

CUSTOMER SUCCESS STORY

MARKETING STRATEGY AND PLANNING FOR \$30M NOT FOR PROFIT

□ Situation

A \$30M mental health services provider established a partner foundation 501(c)3 organization. The company faced uncertain growth due to its reliance on funding from one primary customer.



□ Critical Issue

The company recognized it needed a comprehensive business development and fund diversification plan to establish sustainable growth.

□ Reason

Both the operating and the foundation entities had not developed or executed any comprehensive or integrated marketing, business development, or fundraising program.

□ Rationale (When, Who, What)

The client had several Board members serving both the operating unit and the not-for-profit foundation, and had determined that the next three years would be a critical time to position both entities for future growth and market diversification.

□ What Newport Provided

Newport performed a comprehensive review of business strategy review and developed an actionable forward marketing strategy and three-year budget and staffing plan. We leveraged benchmark data for not-for-profit organizations to analyze marketing spend and operational overhead ratios.

□ Result

Based on Newport's recommendations, the Board endorsed an initial seed donation campaign and will investigate several growth and diversification scenarios.

© 2010 Newport Consulting Group, LLC • Permission to Use Granted by Request • All rights reserved

NEWPORT CONSULTING GROUP, LLC
