Why This Change

- On November 1st SFS was acquired by Infogroup
- New partnership opens a wealth of new products and services to existing SFS clients
- Our highly personalized approach to client services remains while our clients now have a wide array of database services and tools available.
- I saw the need for change… and moving from small independent organization to a larger more robust partnership made sense for my company…. and most importantly our clients.
- Infogroup owns “big” data and as such has developed a variety of solutions for direct marketers to improve and enhance their programs
Our Corporate Strength

Infogroup is all about their client partner’s growth. We provide targeted high-value marketing data and services, customer & market intelligence, and innovative digital engagement solutions that increase sales and customer loyalty.

We enable organizations to engage and connect with millions of consumers and businesses on a daily basis.

- Serve 85% of Fortune 100 Companies
- Power top 5 Search Engines
- Provide Points of Interest data for the leading in-car navigation systems in North America
- Deploy 30 billion emails annually on behalf of clients

Data

The highest quality and most relevant marketing data tailored to consumers and businesses of all types and sizes

- B2C and B2B data
  - 220 million consumers - 17 million businesses
  - Seamless integration with relevant 3rd party data sources
  - Demographics, lifestyle, purchase behavior
  - Firmographics, key contacts for small to enterprise businesses, global reach
What Makes Infogroup Unique?

Our philosophy is that traditional list selection must be enhanced with data-driven analytics to maximize performance

- As an original creator, we access transactional, behavioral, and demographic data on over 120 million households to provide unmatched modeling tools to for your renewal, reactivation and prospecting efforts.
- Our brokerage teams are experts at providing list strategy, segmentation, price negotiations and performance analysis.
- The difference between us and our competitors is that we are able to take it to the next level due to our unmatched access to data, processing power and market knowledge.
- Integration of traditional list brokerage with targeted analytical data-driven solutions to improve acquisition programs.

Analytics and Data-driven Fundraising

Our development strategies are tailored to each unique client situation, based on in-depth analysis of historical trends, market conditions and cost/income estimates.

- As an original data creator, we access transactional, behavioral, and demographic data on over 100 million households to provide unmatched modeling tools to your renewal, reactivation and prospecting efforts.
- Data modeling is combined with traditional segmentation to maximize response and long term value.
Research

Actionable insights that help you make more effective business decisions

• Integrates primary and secondary research
  ➢ Market identification, sizing, segmentation & penetration analysis
  ➢ Positioning and value proposition testing
  ➢ Brand awareness and perception analysis
  ➢ Buyer and user behavior research
  ➢ New product ideation, innovation & testing
  ➢ Competitive intelligence/analysis

Services

Enabling extraordinary customer interaction and delivering meaningful and actionable results

• List Management and Brokerage
• Campaign Strategy
• Cost/Income forecasting
• Award-winning Creative
• Data optimization for increased ROI
• Mail production and deployment
• Email and digital campaign creation and deployment
• Campaign Analytics
• Merge Purge
• Building of Private Prospecting DB solution
• Apogee cooperative DB custom models
Clients We Serve

Media Services
Media Services

- The most experienced brokers in the industry providing over 300 million targeted prospects each year.

- List expertise to identify households who will respond to your appeals at effective ROI and Long Term Value – in postal, email, mobile messaging, and telemarketing campaigns.

- We are the largest manager of nonprofit lists, backed with one of the highest levels of advertising, sales, marketing, public relations, data processing, programming, Internet access, customer service, accounting and security.

Data-driven Audience Development

- Analytical segmentation of your donor/member base using RFM and advanced modeling tools.

- Hundreds of data elements applied to lapsed segments to increase reactivation and allow you to reach deep into your archives.

- The best of traditional list brokerage tools, combined with merge optimization modeling, to direct your budget at the most responsive and generous prospects.
Interactive & Digital Marketing

• Comprehensive, cross-channel digital marketing solution to build and execute powerful marketing campaigns.

• With access to over 100 million permission-based email addresses, we can add multi-channel fundraising to your toolbox immediately.

• Channels include mobile and SMS, email, database, and social media, along with development of websites, microsites, landing pages, and web-based widgets.

Database Compilation & Marketing Database Solutions

• We offer the most comprehensive databases in the industry and are the only company to build and maintain 12 proprietary databases with details on virtually every US and Canadian business and resident.

• We have extensive experience building marketing databases that help our clients optimize their acquisition and retention initiatives.
Merge Purge Services

Who We Serve

- Both Infogroup Media clients and those that only choose to do merge with us.
- We do over 1,000 merges annually.
- Working with over 400 unique nonprofit clients.
- USPS Licensee
- Merge Advantage (optimization)
Additional Merge and Post Merge Options

Additional Merge Options:
- Merge Advantage - Optimization Modeling
- Prospecting Database Options
- Promotion History (Chronic Non-Responder)
- Hotline Processing
- Postal Advantage

Post Merge Options:
- Support of partner relationships
- Splits, Nths and Reassigns
- Multi-Tiering
- Customized Selections or de-selects

The Data

Over 2 Billion Input Records Annually
Data Appends

The Append Service will accept an external file, compare it with the existing file and adds extra data to the existing data. There are over 400 different variables available from the database.

- Some Consumer Elements Available for Append:
  - Head of Household Name
  - Telephone Number
  - Presence of Children
  - Gift Givers
  - Heavy internet User
  - Date of Birth
  - Magazine Buyers
  - Crafts
  - Income
  - Wealth finder
  - Own/Rent Status
  - Ethnic Products
  - Email Address
  - Cell Phone Number
  - Gardeners
  - Cook Book Buyers

Apogee
Cooperative Nonprofit Database
Apogee, The Infogroup Cooperative Donorbase

*Your Foundation for Fundraising*

- Non Profit membership only built by fundraising marketing experts.

- As an original data creator, we maintain transactional, behavioral, and demographic data on over 120 million households to provide unmatched modeling tools to your renewal, reactivation and acquisition efforts.

- Not just another “list source”. Apogee is a flexible marketing tool providing *multiple* solutions to your programs’ many needs.

- Enrich your marketing efforts with Apogee’s 2 billion transactions.

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Apogee, Data Architecture

- **Contributed Data** from Nonprofits:
  - 250,000,000 Donors
  - 1,200,000,000 Transactions

- **Commercial Data**:
  - 65,000,000 Households
  - 1.2BB Transactions

- **Infogroup’s National Consumer Database**:
  - Over 120,000,000 Households
Apogee Marketing Solutions

**Acquisition**  *Increase your prospect pool*
- Tap into Apogee’s massive universe to access prospects ideal for your program.
- Expand into new markets through commercial list optimization

**Reactivation**  *Maximize your most powerful source*
- Ripe prospects exist within even your oldest lapsed donor population. Let Apogee find them.

**MergeOptimization**  *Improve your overall performance*
- Lower cost and improve response rates by cutting prospects unlikely to perform.
- Identify *HighValue* prospects likely to make generous donations.

**HighValue**  *Maximize revenue and LTV*
- Identify prospects and donors ripe for enhanced treatment.
- Upgrade existing donors to *mid donor*, *major donor*, and *planning giving* status.

**Monthly Giving**  *Convert donors to sustainers*
- Grow streams of steady revenue by converting donors to sustainers.

**SurRound**  *True multi-channel marketing*
- Utilize Apogee data to contact prospects and donors multiple times within a campaign.
Apogee, The Infogroup Cooperative Donorbase

- Sectors represented in Apogee:
  - Animal Welfare
  - Arts & Culture
  - Children’s Causes
  - Children’s Health
  - Conservative
  - Domestic Relief
  - Education / Academic
  - Health
  - Humanitarian
  - Int’l Relief
  - Liberal
  - Museums
  - Nature / Environment
  - Political Parties
  - Religious, Catholic
  - Religious, Christian
  - Social Service
  - Veterans Services

Apogee, General Business Rules

- Participation is anonymous.
- No long-term commitment for membership.
- No unique donor contributed households are retained.
- Your donors are suppressed during the selection process.
- Names can be blocked by both category and organization.
- Organization-specific donors are not selectable.
Private Prospecting Database Solutions

Prospecting Database

+ Increase Universe
+ Optimize Performance
+ Lower Costs

Acquisition and Reactivation Efforts
Prospecting Database

A PDB is a data warehouse where millions of data elements are linked and aggregated to enable new intelligence in the marketing campaign process.

Prospecting Database

A PDB will typically contain five major sources of names:

1. **Infogroup’s National Consumer Database of Catalog and Retail COOP Data:**
   Over 220 million compiled names refreshed every month with new transaction data, containing over 300 demographic data elements.

2. **Apogee Data:** Over 20 million unique names should you decide to participate. This new perspective adds demographic, retail and donation recency to every record in the prospect database.

3. **Mailer’s Active/Lapsed Donors and Prospects:** Typically 80% of these names will match Infogroup’s National Consumer Database.

4. **Mailer’s Prospect Mail History:** 2 years past mail history, both responders and non-responders including number of contacts by package and list.

5. **Rental Lists:** Rental files who have agreed to participate, selected at net and updated monthly.
Prospecting Database

• The greatest benefit to an organization operating in a PDB environment is reduced list rental costs through net/net arrangements and a shift from more costly rental lists to better targeted audiences selected from the database.

• The PDB environment will allow a mailer to model every record in the base using a range of intelligence including list source, contact history (when/how often you have mailed them), demographics such as age and income, and a comprehensive view of their purchasing activity.

• In addition, if you are a member of the Apogee donor co-operative, you will gain access to millions of donor transaction data in the PDB as well.

• This is a tool for large mailers and not applicable for anyone

Prospecting Database

The potential benefits of the PDB environment include:

• Decrease in list rental cost through net/net usage and billing
• Increase in response performance by 10-15% across mail universe
• Reallocation of savings into higher value prospects
• Reach deeper into lapsed reactivation pool with reactivation process available in every mail cycle
• Expand targeted prospect universe outside of heavily saturated core list market
• Multi channel marketing opportunities in email and telemarketing
• Target creative such as package, ask string by household
• List plan make-up will change dramatically - costs will decrease significantly
• New marketing intelligence on virtually every household in America
New Initiatives for our stations

- Merge Purge with Infogroup
- Build additional coop models in 2015
- Abacus, Apogee, Target and Wiland
  - Improve overall performance
  - Reduce list cost
  - Increase retention rate
  - Multiple models to target specific goals
- Using Merge and Apogee create other models
  - List and Merge Optimization
  - Deep Lapsed re-activation
  - Conversion Models

Co-Operative List Performance

Co-Op Performance vs. Other Outside Lists

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<th>Co-Op Files 1</th>
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<th>Co-Op Files 2</th>
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