

# ALL ABOUT AUTOMATION

How to optimize your fundraising operation with technology



# INTRODUCTION



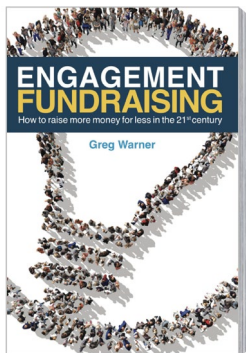
**Greg Warner**

CEO & Founder

market  smart

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FUNDRAISING  
REPORT CARD 

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**Dr. Russell James**

# INTRODUCTION



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**'DONE-FOR-YOU DUO'**  
software + services

**NO RISK OFFER**



**Get 10:1 ROI\***

guaranteed or your money back

\* For qualified organizations only. Terms & conditions apply.

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**BE THE FUNDRAISER YOU  
ALWAYS WANTED TO BE**

# INTRODUCTION



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## ALL ABOUT AUTOMATION

How to optimize your fundraising operation with technology



OR-YOU DUO'  
+ services

WORK OFFER

at 10:1 ROI'  
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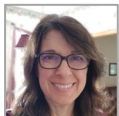
**BE THE FUNDRAISER YOU  
ALWAYS WANTED TO BE**

# INTRODUCTION

## Housekeeping

**Recording & slides will be sent to all attendees & registrants**

**Questions will be answered at the end of the presentation**



Chat



Raise Hand



Q&A

# INTRODUCTION

## Today's Agenda

**Why consider automation?**

**What you can automate?**

**3 types of automation?**

**Where you should start?**

**My key secrets to success**

**Case study / results / ROI**

**Quick promo**

**Q & A**

**Survey**

# WHY CONSIDER AUTOMATION?

## TOP 5 REASONS TO AUTOMATE



**Save money**

**Save time**

**Be more efficient/productive**

**Be more effective/gain ROI**

**Reduce employee turnover (combat the myth)**



# WHY CONSIDER AUTOMATION?

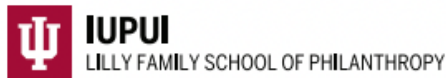
## Fundraising is getting harder



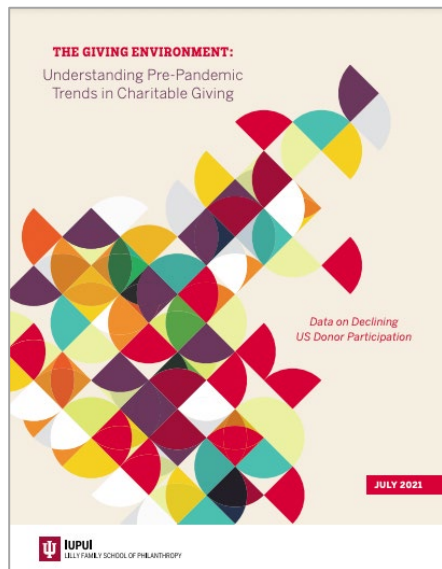


# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder



### % share of Americans who donated



#### ALL SOCIO-DEMOGRAPHIC GROUPS

2000 - 66.2%

2018 - 49.6%

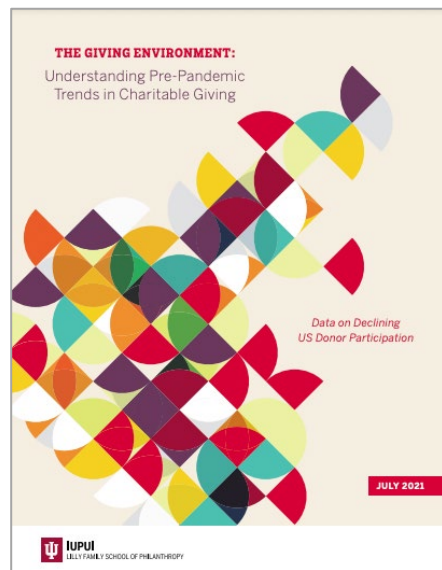
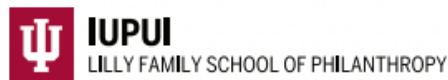


Most occurred  
**AFTER** the  
**Great Recession**  
(2007-2009)

<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

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## Fundraising is getting harder



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2000 - 66.2%

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Most occurred  
**AFTER** the  
**Great Recession**  
(2007-2009)

## Average \$ amount Americans gave

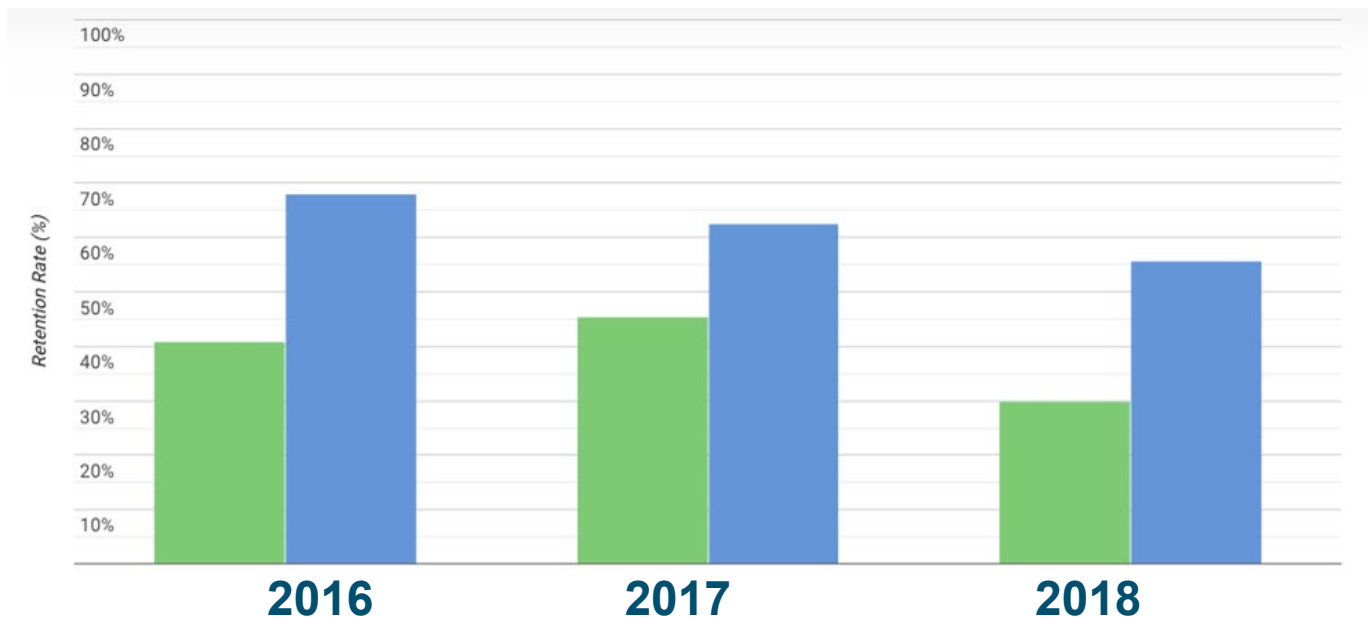
2000 - \$1,790

2018 - \$1,280



# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder

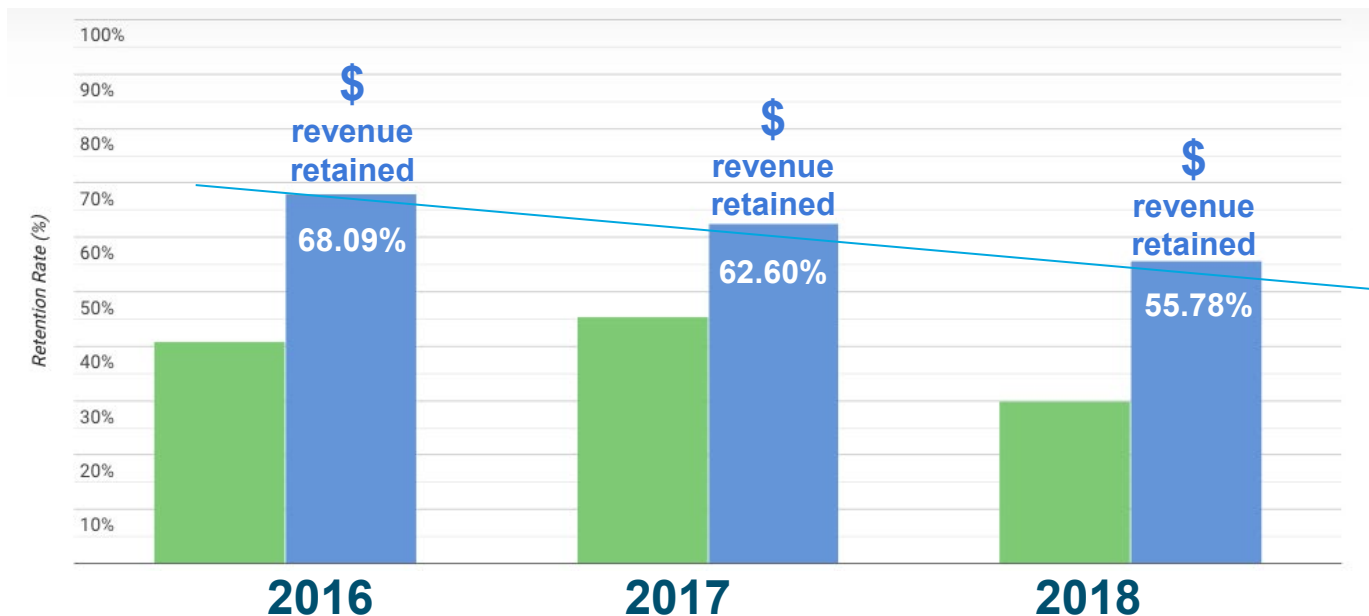


[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



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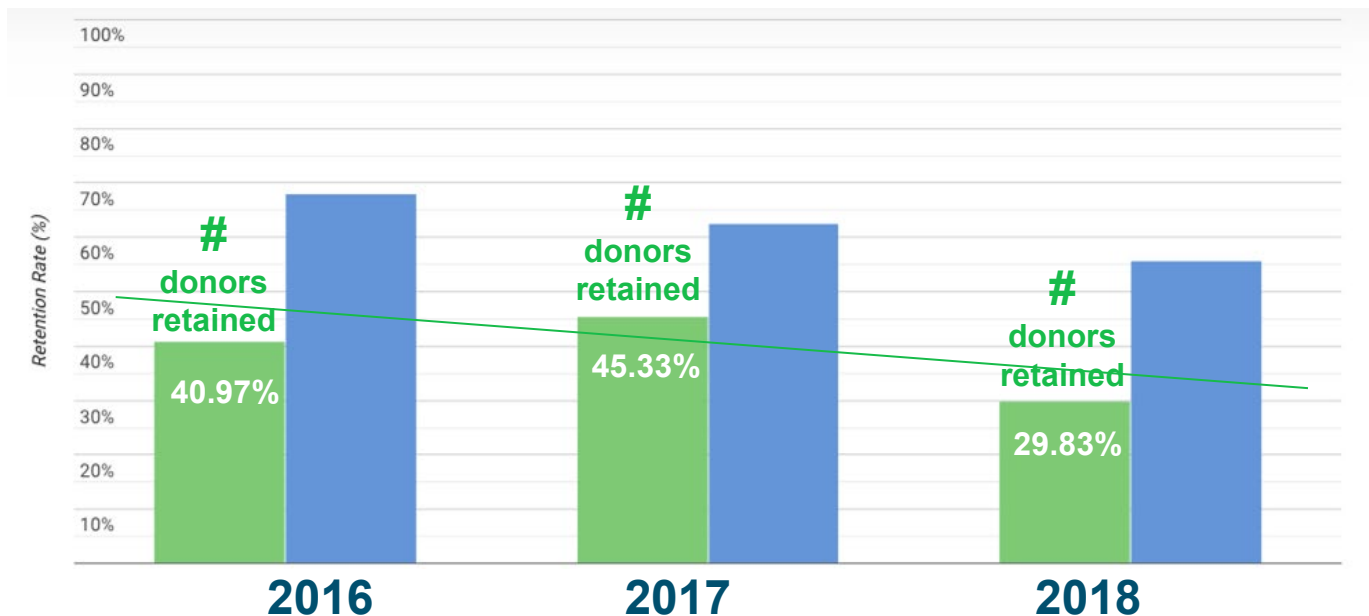


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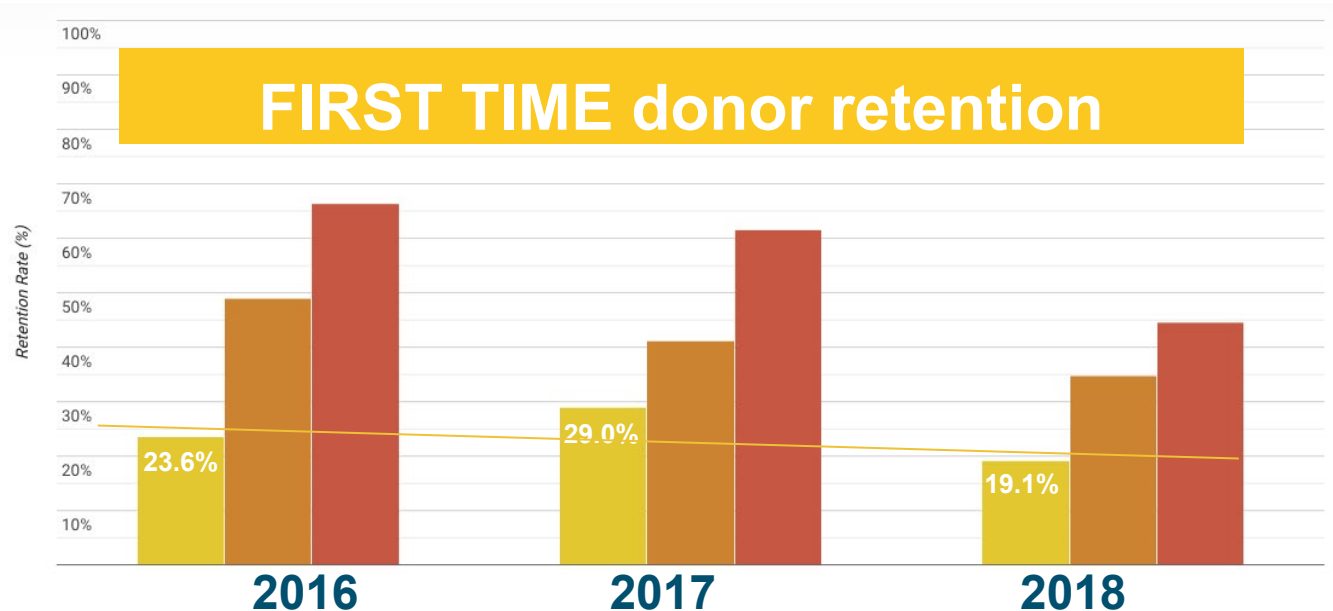


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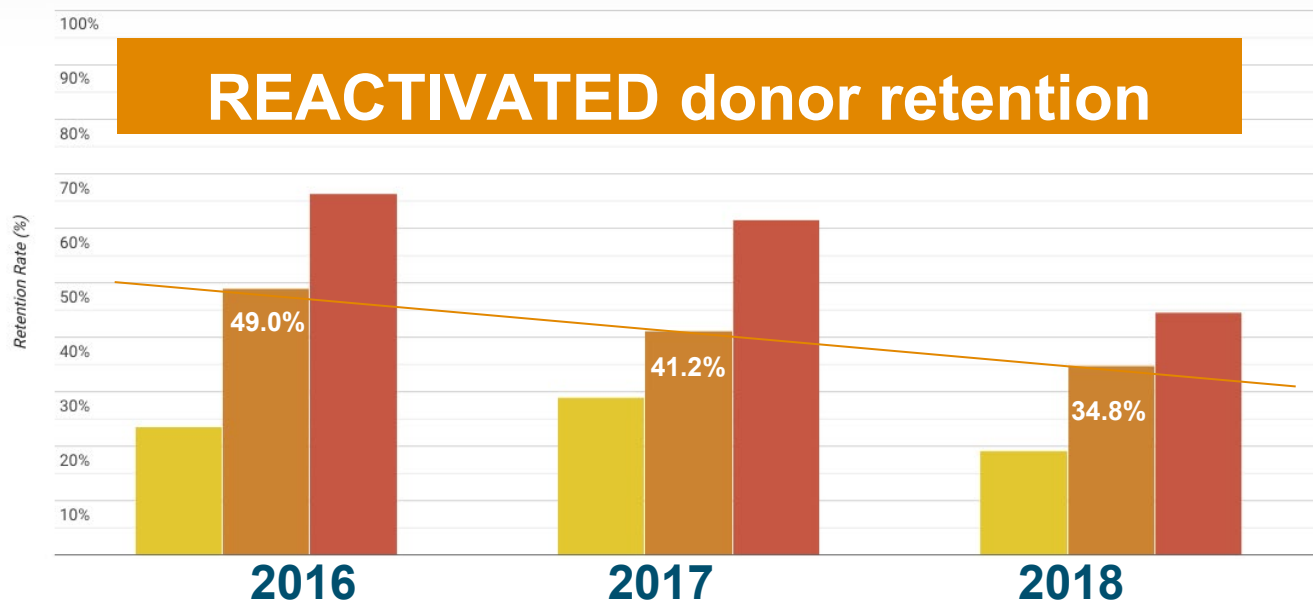


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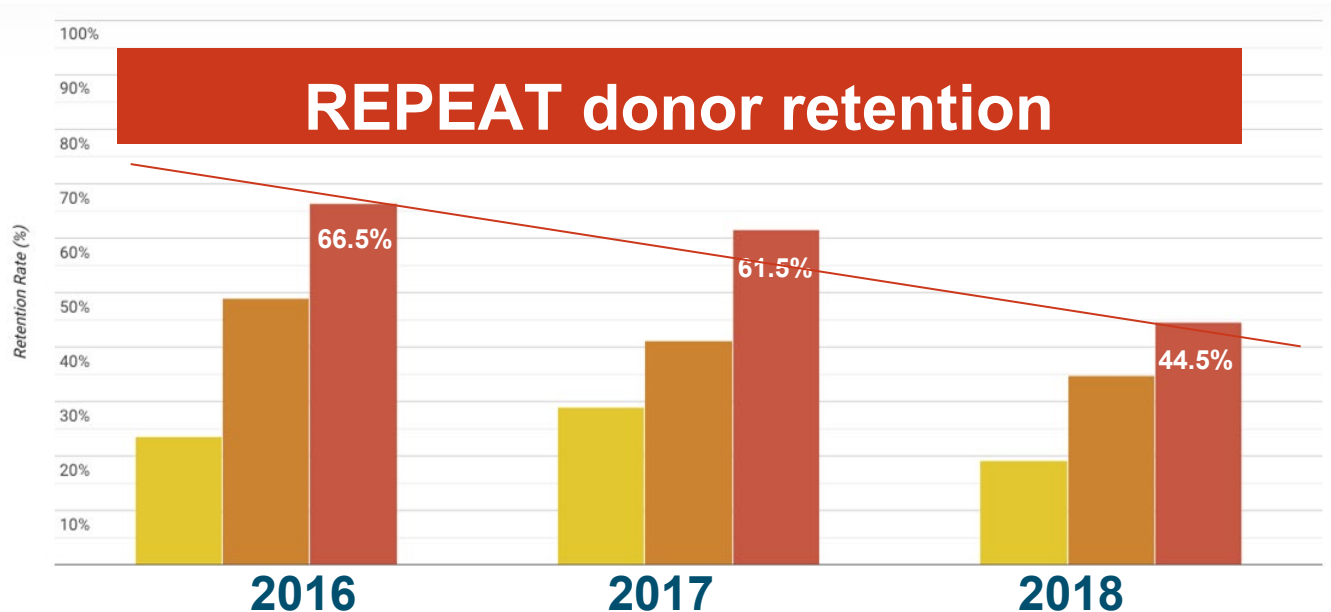


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# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder



[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)





# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder

Low dollar donors = Poor retention and low LTV

High dollar donors = Strong retention and high LTV

### Under \$100 donors

Under \$100   \$100 to \$250   \$250 to \$1,000   \$1,000 to \$5,000   \$5,000 and up

Average Donation Amount

\$26.21

Donor Retention Rate

19.69%

Lifetime Value

\$45.09

### Over \$5,000 donors

Under \$100   \$100 to \$250   \$250 to \$1,000   \$1,000 to \$5,000   \$5,000 and up

Average Donation Amount

\$33,159.64

Donor Retention Rate

38.2%

Lifetime Value

\$75,876.91

August 3, 2021 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)



# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder

80/20 rule is now **72/.74**

**Donors giving over \$5,000**

= **.74%** of an org's donor base  
(or  $\frac{3}{4}$  of 1%) but make up **72%**  
of all donation revenue

**Donors giving under \$100**

= **77%** of an org's donor base  
but make up **just 5.9%** of  
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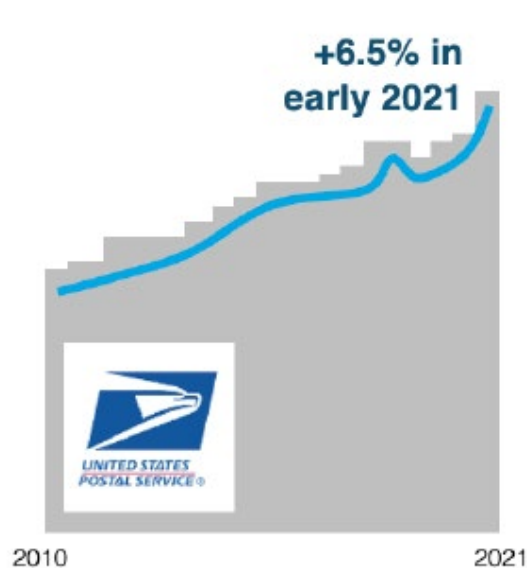
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# WHY CONSIDER AUTOMATION?

## Fundraising is getting harder



80/20 rule is now **72/.74**

**POPULIST FUNDRAISING**  
INTERRUPTING &  
ANNOYING  
**WITHOUT PERMISSION**



DIRECT MAIL



TELEMARKETING



EMAIL

August 3, 2021 Data

[www.fundraisingreportcard.com/benchmarks](http://www.fundraisingreportcard.com/benchmarks)

**FUNDRAISING  
REPORT CARD**



Daily analysis of \$93+ billion in charitable giving  
using data from 8,500+ organizations

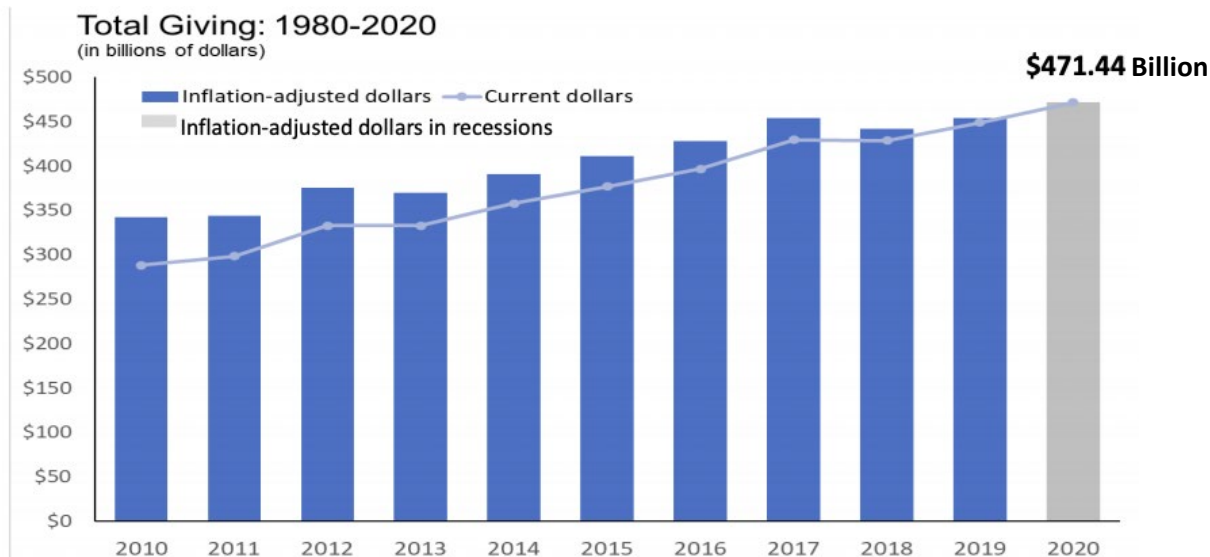
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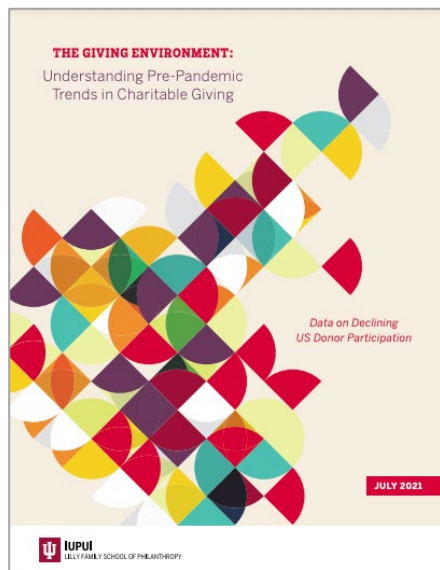
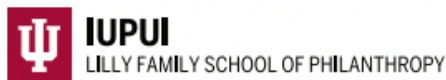
Yet total giving has increased



Donors down  
Dollars up

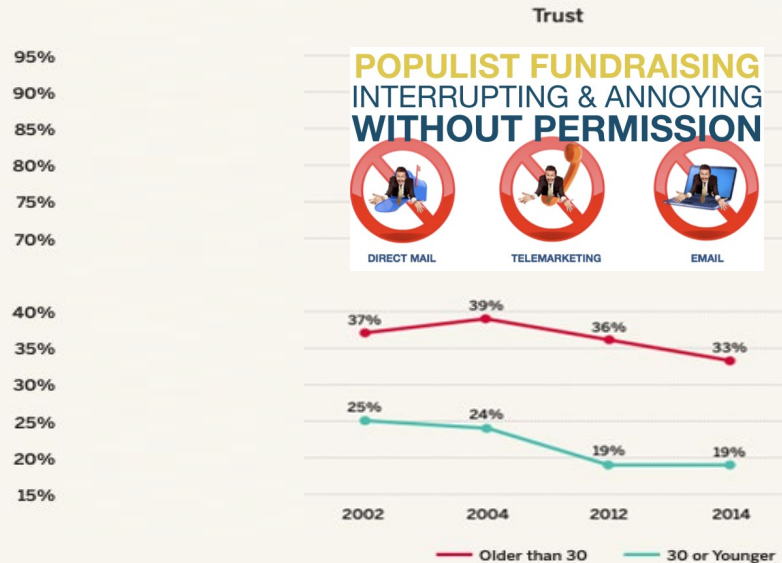


# WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?



Trust! ↓

**Figure 6.** Changes in interpersonal trust and giving participation rates in the GSS



<https://scholarworks.iupui.edu/bitstream/handle/1805/26290/giving-environment210727.pdf>

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# WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?


Trust! ↓



<https://www.edelman.com/trust-barometer>



# WHY IS FUNDRAISING CLIMATE CHANGE HAPPENING?




“Giving is increasing because of **larger gifts from richer donors**. Smaller and mid-level donors are slowly but surely **disappearing** — across the board among all organizations.”



Giving  
USA™  
A public service organization  
of The Giving Institute

Elizabeth Boris  
Chair of the Growth  
In Giving Initiative



“Nonprofit organizations in the United States are now being **challenged** by major political, demographic, economic, and technological factors outside of their control, and most organizations find themselves flat-footed, unable to easily adapt.”

Network  for Good.

Brian Lauterbach, ACFRE  
Vice President of  
Programs & Collective  
Impact

**How can you do more  
and raise more  
with less?**

**TECHNOLOGY!**





# Cautionary tale



**Had 9,000 stores  
at their peak in 2004.**

**Today, they have ONE  
store—in Bend, Oregon.**



| NUMBER OF<br>EMPLOYEES | REVENUE     | REVENUE<br>PER EMPLOYEE |
|------------------------|-------------|-------------------------|
| 85,000                 | \$6 Billion | \$70,588                |



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| 85,000                 | \$6 Billion | \$70,588                |

**Technology is the key to automation!**

**Automation is the key to more cost-effective communications**

# TECHNOLOGY FOR COMMUNICATIONS

## Introducing marketing automation software



CRM/DONOR  
MANAGEMENT

PEER TO PEER

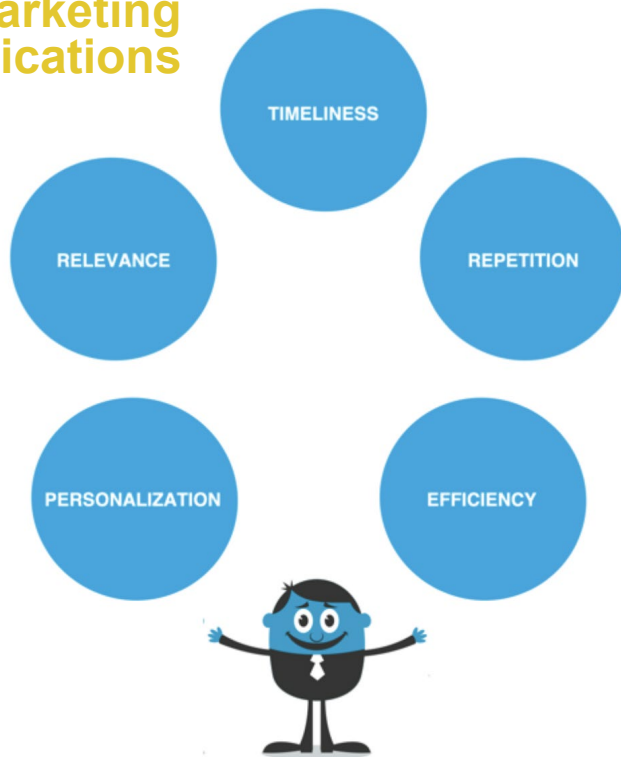
EVENT  
MANAGEMENT

OTHER

# WHY CONSIDER AUTOMATION?

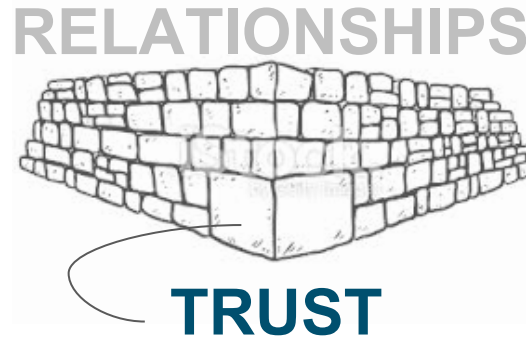
## Fundraising is getting harder

Keys to effective marketing  
communications



# WHY CONSIDER AUTOMATION?

Fundraising is getting harder



# WHAT CAN YOU AUTOMATE?

3 types of automation

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3 types of automation

**Basic**

**Mid-level**

**High-level**



# WHAT CAN YOU AUTOMATE?

## 3 types of automation

**Basic**

Mid-level

High-level

**Set-it-and-forget-it one-off emails**

**Autoresponders (especially thank you emails)**

**Supplying giving receipts**

# WHAT CAN YOU AUTOMATE?

## 3 types of automation

Basic

**Mid-level**

High-level

- + Increased personalization
- + Simple 'drip' (triggered) email series
- + Reporting of metrics

# WHAT CAN YOU AUTOMATE?

## 3 types of automation

Basic

Mid-level

High-level



LOW-DOLLAR GIFT  
FUNDRAISING  
FOCUSED ON CASH

# FUNDRAISING AUTOMATION



# WHAT CAN YOU AUTOMATE?

## 3 types of automation

Basic

Mid-level

High-level




LOW-DOLLAR GIFT  
FUNDRAISING  
FOCUSED ON CASH



MAJOR & LEGACY GIFT  
FUNDRAISING  
FOCUSED ON ASSETS

FUNDRAISING  
AUTOMATION



Ability to create marketing assets such as landing pages and microsites, and forms

Ability to automatically segment and manage lists in hyper-specific ways

Sophisticated personalization

Dynamic, relevant online content

Complex campaign workflows in line with donor timing

Online engagement tracking to gauge interests

Robust lead scoring based on

Prioritization and real-time notifications

# WHERE SHOULD YOU START?

Basic  
?

Mid-level  
?

High-level  
?

**Focus on assets, not cash!**

# WHERE SHOULD YOU START?

Focus on assets, not cash!

80/20 rule is now

72/.74

**Donors giving over \$5,000**

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August 3, 2021 Data

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# WHERE SHOULD YOU START?

Focus on assets, not cash!

Basic

Mid-level

High-level



LOW-DOLLAR GIFT  
FUNDRAISING  
FOCUSED ON CASH



MAJOR & LEGACY GIFT  
FUNDRAISING  
FOCUSED ON ASSETS

Improve how you:

1. Engage major donor prospects
2. Assign caseloads

REMOVE  
MUNDANE,  
TEDIOUS AND  
TIME-CONSUMING  
TASKS FROM  
YOUR HIGHLY  
COMPENSATED  
MAJOR GIFT  
STAFF'S DUTIES!

FUNDRAISING  
AUTOMATION



# WHERE SHOULD YOU START?

**Focus on assets, not cash!**

## Where major gift staff excel

- Meeting major donor prospects
- Building relationships
- Facilitating philanthropic giving

## What causes failure & high turnover

- Overworking GOs with tedious tasks
- Forcing them to attend meetings
- Making them help with events
- Making them feel undervalued or unappreciated
- **Sending them on wild-goose chases**
- **Forcing them to make cold calls**



# WHERE SHOULD YOU START?

Focus on assets, not cash!

False positives



## What causes failure & high turnover

- Overworking GOs with tedious tasks
- Forcing them to attend meetings
- Making them help with events
- Making them feel undervalued or unappreciated
- Forcing them to make cold calls
- Sending them on wild-goose chases

# WHERE SHOULD YOU START?

## Focus on assets, not cash!

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

False positives



What % of newly assigned prospects do you feel are **truly qualified** to be in your major and/or planned gift donor pool?

Only  
**37%**



# WHERE SHOULD YOU START?

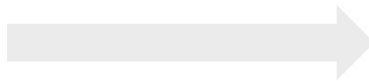
## Focus on assets, not cash!

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

- 27% reported that wealth ratings were “quite effective or very effective for focusing on the right prospects.”
- **92% said they stay engaged with donors and prospects by sending personal emails manually**
- Yet over half (55%) said they didn't spend enough time on solicitation
- 42% said they didn't spend enough time on qualification
- Overall, they reported experiencing “significant frustration with the time spent setting up and completing qualification visits that did not ultimately lead to gifts.”

# WHERE SHOULD YOU START?

## Focus on assets, not cash!



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# WHERE SHOULD YOU START?

Focus on assets, not cash!



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



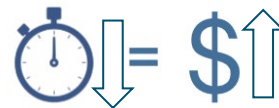
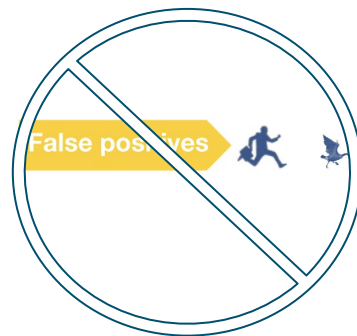
NEGOTIATION



STEWARDSHIP

**TECH-ENABLED  
DONOR DISCOVERY**

**SCALE YOUR  
QUALIFICATION &  
PRIORITIZATION  
EFFORTS**



# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Example #1

From: [REDACTED]  
To: [REDACTED]  
Date: Tue, 12 Jan 2021  
Subject: You are defending the natural world

Dear [REDACTED],

I just wanted to say thank you.

You're a wonderful friend and supporter and a true activist for a sustainable future. Thank you for everything you do.

Years from now, future generations will look back and thank you, too, just as we look back in gratitude to those who came before us. We are so grateful for all you do!

Sincerely,

[REDACTED]

P.S. Please remember, my job is to learn about your needs and interests and help connect you with information. Please don't hesitate to get in touch or, if you prefer, [you can always explore more here](#).

[REDACTED],

I've been supporting a host of groups for years--this was the most gracious acknowledgment I ever received--good work!

Tell your supervisor I said to keep you on staff.

Your mother brought you up right!

Hope your new year is off to a good start--and better days ahead,

Many blessings and peace,

[REDACTED]



# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Example #2

**Personalized salutation.**

Dear John,

I noticed that you engaged with us recently saying, first, that you:

1. Found intentionally investing in someone's life by spending time in the word, in prayer, and everyday life most valuable to you
2. You are considering a legacy gift to sustain and advance The Navigators' ministry for generations to come.

**Personalized based off of what we learn in the respondents survey response.**

**1-to-1 from a gift officer.**

Did you know that there are other Navigators and disciple makers who have already made the decision you're thinking about now? [You can read their stories here.](#)

Blessings!

Brian

Brian Kinney | Gift Planning Officer, CFP®  
PO Box 6000 | Colorado Springs, CO 80934  
1-888-283-0157  
[mylegacy.navigators.org](http://mylegacy.navigators.org)

**Replies go directly to your inbox.**

**Call to action to VIP Microsite that is tracked and scored**

**Different senders based off of geographic region.**



# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Example #3

This email expresses gratitude while delivering your CEO's engaging report "from the field." We should continue to use more authentic, personal video reports in future Efforts.

✓ 41.5% Opened

✓ 20% Clicked

Dear {{ subscriber.name }},

I thought you might like to see this video our President and CEO, Collin O'Mara, prepared for supporters like you, reporting from the field on the deadly red tide in Florida. [You can watch the video here.](#)

You'll see that Collin isn't just another CEO stuck in the board room. Far from it. He's a hands-on activist working on behalf of conservationists like you every day to protect wildlife and wild places.

{{ subscriber.name }}, thank you so much for standing with us.

Sincerely,



DONATE

P.S. Collin asked that I or another one of our wildlife enthusiasts be your personal connection to the National Wildlife Federation. We will occasionally send you stories and updates on conservation issues. If you'd like to send us feedback, please do!



# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Example #4

### Nicole, can we chat please?

Jodi Stoken, Child Crisis Arizona <Jodi.Stoken@childcrisisaz.org>  
To: ndelgiorno@imarketsmart.com

Wed, Aug 4, 2021 at 8:39 AM

Dear Nicole,

Why is protecting children and serving families in need so important to you?

If you have a moment, I would sincerely like to learn about what inspired you to support our mission and connect you with information about what we're doing here at Child Crisis Arizona on your behalf. Input from partners like you is so valuable, and I would love to hear more about your vision for children, youth and families in Arizona.

I hope you'll reply. Or, you can simply [use this link](#) to schedule a time that is convenient for you to chat. I look forward to hearing from you!

Sincerely,

Jodi Stoken, CFRE, CAP  
Chief Development Officer  
work 480-834-9424  
direct 480-304-9458



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**Rensselaer**

why not change the world?®

**\$4.5 million  
legacy gift**

# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Scale your operation



## Benefits

- One Gift Officer can perform like 9
- Generate 'hot' major donor prospect leads
- Cultivate 'cool' prospects > 'warm' > 'hot'
- See where prospects click online to help qualify
- Prioritize your outreach based on who is 'hot'
- Have the prospects set appointments on your calendar

# AUTOMATION FOR RAISING MAJOR GIFTS OF ASSETS

## Retain staff (and attract A-players)

Hard and soft costs you incur every time you look to hire a new major gifts fundraiser:

- **Recruitment costs:** advertising, recruitment firm commissions, interviewing time
- **Training costs:** time spent on-ramping and getting them up to speed
- **Management costs:** your management time is money, too
- **HR costs:** performance plans, onboarding, offboarding
- **Legal costs:** especially because fired workers sometimes sue their former employers
- **Equipment and facility costs:** computers, office, cybersecurity
- **Travel costs:** air, train, car, hotel, dining and per diem
- **Benefits costs:** health insurance, vacations



# AGENDA REVIEW

## Today's Agenda

Why consider automation?

What you can automate?

3 types of automation?

Where you should start?

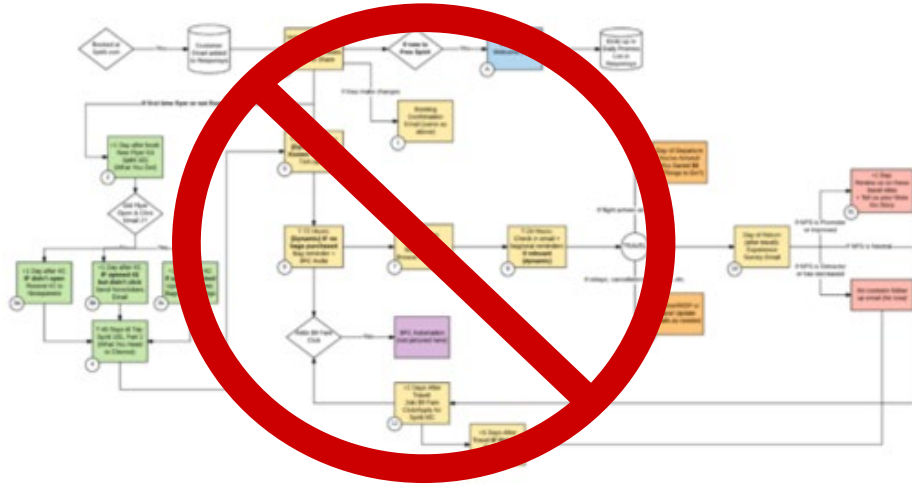
**My key secrets to success**

**Case study / results / ROI**

**Quick promo**

**Q & A**

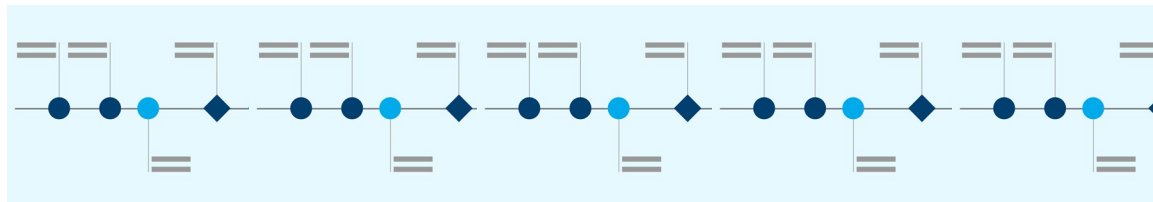
**TOP SECRET**



# TOP SECRETS

## Donor journeys?

**TOP SECRET**

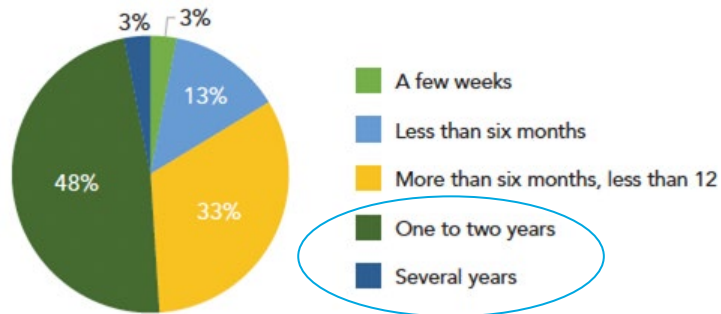


Weeks or months

Months or years



**Figure 21:** Time from prospect identification to gift close (n = 98)



# TOP SECRETS



## Checklist for automated emails that build trust

- ✓ Text only
- ✓ Be real/genuine/authentic
- ✓ Be informal/colloquial/warm
- ✓ Make it about them (be relevant)
- ✓ Make it easy to read/no jargon!
- ✓ Provide an **offer** that delivers **value**
- ✓ Include a [link](#) to that offer
- ✓ Make sure they can respond to *you*
- ✓ Incorporate a calendar link
- ✓ **NEVER ASK FOR MONEY!**



## FUNDRAISING AUTOMATION

# CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“the best thing we’ve ever done!”

BJ Dorman  
Senior Director Legacy Gifts  
The Salvation Army



DOING THE  
MOST GOOD™



# CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“doubled our results at  
half the cost”



Glen Belden  
Food for the Poor

# CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



**“The results have been amazing.”**

Amy Goldman, Vice President of Planned Giving, City of Hope



# CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



“People are **reaching out to me**,  
instead of the other way around!  
How refreshing is that!”

Cheryl Smoot, National Assistant Vice President, Individual & Planned Giving



# CAN YOU AFFORD TO INVEST IN AUTOMATION?

Better question: Can you afford NOT to?



**“\$60 returned for every \$1 invested and we haven’t even really scratched the surface yet.”**

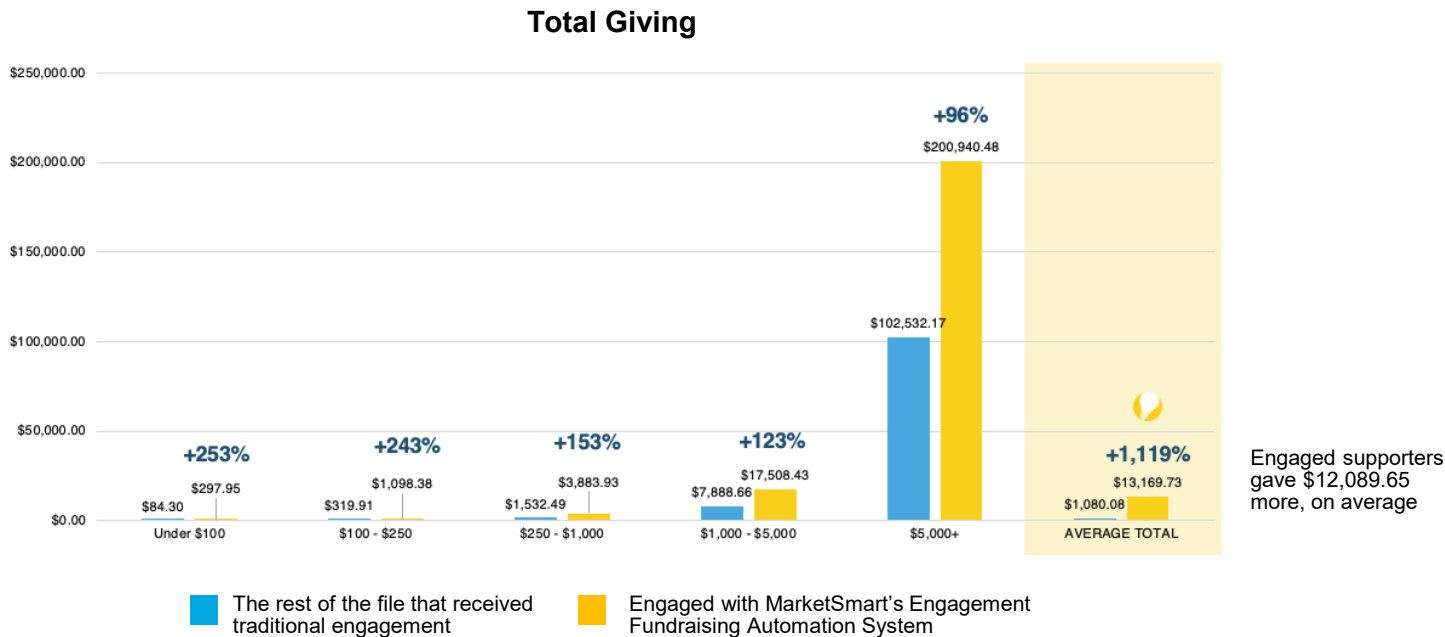
Jonelle Beck, Executive Director of Estate & Gift Planning, University of the Pacific

UNIVERSITY OF THE  
**PACIFIC**

# CASE STUDY



# TOTAL GIVING

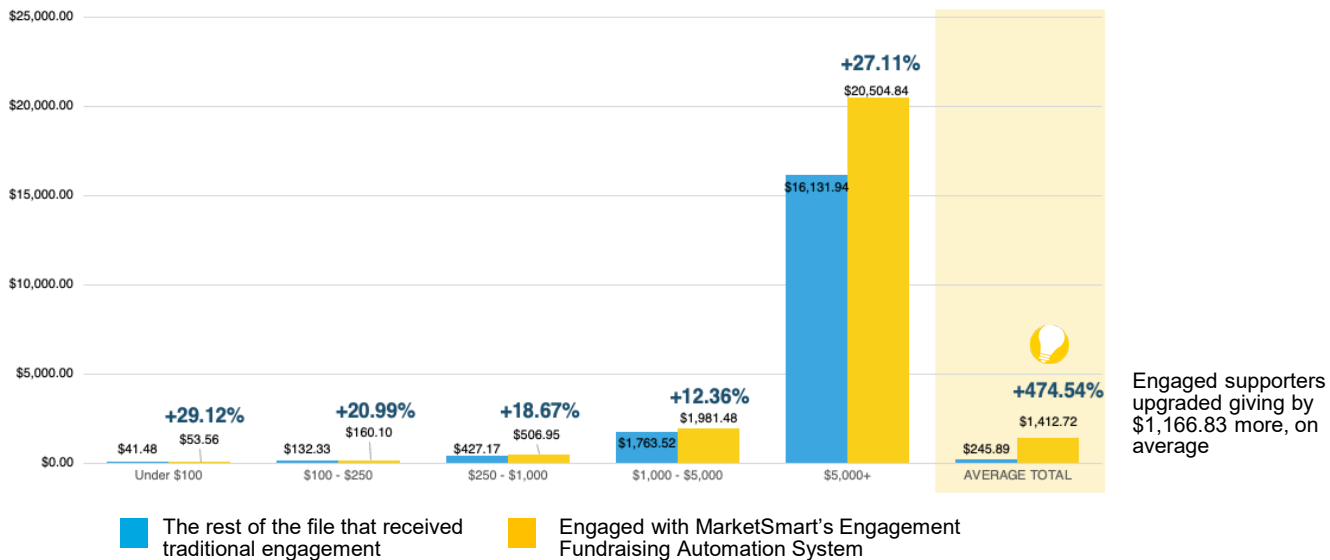


**At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System gave more (+1,119% more on average) than the rest of the file.**



# UPGRADE \$

Upgrading: Average Annual Giving Increases

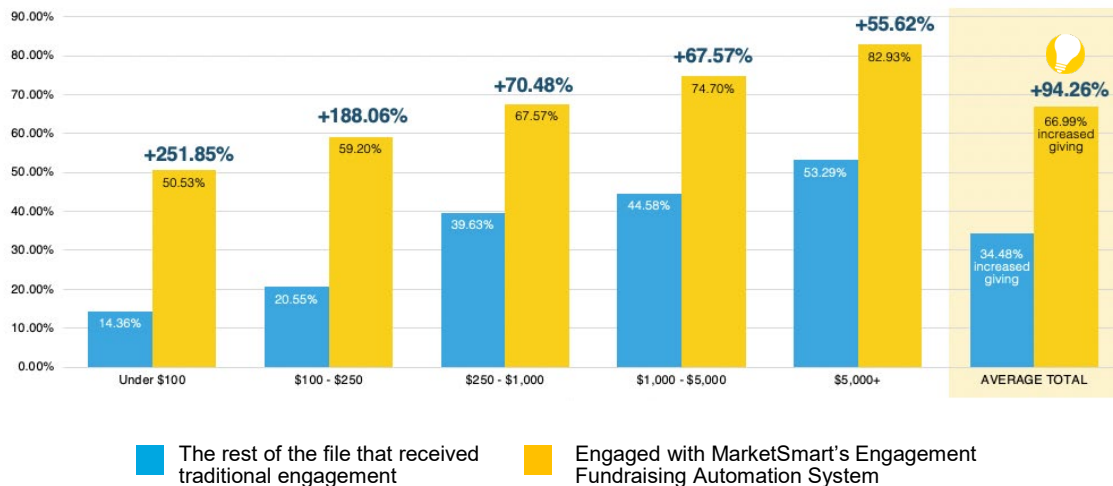


**At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System increased their giving by more than the rest of the file (+474.54% more on average).**



# UPGRADE %

Upgrading: Percent of Supporters with Increased Giving



Engaged supporters upgraded their giving at almost double the rate of the rest of the file, on average

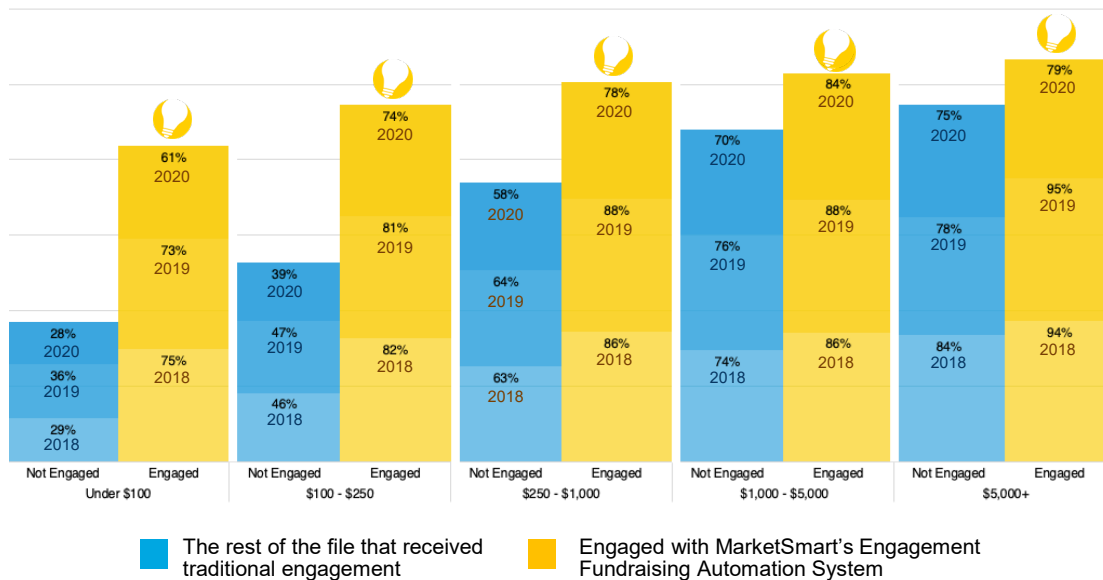
**At every giving level, individuals engaged by MarketSmart's Engagement Fundraising System upgraded at greater rates (+94.26% greater on average) when compared with the rest of the file.**





# MULTI-YEAR RETENTION

Multi-Year Retention Rates

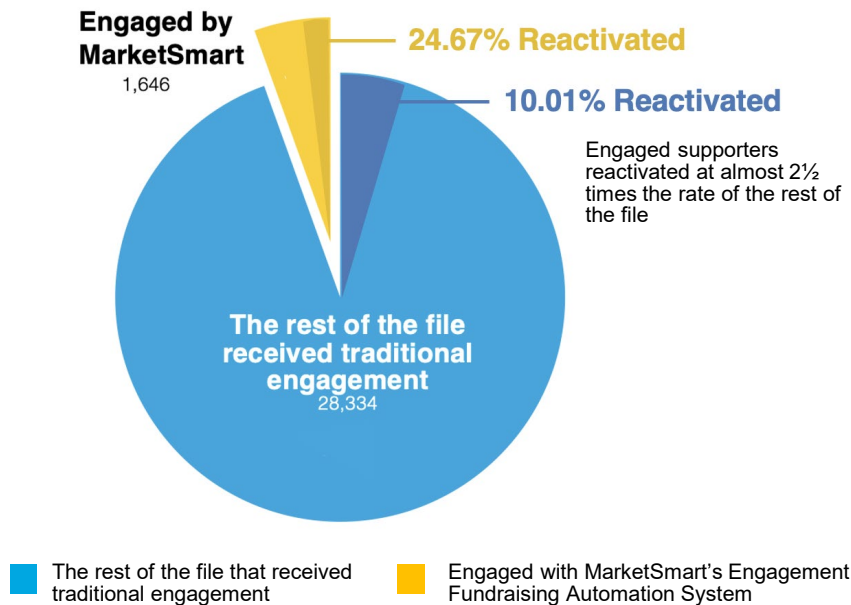


**At every giving level and in every year, individuals engaged by MarketSmart's Engagement Fundraising System **retained at greater rates** than individuals in the rest of the file.**



# REACTIVATION %

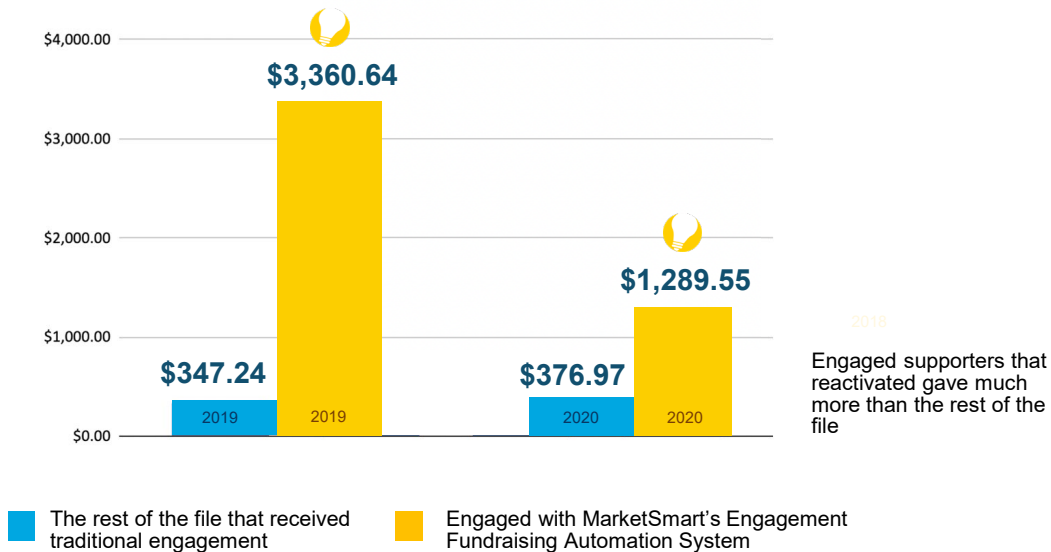
## % Reactivated Between 2018 - 2020



Individuals engaged by MarketSmart's Engagement Fundraising System **reactivated their giving at a higher percentage** compared to the individuals in the rest of the file.

# REACTIVATION \$

Average Reactivation Donation



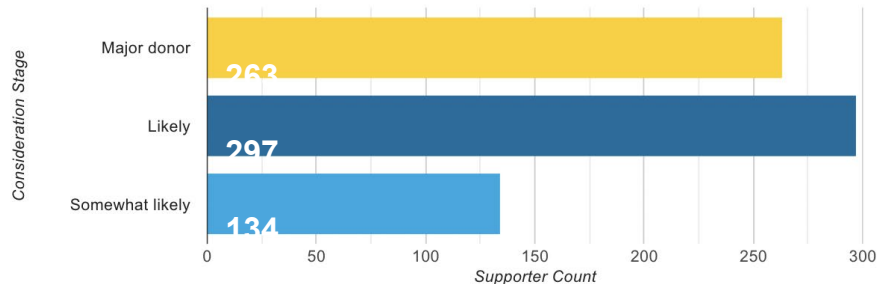
Individuals engaged by MarketSmart's Engagement Fundraising System that reactivated their giving did so while **giving substantially more** than individuals in the rest of the file.

# PIPELINE

As of 3/25/21

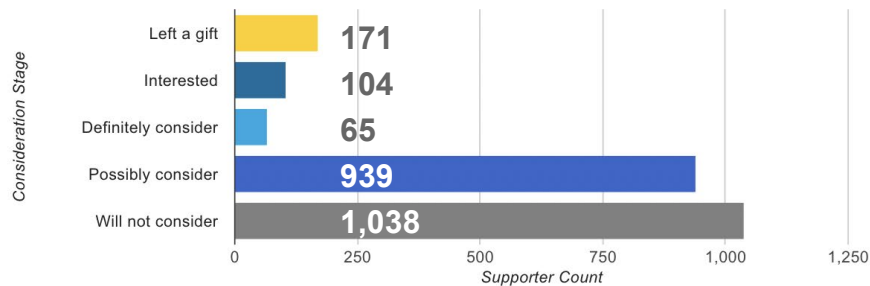
VIEW PIPELINE:

Major Gift Pipeline



VIEW PIPELINE:

Legacy Gift Pipeline



# PIPELINE

As of 3/25/21

## Major Giving Potential

This **potential major gift revenue** is based on an estimated \$10,000 major gift amount and conservative close rates.

**694 supporters indicated likelihood**

**134 Somewhat Likely**  
(25% close) = \$335,000

**297 Likely**  
(50% close) = \$1,485,000

**263 Major Donors**  
(75% close) =  
\$1,972,500



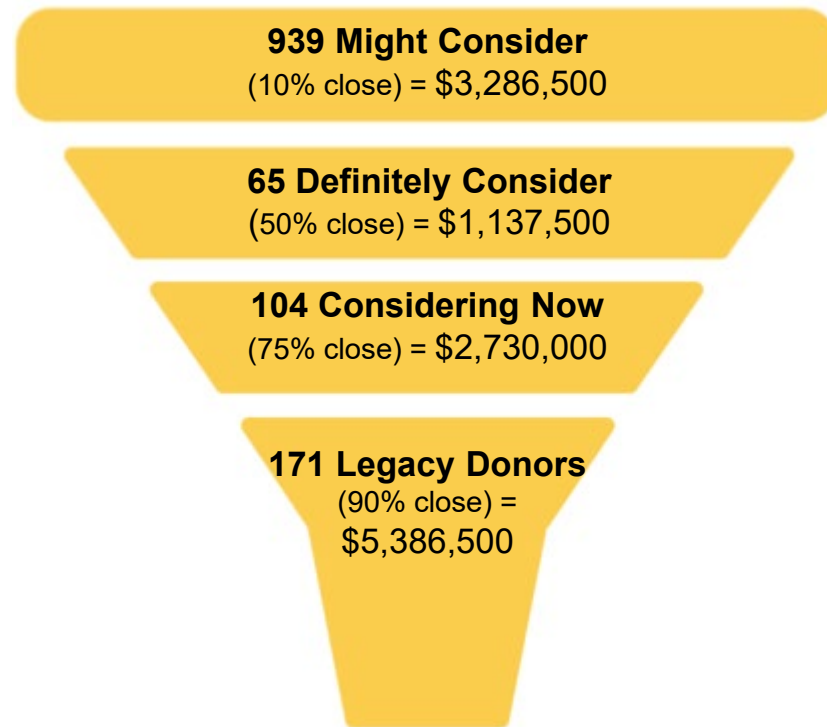
# PIPELINE

As of 3/25/21

## Legacy Giving Potential

It is generally accepted that the **average bequest amount** in the US and Canada is around \$35,000. Some sectors like healthcare, arts & culture, and higher education report **average** planned gifts 3 to 4 times that amount.\*

One supporter documented their gift online and disclosed it's value at **\$250,000**.



\*Source: 24 Planned Giving Terms You Should Know. [Blackbaud.com](https://www.blackbaud.com) April 2015 Web. April 2018.

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# RETURN ON INVESTMENT PROJECTIONS

## REVENUE FROM ENGAGED SUPPORTERS

**\$21,677,376**

Does not include top .05% of donors (outliers)

## ENGAGED PIPELINE (potential revenue):

**\$16,333,000**

Potential major giving funnel revenues if closed = \$3,792,500

Potential planned giving funnel revenues if closed = \$12,540,500

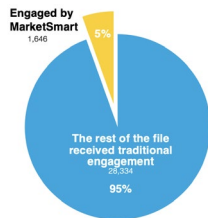
## TOTAL REVENUE FROM ENGAGED SUPPORTERS + PIPELINE =

**\$38,010,376**

Total investment in MarketSmart (2015 - March 2021) = \$374,883

**EXPECTED RETURN ON INVESTMENT = \$101.40 : \$1**

\$101.40 projected  
to be returned for  
every \$1 invested.



**IMPORTANT NOTE: THE LARGEST GIFTS WERE NOT INCLUDED**  
In an effort to normalize the data (reduce skewing), we removed the top 1/2% (.005) of donors making the largest gifts (approximately 20 per year) thereby eliminating donations of \$100,000 or more.



**CAN YOU AFFORD TO INVEST IN AUTOMATION?**

**Better question: Can you afford NOT to?**





# ABOUT US

**'Done-for-you'**  
fundraising automation



[imarketsmart.com](http://imarketsmart.com)

# PROSPECT IDENTIFICATION



“**OVERWHELMED** BY THE DATA”



“MOSTLY WENT **UNUSED**”



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



“WE NEED MORE **ACTIONABLE INFORMATION**  
TO  
HELP US LAND **MORE MEANINGFUL MEETINGS**  
....**NOT MORE DATA!**”

# BE THE FUNDRAISER YOU ALWAYS WANTED TO BE



market  smart

[imarketsmart.com](http://imarketsmart.com)



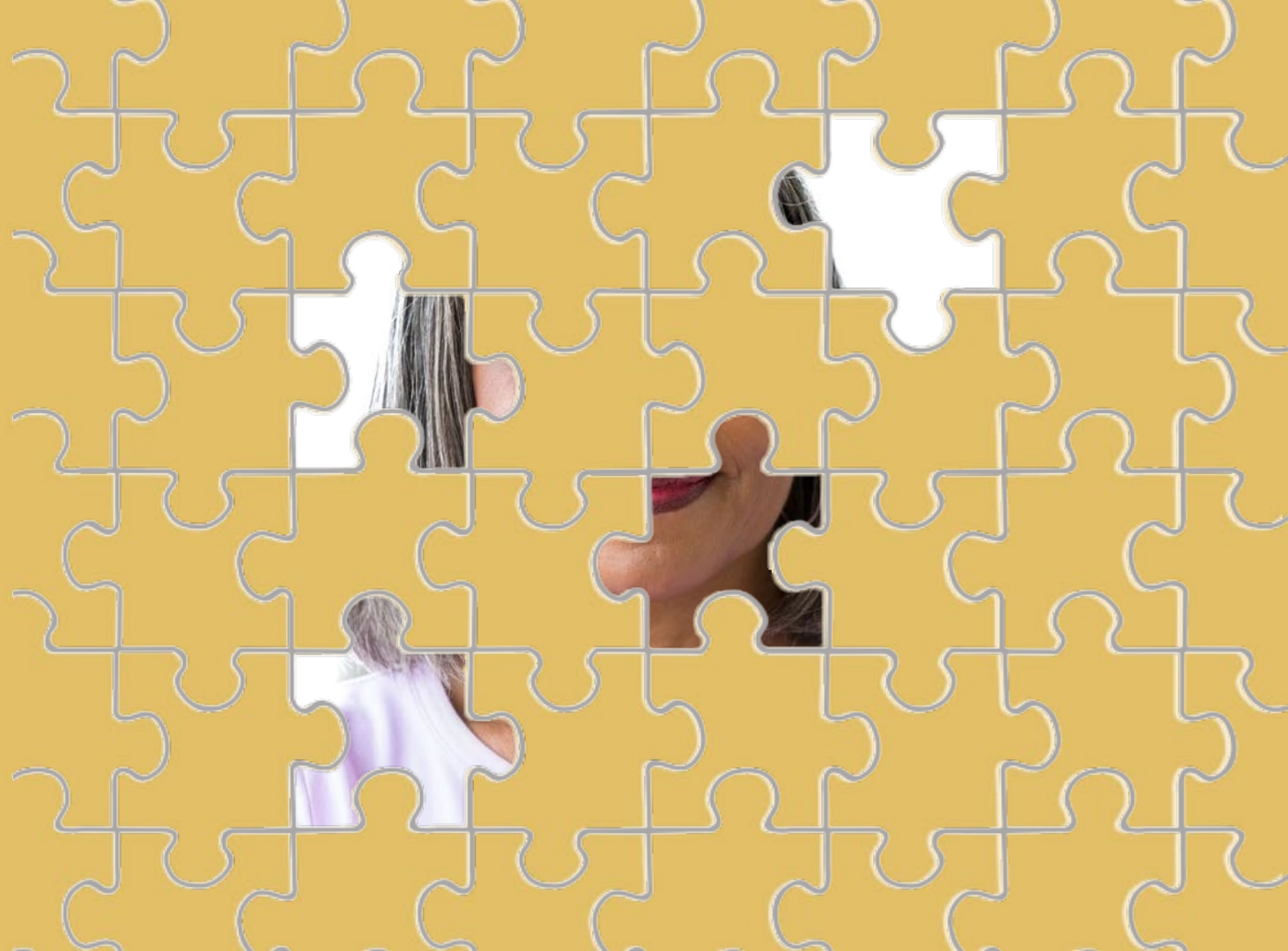
# PROSPECT **QUALIFICATION**

who &  
why?



WHY  
THEY CARE





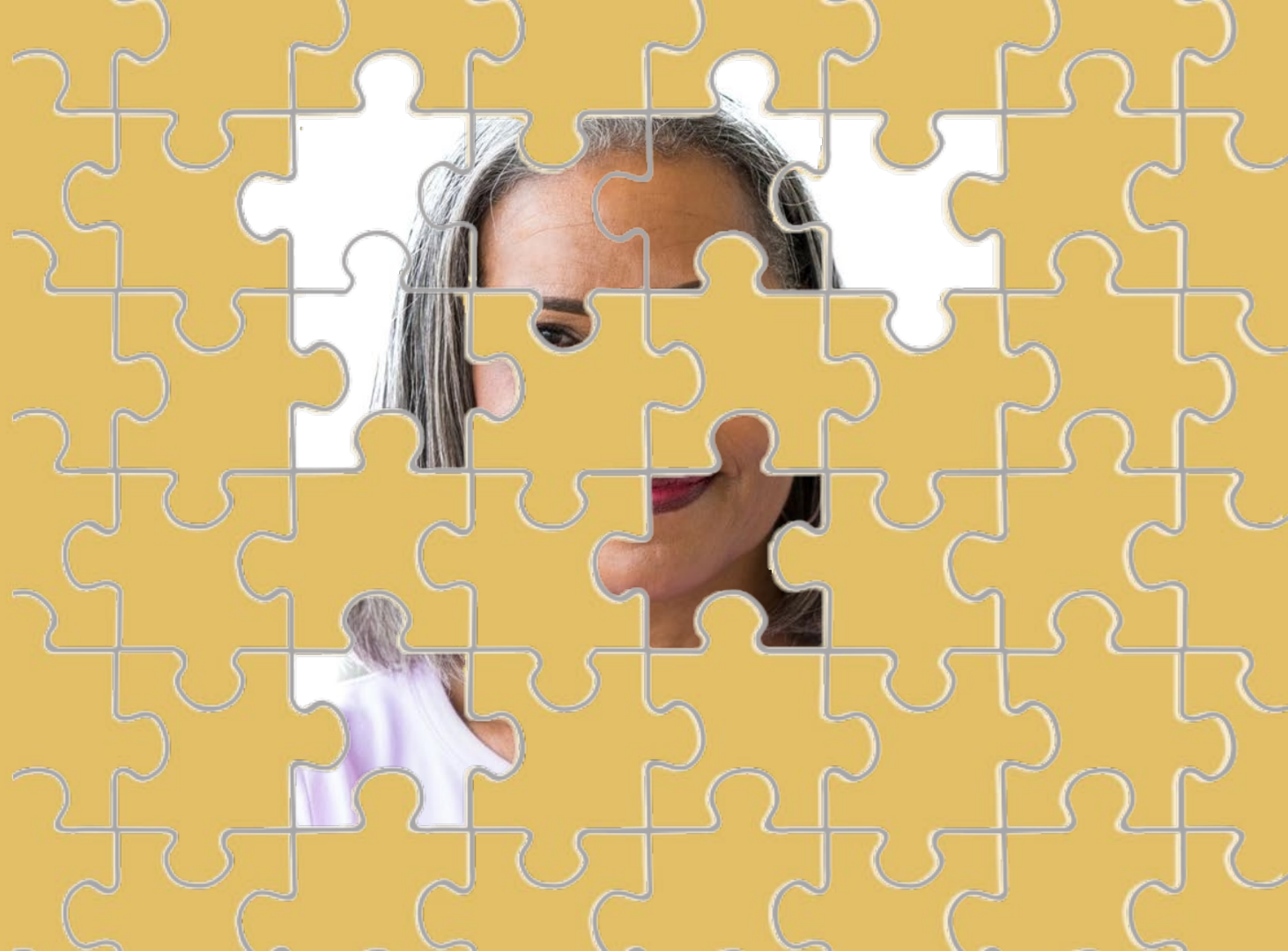
**INTERESTS**

**PASSIONS**

**LIFE  
STORIES**











**INFLUENCERS RANKING COMMITMENT  
LEVEL**





A woman with grey hair and a slight smile is looking through a large puzzle piece that is part of a larger grid. The grid is composed of many interlocking puzzle pieces, all of which are yellow with white outlines. The woman's face is the central focus, framed by the puzzle pieces. The background is a solid yellow color.

**CONSIDERING  
NOW**

**MAYBE  
LATER**

**ASSETS  
OR CASH**









**LEGACY  
GIFT**

**WANT  
INFORMATION**

**MEET  
NOW**









# PROSPECT **QUALIFICATION**



**HIGHLY EDUCATED  
WIDOW/WIDOWER  
CHILDLESS  
ATTORNEY**





# A PROVEN SYSTEM

## Start with a SURVEY



Online landing pages



Online opt-in forms  
or surveys

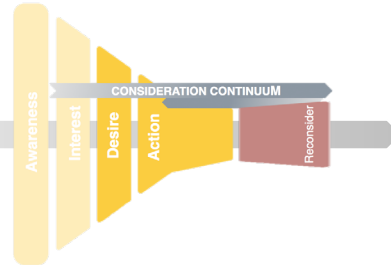
Tech-enabled donor  
discovery at scale

## Automate your EMAILS



Build trust, grow relationships &  
drive engagement with highly  
relevant cultivation

## Engage with EFFORTS



Increase donor interest  
& desire with novel,  
value-oriented efforts

## Prioritize with your DASHBOARD



Prioritize outreach based on  
recency of engagement,  
passion, interest & capacity



Meet & facilitate  
giving

# A PROVEN SYSTEM

1. Zero-in on people who are **ready** to **engage with you now**



2. Cultivate **tons** of **prospects**



# Return on investment Immediate ROI

(Return on investment)

10x

# Lifetime value ROI

(Return on investment)

100x



# OPPORTUNITY ANALYSIS

## 100% FREE WITH NO STRINGS ATTACHED



### ANALYZE YOUR **TRANSACTIONAL** DATA

Quantities, counts and amounts  
along with current lead allocation



### MARRY WITH OUR **SURVEY** DATA

Collected from millions of  
surveys sent to supporters of  
MarketSmart's customers



### CALCULATE OUR **FORECASTED** DATA

Reformatted to determine  
what is likely to occur



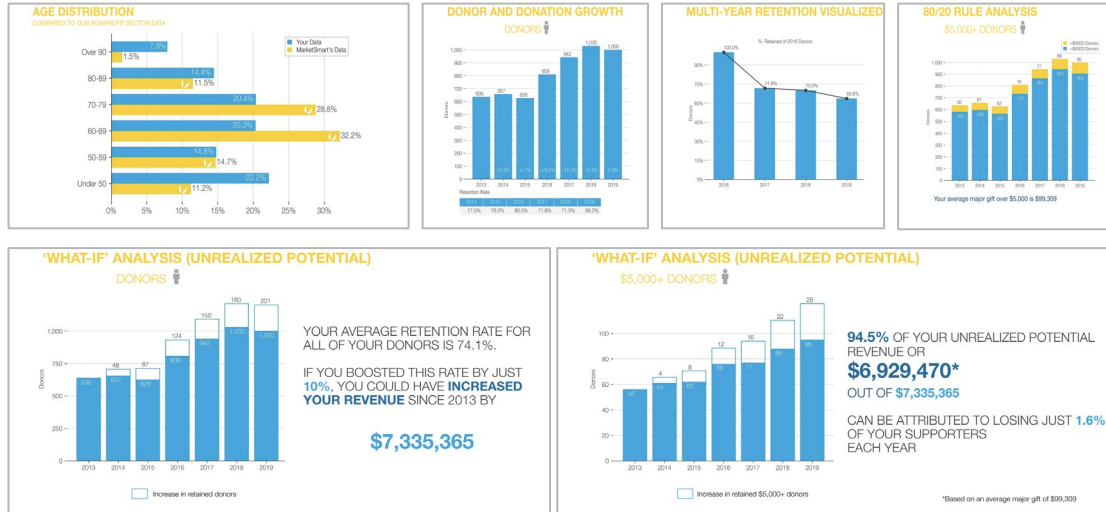
### PRESENT YOUR **OPPORTUNITY** & POTENTIAL

Predictions for success in  
association with available  
media channels



# OPPORTUNITY ANALYSIS

## WHAT YOU GET



This model simulates the following response rates:

- 5% response rate from email surveys sent to 1,880 donors (94 responses)
- 3% response rate from email surveys sent to 4,000 non-donors (120 responses)
- 7% response rate from print surveys sent to 913 donors (64 responses)

= 278 responses (4.1% response rate)

### PROJECTION OF MID-LEVEL AND MAJOR GIVING REVENUE

| Variable               | Value              | Consideration stage | Win rate |
|------------------------|--------------------|---------------------|----------|
| Total list             | 6,793              | No interest         | 0.00%    |
| Response rate          | 4.10%              | Somewhat likely     | 40.00%   |
| Total response         | 278                | Likely              | 60.00%   |
| Mid/Major Gift Portion | 15.00%             | Already do it       | 75.00%   |
| Average Gift           | \$5,000 - \$10,000 |                     |          |
| Renewal Rate           | 80%                |                     |          |

Average gift of \$5,000 = ~\$450,000 from 25 donors (10 year lifetime value)

Average gift of \$10,000 = ~\$900,000 from 25 donors (10 year lifetime value)

### PROJECTION OF PLANNED GIVING REVENUE

| Variable                  | Value       | Consideration stage | Win rate |
|---------------------------|-------------|---------------------|----------|
| Total solicitable list    | 6,793       | No interest         | 1.0%     |
| Total Email               | 5880        | Deferred interest   | 15.0%    |
| Total Direct Mail         | 913         | Immediate interest  | 60.0%    |
| Email Response rate       | 3.64%       | Gift disclosed      | 95.0%    |
| Direct Mail Response rate | 7.00%       |                     |          |
| Overall Response rate     | 4.09%       |                     |          |
| Total response            | 278         |                     |          |
| Average Bequest           | \$50,000.00 |                     |          |

\$2 Million in deferred giving potential from 40 legacy donors.

### YOUR OPPORTUNITY & POTENTIAL

#### REVENUE PROJECTION SUMMARY & RETURN ON INVESTMENT

Planned Giving revenues = \$2,000,000

Mid/Major Giving revenues = \$450,000 - \$900,000

TOTAL = \$2,450,000 - \$2,900,000\*

\*Keep in mind that there is MORE opportunity in Danforth's database than outlined in this analysis. The ROI outlined in this analysis is from one pass through of MarketSmart's strategy to ~6,800 supporters in Danforth's database.



# ALL ABOUT AUTOMATION

How to optimize your fundraising operation with technology

# QUESTIONS?

