

Comprehensive Data Management Solutions for Nonprofit Organizations

PORTFOLIO™

Donor Relationship Management Software,
Campaign Management, Reporting & Analytics



AMERGENT



“Portfolio is helping The Salvation Army Western Territory facilitate a much more strategic approach to fundraising. The new system will give our fundraising staff a complete picture of a donor’s relationship with The Salvation Army, allowing us to tailor our donor contact with more personalization and accuracy for greater impact.”

– Dona Romine, Territorial Direct Marketing and Donor Management Director,
The Salvation Army – Western Territory

PORTFOLIO™

Turning *Names* into *Friends*

In today's competitive fundraising environment, your donor database needs to be far more than a list of names and transactions. It is your organization's most valuable asset and a critical success factor for fundraising growth.

Since 1980, Amergent has been helping the country's foremost nonprofit organizations find and cultivate lifetime relationships in their donor databases. Now, you can apply Amergent's legendary expertise with **Portfolio™**, the Enterprise Nonprofit Data Management Solution. Powerful and intuitive, Portfolio puts you in control of your fundraising cycle and helps keep your donors committed to your cause.

Your complete fundraising solution includes

- a comprehensive nonprofit database management system to manage donor relationships for any size population, large or small
- state-of-the-art reporting/analysis tools that show you which variables influence your results and why
- powerful campaign management and segmentation tools that focus your marketing for greatest impact
- complete consultative system implementation, data conversion, and training services that fit the system to your unique organization
- configuration, customization and integration, so your solution works the way you work
- comprehensive, pro-active system support and data management services provided by experienced nonprofit data experts who speak your language
- the "Amergent Difference" – a true partnership approach and commitment to your success – Just Ask Our Clients!!!

Advanced Technology Meets Ease-of-Use

You don't need to choose between "powerful" and "easy-to-use." With Portfolio, you get both.

Portfolio uses Microsoft's SQL Server Technology, giving you all the power of the leading relational database management system. And its intuitive interface is browser-based. If you know how to use a browser, you know how to use Portfolio.

Take advantage of this power and ease of use in one of two ways:

1. Software as a Service (SaaS) with a full range of service options from basic software hosting to full-scale outsourced data management
2. traditional "In-House" Software implementation with the software implemented on your own servers.

With either option, Amergent works in partnership with you to ensure your success.

Portfolio provides functionality to handle everything from complex, multichannel direct marketing programs to highly-personalized, one-to-one major and planned gift cultivation – and everything in between!

- powerful role-based security
- user-based dashboards
- flexible organizational defined coding
- supports all types of gifts, pledges, purchases, etc.
- tracking of nonfinancial activities
- comprehensive history of every donor/prospect "touchpoint"
- complete audit trails





In-depth Relationship Building and Major Gift Cultivation

Portfolio provides unparalleled relationship-building and cultivation tools, so you can plan and execute activities to increase foundation, corporate, major and planned gifts. Portfolio's tools will help you identify prospects and, as they become donors, strengthen your relationships with them, whether individuals, large corporations or family foundations.

Portfolio enables **you** to assign and manage major gift officers, store detailed history of all correspondence, assign to-do's and ticklers, attach documents, link with third-party wealth and overlay data, store asset and demographic profiles, link directly from within a Portfolio record to related websites and much more.

Step Type/Action Type	Assigned To	Due Date	Date Completed
Research	115	4/18/2008	4/18/2008
Phone Call Follow Up	Mark Connors		
Cultivation	115	4/28/2008	4/30/2008
Meeting	Mark Connors		
Cultivation	115	6/28/2008	6/25/2008
Share Plans	Mark Connors		
Cultivation	115	8/7/2008	
Site Visit	Mark Connors		
Cultivation	115	8/12/2008	
Write & Send Proposal	Mark Connors		

- detailed personal profiles
- asset and demographic information
- contact management
- “moves management” – personalized cultivation plans
- e-mail integration
- leads/opportunity tracking
- automated reports and alerts
- much more...

Flexible Reporting Tools

You'll have a comprehensive library of standard reports that provide actionable data on every aspect of your fundraising program. You can schedule all Portfolio reports to run automatically, and you can even tell the system to e-mail them to you!

In addition to the standard reports provided with Portfolio, your Amergent implementation and support specialist will work with you to develop whatever custom reports you need to get the information you want in the format you prefer.

May Appeal Mail Date: Last Gift:

	Mailed	Gifts	Response	Revenue	Average Gift	Cost	Unit Cost	CPDR	Net Income
Program E: 740	43,512	2,092	4.81 %	\$141,825	\$67.79	\$23,936	\$6.55	30.17	\$117,889
132 Days of Giving				\$190	\$38.00				\$190
White Mail		5							
Grand Total	43,512	2,097	4.82 %	\$142,015	\$67.72	\$23,936	\$6.55	30.17	\$118,080

	Mailed	Gifts	Response	Revenue	Average Gift	Cost	Unit Cost	CPDR	Net Income
1	5,943	730	13.43 %	\$64,230	\$89.30	\$3,508	\$9.00	30.06	\$60,722
2	244	6	2.46 %	\$1,826	\$304.17	\$379	\$1.55	30.21	\$1,446
3	4,729	117	2.47 %	\$4,808	\$41.09	\$2,498	\$9.55	30.52	\$2,310
4	32,048	1,170	3.65 %	\$70,963	\$60.65	\$17,161	\$9.54	30.34	\$53,801
5	542	6	1.00 %	\$0	\$0.00	\$299	\$9.55	30	(\$299)
Total	43,512	2,092	4.81 %	\$141,825	\$67.79	\$23,936	\$6.55	30.17	\$117,889

	Mailed	Gifts	Response	Revenue	Average Gift	Cost	Unit Cost	CPDR	Net Income
0	8,917	1,268	14.11 %	\$91,739	\$72.51	\$5,138	\$9.59	30.04	\$86,601
1	11,477	400	3.55 %	\$27,524	\$67.40	\$6,591	\$9.57	30.24	\$20,933
2	3,460	250	7.24 %	\$12,363	\$49.45	\$5,000	\$9.54	30.41	\$7,363
3	2,185	59	2.70 %	\$3,383	\$55.95	\$1,218	\$9.56	30.46	\$1,849
4	9,205	108	1.18 %	\$5,075	\$46.99	\$4,755	\$9.51	30.84	\$320
5	409	7	1.71 %	\$836	\$119.29	\$224	\$9.55	30.27	\$611
6	1,869	12	0.64 %	\$1,225	\$102.08	\$932	\$9.50	30.76	\$293
Total	43,512	2,092	4.81 %	\$141,825	\$67.79	\$23,936	\$6.55	30.17	\$117,889

	Mailed	Gifts	Response	Revenue	Average Gift	Cost	Unit Cost	CPDR	Net Income
9	232	9	3.88 %	\$16,075	\$1,786.11	\$305	\$1.50	30.02	\$15,770
8	932	43	4.61 %	\$16,730	\$389.07	\$750	\$9.80	30.05	\$15,979
7	1,542	71	4.60 %	\$15,795	\$222.32	\$1,815	\$9.66	30.08	\$14,779
6	5,748	414	7.20 %	\$45,880	\$110.29	\$5,931	\$9.64	30.12	\$40,949
5	9,499	436	4.59 %	\$22,575	\$51.78	\$4,929	\$9.52	30.22	\$17,646
4	13,567	613	4.52 %	\$17,592	\$28.70	\$6,782	\$9.50	30.38	\$10,810
3	5,734	396	6.91 %	\$5,246	\$17.14	\$2,858	\$9.50	30.54	\$2,388
2	3,260	290	8.90 %	\$2,182	\$10.81	\$1,625	\$9.50	30.75	\$557
Total	43,512	2,092	4.81 %	\$141,825	\$67.79	\$23,936	\$6.55	30.17	\$117,889

	Mailed	Gifts	Response	Revenue	Average Gift	Cost	Unit Cost	CPDR	Net Income
Lot 1: First Class Hardtop	348	29	8.33 %	\$23,300	\$805.55	\$928	\$1.82	30.60	\$22,372
Lot 2: First Class Present	3,464	537	15.50 %	\$75,420	\$140.44	\$6,510	\$9.89	30.69	\$68,910
Lot 3: NP Invois	33,700	1,429	4.24 %	\$43,015	\$30.16	\$16,797	\$9.50	30.39	\$26,218

Want to create your own? Use Portfolio's drag and drop technology to quickly and intuitively build ad hoc reports. Click. Click. Click. There's your report.

And because Portfolio uses Microsoft's renowned SQL Reporting Services tools, you know that everything in the database is accessible for reporting, whether you're preparing high-level summaries, drilling down to individual transactions, or anything in between. You get the information and analysis you need, when you need it.

**To Schedule a Demonstration of Portfolio and/or
Learn More About Amergent Call 1-800-370-7500**



Why Portfolio?

If you're like most professional fundraisers, you have used cookie-cutter software to track your program's effectiveness – and you've found yourself adjusting your work process to fit the software's requirements. Why not take the next step? Why not graduate to a comprehensive fundraising database management solution that takes into account the unique needs of your organization? Software that works for you, not the other way around.

Amergent and Portfolio support you with

- an ever-improving solution that protects your investment in technology...
- a suite of tools for effectively managing relationships through a variety of direct marketing channels...
- extensive capabilities to manage personalized cultivation activities with your most important foundation, corporate and major gift donors and prospects...
- the ability to evaluate your fundraising program's performance with precision...
- a view of your operation that helps you spot negative trends and address them promptly...
- tools for uncovering and capitalizing on fundraising opportunities...
- unparalleled, proactive support from fundraising professionals who understand not only the technology but how you actually use the technology to do your job...

... in short, a system that allows you and your staff to focus on what you do best – build stronger relationships with your donors and members to raise more money for your organizational mission!

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