



Summoning the Courage to Change

**A Case Study of List Brokerage
and Analytics Driving
Prospecting Growth**

In August 2007, List Services Fundraising started working with Catholic Relief Services (CRS), a very large and well-established mailer.

The challenge for List Services was that we had absolutely no prior experience in the Catholic market.

However, during the proposal process CRS liked the way we approached their programs and how we challenged their assumptions in a constructive way. So they “took a chance” on us.

Key Achievements

- **Finding new test lists**
- **Continuing Growth: Building upon early successes**
- **Achieving net cost savings**
- **Outperforming peer benchmarks**
- **Understanding client goals and developing solutions to succeed**
- **Utilizing advanced analytics to formulate actionable strategies**

Starting with CRS in Q4 2007 was a challenge in itself due to a rapidly deteriorating economy.

Due to List Services' ability to improve performance and expand universes, CRS had more ability to improve in a bad environment. They could replace declining lists with new, better lists.

Some mailers were forced to reduce their viable list universe and use the same files more often, but List Services was actually delivering better results overall and truly growing the prospecting universe and performance simultaneously.

Key Achievements

- **55 new continuation lists in first 12 months**
- **Expanded continuation universe by 1,900,000 names**
- **Grew acquisition volumes / donors to file by 20% without degrading performance**



Jan 2008:
US
recession
begins

Aug 2008:
Oil hits
\$147/bl

Aug 12, 2008:
China
Earthquake

Nov 2008:
Pres.
Obama
elected

Feb 2009:
\$787B
stimulus
bill passes

Apr 2009:
H1N1
Global
pandemic

Encouraged by early results CRS wanted to keep growing. We showed them how switching performance benchmarks from a gross to net basis could improve the program efficiency still further and simultaneously facilitate additional growth.

We applied our Marketing Intelligence Platform to quantify longer-term value metrics in decision-making.

Key Advantages

- CRS was able to grow by reinvesting cost savings back into prospecting without increasing budgeted expenses.
- CRS uses long-term value to anticipate the condition of their program in future periods and thereby make reasoned arguments for additional investment.
- The program was significantly outpacing peers.

Long-Term Donor Growth

View E

Select Rate to Plot
Cumulative Growth

Select Starting Quarter
Q4 2007

Select Donor Population
New Donors

Select Cohorts to Display

All Organizations
 My Organization

Enter Password: Go

Catholic Relief Services

Animal Welfare

Arts & Culture

Environmental Health

Human Services

Internat. Relief

Religion

Societal Benefit

Gross Domestic Product

Consumer Price Index


Consumer Sentiment

S & P 500 Index

Unemployment Rate

U.S. Population Growth

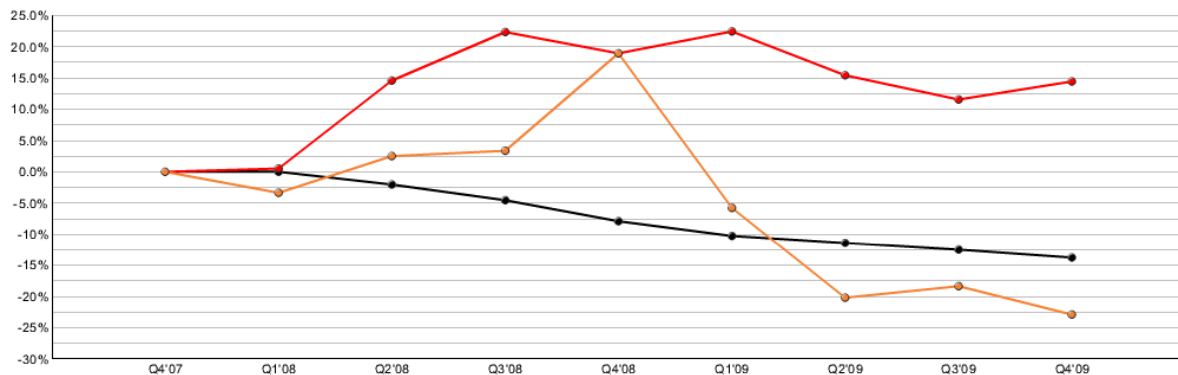
% of All Organizations That Had a Positive Change in Donors from Q4 2007 to Q4 2009



Position cursor over a data point to refresh.

Donor Growth of Cohorts and Economic Indicators

Rolling Medians: Each data point shows the median % change in 12-month donor numbers from Q4 2007.



Key Observations

- Prior experience in a specific market is not a prerequisite for great success.
- Immediate improvements are critical but sustaining success over the long-haul is paramount.
- These results were obtained in a very difficult—and downward trending—fundraising environment. We find ways to overcome challenges.
- Clients who engage directly with List Services Fundraising typically have the greatest success because we become a part of your team and will better understand the true dynamics of your program.
- Clients who take advantage of our significant analytical capabilities derive much greater value than those who prefer to operate under the status quo.
- It can be intimidating to make the initial decision to change business relationships but if you choose a partner with a proven track record, your courage will be handsomely rewarded.

About List Services Fundraising

List Services Fundraising aims to be the premier **acquisition partner** for our clients in the non-profit industry. By leveraging our core competencies of direct response list brokerage and list management as well as our extensive industry experience and our culture of innovation and discovery, we are positioned to deliver the most appropriate and rewarding donor acquisition opportunities to non-profits.