

THE SMART WAY Scorecard 2.0

The SMART Way Scorecard 2.0: You've seen the SMART Way Scorecard. You've even set up a profile or two. Now step up your fundraising efficiency with BSG's new Scorecard 2.0. We built it on Microsoft's popular Excel spreadsheet platform so it would be easy to use. We'll even pre-format it to match your Scorecard profiles and install it for you, so you'll start to benefit right away. The new Scorecard Software scores and ranks donor prospects, keeps track of opportunities, and reports on fundraising performance. Scorecards help you choose prospects with the right capacity AND motivation to give to your nonprofit. Pipeline insights keep you focused. Analytical reports show what's working, what isn't and how to improve things.

Evaluate your prospects based on objective criteria!

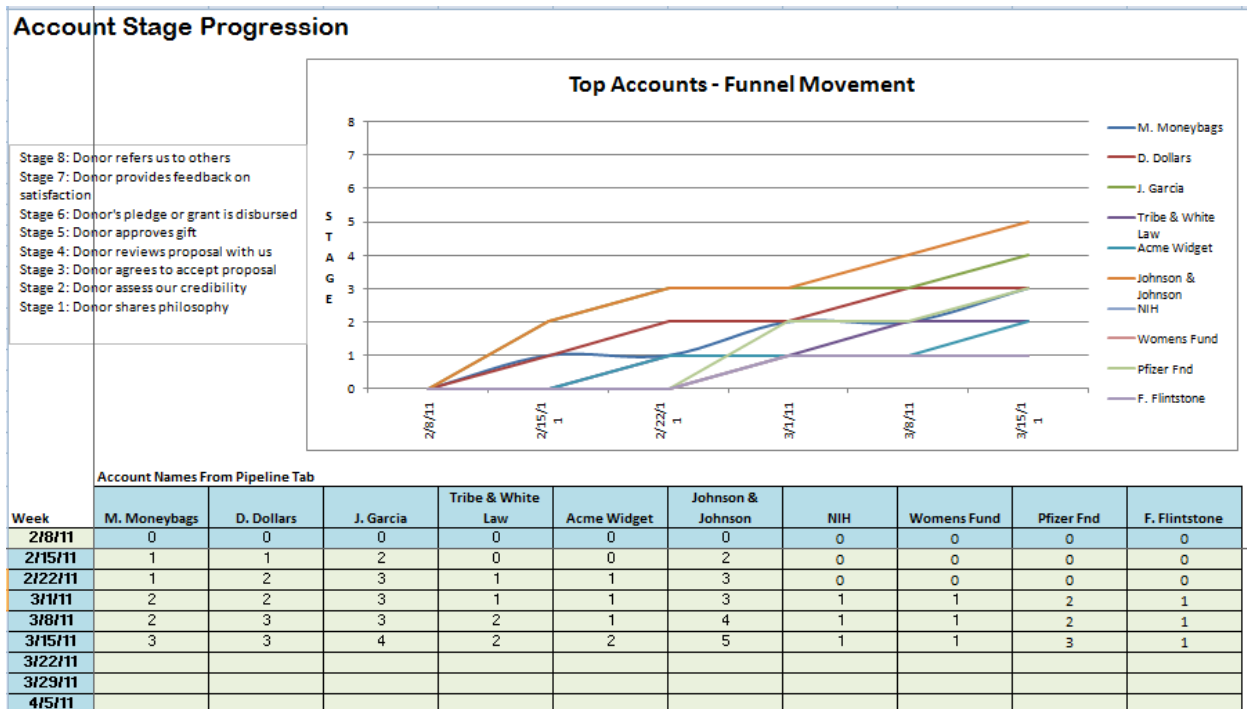
Children's Agency Scorecard by BSG		Line of Business:	Donors	
Account (from tab name):	D. Dollars	Key Contact:		
Opportunity Within Account:	Annual Campaign	Source:	annual campaign list	
Account Exec:	Mary Jones	Phone:		
Estimated Revenue:	\$45,000	E-mail:		
Date Created:		Category:		
		Rank	Ideal Score	Actual Score
RANK = A, Justifies MAXIMUM Effort		B	275	204
RANK = B, Justifies REASONABLE Effort				
RANK = C, Justifies MODEST Effort				
RANK = D, Justifies LITTLE Effort				
		Weight	Prospect Score	Weighted Score
FACTS, SPECIFICS STATEMENTS - ENTER 1 (LOW) - 5 (HIGH)				
Has given to one or more charities at \$10,000/year for 5-10 years		5	5	25
Demonstrates affinity thru past giving for women/children's issues, health, economic		5	5	25
Residens in affluent community/zip code in our geography		4	4	16
Has a net worth of \$10,000,000 or more		5	5	25
Is over 60 years old		3	5	15
Has given \$1,000 to us in the past five years		3	5	15
Subtotal this category		125		121
VALUE STATEMENTS - ENTER 1 (LOW) - 5 (HIGH)				
Donor wants to lower teen pregnancies, improve family/child relationships, raise school attendance through appropriate psychological support		5	4	20
Donor is strongly committed to supporting women, children, families		5	3	15
Donor appreciates that Children's was there for her or a family member		5	2	10
Donor wants to make a real difference in our community		5	3	15

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Imagine. A pipeline report that's not a series of rambling anecdotes!

Pipeline View		Account Owner: Mary Jones				
TOTAL Est. Revenue:		\$758,000				
Account	Opportunity	Source	Rank	Est. Revenue	Stage	Line of Business
M. Moneybags	Annual Campaign	annual campaign list	A	\$25,000	3	Donors
D. Dollars	Annual Campaign	annual campaign list	B	\$45,000	3	Donors
J. Garcia	Annual Campaign	Annual campaign list	A	\$100,000	4	Donors
Tribe & White Law	Gala Program Prime Sponsor	Board connection	A	\$90,000	2	Corporate
Acme Widget	Gala Sponsor	Board connection	A	\$75,000	2	Corporate
Johnson & Johnson	Gala Title Sponsor	Tradeshaw	B	\$75,000	5	Corporate
NIH	Federal Behavioral Health Program	Grantor invitation	A	\$150,000	1	Grants
Womens Fund	Capacity Building	Past funder	C	\$47,500	1	Grants
Pfizer Fnd	NeoNatal Care Project	Past grantee	B	\$50,500	3	Grants
F. Flintstone	Teen Program	Board member	A	\$100,000	1	Donors

View the way your opportunities move from 'hello' to 'here's my check'!



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View overall performance and each funding category.

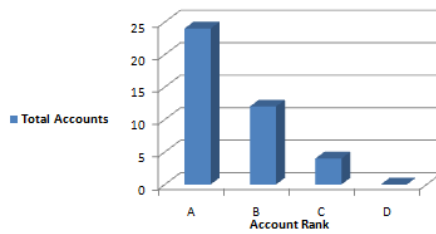
MASTER Summary Account View: THE CHILDREN'S AGENCY

ALL Lines of Business

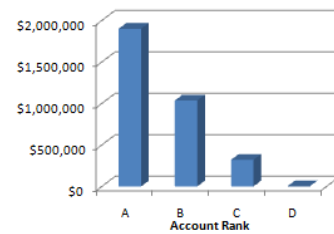
Total Accounts & Revenue

Rank	Total Accounts	Total Revenue
A	24	\$1,900,000
B	12	\$1,035,500
C	4	\$320,000
D		
TOTAL	40	\$3,255,500

Total Accounts by Rank



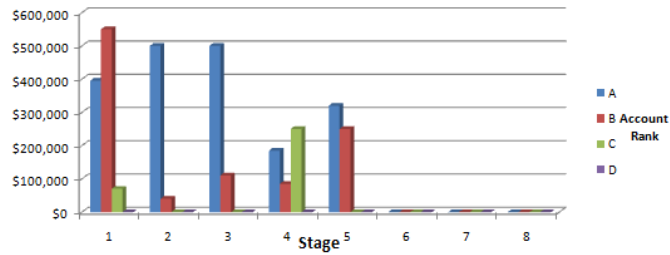
Total Revenue by Rank



Total Revenue by Rank

Stage	A	B	C	D	TOTAL
1	\$395,000	\$550,000	\$70,000		\$1,015,000
2	\$500,000	\$40,000			\$540,000
3	\$500,000	\$110,500			\$610,500
4	\$185,000	\$85,000	\$250,000		\$520,000
5	\$320,000	\$250,000			\$570,000
6					
7					
8					
TOTAL:	\$1,900,000	\$1,035,500	\$320,000		\$3,255,500

Total Revenue by Ranking and Stage

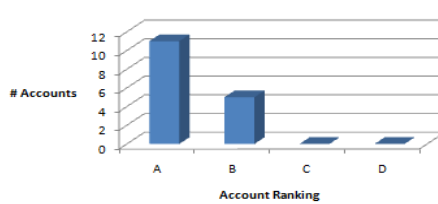


Line of Business 1: Donors

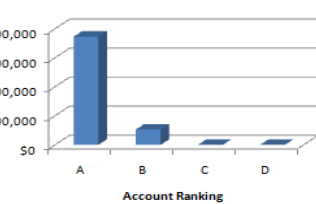
Total Accounts & Revenue

Rank	Total Accounts	Total Revenue
A	11	\$745,000
B	5	\$105,000
C		
D		
TOTAL	16	\$850,000

Total Accounts by Rank



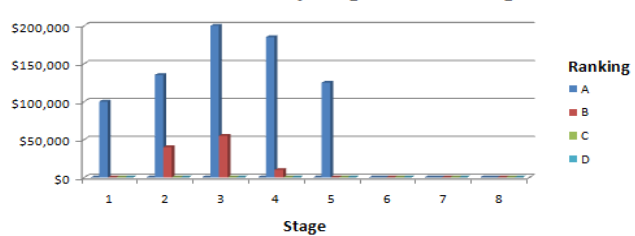
Total Revenue by Rank



Total Revenue by Rank

Stage	A	B	C	D	TOTAL
1	\$100,000				\$100,000
2	\$135,000	\$40,000			\$175,000
3	\$200,000	\$55,000			\$255,000
4	\$185,000	\$10,000			\$195,000
5	\$125,000				\$125,000
6					
7					
8					
TOTAL:	\$745,000	\$105,000			\$850,000

Total Revenue by Stage and Ranking



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View your entire pipeline for all team members and all income categories.

MASTER Pipeline View

TOTAL Est. Revenue:		\$3,255,500								
Account Exe	Account	Distribution	Rank	Est. Revenue	Last Stage	Source	Line of Business	Hyperlink to Account		
Mary Jones	M. Moneybags	Annual Campaign	A	\$25,000	3	annual campaign list	Donors	[Dev Officer Scorecard - Mary Jones.v1.xlsm!M_Moneybags!\$A\$1]		
Mary Jones	D. Dollars	Annual Campaign	B	\$45,000	3	annual campaign list	Donors	[Dev Officer Scorecard - Mary Jones.v1.xlsm!D_Dollars!\$A\$1]		
Mary Jones	J. Garcia	Annual Campaign	A	\$100,000	4	Annual campaign list	Donors	[Dev Officer Scorecard - Mary Jones.v1.xlsm!J_Garcia!\$A\$1]		
Mary Jones	Tribe & White Law	Gala Program Prime Sponsor	A	\$90,000	2	Board connection	Corporate	[Dev Officer Scorecard - Mary Jones.v1.xlsm!Tribe & White La!\$A\$1]		
Mary Jones	Acme Widget	Gala Sponsor	A	\$75,000	2	Board connection	Corporate	[Dev Officer Scorecard - Mary Jones.v1.xlsm!Acme Widget!\$A\$1]		
Mary Jones	Johnson & Johnson	Gala Title Sponsor	B	\$75,000	5	Tradeshov	Corporate	[Dev Officer Scorecard - Mary Jones.v1.xlsm!Johnson & Johns!\$A\$1]		
Mary Jones	NH	Federal Behavioral Health Prc	A	\$150,000	1	Grantor invitation	Grants	[Dev Officer Scorecard - Mary Jones.v1.xlsm!NH!\$A\$1]		
Mary Jones	Womens Fund	Capacity Building	C	\$47,500	1	Past funder	Grants	[Dev Officer Scorecard - Mary Jones.v1.xlsm!Womens Fund!\$A\$1]		
Mary Jones	Pfizer Fnd	Neotatal Care Project	B	\$50,500	3	Past grantee	Grants	[Dev Officer Scorecard - Mary Jones.v1.xlsm!Pfizer Fnd!\$A\$1]		
Mary Jones	F. Flintstone	Teen Program	A	\$100,000	1	Board member	Donors	[Dev Officer Scorecard - Mary Jones.v1.xlsm!F_Flintstone!\$A\$1]		
Greg Hanson	Oracle	Community Relations	A	\$90,000	5	Donor Renewal	Corporate	[Dev Officer Scorecard - Greg Hanson.xlsm!Oracle!\$A\$1]		
Greg Hanson	Meineke Auto	Community Relations	B	\$5,000	3	Board Member	Corporate	[Dev Officer Scorecard - Greg Hanson.xlsm!Meineke Auto!\$A\$1]		
Greg Hanson	Frank Meineke	Naming Opportunity	A	\$60,000	4	Annual Campaign	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Frank Meineke!\$A\$1]		
Greg Hanson	Jane Benson	Annual Campaign	B	\$10,000	3	Past donor	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Jane Benson!\$A\$1]		
Greg Hanson	Brett Hanson	Naming Opportunity	A	\$25,000	5	Direct-mail	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Brett Hanson!\$A\$1]		
Greg Hanson	Sam Bernstein	Naming Opportunity	B	\$25,000	2	donor referral Meineke	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Sam Bernstein!\$A\$1]		
Greg Hanson	Helen Mann	Annual Campaign	A	\$45,000	2	0	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Helen Mann!\$A\$1]		
Greg Hanson	Jen Kaplan	Annual Campaign	A	\$15,000	2	0	Donors	[Dev Officer Scorecard - Greg Hanson.xlsm!Jen Kaplan!\$A\$1]		
Greg Hanson	Kaplan & Shore PA	Community Relations	C	\$17,500	1	direct mail	Corporate	[Dev Officer Scorecard - Greg Hanson.xlsm!Kaplan & Shore P!\$A\$1]		
Greg Hanson	Nerds.net	Community Relations	C	\$5,000	1	Direct mail	Corporate	[Dev Officer Scorecard - Greg Hanson.xlsm!Nerds.net!\$A\$1]		
Patty Riordan	IBM	Gala Sponsor	A	\$25,000	5	Donor Renewal	Corporate	[Dev Officer Scorecard - Patty Riordan.xlsm!IBM!\$A\$1]		
Patty Riordan	Flowers Direct	Gala Sponsor	A	\$5,000	5	Board Member	Corporate	[Dev Officer Scorecard - Patty Riordan.xlsm!Flowers Direct!\$A\$1]		
Patty Riordan	Jim Foster	Naming Opportunity	A	\$25,000	4	Annual Campaign	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Jim Foster!\$A\$1]		
Patty Riordan	Matthew Bodine	Annual Campaign	B	\$10,000	4	Past donor	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Matthew Bodine!\$A\$1]		
Patty Riordan	Seymour Weinstein	Annual Campaign	A	\$25,000	3	Direct-mail	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Seymour Weinstn!\$A\$1]		
Patty Riordan	Esther Cummings	Major Gift - naming opportuni	A	\$150,000	3	Past donor	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Esther Cummings!\$A\$1]		
Patty Riordan	Mathilde St. Jacques	Annual Campaign	B	\$15,000	2	Direct Mail	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Mathilde St. Jacq!\$A\$1]		
Patty Riordan	Nancy Brooks	Annual Campaign	A	\$75,000	2	Board referral	Donors	[Dev Officer Scorecard - Patty Riordan.xlsm!Nancy Brooks!\$A\$1]		
Patty Riordan	Brooks Developers	Gala	B	\$50,000	1	Board referral	Corporate	[Dev Officer Scorecard - Patty Riordan.xlsm!Brooks Develop!\$A\$1]		
Patty Riordan	Hyatt	Gala	A	\$100,000	1	0	Corporate	[Dev Officer Scorecard - Patty Riordan.xlsm!Hyatt!\$A\$1]		
Tim Winston	Moonstone Fnd	Capacity Bldg	B	\$75,000	4	F	Grants	[Dev Officer Scorecard - Tim Winston.xlsm!Moonstone Fnd!\$A\$1]		
Tim Winston	CSC	Teen Program - Extension	B	\$175,000	5	repeat	Grants	[Dev Officer Scorecard - Tim Winston.xlsm!CSC!\$A\$1]		
Tim Winston	Target Fnd	Sponsor Teen Research Pro	A	\$75,000	5	Board contact	Grants	[Dev Officer Scorecard - Tim Winston.xlsm!Target Fnd!\$A\$1]		
Tim Winston	Braman Fnd	School Health Clinic	C	\$250,000	4	Past Grantor	Grants	[Dev Officer Scorecard - Tim Winston.xlsm!Braman Fnd!\$A\$1]		

Effective donor management that can stand alone or integrate with your preferred software application! We designed Scorecard 2.0 to work for any nonprofit, regardless of budget, whether you manage your fundraising on a spreadsheet or a donor-management software package. If you use donor management software, Scorecard 2.0 adds meaningful benefits:

- **Adopt and implement the SMART Way model.** Fundraising the SMART Way helps you and your team do their fundraising jobs a little bit differently. Use SMART Way Scorecard 2.0 to ease the transition into the new style of working!
- **“Import and export”.** If you don’t want complete integration with your donor management software, simply import and export data from the Scorecard spreadsheets (requires modest up-front effort).
- **Use Scorecard 2.0 as your “specification” for integration.** No guesswork required. The Scorecard 2.0 can give your IT specialists the information they need in order to customize your current platform. Or we can handle the integration for you.

**Fundraising the SMART Way™ -
The Science that Makes the Art of Fundraising Possible**

Visit us at www.bristolstrategygroup.com

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