

Schultz & Williams Brand Brief & Messaging Guide March 2018

Introduction

The purpose of this Brand Brief is to provide a platform from which we consistently articulate the Schultz & Williams brand. The contents of this document are meant to guide how we talk about, write about and present ourselves on behalf of the firm. (We've started the Brand Brief with **About** and **Services** descriptions to ensure our full understanding of who we are and what we do.)

This current iteration of the Brief is a refreshed version of a similar document resulting from our 2016 marketing and business planning initiative, which helped to guide S&W's current website content. It is the culmination of a cross-section of S&W team members who came together to define our brand as succinctly as possible, creating a tool that we can all use to develop content that ties together across multi-media channels—our website, social media, advertising, marketing and sales initiatives.

Since we are currently knee deep in creating content—articles, white papers, case studies, proposals, reports, brochures etc.—it is most important that we are writing with one voice, developing pieces based on what we collectively know, and believe, about ourselves.

This is standard format for a Brand Brief, which defines us in many forms. **The words and messaging are not meant to be used verbatim**, but to guide the language we use to consistently and creatively build our brand identity.

Please excuse any redundancies throughout; they simply reinforce who we are.

Schultz & Williams Description

About: Schultz & Williams (S&W) is an established national firm offering counsel in development and campaign planning; strategic, management and business planning; and philanthropic marketing. S&W also executes multi-channel membership and fundraising campaigns and provides StaffSolutions when organizations require transitional, campaign or start-up staffing to achieve their development, marketing, planning and fundraising goals.

Headquartered in Philadelphia, S&W also has operations in Washington, D.C., Los Angeles and San Francisco and works closely with a diverse client base across the country: arts & culture; conservation & environmental; education; health & sciences; social justice & community services; and zoos & aquariums.

Unique approach: S&W believes that for every nonprofit, development, management and marketing strategies must be fully integrated. That's the only way organizations can achieve firm financial footing, operational excellence and, ultimately, their mission-related goals.

Since S&W was established in 1987, the firm has partnered with more than 1,000 outstanding clients coast to coast. Today, S&W has more than 65 seasoned professionals and senior-level consultants covering the firm's full range of services. S&W also has established partnerships with leaders in creative copywriting and design, list management and planning, production services, and market research.

Services: **Development Consulting:** S&W consultants partner with nonprofits to build a stronger base of philanthropic funding to support their missions. Services include development assessments and comprehensive development plans; campaign planning studies and campaign implementation; Board development and training; prospect research; and innovative approaches to annual giving, major and planned giving and institutional support.

Direct Response: S&W takes a holistic approach to direct response fundraising and membership campaigns utilizing data analytics, digital communications strategies and proven direct mail programs to ensure the greatest potential for success. S&W Direct is a full-service operation including list management, mail house, printing, copywriting and design resources.

Strategic, Management & Business Planning: Services include strategic planning; business planning and modeling; governance analyses; executive transition and search services; and facility master plan integration.

Philanthropic Marketing: Services include branding and positioning; campaign communications; multi-channel direct response marketing; campaign strategies; campaign materials; research and development.

Digital Communications: S&W develops informed, strategic and creative plans for campaigns and audience data and testing techniques, optimizing the way nonprofits reach constituents. Tactics include email, social media and websites, leveraging a true multi-channel approach to fundraising, amplifying campaigns and programs employed in other channels.

Data Analytics: Through S&W ProFile Analytics™, Prospect Identification Modeling, Direct Marketing Insights, Advanced Audience Analysis, Philanthropic Capacity Screening and Database Audits, S&W analysts and senior level strategists provide actionable analysis and achievable results for a wide-range of fundraising and development programs.

S&W StaffSolutions™: Because 100% of the firm’s senior staff have served as nonprofit executives on “the other side of the desk,” S&W has the talent and experience to help its clients fill critical staffing roles—from CEO to campaign director—with transitional, start-up and project-based experts in development, management and marketing.

Brand Brief

Vision: To be a national leader at helping nonprofits succeed.

Mission: Schultz & Williams works to build a better world by strengthening the ability of mission-driven organizations to achieve their goals and successfully tackle the most significant issues of our time.

BIG Idea: Powering Missions That Matter.

Core Values:

- **Honesty:** S&W works to create honest and open partnerships with every client.
- **Quality Service:** S&W provides excellent client services at all levels of its work.
- **Passion:** S&W consultants are involved in the fabric of the nonprofit sector and committed to making a difference through their work.
- **Collaboration:** S&W is all in, working as a team within the firm and with every client. S&W shares what it knows and aligns its efforts with those who are committed to achieving greater mission impact.
- **Dedication:** S&W is dedicated to serving every client with data-driven tailored solutions.
- **Respectful:** S&W values diverse perspectives, listening to and learning from one another, its clients and its clients’ current and prospective donors.

Core Attributes:

- **Data Driven Analytics:** S&W’s recommendations are driven by data and analyses used to inform strategic and tactical plans targeted to maximize every client’s success.
- **Creative:** S&W is a community of creative problem solvers, offering holistic views and solutions through integrated strategies, proven successful across many sectors nationwide.
- **Flexible:** S&W offers a flexible service model designed to meet the unique needs and culture of each organization served. The firm’s services range from executive

consultation and executing multi-channel fundraising and membership campaigns to full- or part-time onsite staffing.

- **Confident:** S&W is confident in its work and builds confidence in its clients to take bold steps and calculated risks.
- **Focused:** S&W approaches its work with an eye on the big picture, helping nonprofits realize financial and organizational success to achieve their mission-related goals.
- **Comprehensive:** S&W plans the work (consulting) then works the plan (execution).

Brand Promise:

- Provide every client with a tailored suite of S&W services and resources needed to tackle their specific challenges, realize their strategic goals and ensure their greatest mission impact.

Voice, Tone, Imagery:

- Confident
- Passionate
- Smart
- Trustworthy
- Creative
- Dynamic
- Optimistic

Culture:

- If you are passionate about helping to make the world a better place, you can do that at Schultz & Williams, committing your time and talents to support the most significant missions and causes of our time.

Competitive Advantage:

- **Value added resources:** With the depth and breadth of the services offered by S&W, clients get the “whole” firm behind every project.
- **Talent:** S&W’s deep bench of experienced professionals has a practical knowledge of the nonprofit and philanthropic sectors. 100% of the firm’s senior consulting staff has worked in nonprofit leadership and management positions.
- **Experience:** With more than 30 years of success under S&W’s belt, the firm has first-hand experience of the nation’s evolving nonprofit sector, giving us a history that clients can count on and a competitive edge that we can build on.
- **Tailored solutions:** S&W provides its clients with tailored, actionable plans grounded in data-informed assessments and analyses of their capacity and the interests of their donors.

- **Strong existing relationships with clients:** Proven by the number of long-term partnerships, referrals and repeat business.
- **Have a corner on the regional market:** S&W has an edge on its competition, working with a majority of small to large organizations and institutions throughout the Philadelphia region.
- **StaffSolutions:** S&W has the unique opportunity to support our consulting work, or any organization's current staffing needs, with professionals who are ready, willing and able to step in to execute development, planning or marketing strategies/campaigns on behalf of the organization.
- **Current:** S&W has expanded its proprietary products, professional staff and critical services in recent years to keep pace with today's nonprofit needs in the following areas:
 - o Digital
 - o S&W ProFile Analytics™
 - o S&W StaffSolutions™
 - o Succession Planning and Soft Executive Searches
 - o Public-private Partnerships
 - o Business and Organizational Planning
 - o Mid-level Giving Programs (strategies and implementation)
 - o Development and Annual Giving Assessments
- **National reputation:** zoos, museums, children's hospitals, social service organizations
- **International impact:** social justice, conservation, international relief, healthcare

Target Audience:

- Nonprofits of all types and sizes across the nation. Schultz & Williams has experience working with nonprofit leaders, volunteers and managers responsible for the financial, marketing and management successes of their organizations.
 - More targeted breakdowns may be:
 - o Presidents, Vice Presidents, Directors, CEOs, CFOs, CDO's, CMO's, Board Leadership
 - o PA, NJ, DE, NY, D.C., VA, MD, L.A., National
 - o Key Sectors:
 - **Direct:** zoos and aquariums; museums; healthcare; children's hospitals; community service; social justice; international relief
 - **Development:** independent schools; small and mid-size colleges and universities; healthcare; regional museums; community service; social justice; international relief; conservation
 - **Planning:** zoos and aquariums; conservation, museums
 - **Marketing:** supports all

Key Competitors (Most have been benchmarked):

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|------------------------|--|
| - CCS | - Zoo Advisors |
| - GG&A | - Mal Warwick Donordigital |
| - Dunleavy | - RKD |
| - Marts&Lundy | - Lautman Maska Neill & Company |
| - Pursuant Ketchum | - The lukens company |
| - Fairmount Ventures | - Campbell & Company (not benchmarked) |
| - The Bridgespan Group | - The Harrington Group (not benchmarked) |

Messaging

Positioning Statement:

Exclusively serving the nonprofit sector, Schultz & Williams (S&W) is a nationally recognized consulting firm that takes an integrated development, fundraising, marketing and management approach to helping its clients achieve financial stability, meet organizational goals and support greater mission impact.

As the only firm focused on bringing a big-picture perspective to every client challenge, S&W serves as an authority on best practices, resulting in tailored, actionable strategies and campaigns that are built on trust, centered on mission and focused on success.

In a rapidly evolving nonprofit sector, S&W utilizes the power of analyses and digital communications, leveraging data and strengthening insights to ensure each client benefits from informed solutions and the exact resources needed to achieve current goals and prepare for what's next—from emerging capital needs or relevancy challenges to growing competition for support, leadership and resources.

Every Schultz & Williams recommendation and plan is powered by a full team of experts in the field and their passion to make a positive change in the local and global community.

Key Messages:

1. Nationally recognized, Schultz & Williams consultants take a full-team, integrated approach to helping nonprofits achieve financial stability, meet organizational goals and support greater mission impact.
2. As a team of creative problem solvers and subject matter experts, Schultz & Williams consultants are unequaled in their experience and passion to help nonprofits succeed.
3. With its fingers on the pulse of current issues facing today's nonprofits, Schultz & Williams applies best practices and utilizes the power of data-driven analyses and strategies to help each organization tackle its unique organizational, development, fundraising and marketing challenges.
4. Schultz & Williams helps clients tackle what's now and prepare for what's next with a strategic big-picture perspective.

Key and Supporting Messages:

1. Nationally recognized, Schultz & Williams takes a full-team, integrated approach to helping nonprofits achieve financial stability, meet organizational goals and support greater mission impact.
 - S&W brings together expertise in multiple areas to fulfill this concept of integration, working in thoughtfully orchestrated teams to address an organization's business, creative and strategic services.
 - For more than 30 years, S&W has partnered with nonprofits working on the most significant issues of our time, having a positive effect on millions of lives touched by their missions at the local, regional, national and global levels.
 - A partnership with S&W provides the intense service of its professional team, along with the valued-added benefit of its comprehensive suite of services in development; multi-channel fundraising and membership campaigns; strategic, business and operational planning; digital; data analytics; marketing and transitional staffing.
 - Clients benefit from S&W's full-team approach, complementing their staffs, boosting their confidence and ensuring their capacity to tackle complex challenges.
 - S&W has strong professional collaborations with design, copywriting, research, production and planning experts who complement its team with essential resources, ensuring the firm seamlessly delivers the most creative, comprehensive and customized solutions possible to every client.
2. As a team of creative problem solvers and subject matter experts, Schultz & Williams consultants are unequaled in their experience and passion to help nonprofits succeed.
 - S&W's leadership, staff and consultants have held executive and management positions within and across the nonprofit sector, bringing decades of direct experience to every client engagement and the right team to every client project.
 - S&W thrives on innovation and client partnerships: its approach is inclusive; its strategies are tailored; its methods are proven.
 - The firm's professional staff and consultants have a strong work ethic and commitment to supporting its clients work and the causes they serve.
 - S&W's client engagements result in long-term partnerships with lasting impact.

3. With its fingers on the pulse of current issues facing nonprofits, S&W applies best practices with current digital communications and data analytics to meet the evolving needs of today's organizations, helping each client achieve its unique management, development, fundraising and marketing goals.
 - Working with a diverse client base on a wide-range of projects each year provides S&W with the opportunity to keep its pulse on current trends and benefit from the professional development it yields.
 - S&W works side-by-side as partners with its clients, maximizing the knowledge, synergy and skillsets needed to address complex issues and create achievable solutions that will help them thrive and succeed now, and into the future.
 - As trustworthy partners with its clients, S&W helps them identify and clarify organizational challenges and opportunities through methods that include a comprehensive discovery phase of their situation and a tailored action plan grounded in a realistic assessment of their capacity, revenue markets and the interests of their donors.
 - S&W's capacity to serve nonprofits is continually evolving through the growth of its professional staff and its ongoing development of proprietary products and services.
4. Schultz & Williams helps clients tackle what's now and prepare for what's next with a strategic big-picture perspective.
 - S&W's leaders are chock full of valuable information and insights, helping nonprofits take bold steps and build organizational platforms that support long-term sustainable growth and measurable ROI, defining and strengthening their capacity for success.
 - Based on its philosophy to forge strong client partnerships, S&W's consultants are ready, willing and able to provide transitional staffing to execute strategies and to fill immediate and longer-term personnel needs when necessary.
 - S&W works to ensure that each client addresses and reveals its relevancy to the community(ies) it serves.