO GROW YOUR CONSULTING PRACTICE

GIVE BEFORE YOU RECEIVE TO BUILD AWARENESS AND TRUST

CREATE CONTENT

- ✓ Blog
- ✓ Post on LinkedIn
- ✓ Create reports



What's the one thing you know better than anyone?

17 awful mistakes
almost every
nonprofit board
makes and how to
avoid them

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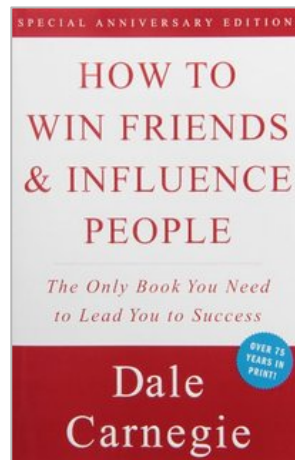
HOW TO GROW YOUR CONSULTING PRACTICE

GIVE BEFORE YOU RECEIVE TO BUILD AWARENESS AND TRUST

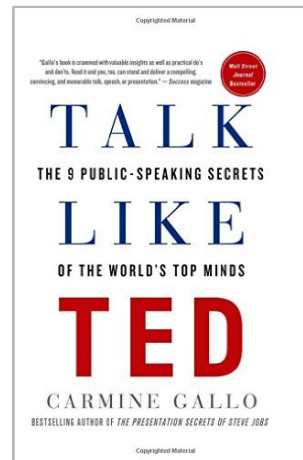
Engage on social media

Share your experience for free

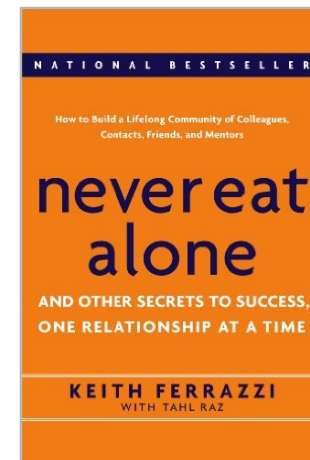
- ✓ Be nice
- ✓ Don't be creepy
- ✓ Like people
- ✓ Drive back to your content



Speak at events



Network



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HOW TO GROW YOUR CONSULTING PRACTICE

GAIN REFERRALS

1. Be awesome!
 - ✓ Do great work!
 - ✓ Get results!
 - ✓ Do more than is expected (within reason)
 - ✓ Provide value
2. Make sure it's easy for people to contact you
 - ✓ Photo on LinkedIn
 - ✓ Phone # and/or form on web page
3. Ask!
4. Use a survey
 - ✓ Ask for feedback
 - ✓ Probe for opportunities
 - ✓ Ask for referrals
5. Look at who's connected to whom on LinkedIn... then ASK for an intro!
6. Enable sharing of your content
7. Thank your network (clients, friends, bloggers) by sending gifts!
8. Give referrals

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HOW TO GROW YOUR CONSULTING PRACTICE

GET YOUR FOOT IN THE DOOR

ASK ME ANYTHING

FREE 1-HOUR CONSULTATION

SELL AN AUDIT OR UP FRONT DISCOVERY

SMALL PROJECTS FIRST

SMOOTH OUT INCOME PEAKS AND VALLEYS

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SMOOTH OUT INCOME PEAKS AND VALLEYS

LUMPY REVENUE?

1. STRICT PAYMENT TERMS / BAN DORMANCY
2. RECOMMEND LONG-TERM PROJECT PLANS
3. PROVIDE VALUE NOT TIME (STOP COUNTING HOURS)
 - ✓ Sell retainer contracts
 - ✓ All you can eat/as needed retainers.... Less cost, more risk
 - ✓ Prove your value every month or quarter
4. ALLY WITH MARKETSMART

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FUNDRAISING
REPORT CARD 

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We do the marketing. You get the results.

BUILD RESIDUAL INCOME STREAMS

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BUILD RESIDUAL INCOME STREAMS

LUMPY REVENUE?

Seek out partner programs that pay



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BUILD RESIDUAL INCOME STREAMS

LUMPY REVENUE?

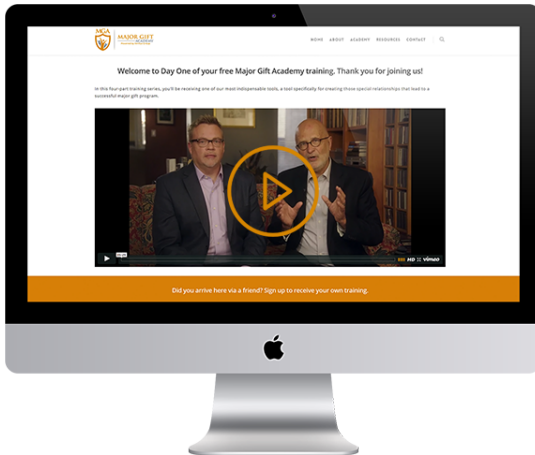
Sell stuff!



MAJOR GIFT
ACADEMY
Powered by Veritus Group



FIRE! UP FUNDRAISING™



Clairification
Philanthropy, Not Fundraising



[Thank You Calls E-Book + Script](#)

This practical book tells you everything you need to know about making dynamite donor thank you calls that increase donor loyalty. As a stand-alone piece, it's perfect for staff, Board and volunteers. In fact, it's a great introduction to getting on the phone and connecting directly with your supporters – a non-threatening way to introduce folks to fundraising.

You can [grab a "Bargain Bundle" of all six for just \\$106 – more than 30% less than buying them separately.](#) If you want the bundle bargain – all 6 donor retention road maps for one low price – click below.



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We do the marketing. You get the results.

BONUS

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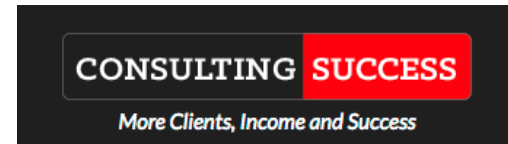
BONUS

- ❑ Client selection is key
 - ✓ Review your case
 - ✓ Make sure there's a fit
 - ✓ FIRE CLIENTS!



- ❑ Get a SCORE mentor

- ❑ Great websites/blogs for consultants



www.consultingsuccess.com

- ❑ Join APC or AFP Affinity Groups



Home > Event Calendar

AFP DC, Washington D.C. Metro Area Chapter: AFP DC Consultant's Affinity Group

July 23, 2014

Join us for

**AFP DC Consultant's Affinity Group
for a brown bag lunch**

March 21 - Meyer Foundation

May 16 - Foundation Center

July 23 - Meyer Foundation

September 19 - AWHONN

November 21 - AWHONN



We do the marketing. You get the results.

HOW MARKETSMART CAN HELP YOU

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HOW MARKETSMART CAN HELP YOU

1. WHY CONSULTANTS PARTNER WITH MARKETSMART
2. WHAT WE DO
3. HOW YOUR CLIENTS BENEFIT
4. HOW CONSULTANTS, NONPROFITS & MARKETSMART WIN TOGETHER

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HOW MARKETSMART CAN HELP YOU

Nonprofit

- ✓ Need major gift and planned gift lead generation
- ✓ Need to uncover hidden bequests
- ✓ Need to cultivate and steward supporters at low cost
- ✓ **RAISE MORE MONEY AT REDUCED COSTS**

MarketSmart

Consultant

- ✓ Software
- ✓ Technology-enabled services
- ✓ Marketing research
- ✓ Multi-channel engagement expertise
- ✓ Testing

- ✓ Grow their practices
- ✓ Stay on cutting edge
- ✓ Smooth-out lumpy contract work revenue
- ✓ Cinch-up long term projects
- ✓ Find ways to generate residual income

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HOW MARKETSMART CAN HELP YOU

 **DANGER**

Many “marketing/technology firms”
have consultants on staff



**We won't compete with you,
we'll help you win!**



GROW



LEVERAGE
TECHNOLOGY



GET
RESULTS



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We do the marketing. You get the results.



Free stuff

Paid stuff

CONTENT



WIDGETS & TOOLS

FUNDRAISING
REPORT CARD



SHAREABLES
ARCHIVE

PRODUCTS:

survey**giftmaker**
legacy**giftmaker**
major**giftmaker**
giftmaker+

SERVICES:

TARGETED
CULTIVATION
CAMPAIGNS



FUNDRAISING
REPORT CARD

FUNDRAISING REPORT CARD



Analytics & Insights for Nonprofits

Compelling charts. Actionable insights. **Free forever.**



www.fundraisingreportcard.com

How we help you and your clients

1. Zero-in on people who are ready to **engage with you now**
2. Cultivate **tons of prospects effortlessly**



How we help you and your clients

Here are the
traditional ways
to find out

Past giving
and affinity
history

Wealth &
demographic
screening

1. Who is ready to
engage with you now



But the traditional ways end up **creating** some **new challenges**:

“**OVERWHELMED** BY THE DATA”



“MOSTLY WENT **UNUSED**”



“DONORS WERE **NOT READY** TO MEET OR GIVE RIGHT NOW”



“**NEED MORE ACTIONABLE** INFORMATION ABOUT EACH PROSPECT”



You want to know You **need** to know

WHO

PHILANTHROPIC
CAPACITY

Past giving
and affinity
history

Wealth &
demographic
screening

360°
donor profile



Real-time online
engagement
tracking and
survey data

Lead
scoring

985

WHY

STORY
PASSIONS
INTERESTS
INFLUENCERS
HOT OR COLD?
ENGAGED OR NOT?
READY TO MEET?

MORE INFORMATION ABOUT PROSPECTS
MORE HIGHLY QUALIFIED LEADS
MORE MEANINGFUL MEETINGS

MORE MAJOR GIFTS
MORE EFFICIENTLY



1. Who is **ready** to engage **now** ?

“Actionable intelligence”



“Verbatims”
Self-reported
donor data

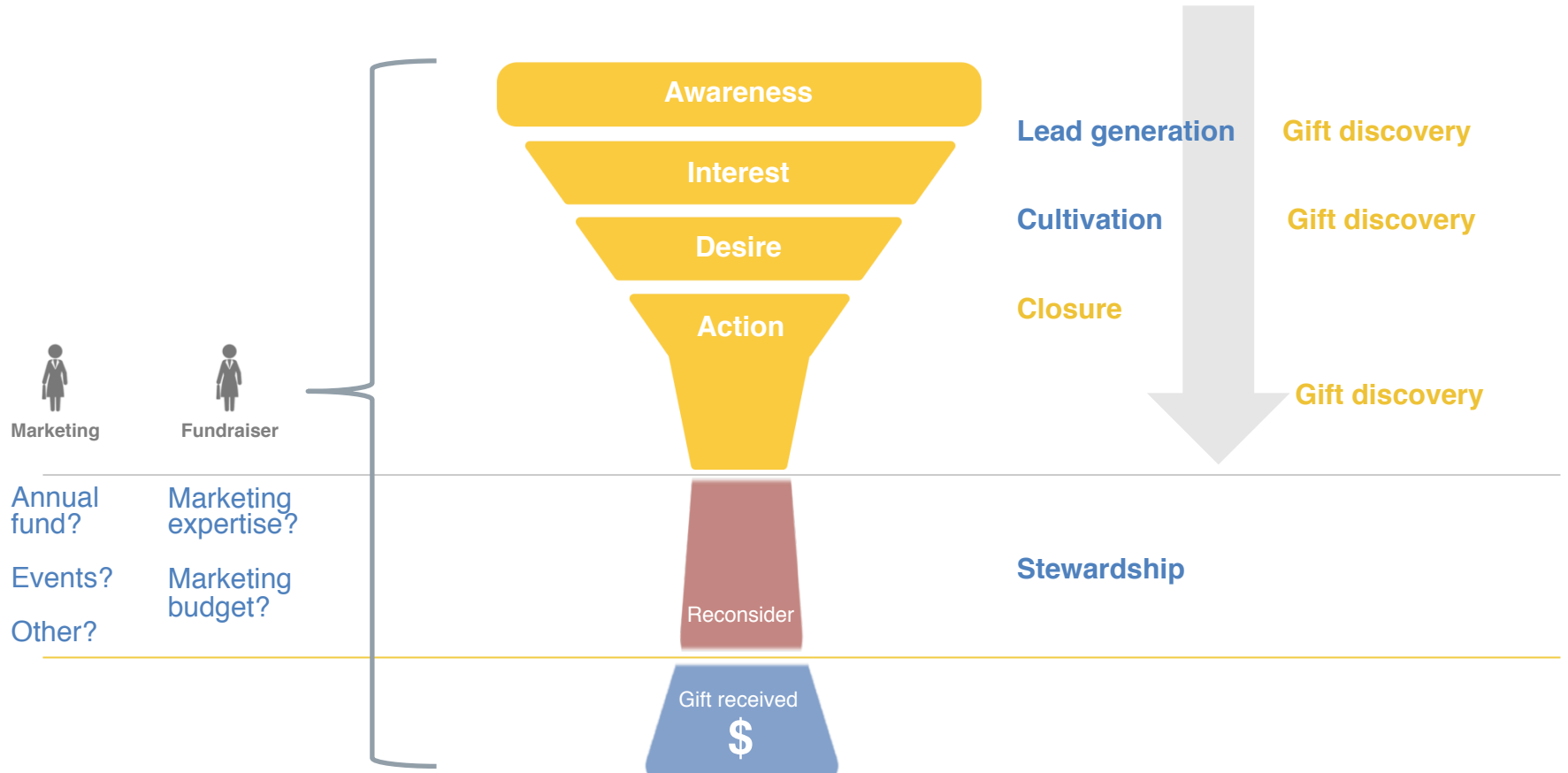


“Digital body language”
Tracked online &
email engagement

Better prospect qualification

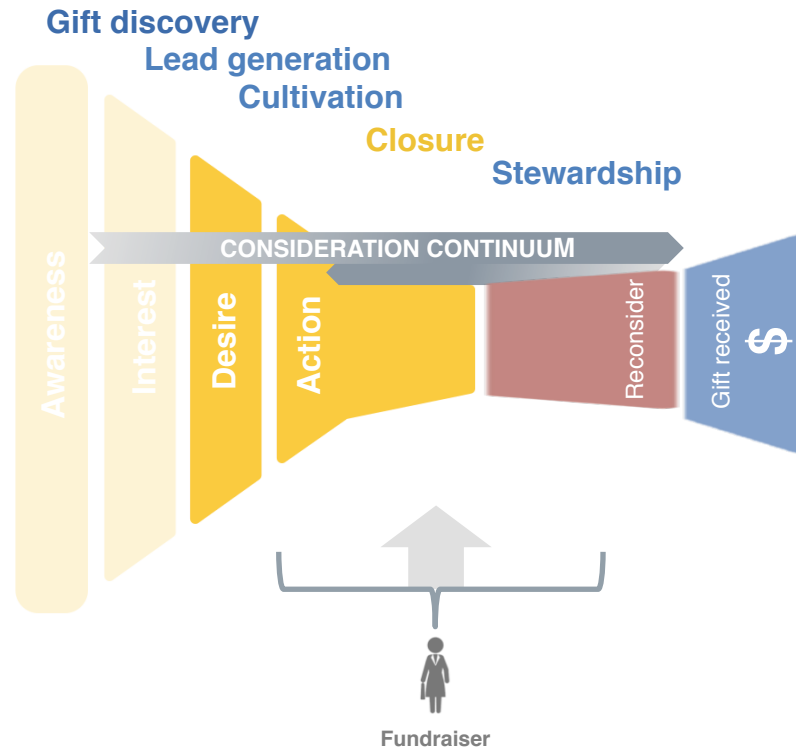


Major & legacy gift marketing basics



Major & legacy gift marketing basics

1. Who is ready to engage with you now
2. Cultivate tons of prospects effortlessly



Engagement Fundraising

Our process

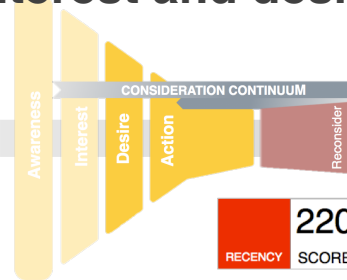
We usually start with a **donor survey**



Use the data to nurture the relationships and drive engagement with **automated emails and targeted “booster” campaigns**



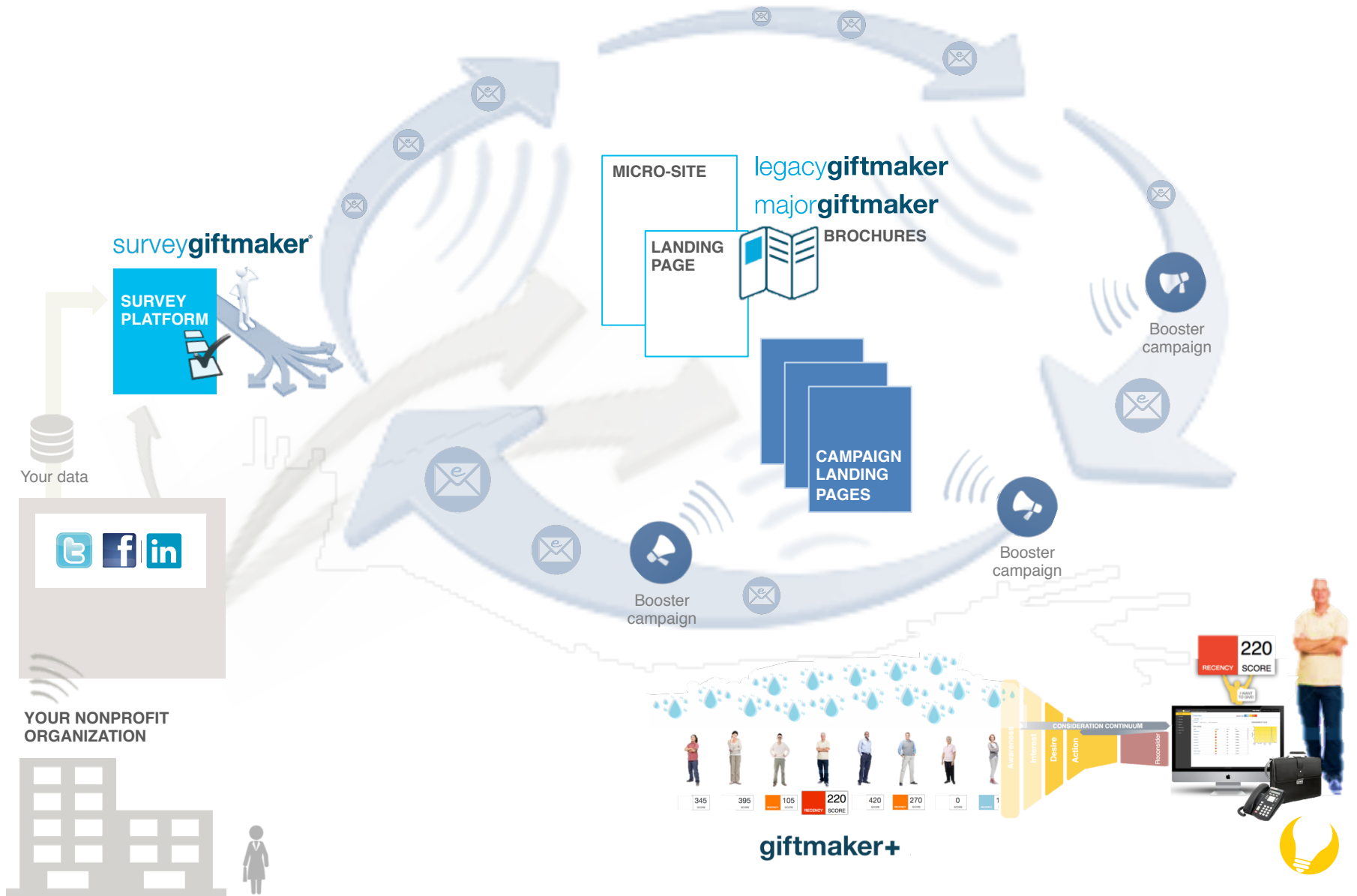
Engagement builds **interest and desire**



Prioritize your efforts thanks to the **actionable insights** found in your dashboard



Engagement Fundraising

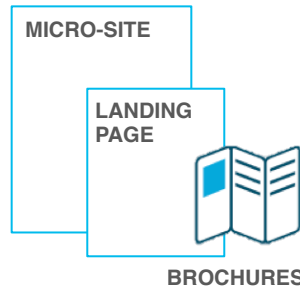


surveygiftmaker

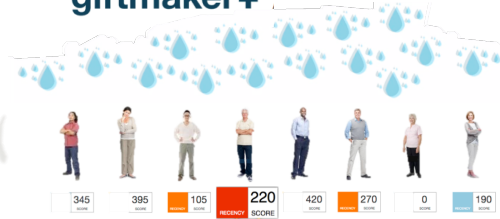


legacygiftmaker

majorgiftmaker



giftmaker+



BOOSTER CAMPAIGNS

CAMPAIGN LANDING PAGES

ESTATE PLANNING SERIES CAMPAIGN

V.I.P. BULLETINS
For stewards

Beneficiary Designation CAMPAIGN

CERTIFICATE CAMPAIGN
With survey

Postcards and ACKNOWLEDGMENT
Insert Cards

Planned Giving PRINT NEWSLETTER
with Online Complement

SOCIAL MEDIA Presence

Website POP-UPS

Banner and Retargeting ADS

Traditional ADVERTISEMENTS

Large Visual DISPLAYS

VIDEOS

Tell Your Story CAMPAIGN

ETHICAL WILL Campaign

Create Your AUTOBIOGRAPHY MEMOIR MAKER CAMPAIGN

Create Your LEGACY LETTER Campaign

VIDEO Campaign

FREE ESTATE PLANNING Information Offer

Blunt or Testimonial ASK

Charitable Gift Annuity CAMPAIGN
CGA

Door Opener CAMPAIGN

MEMORIAL or Tribute Campaign:
Buy a brick, Get a plaque, Support-a-garden, etc.

CHALLENGE CAMPAIGN

Leave Behind/ Fulfillment BROCHURES



Want to learn more?

Contact us anytime!

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www.imarketsmart.com