



## CASE STUDY

# PG Calc

## Mission Possible

Founded in 1985 by a group of Harvard undergraduates, PG Calc is the leading provider of planned giving software for non-profit organizations. But with growing competition, the company recognized that its future lay in broadening its perception beyond that of a software vendor.

To support its goals, PG Calc acquired Planned Giving Services, a Seattle-based planned giving consulting company. At the same time, it grew its capabilities in the area of gift administration, giving it additional sales opportunities with nonprofits and expanding its reach into banking and investment management organizations. To help communicate the changing nature of the organization to its target markets, PG Calc reached out to 360.

### 360's approach

We viewed PG Calc as a preemptive leader in planned giving and a series of interviews with their client base confirmed that position. With that as the underlying proposition, we sought to expand the perception of the company, draw attention to their broad range of services and support the sales process.

### The elements

- We developed a new corporate identity for PG Calc including logo, themeline and key messaging.
- We created an integrated marketing program targeting non-profit institutions and third-party vendors like gift administration officers in banks and investment companies.
- We created a website that draws attention to the company's broad range of capabilities and print and electronic advertising that focused on PG Calc's expertise in areas such as Consulting and Marketing and boosted recognition of previously under-recognized products and services.
- Working closely with PG Calc's marketing staff, we developed a series of content-rich, downloadable white papers for planned giving managers and actively promoted them online and through print advertising.

## THE RESULTS

- ▶ Articulated 5 new business lines that supported PG Calc's desire to expand its mindshare among planned giving professionals and enabled sales to present products and services in an organized, compelling manner across the "planned giving lifecycle"
- ▶ Generated significant numbers of downloads (typically >4,100) through premium content whitepaper offers that fueled the sales pipeline

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