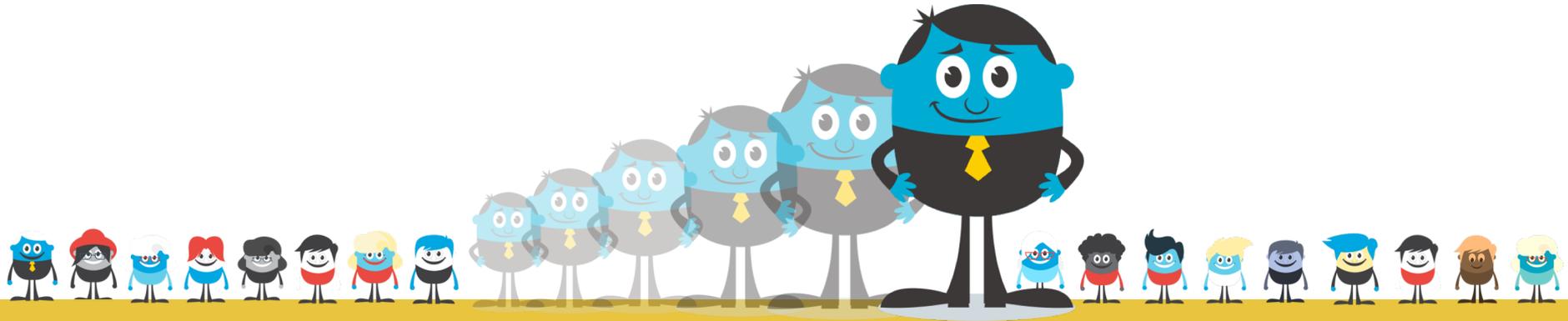
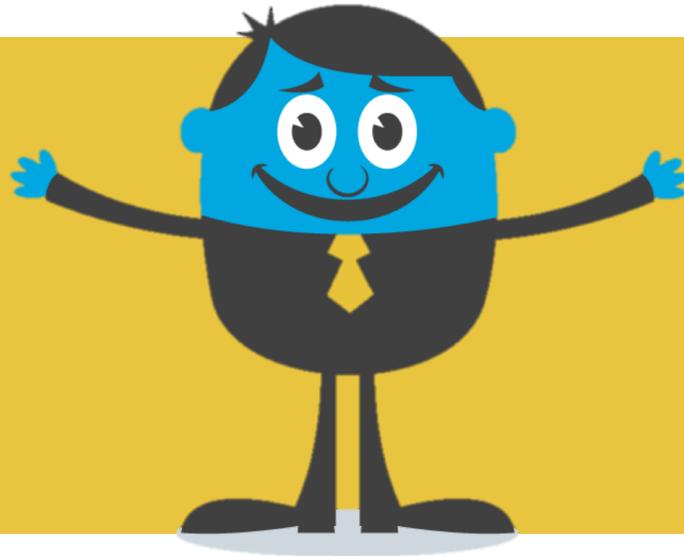


Partners grow with market  smart



Does it make sense to ally with us?



How we help you

- ✓ Elongate engagements with your clients
- ✓ Smooth out the lumpy peaks and valleys of traditional contract work
- ✓ Stay on the cutting edge
- ✓ Garner better results for your clients
- ✓ Coach your clients to success using the tools and technologies we provide
- ✓ Employ our team of marketing geeks as if they were yours

- ✓ Grow your business with *engagement fundraising* technologies and tactics
- ✓ Be “in the know” about new research findings and technological advances
- ✓ Collaborate for success to give your clients what they need

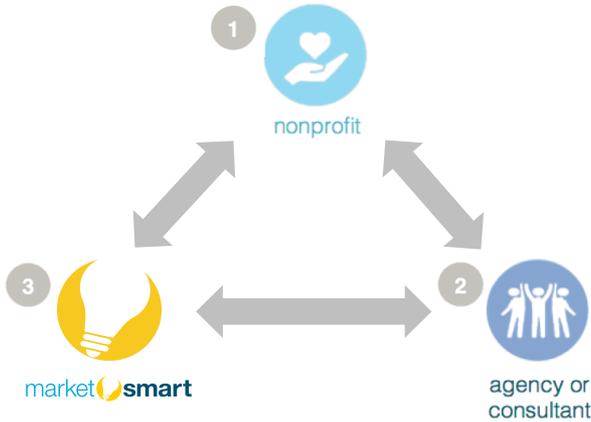
How we help your clients

- ✓ Generate highly qualified leads for major and legacy gifts
- ✓ Cultivate those leads
- ✓ Steward major and legacy donors
- ✓ Build, optimize and manage portfolios
- ✓ Spend less time cold-calling
- ✓ Plan donor visits more efficiently

Together everyone can win

Let's team-up!

We can't do what you do and you don't want to develop software. So why not team-up so everyone wins?



Best of all, we'll never steal your business. We'll just enhance it so your clients love you even more.

GUARANTEED

Our technologies support:

- ✓ Capital campaigns
- ✓ Major gift marketing
- ✓ Mid-level donor migration marketing
- ✓ Legacy gift marketing
- ✓ Cultivation marketing
- ✓ Stewardship marketing

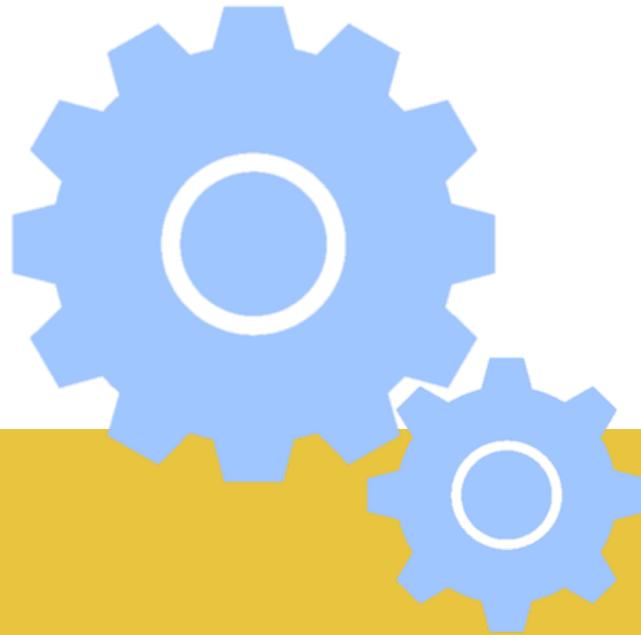
- ✓ Feasibility study donor survey technology
- ✓ Caseload qualification through digital discovery and opt-in strategies (we let the donor decide whether or not they want to be in a portfolio)
- ✓ Lead generation and qualification for major gifts and legacy gifts
- ✓ Previously undisclosed legacy gift discovery and documentation
- ✓ Automated donor cultivation
- ✓ Donor stewardship engagement marketing

Could an alliance work for you?

Try this worksheet to find out.

1. Do you or your clients want/need **highly qualified leads** for major gifts and/or legacy gifts especially during capital campaigns?
2. Do you or your clients want/need their **leads prioritized** so they can build or refresh caseloads and optimize them for more efficient, cost-effective fundraising and outreach?
3. Do you or your clients want/need an **automated lead cultivation system** that helps their supporters involve themselves with the organization's mission as they move themselves through the consideration process?
4. Do you or your clients want/need to **uncover hidden legacy gifts** at low very cost?
5. Do you or your clients want/need to **enhance their stewardship efforts** to improve retention among major donors and legacy society members?
6. Do you or your clients want/need to **retain and move mid-level donors up** the pyramid?
7. Do you or your clients want/need to **find new major donors**?
8. Would you or your firm **benefit** if your clients achieved success faster and more efficiently?
9. Would you or your firm be able to **leverage case studies** from your clients to grow your business?
10. Do you want to **grow your business**?
11. Do you want to **elongate your contracts** with clients?
12. Do you want to **smooth-out** the lumpiness of contract work?

How it works



First, consider where your clients need help most



IDENTIFICATION

Leverage data

Performance measurement and fundraising analytics



QUALIFICATION

Uncover donor capacity, passion and interest

Donor survey
Online tracking of donor digital engagement

Build effective caseloads/portfolios

Caseload/portfolio development
Caseload/portfolio rejuvenation
Caseload/portfolio management

Manage leads

Lead generation
Lead qualification
Lead prioritization



CULTIVATION

Cultivate relationships

Automated cultivation
Progressive profiling
Donor journey display
Reduce days-to-close

Prioritize outreach

Recency monitoring
Proprietary scoring
Focus and optimization



SOLICITATION

MarketSmart does not solicit or negotiate donations. We are a marketing software and services firm, not fundraising counsel.



NEGOTIATION



STEWARDSHIP

Steward relationships

Improve retention among major donors and legacy society members

Report results

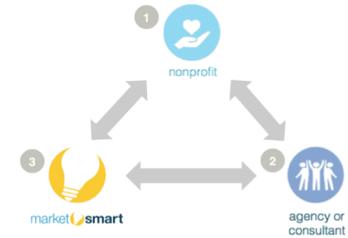
Show impact
Provide VIP treatment

HOW IT WORKS

Next, get the ball rolling

Arrange a three-way call (you, your client and us) to get started.

The best way to get going is to arrange an exploratory call between you, your client and one of our Solutionists. If you prefer, you can iron-out all of your concerns with our Solutionist prior to arranging the call. Or you can handle all of your client's questions on your own (if you feel comfortable doing so).



You'll be the orchestra conductor and we'll do the heavy lifting.

Let us support your goals and theirs.

You know your clients best. We know that! So we aim to support your efforts, not undermine them. That way you can help your clients raise more funds while growing your business too.

Here's what we might do for you during a three-way call.

- ✓ Ask questions to learn about your client's needs
- ✓ Demonstrate how our products and systems work
- ✓ Present how other nonprofits have benefitted
- ✓ Review case studies and results
- ✓ Write proposals



We aim to make you look good.

Your clients trust you and we don't want to upset your relationship at all. In fact, we only want to enhance it.

When your clients achieve their goals faster and at lower cost, they'll thank you and refer you to others.

We promise

- ✓ We'll never 'steal' your clients
- ✓ We'll keep you involved every step of the way
- ✓ We'll support you to help you grow
- ✓ We'll deliver results that make you look good

Products

market  smart

FUNDRAISING
REPORT CARD 

dafwidget 



SURVEYS

We built the most effective donor survey tool ever created for you.

Our survey system helps nonprofits learn about their donors' wants, needs, wishes, dreams, and desires. It also helps fundraisers determine who is most engaged and passionate about their mission.

Supporters are invited to take the survey via direct mail, email and/or social media you can produce. IP addresses are captured and cookies are placed on the web browsers of survey takers in order to monitor engagement. The donors' online behaviors are meshed with survey responses to accurately reflect real-time passion, commitment, and intent.

When customers and their agencies launch a survey effort they quickly uncover **hidden bequests and generate solid legacy giving and major gift leads**. They also usually generate revenue from cash donations and donor-advised funds. This revenue often surpasses the value of the investment in the campaign system thereby delivering an immediate return on investment.

MarketSmart's system is based on research conducted by **Dr. Russell James III** [Texas Tech University], author of the groundbreaking book "**Inside the mind of the bequest donor: A visual presentation of the neuroscience and psychology of effective planned giving communication.**" It's powerful, easy, and it works!

We are constantly upgrading the system and working with Dr. James (and many others) to test, tweak and improve the results we deliver to clients all over the world.

SurveyGiftmaker system includes:

- Custom development of a branded, powerful survey system AND one outbound marketing campaign (usually involving direct mail and/or email with 2 sends)
- MarketSmart writes the questions in the survey and outbound marketing
- Back-filling technology for forms ensures high completion rates
- Based on cutting-edge research
- Email list cleansing and multi-browser testing included
- Dashboard access
- Wrap-up analysis of the campaign's effectiveness
- Automated notifications deliver 'sales-ready' leads to help improve staff efficiency



All MarketSmart clients and their agencies get access to a marketing dashboard to review their leads, monitor engagement, access reports and download data

VIP MICROSITES

Our **marketing system** includes a website, publications order landing page, tracking technology and a dashboard to help busy development professionals engage with donors and **prioritize** who to talk to now so they can increase results efficiently.

The system is designed to **generate leads, cultivate leads and unearth legacy gifts while also helping donors consider major giving** so you and your clients can be more effective. These VIP microsites are simple to understand and designed for mature eyes and fingers. Best of all, we create them so you can be more effective spending more time meeting with highly qualified prospects!

Our proprietary **tracking** code monitors each donors' interests and passions by capturing their engagements online.

Plus supporters can instantly donate online, transfer donor advised fund money, calculate tax deductions, and give in other ways from the convenience of their personal computers.

Includes:

- Custom development of a branded VIP microsite system that follows best practices for engagement fundraising
- MarketSmart writes the copy for the system based on cutting-edge research but agencies can help
- Multi-browser testing for compatibility with various devices
- Automated notifications from landing page submissions
- Dashboard access

Additional marketing landing pages and efforts can be purchased separately.



All MarketSmart clients get access to a marketing dashboard to review their leads, monitor engagement, access reports and download data

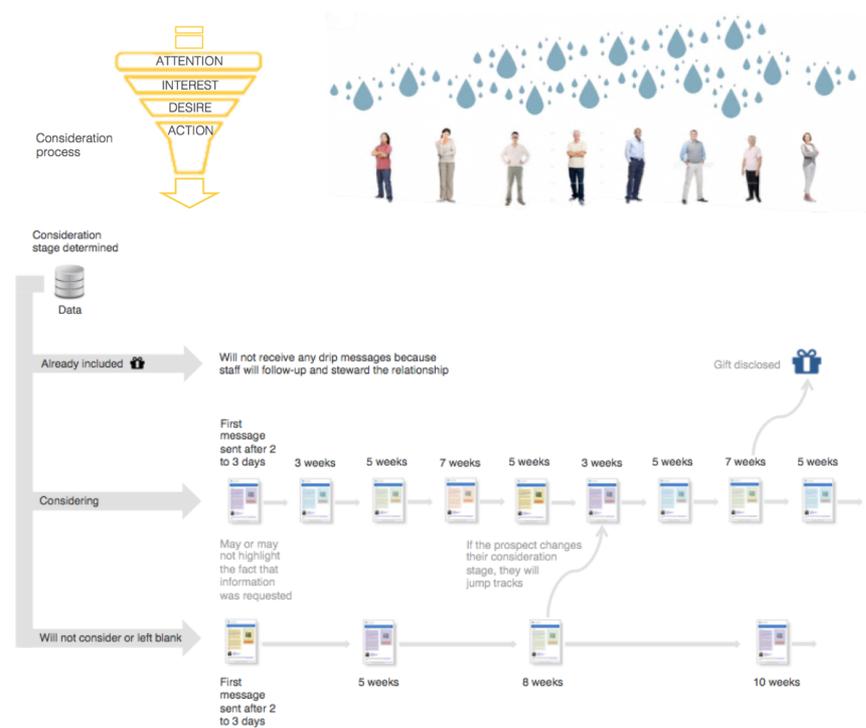
ARTIFICIAL INTELLIGENCE AND AUTOMATED CULTIVATION

The system combines “marketing automation” (moves management using pre-programmed, ongoing automatic emails) with your VIP microsites to help **multiply a fundraiser’s efforts efficiently, and cost-effectively.**

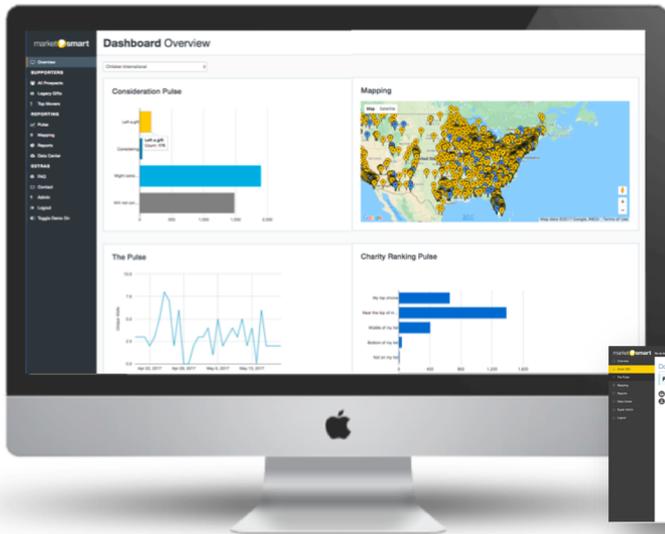
Pre-written, personal, highly relevant, text-only emails get sent out **automatically** to supporters based on their past survey responses and/or other engagement data points. This helps fundraisers **cultivate relationships** with tons of prospects with little to no effort. Then, they can determine who should be contacted based on who is engaging most with these communications by simply checking the scoring in the dashboard.

Includes:

- Custom development of sophisticated marketing automation emails (set-up includes programming of emails for approximately 2 years worth of cultivation)
- Copy and code for the pre-programmed, one-to-one, personalized emails
- Dashboard access



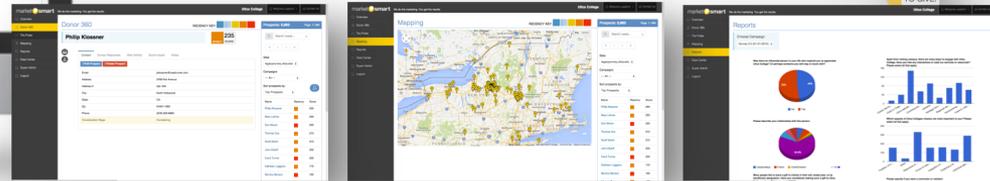
See your clients' results in real-time with our dashboard



For your clients

All MarketSmart customers can get access to a marketing dashboard to **review their leads, monitor engagement, access reports and download data**. Each individual's engagement is monitored and displayed in real-time to help you help your clients qualify prospects and donors so you can help them prioritize their outreach.

Fundraisers use the system to determine who is interested and most likely to make a large donation now. By zeroing-in on the best prospects, they use their time more efficiently. That saves their organizations' money and increases their fundraising effectiveness.



All MarketSmart clients get access to a marketing dashboard to review their leads, monitor engagement, access reports and download data

- Build and refresh portfolios/caseloads
- Optimize moves management
- Complete capital campaigns
- Qualify, cultivate and steward donors
- Prioritize outreach
- Develop strategy

Consultants get access too

Most nonprofits are busy. They need smart consultants like you to help them stay focused on what's important. That's why you get access to the dashboard too!

You can help your clients review their leads, monitor engagement, access reports and download data. That way, you can help your clients use the system to be more focuses and efficient.

PRODUCTS

FUNDRAISING REPORT CARD



The simplest reporting and analytics tool for nonprofits and consultants

Basic charts are free
The multi-client, deep-dive, all-you-can-eat version is available to consultants at \$5,000/year



Ask us about white labeling opportunities

Thousands of nonprofits around the world and their consultants use the Fundraising Report Card **to analyze their fundraising effectiveness.**

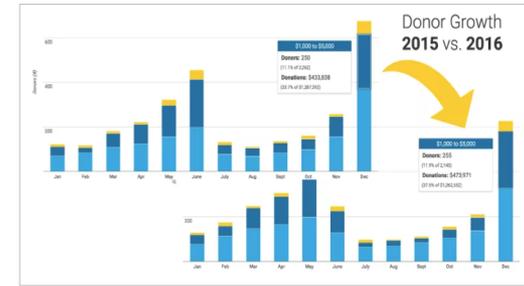
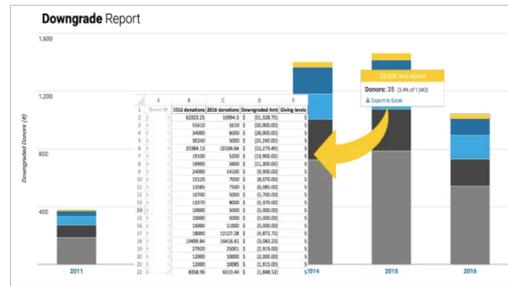
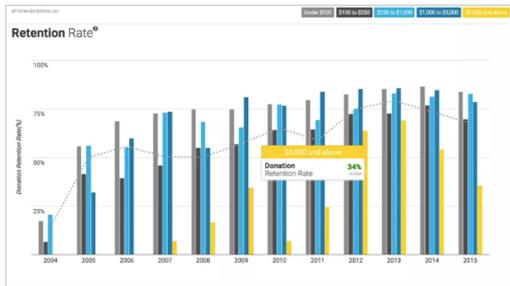
You can help your clients understand what their data “says” and what they should do. The visualizations are simple and board-meeting-ready. Compare donor groups, campaign effectiveness and so much more. Try it for free at www.fundraisingreportcard.com.

Fundraising metrics

- Donation Growth
- Donor Acquisition
- Lapsed Donors
- Donor Retention
- Donor Churn
- Donation Reactivation
- Donation Retention

Fundraising KPI's

- Average Donation
- Donor LTV
- Bequest Potential
- One-time vs. Recurring Donors
- Retention Rate
- Donation Frequency



Syncs with CRM in seconds





When we see a problem, we fix it. In this case we saw the growth of donor-advised funds and realized too many organizations and institutions were missing the boat.

Plus, while many in the sector saw DAFs solely as “holding pens” for donor dollars, we saw them as opportunities waiting to be let loose. So we sought to develop an easy way for philanthropic-minded people to make an impact at no cost to anyone. And so, the DAFwidget was born.

What’s the catch? There is none. It’s 100% free for everyone. We spent our time and money to develop the DAFwidget because we wanted to help move more dollars, faster to good causes like yours. It’s all part of the philanthropic mindset here at MarketSmart.

Download the code for free at dafwidget.com.

Here’s what your DAFwidget will look like:

1

This is how the DAFwidget might look on your website
(Note: We recommend you place it below your online donation button):

DONATE NOW

Give now from your [Donor-Advised Fund](#)

2

And this is what the widget pop-up looks like:

×

Give from your donor-advised fund:

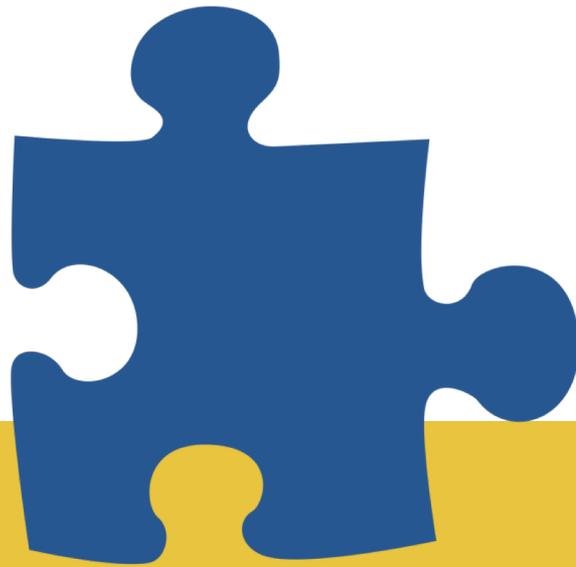
Enter donor-advised fund name

GO »

By using this search tool, you agree to the [Terms of Service and Privacy Policy](#).

[Don't see your fund? Let us know.](#)

Is there a fit?



Types of partners



Thought leaders, speakers, educators
Bloggers, journalists, professors, etc.



Individual consultants
Capital campaigns, cases for support, legacy giving, major giving, etc.



Data enhancement consultants
Wealth screening, predictive modeling, and cleansing, etc.



Consulting firms
Especially ones focused on capital campaigns



Direct marketing firms
Small, medium and large digital, direct mail, telephone, etc.

Judge us by the company we keep



“Their **results** far surpass any I’ve seen in two-plus decades of legacy giving.”

Greg Lassonde, CFRE
Legacy Giving Specialist/Consultant



Greg
LASSONDE

“ I think what you’ve done is **game-changing.**”

Phyllis Freedman
President
SmartGiving



SMART GIVING
PLANNING WELL TO DO THE MOST GOOD

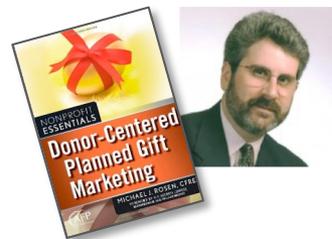
the Planned Giving Blogger

Best practices and ideas for encouraging legacy gifts

“ I believe that what you are offering has the power to help transform the nonprofit sector, a goal we both share.”

Michael Rosen, CFRE

Author- Donor-centric Planned Giving Marketing
President- ML Innovations, Inc.



ML Innovations, Inc.
Fundraising and Marketing Consulting

“I have always been impressed with the interest in the latest academic research at MarketSmart and their willingness to adapt their practices to reflect the newest findings. This openness to new ideas places them on the **cutting-edge** of the latest knowledge and consequently benefits their clients.”



Dr. James has over 100 publications in academic journals, conference proceedings, professional periodicals, and books including 20 on neuroimaging and neuroeconomics. He has been quoted in a variety of news sources including The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News and the Chronicle of Philanthropy.

Dr. Russell James
World renowned researcher, Professor, and Author
J.D., PHD., CFP®



market  smart

“Working with MarketSmart’s system has brought our program **more than great leads**. It has brought awareness of existing intentions in numbers that surpassed the expectations of both our team and theirs.”

Jay Auslander
Associate Director, Gift Planning
California Academy of Sciences



“The **results** have been amazing.”

Amy Goldman
Vice President, Development
City of Hope



“Because of your vision IPPF/WHR **will end the year as a much more sustainable organization** now and in the future.”

Tracy Malloy-Curtis
Mal Warwick DonorDigital



Mal Warwick
Donordigital
Integrated fundraising, advocacy and marketing

TESTIMONIALS

WE'LL BE YOUR **PARTNER** NOT YOUR COMPETITOR



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

For mid-level, major and legacy gifts

market  smart
imarketsmart.com

