

Strategic Performance Assessment Taking Advancement Results to a Higher Level

ADVIZOR® Solutions is a market leader in delivering data discovery and analysis solutions to advancement professionals. With over a hundred clients, our work and experience span major giving, annual giving, member and alumni relations, and campaign and executive reporting. The focus of our work is on empowering teams to make better and faster decisions from their data. We leverage our clients' existing data, and can easily bring in additional outside information as needed. Our technology combines a high performance and light footprint in-memory data mart with interactive data visualization and predictive modeling. We are consultative and can deliver complete custom-designed solutions, or work side by side with a client team to develop high-value solutions together.

ADVIZOR's Strategic Performance Assessment combines the rich data analytics capability of our software with the extensive industry experience and synthesis / problem solving skills of our consultants to take you from information to insight. We provide:

- Evaluation of your performance against external and internal metrics
- Strategic assessment of what it all means
- Clear action plans and next steps

Proven Benefits for Major Giving

The most effective major giving programs balance strong relationships with a proven, measurable, and repeatable process. Getting the balance right is critical. And knowing where you and your team stands is essential to determining what conversations to have with your team and how to properly align resources.



Through our extensive work in major giving we have found seven key metrics that matter most:

- % of rated prospects assigned
- Prospect manager pool sizes
- Activity / visit levels
- % prospect pool penetration
- % prospect pool solicitation
- Proposal close rate
- Proposal values relative to prospect rating levels

Our professional consultants are experts at working with these metrics, and will help you understand your team's performance against them. We analyze performance both vertically within and across your team, and also horizontally against outside benchmarks. Our approach is nuanced and flexible and focuses on what matters most to your team and your current goals and objectives.

We follow up data driven horizontal and vertical analysis with a synthesis of what is most significant to improving your team's returns and effectiveness. The metrics provide the plotline to the story, but it's the story that matters. And key to that is understanding how the various activities and factors relate to outcomes. The fact that, for example, your prospect pool sizes are larger or smaller than your peers may or may not be material. It's the synthesis with the other factors wrapped in a logical framework that becomes the story. For example, perhaps the team has overly large pools compared to peers and therefore low penetration ratios. But perhaps the gift officers have been able to focus in on and well cover a reasonable numbers of prospects, despite the large pools. The key issue may not be the large pools, but rather lower than expected proposal close rates. And on further examination the key issue could be that the team is too often "over asking". Our team of experienced professionals are experts at this type of causal analysis.

The final step in our three step process is developing, with your team a clear action plan which prioritizes next steps to help them become more efficient and effective in their major giving efforts. In the example above it could mean a plan to better align the team's ask amounts with the expected value of the prospects being solicited.

... and for Annual Giving

The most effective annual giving programs focus on the most "attached" and highest likelihood prospects, and then deliver the right messages at the right times. This involves developing an understanding of the interests and behaviors of the stakeholders, and then segmenting them into different subgroups that receive differentiated messages. Fundraisers who do this well achieve higher yields on their appeals, and they do this with fewer sends and touchpoints. The result is more money raised at lower cost -- both good things, especially with higher cost-per-touch programs such as phone-a-thons!

In annual giving we have found that there are six key metrics that matter most:

- Participation rate and trend
- LYBUNT retention rate and trend
- SYBUNT reacquisition rate and trend
- Non-Donor acquisition rate and trend
- Appeal yield assessment
- Touchpoint assessment

Our professional consultants are experts at working with these metrics and can help you and your team understand where you are doing well, and where you should focus for improvement. As with major giving, our approach is nuanced and flexible and focuses on what matters most to your team and your current goals and objectives

After completing a metrics based evaluation, our professionals develop a report which provides a clear understanding of what's working well and what could be improved. For example, perhaps the overall participation rate is fine but the SYBUNT reacquisition rate is lower than expected and falling. On further examination it becomes clear that lapsed donors are being "over touched" by a series of generic messages that are just not connecting with them in an increasingly competitive market. Focusing on improving yield in this key area would likely be the highest priority improvement for the team.

The final step in our three step process is developing, with your team, a clear action plan which prioritizes next steps and which will help them become more efficient and effective. In the example above this could be a revised communications program for lapsed SYBUNTs that creates more focused and tailored messaging, perhaps combined with the creation of an attachment score to better prioritize and rank the targets.

Improve Your Fundraising Results

Visual Discovery™ is the core patented technology that drives ADVIZOR's unique display, interaction and authoring capabilities. Leveraging an extensive algorithmic underpinning, advancement professionals are now able to explore and understand their existing data in ways never before possible.

Combine that with our experienced professional services team, and ADVIZOR provides a uniquely powerful, highly flexible, and low cost approach to empowering you and your team to become more efficient and effective in your fundraising efforts.

