

Prospect Identification Demo

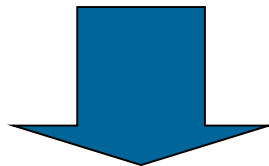


Leveraging Advancement Information for Fundraising

Need: Better Information Faster



- ▲ **Find Best Prospects**
- ▲ **Better Align Development Staff with Constituents**
- ▲ **Manage Staff to Best Practices**
- ▲ **Enable Staff**
- ▲ **Focus Annual Fund and Campaign Appeals**



Need Quick Access to Information

Problem: the “Cycle of Pain”



▲ Custom Report Requests:

- Custom query submitted to IT
- Backlog – 5 days to get answer
- Begs another question, back through the cycle
- Frustration on both sides

▲ Excel:

- Download “extracts”
- Slice and dice in Excel
- Time consuming and challenging
- Don’t have all the data
- Hard to show to management
- “Shadow data systems”



Scope of This Demo



Solutions We Offer → Range of Questions → 2 Demo Questions

- ▶ **Advancement**
 - ▶ **General Management**
 - ◀ Staff Performance Mgmt
 - ◀ Campaign Analysis
 - ◀ Ad Hoc Rpt & Analysis
 - ▶ **Leadership Giving**
 - ◀ Prospect Identification
 - ◀ Prospect Management
 - ▶ **Annual Giving**
 - ◀ Appeals Targeting
 - ◀ Volunteer Assignments
 - ◀ Call Center Opt
 - ▶ **Member / Alumni Rltns**
 - ◀ Events, Trips, Clubs

Prospect Identification:

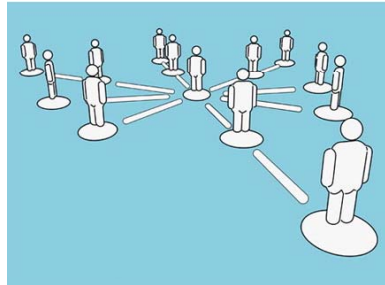
- Who should we target for a dinner in New York to raise money for a new facility?
- Who is not being seen; who has high potential and is not giving?
- Who have historically been my best donors? Which of my younger prospects fit that same profile?
- Who are all the prospects rated with an active rating over \$500k, who are not assigned to a gift officer?
- Who should we target for our new financial aid matching grant campaign?
- Etc.

• Who should we target for a dinner in New York to raise money for a new facility?

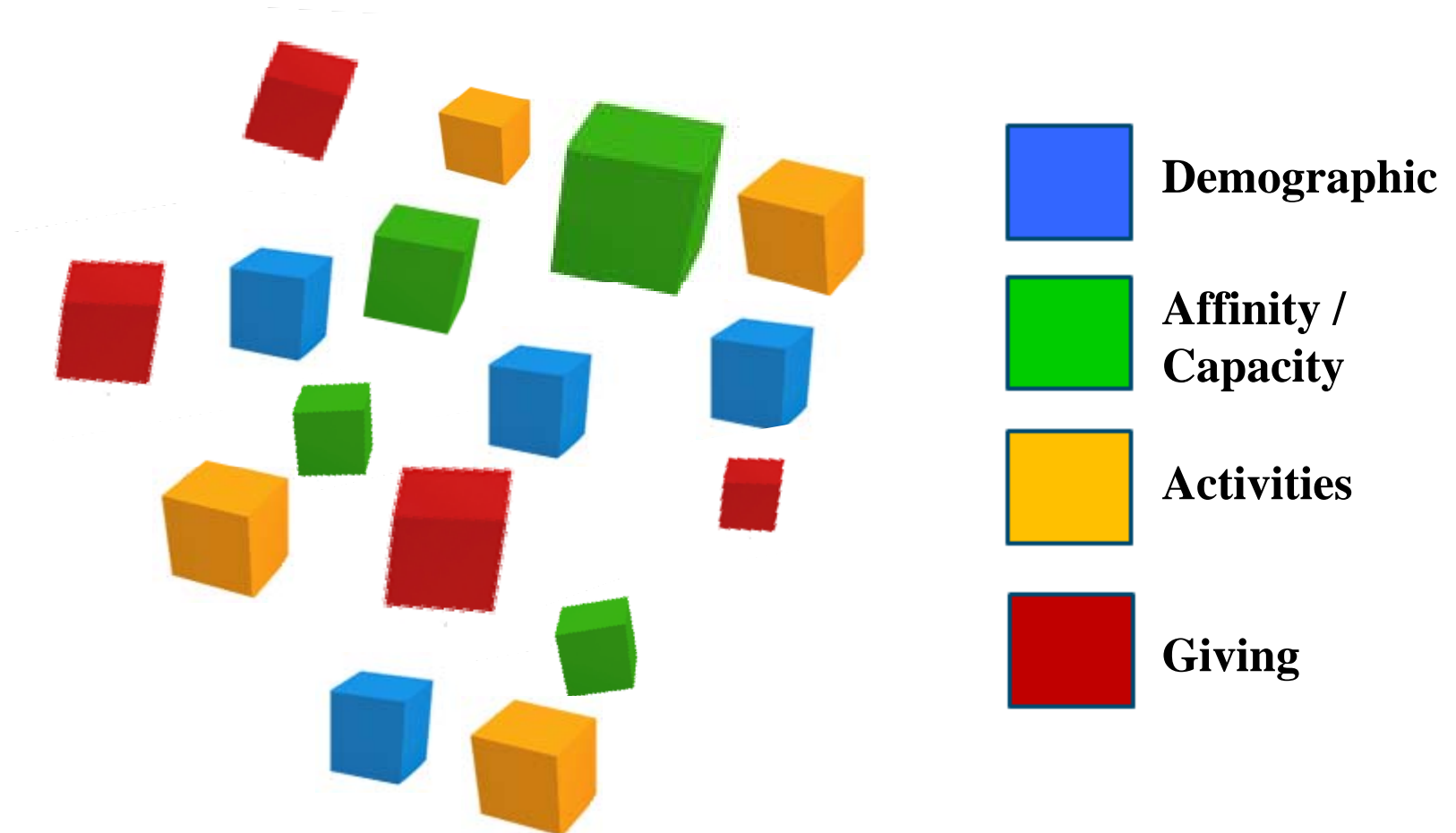
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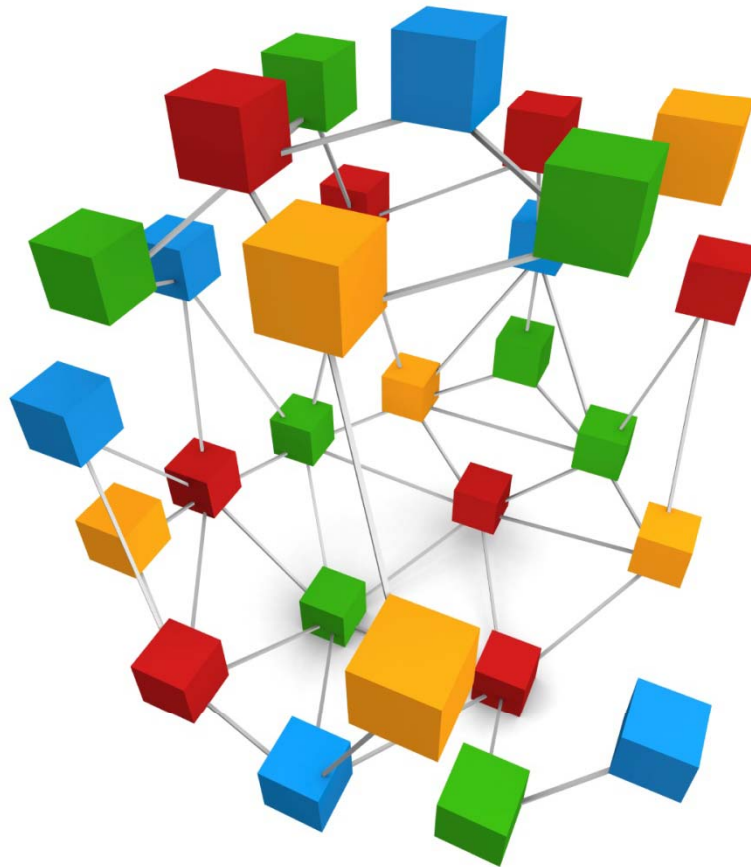
A Wealth of Information



Information Fragmented and Hard To Access . . .



... Advizor Knits It Together



Demographic



**Affinity /
Capacity**



Activities

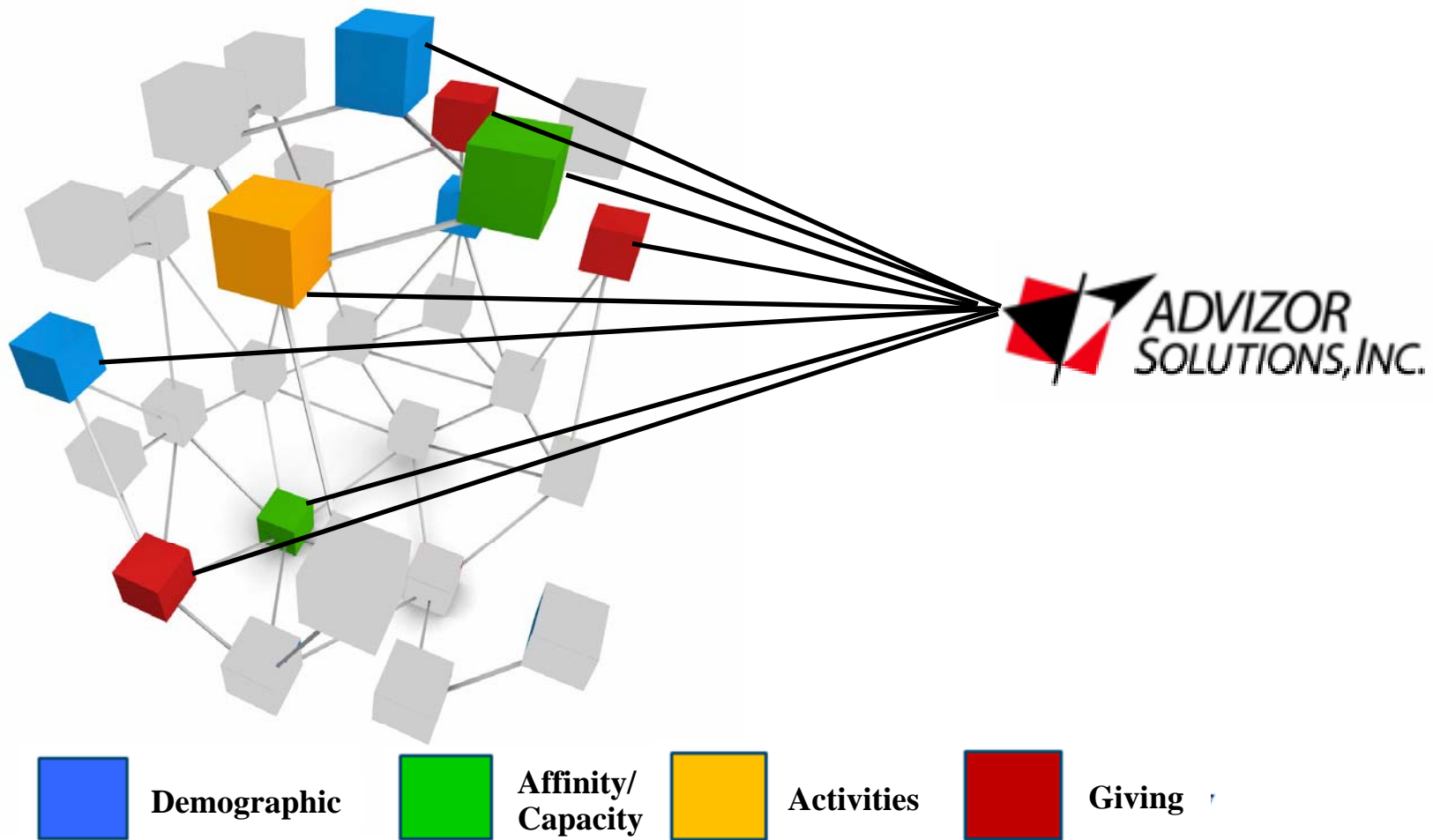


Giving

... Enabling Easy Answers to Key Questions.



Q: Who should we target for a dinner in New York to raise money for a new facility?



Demo: upcoming dinner in NYC, who should be invited? (Higher Education example)



Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | Giving History | Giving Detail

Affiliation Filter

(All) (None)

- Alumnus/a
- Applicant
- Faculty/Staff
- Friend
- Grandparent
- Honorary Degree

Rating Filter

(All) (None)

- 0 - NA
- 01 - \$50M or more
- 02 - \$10M - \$49.9M
- 03 - \$5M - \$9.9M
- 04 - \$1M - \$4.9M
- 05 - \$500K - \$999K

Class Year Filter

(All) (None)

- 1902
- 1909
- 1911
- 1913
- 1914
- 1915

Prospect Count

Statistic	id_number
Total Count	93,743
Selected	93,743
Unselected	
Excluded	

List of Selected Prospects // right click to export

id_number	PREF_NAME_SORT	TLG..	class...	event_inst_suffix	Lg Region City	Lg Region State	Region P...	Staff_Name	afil_record...	rating
52961	Oliver, Harley	\$40,769,726	1960	'60 E'61 P'87 P'94 P'95...	Mundelein	IL		Deon	AL	02 - \$10M - \$49.9M
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131176	Couture, Abe	\$21,492,984	1985	P'81 P'85 TP'86	Etna	PA		ayla	PA	01 - \$50M or more
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56521	Burrows, Marvin	\$6,572,507	1962	P'92	Fairfield County, CT	CT	(2)	Law, Daniel	AL	02 - \$10M - \$49.9M
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66028	Karp, Jamal	\$5,393,581	1970	P'90	Boston/Rt. 128 MA	MA	(1)	Law, Daniel	AL	02 - \$10M - \$49.9M
189359	Kaufmann, Leonard	\$5,300,000	1902	P'92	Boston/Rt. 128 MA	MA	(1)	Brown, Kayla	NA	02 - \$10M - \$49.9M
24556	Hosch, Michale	\$5,288,196	1937	'37 P'84 P'91	Barrington	RI		Law, Daniel	AL	02 - \$10M - \$49.9M
66029	Tangella, Alta	\$4,915,164	2008	P'03 P'08	Haverford	PA		Philadelphia, PA (3)	PA	02 - \$10M - \$49.9M
57296	Villanueva, Carlos	\$4,501,423	1963	'63 P'91	New York	NY		New York City, NY (2)	AL	01 - \$50M or more
63280	Cousins, Augustina	\$4,477,821	2006	P'92 P'94 P'97 P'06	Port Washington	NY		NYC Boroughs (2)	PA	02 - \$10M - \$49.9M
65015	Tompkins, Bok	\$4,451,769	1969	NA	Weston	MA		South Shore MA (1)	SP	02 - \$10M - \$49.9M
244915	Perano, Elaine	\$4,408,466	1902	NA	Boston	MA		Boston/Rt. 128 MA (1)	NA	02 - \$10M - \$49.9M
46673	Sargent, Eddie	\$4,368,886	1955	'55 H'05	Portola Valley	CA		Peninsula, CA (5)	AL	03 - \$5M - \$9.9M
78383	Huffman, Marcia	\$4,200,000	1978	P'06 P'08	Chicago	IL		Chicago, IL (4)	SP	01 - \$50M or more
31717	Smith, Leta	\$4,199,999	1984	'84 P'83 P'87	Princeton	NJ	(2)	Ames, Patrick	AL	04 - \$1M - \$4.9M

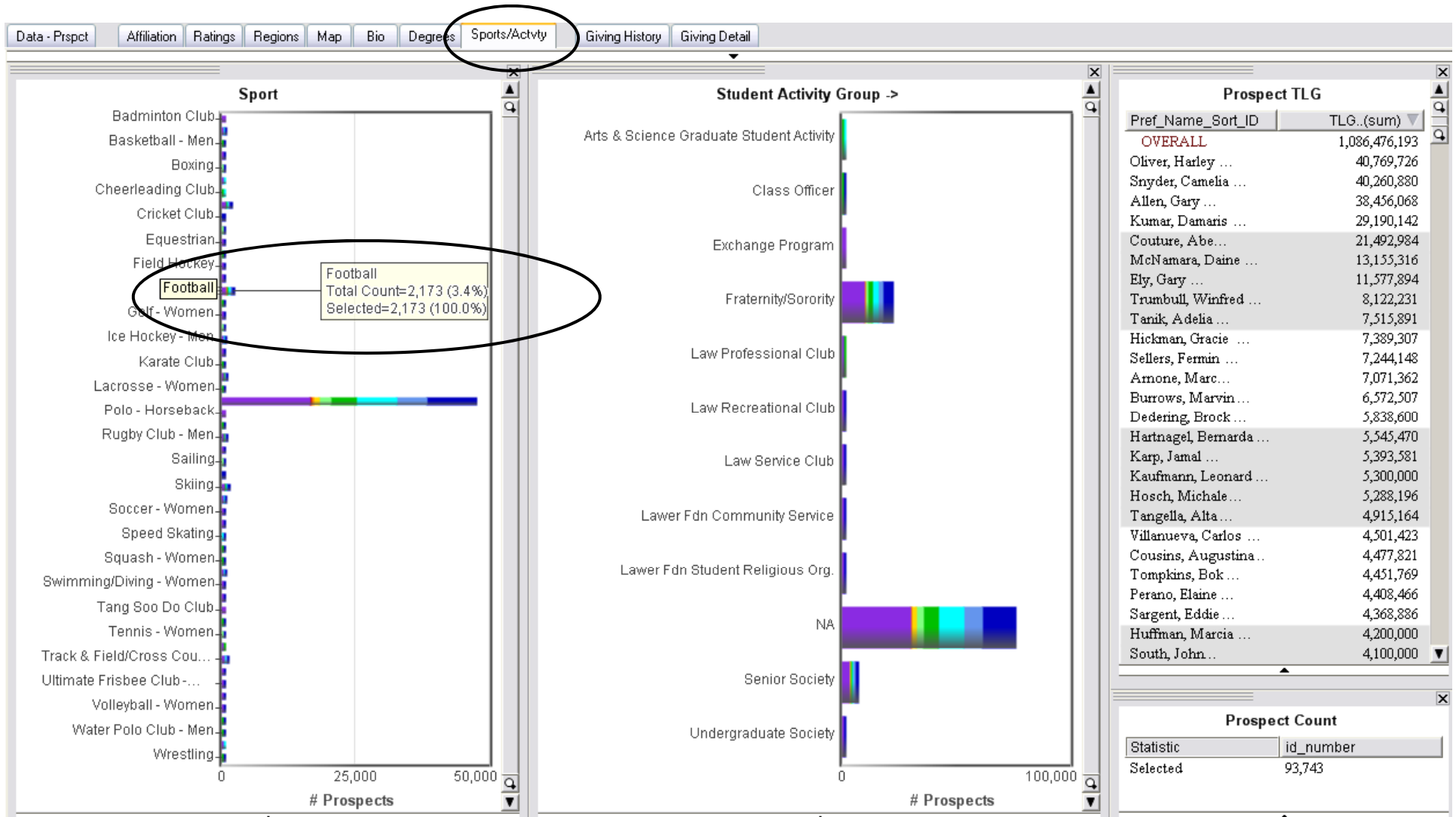
Starting List of 94k Prospects

Money Being Raised for?



→ *New Training Facility for Football & Lacrosse teams.*

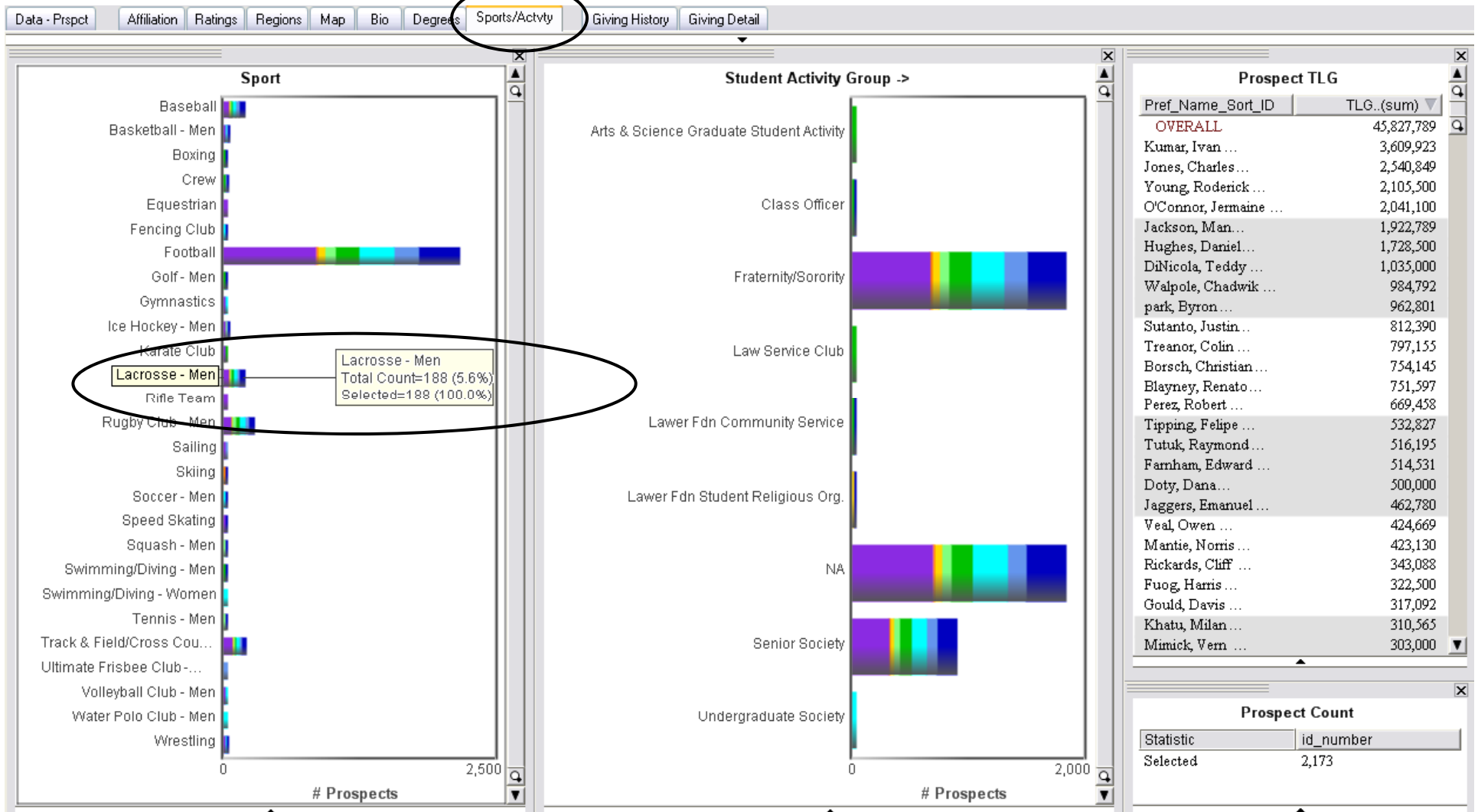
Click → 2,173 Football Players . . .



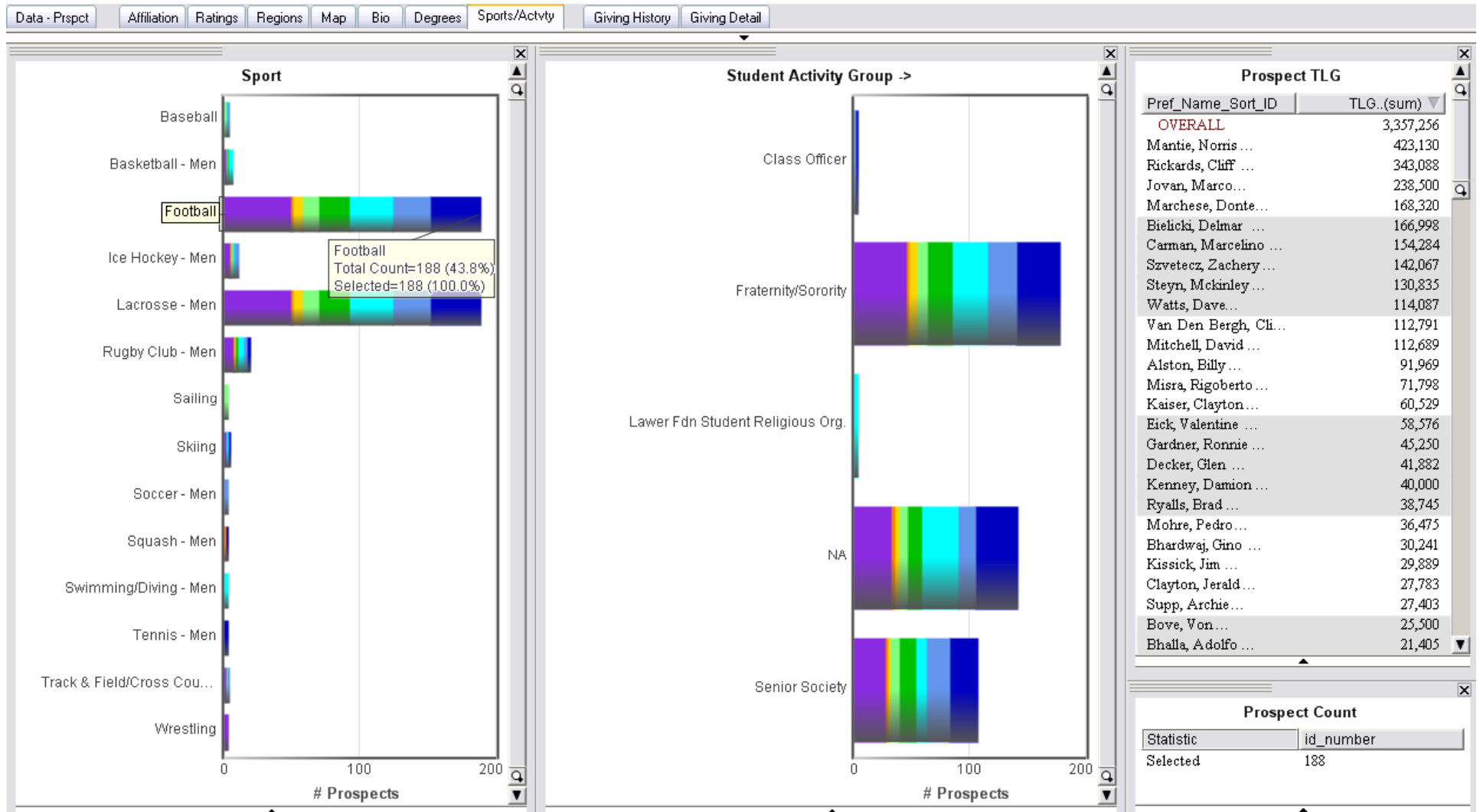
Click Again → 188 Also Played Lacrosse



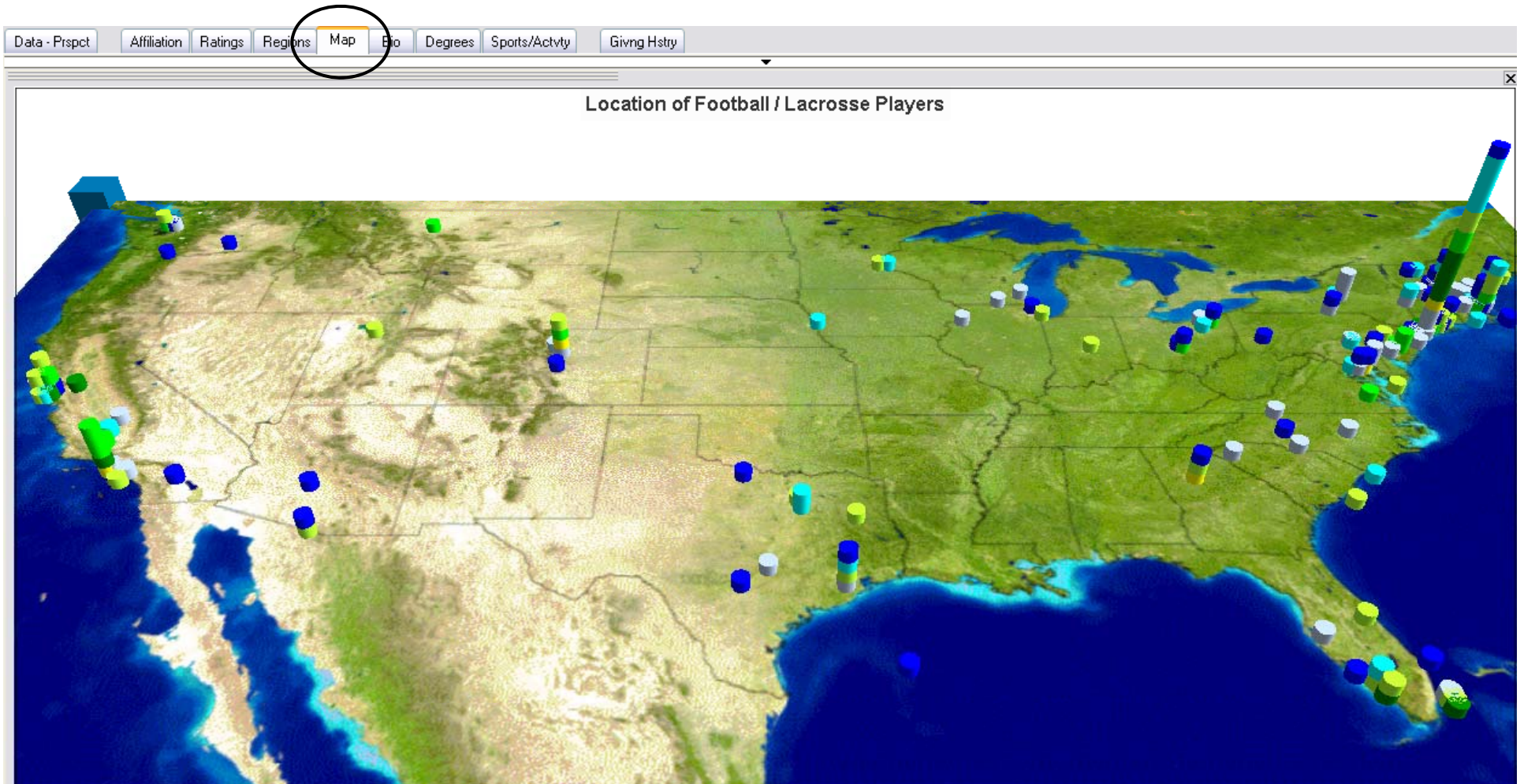
Note: Color Set to Rating (red = highly rated; blue = low rated; grey = unrated)



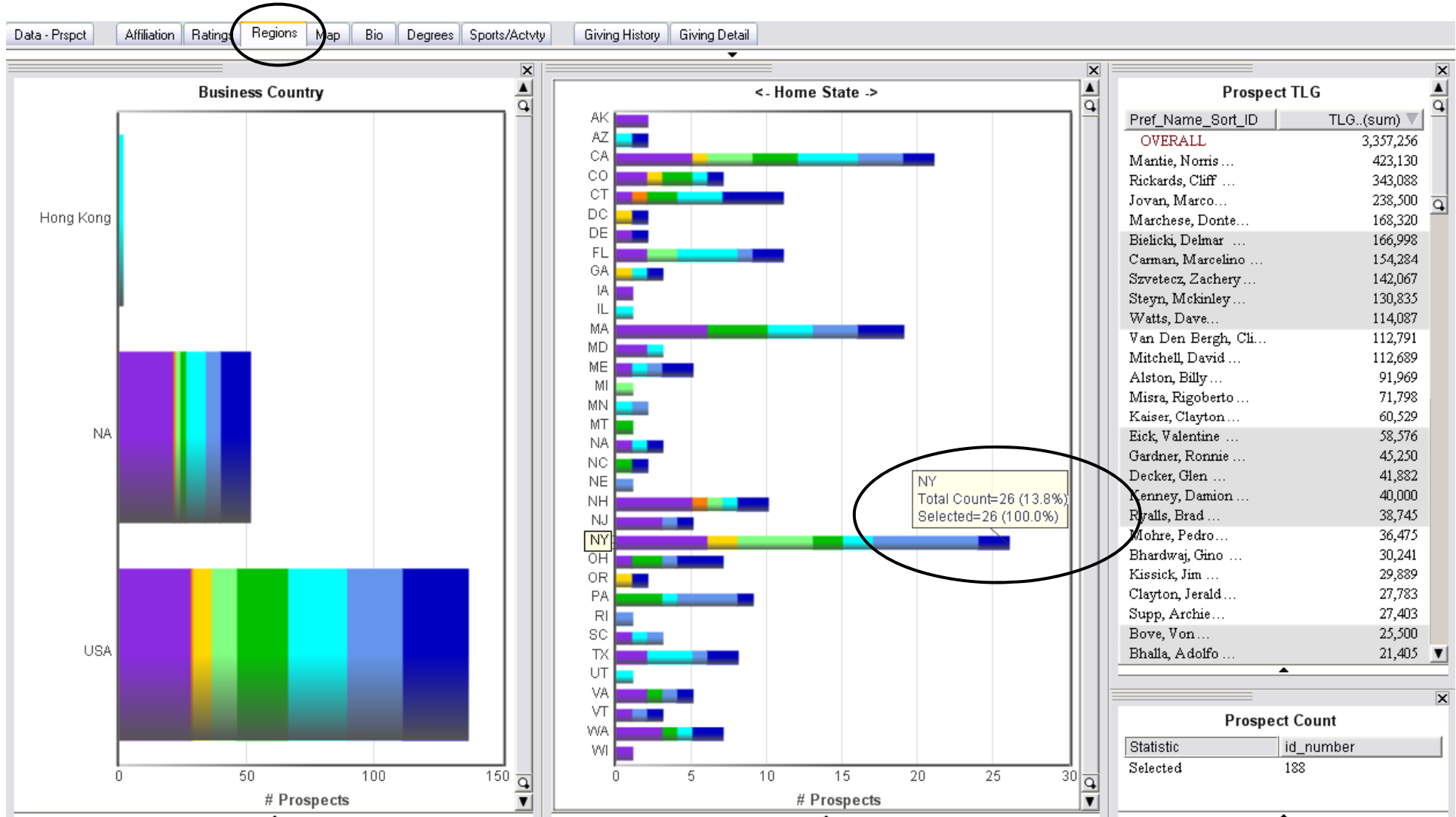
... "Zoom In" on these 188 ...



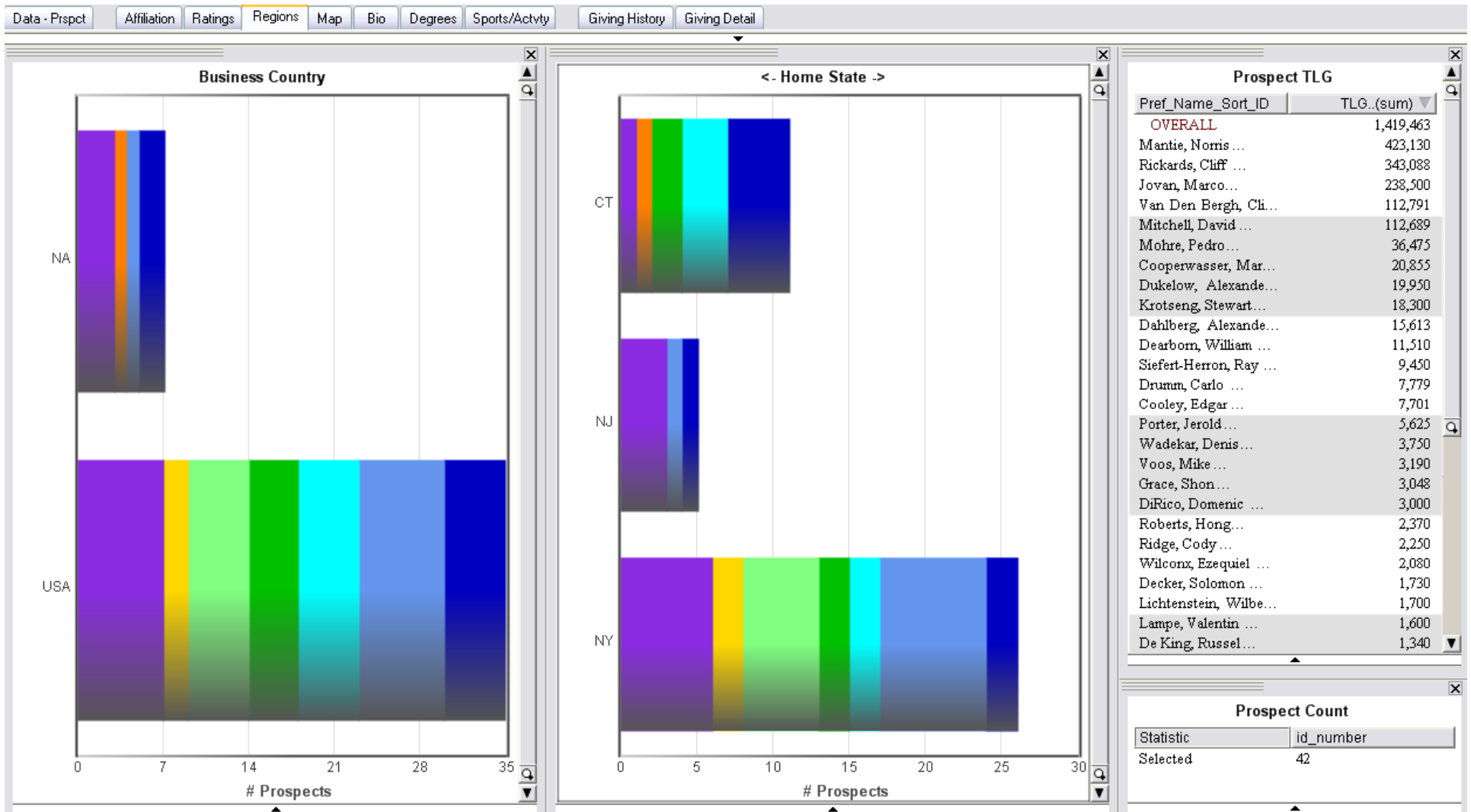
. . . Most Live in the Northeast . . .



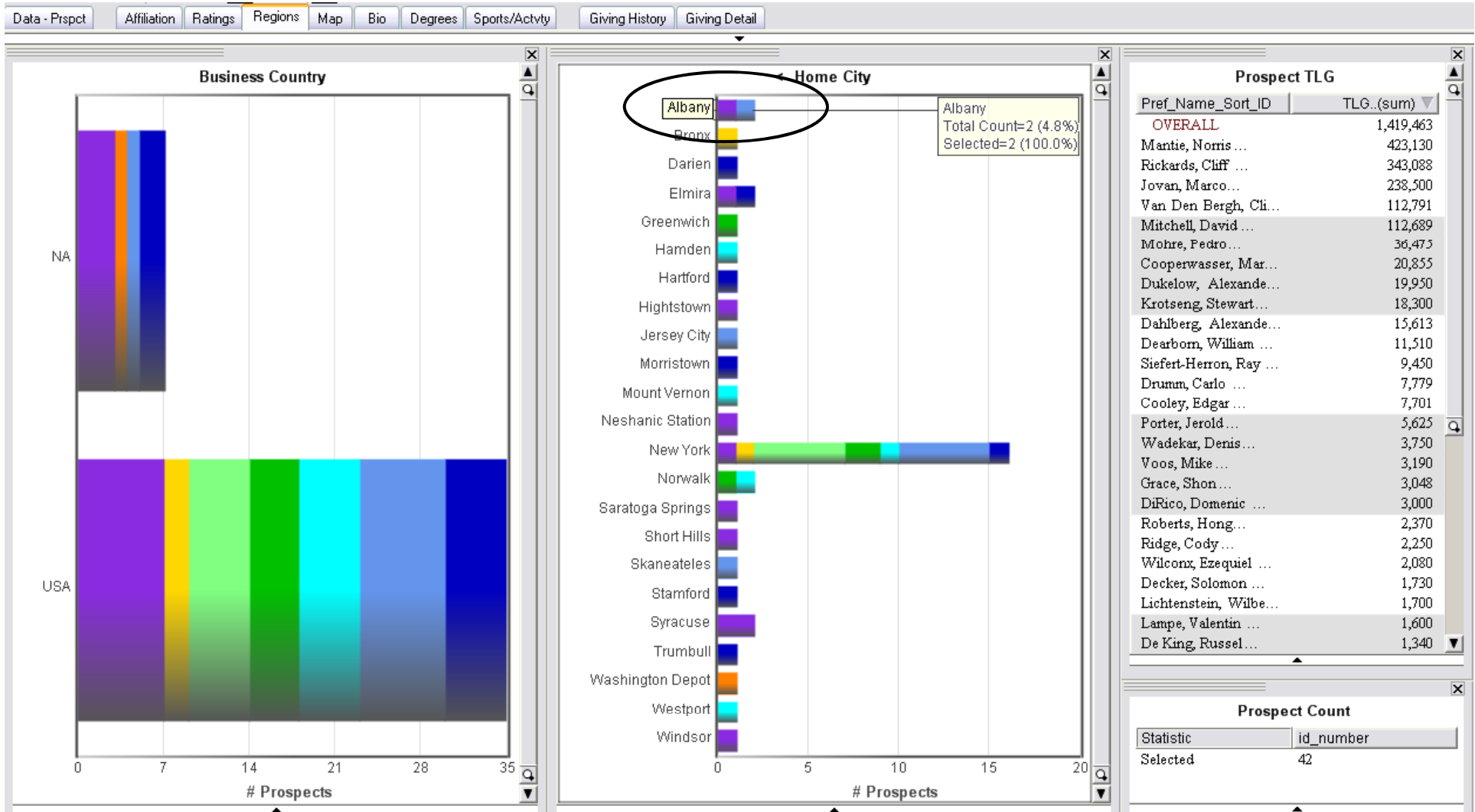
... 26 in NY State ...



Click → 42 in NY, CT, NJ ...



... Click to Remove 2 in Albany ...



... Click to Remove 10 Who Aren't Rated ...



Data - Prspct Affiliation **Ratings** Regions Map Bio Degrees Sports/Actvty Giving History Giving Detail

Rating

Rating Category	# Prospects
0 - NA	10
01 - \$0K - \$9.9M	1
04 - \$1M - \$4.9M	2
05 - \$500K - \$999K	5
06 - \$250K - \$499K	4
07 - \$100K - \$249K	5
08 - \$50K - \$99K	8
09 - \$25K to \$49K	7

Primary Staff

Staff Member	# Prospects
<NULL>	10
Bellefeuille, Megan	1
Walde, Bridgett	1
Brown, Kayla	1
Lanahan, Tanner	1
Law, Daniel	1
Salter, Ulysses	1
Seyfried, Blake	1

Prospect TLG

Pref_Name_Sort_ID	TLG..(sum)
OVERALL	1,419,463
Mantie, Norris ...	423,130
Rickards, Cliff ...	343,088
Jovan, Marco...	238,500
Van Den Bergh, Cli...	112,791
Mitchell, David...	112,689
Mohre, Pedro...	36,475
Cooperwasser, Mar...	20,855
Dukelow, Alexande...	19,950
Krotseng, Stewart...	18,300
Dahlberg, Alexand...	15,613
Dearborn, William ...	11,510
Siefert-Herron, Ray ...	9,450
Drumm, Carlo ...	7,779
Cooley, Edgar ...	7,701
Porter, Jerold ...	5,625
Wadekar, Denis...	3,750
Voos, Mike ...	3,190
Grace, Shon...	3,048
DiRico, Domenic ...	3,000
Roberts, Hong...	2,370
Ridge, Cody ...	2,250
Wilcox, Ezequiel ...	2,080
Decker, Solomon ...	1,730
Lichtenstein, Wilbe...	1,700
Lampe, Valentin ...	1,600
De King, Russel...	1,340

Affinity

Affinity Level	# Prospects
A	1
B	1
C	1
NA	10
U	10

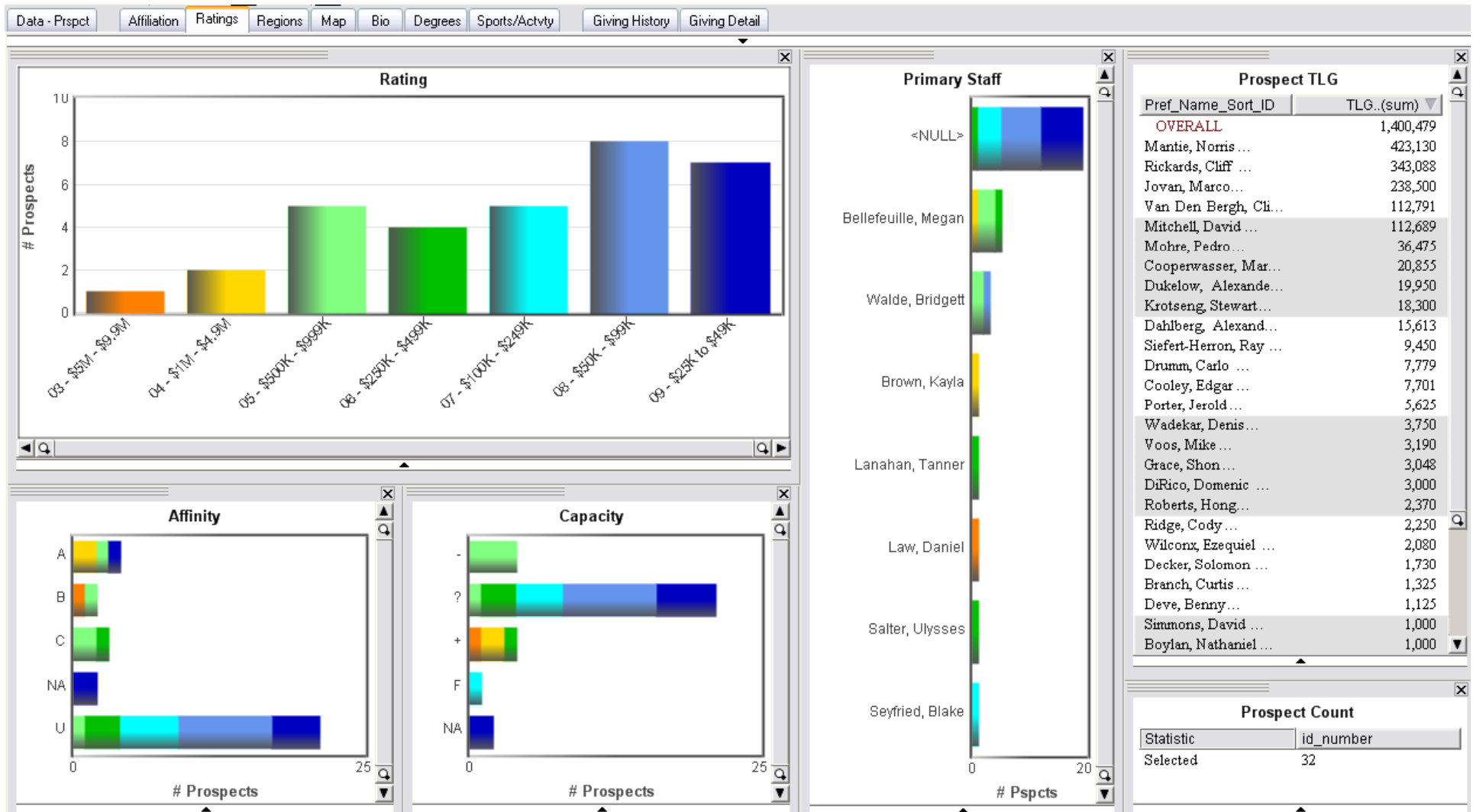
Capacity

Capacity Level	# Prospects
-	1
?	10
+	1
F	1
NA	10

Prospect Count

Statistic	id_number
Selected	42

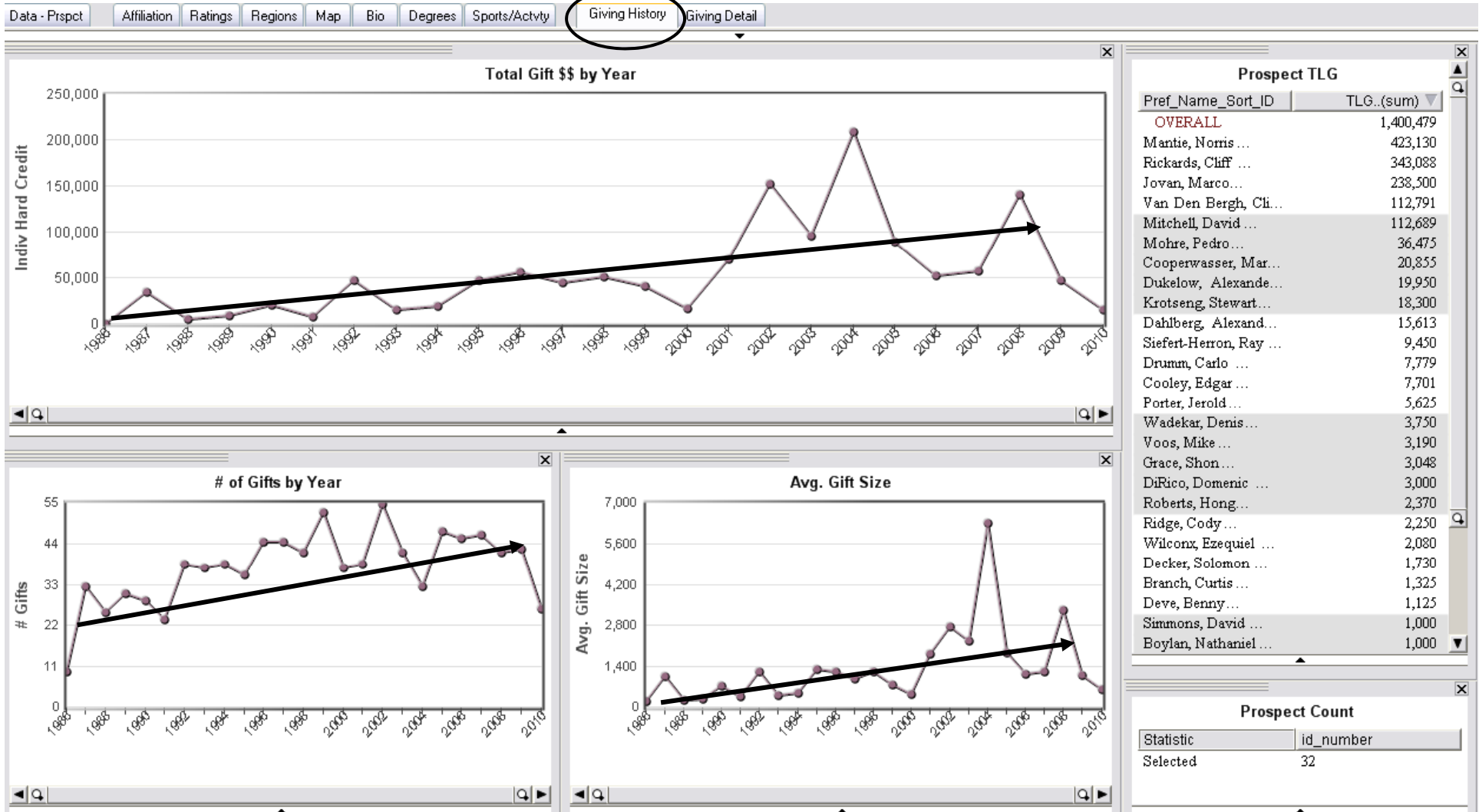
... 32 Prime Prospects.



Clustered in the '70's and '80's.



Reasonable Giving History.



List of the 32.



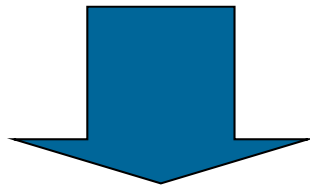
Data - Prspct	Affiliation	Ratings	Regions	Map	Bio	Degrees	Sports/Actvty	Giving History	Giving Detail
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List of Selected Prospects // right click to export

id_number	PREF_NAME_SORT	TLG..	class...	event_inst_suffix	Lg Region City	Lg Region State	Region Description	Prim_Staff_Name	affil_record...	rating
55315	Mantie, Norris	\$423,130	1962	'62	Washington Depot	CT	Waterbury, CT (1)	Law, Daniel	AL	03 - \$5M - \$9.9M
61385	Rickards, Cliff	\$343,088	1966	'66 T'68 P'95	New York	NY	New York City, NY (2)	Brown, Kayla	AL	04 - \$1M - \$4.9M
65878	Jovan, Marco	\$238,500	1970	'70 P'99 P'05	New York	NY	New York City, NY (2)	Bellefeuille, Me...	AL	06 - \$250K - \$499K
53383	Van Den Bergh, Cl...	\$112,791	1960	'60 T'61	Greenwich	CT	Fairfield County, CT (2)	<NULL>	AL	06 - \$250K - \$499K
70452	Mitchell, David	\$112,689	1973	'73	Bronx	NY	NYC Boroughs (2)	Bellefeuille, Me...	AL	04 - \$1M - \$4.9M
79558	Mohre, Pedro	\$36,475	1979	'79	New York	NY	New York City, NY (2)	Bellefeuille, Me...	AL	05 - \$500K - \$999K
75806	Cooperwasser, Ma...	\$20,855	1977	'77 T'84	New York	NY	New York City, NY (2)	Bellefeuille, Me...	AL	05 - \$500K - \$999K
81939	Dukelow, Alexander	\$19,950	1980	'80	New York	NY	New York City, NY (2)	Walde, Bridgett	AL	05 - \$500K - \$999K
43187	Krotseng, Stewart	\$18,300	1953	'53 P'83	Skaneateles	NY	Syracuse, NY (1)	<NULL>	AL	08 - \$50K - \$99K
100065	Dahlberg, Alexander	\$15,613	1993	'93	New York	NY	New York City, NY (2)	<NULL>	AL	08 - \$50K - \$99K
50324	Siefert-Herron, Ray	\$9,450	1958	'58	Hartford	CT	Hartford, CT (1)	<NULL>	AL	09 - \$25K to \$49K
70693	Drum, Carlo	\$7,779	1973	'73	Elmira	NY	Elmira, NY (1)	<NULL>	AL	09 - \$25K to \$49K
81271	Cooley, Edgar	\$7,701	1980	'80 M'84	Norwalk	CT	Fairfield County, CT (2)	Lanahan, Tanner	AL	06 - \$250K - \$499K
64605	Porter, Jerold	\$5,625	1969	'69 P'96	New York	NY	New York City, NY (2)	<NULL>	AL	08 - \$50K - \$99K
89749	Wadekar, Denis	\$3,750	1985	'85	New York	NY	New York City, NY (2)	Walde, Bridgett	AL	05 - \$500K - \$999K
75020	Voos, Mike	\$3,190	1976	'76 E'77	Norwalk	CT	Fairfield County, CT (2)	Seyfried, Blake	AL	07 - \$100K - \$249K
88498	Grace, Shon	\$3,048	1985	'85	Jersey City	NJ	Northern NJ (3)	Walde, Bridgett	AL	08 - \$50K - \$99K
84787	DiRico, Domenic	\$3,000	1982	'82	New York	NY	New York City, NY (2)	<NULL>	AL	08 - \$50K - \$99K
67916	Roberts, Hong	\$2,370	1971	'71	Mount Vernon	NY	Westchester County, N...	<NULL>	AL	07 - \$100K - \$249K
83718	Ridge, Cody	\$2,250	1982	'82	New York	NY	New York City, NY (2)	Bellefeuille, Me...	AL	05 - \$500K - \$999K
82735	Wilcox, Ezequiel	\$2,080	1981	'81 T'87	New York	NY	New York City, NY (2)	Salter, Ulysses	AL	06 - \$250K - \$499K
69666	Decker, Solomon	\$1,730	1972	'72	Westport	CT	Fairfield County, CT (2)	<NULL>	AL	07 - \$100K - \$249K
79810	Branch, Curtis	\$1,325	1979	'79	New York	NY	New York City, NY (2)	<NULL>	AL	08 - \$50K - \$99K
72988	Deve, Benny	\$1,125	1975	'75	Albany	NY	Albany, NY (1)	<NULL>	AL	08 - \$50K - \$99K
104574	Simmons, David	\$1,000	1997	'97	Darien	CT	Fairfield County, CT (2)	<NULL>	AL	09 - \$25K to \$49K
101777	Boylan, Nathaniel	\$1,000	1994	'94	New York	NY	New York City, NY (2)	<NULL>	AL	09 - \$25K to \$49K
56982	Nelson, Steven	\$800	1963	'63 T'65	New York	NY	New York City, NY (2)	<NULL>	AL	08 - \$50K - \$99K
79406	Brewer, Jayson	\$575	1979	'79	Trumbull	CT	Coastal CT (1)	<NULL>	AL	09 - \$25K to \$49K
100468	Hart, Robert	\$450	1993	'93	New York	NY	New York City, NY (2)	<NULL>	AL	07 - \$100K - \$249K
99625	Kennedy, Maria	\$375	1993	'93	Morristown	NJ	Northern NJ (3)	<NULL>	AL	09 - \$25K to \$49K
89677	Brierley, Jewell	\$365	1985	'85	Stamford	CT	Fairfield County, CT (2)	<NULL>	AL	09 - \$25K to \$49K
87729	Esteban, Monte	\$100	1984	'84	Hamden	CT	Coastal CT (1)	<NULL>	AL	07 - \$100K - \$249K

Summary:

- ▲ **Answer & List in 20 minutes**
- ▲ **No help needed from IT or Outside Resources**
- ▲ **Clear Action Plan**



▲ ***Found Major Donor!!***

2nd Demo:

➔ ***Who have historically been my best donors? Who else fits that same profile? Out of that list:***

- Who are currently rated?
- Staffed?
- Attended an event recently?
- Etc.



Note: Illustrative Example using Disguised Data

Predictive Analytics



- ▲ **“Uses mathematical tools and statistical algorithms to examine and **determine patterns** in one set of data . . .**
- ▲ **. . . in order to **predict behavior** in another set of data**
- ▲ **Integrates well with in-memory-data and data visualization”**

Concepts:

- ▲ **Target**
- ▲ **Base Population** (“excluded” data not used)
- ▲ **Explanatory Fields**
 - **Core Table**
 - **Calculated and joined from other tables**
- ▲ **Regression**
- ▲ **Correlation \neq Causation**

Iterative & Collaborative Process



Steps:

1. Select Target & Base Population
2. Visually Explore
3. Select list of Explanatory Fields
4. Build Model
5. Iterate
6. Get lists from Model Outputs



Collaborative Process

-
7. Predict / Score Base Population
 8. Get lists of Scored potential targets

Best Done With Your Team – NOT Outside Consultants



- ▲ **Not a “black box”**
- ▲ **A process**
- ▲ **Your team knows the data . . .**
- ▲ **. . . and the context**

➔ *Knowing the data and context is the key factor*

ADVIZOR Dashboard



Affiliation Filter

 (All) (None)

- Alumnus/a
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Rating Filter

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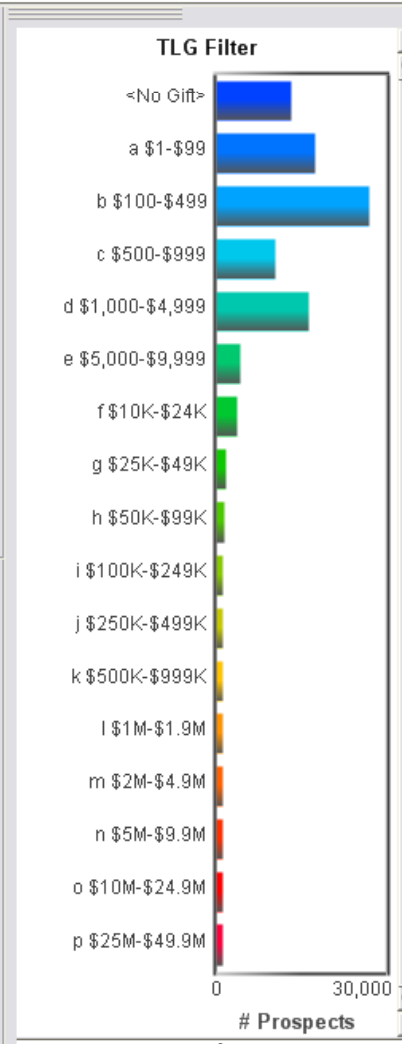
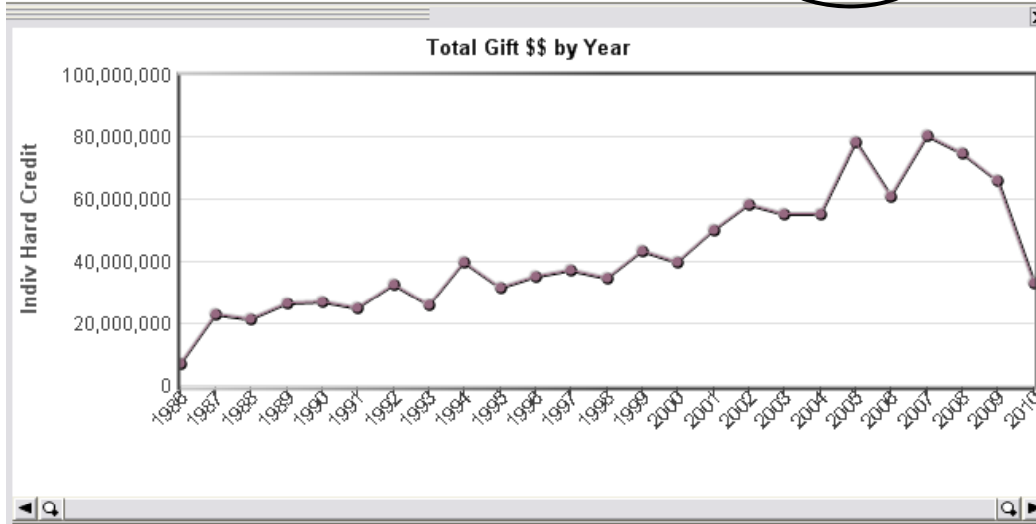
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66029	Tangella, Alta	\$4,915,164	2008	P'03 P'08	Haverford	PA	Philadelphia, PA (3)	Law, Daniel	PA	02 - \$10M - \$49.9M
57296	Villanueva, Carlos	\$4,501,423	1963	'63 P'91	New York	NY	New York City, NY (2)	Law, Daniel	AL	01 - \$50M or more
63280	Cousins, Augustina	\$4,477,821	2006	P'92 P'94 P'97 P'06	Port Washington	NY	NYC Boroughs (2)	Law, Daniel	PA	02 - \$10M - \$49.9M
65015	Tompkins, Bok	\$4,451,769	1969	NA	Weston	MA	South Shore MA (1)	Cosgrove, Jada	SP	02 - \$10M - \$49.9M
244915	Perano, Elaine	\$4,408,466	1902	NA	Boston	MA	Boston/Rt. 128 MA (1)	<NULL>	NA	02 - \$10M - \$49.9M
46673	Sargent, Eddie	\$4,368,886	1955	'55 H'05	Portola Valley	CA	Peninsula, CA (5)	Harris, Deon	AL	03 - \$5M - \$9.9M
78383	Huffman, Marcia	\$4,200,000	1978	P'06 P'08	Chicago	IL	Chicago, IL (4)	Harris, Deon	SP	01 - \$50M or more
31717	Smith, Leta	\$4,199,999	1984	'84 P'87 P'87	Princeton	NJ	Princeton, NJ (2)	Amos, Patrick	AL	04 - \$1M - \$4.9M

Starting List of 94k Prospects

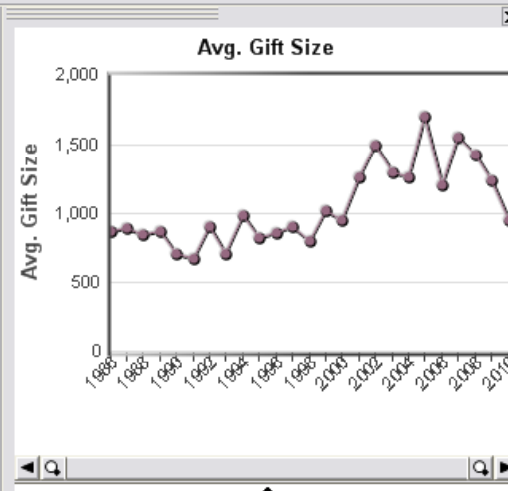
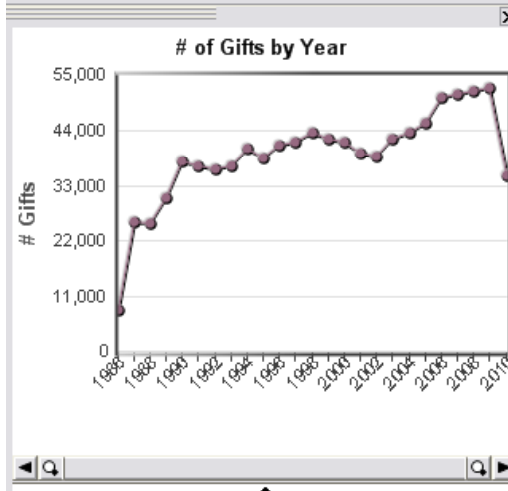
Giving History



Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | **Giving History** | Giving Detail



Prospect TLG	
PREF NAME SO...	TLG(sum)
OVERALL	1,643,235,155
Anastacio, Daniel	39,097,173
Haines, Kimberly	25,834,850
Saladgekar, David	21,474,363
Goff, Irving	20,535,227
Read, Paul	19,761,270
Oliver, Harley	19,535,638
Snyder, Camelia	18,972,494
Allen, Gary	18,972,043
Kumar, Damaris	18,321,738
Couture, Abe	16,340,773
McNamara, Daine	16,133,375
Ely, Gary	15,954,342
Trumbull, Winfred	15,848,973
Tanik, Adelia	15,684,400
Hickman, Gracie	14,255,030
Sellers, Fermin	13,747,616
Amone, Marc	12,435,937
Burrows, Marvin	12,241,223
Dederling, Brock	11,690,410
Hartnagel, Bernarda	11,141,690
Karp, Jamal	11,000,960
Kaufmann, Leonard	10,910,587
Hosch, Michale	10,769,589
Tangella, Alta	10,503,200
Villanueva, Carlos	10,104,792
Cousins, Augustina	10,024,477



Prospect Count	
Statistic	id_number
Selected	93,748

Select Target: 237 Current Million \$\$ Donors (click with mouse)



Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | **Giving History** | Giving Detail

Total Gift \$\$ by Year

TLG Filter

- <No Gift>
- a \$1-\$99
- b \$100-\$499
- c \$500-\$999
- d \$1,000-\$4,999
- e \$5,000-\$9,999
- f \$10K-\$24K
- g \$25K-\$49K
- h \$50K-\$99K
- i \$100K-\$249K
- j \$250K-\$499K
- k \$500K-\$999K
- l \$1M-\$1.9M**
- m \$2M-\$4.9M
- n \$5M-\$9.9M
- o \$10M-\$24.9M
- p \$25M-\$49.9M

Prospects

Prospect TLG

PREF_NAME_SOR...	TLG(sum)
OVERALL	958,228,060
Anastacio, Daniel	39,097,173
Haines, Kimberly	25,834,850
Saladgekar, David	21,474,363
Goff, Irving	20,535,227
Read, Paul	19,761,270
Oliver, Harley	19,535,638
Snyder, Camelia	18,972,494
Allen, Gary	18,972,043
Kumar, Damaris	18,321,738
Couture, Abe	16,340,573
McNamara, Daine	16,133,375
Ely, Gary	15,954,342
Trumbull, Winfred	15,848,973
Tanik, Adelia	15,684,400
Hickman, Gracie	14,255,030
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Hartnagel, Bernarda	11,141,690
Karp, Jamal	11,000,960
Kaufmann, Leonard	10,910,587
Hosch, Michale	10,769,589
Tangella, Alta	10,503,200
Villanueva, Carlos	10,104,792
Cousins, Augustina	10,024,477

of Gifts by Year

Avg. Gift Size

Prospect Count

Statistic	id_number
Selected	237

Now Build Predictive Model



- ▲ **Target**: The 237 Entities who given \$1mm+
- ▲ **Base Population**: All Entities; leverage all factors in the Entity Table
- ▲ **Determine**: What makes the target different than everybody else
- ▲ **Predict**: Who else fits this target group, but who hasn't yet given \$1mm+

Explanatory Fields



**Model runs
against this
(one table
at a time)**

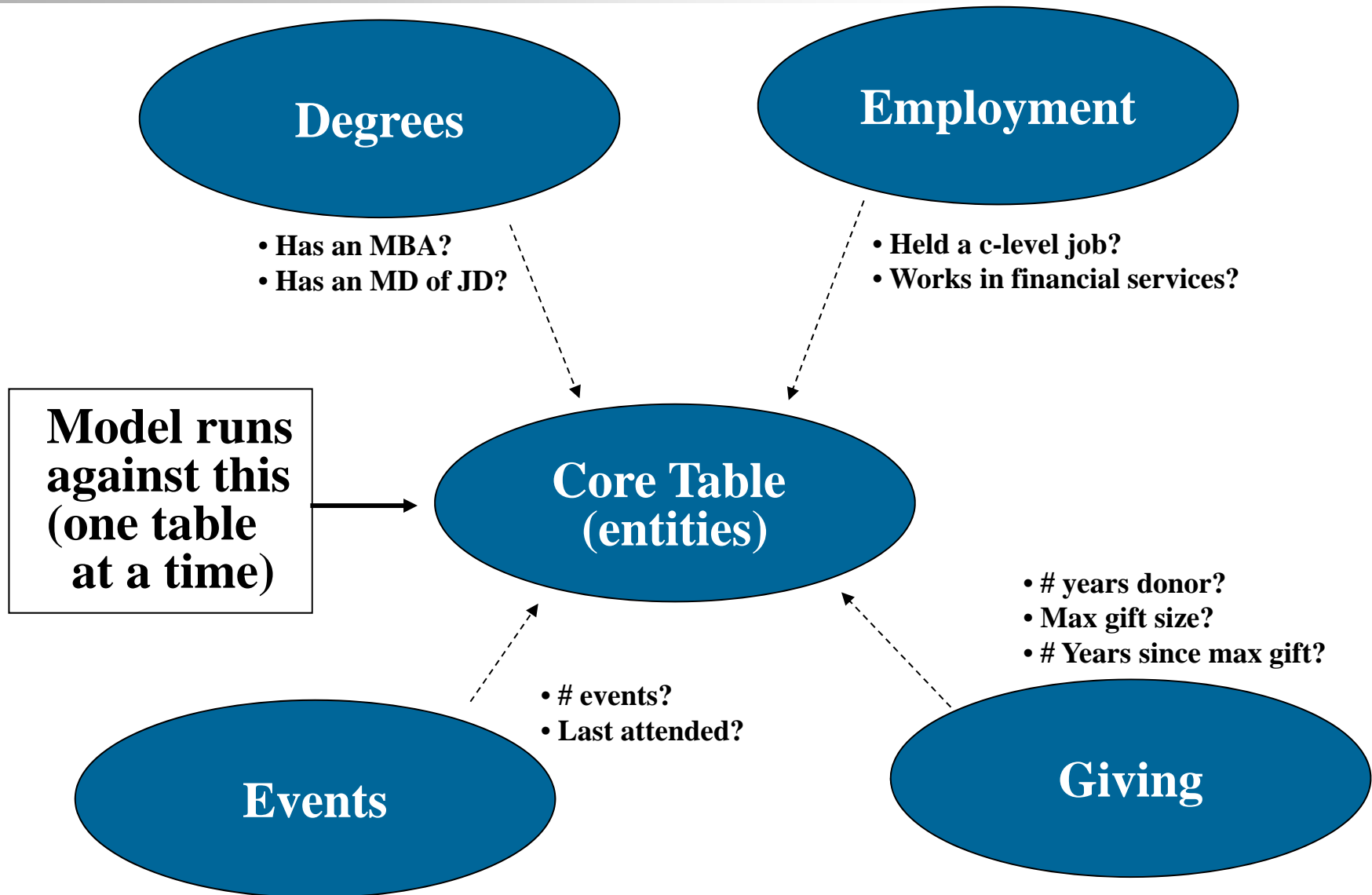


**Core Table
(entities)**

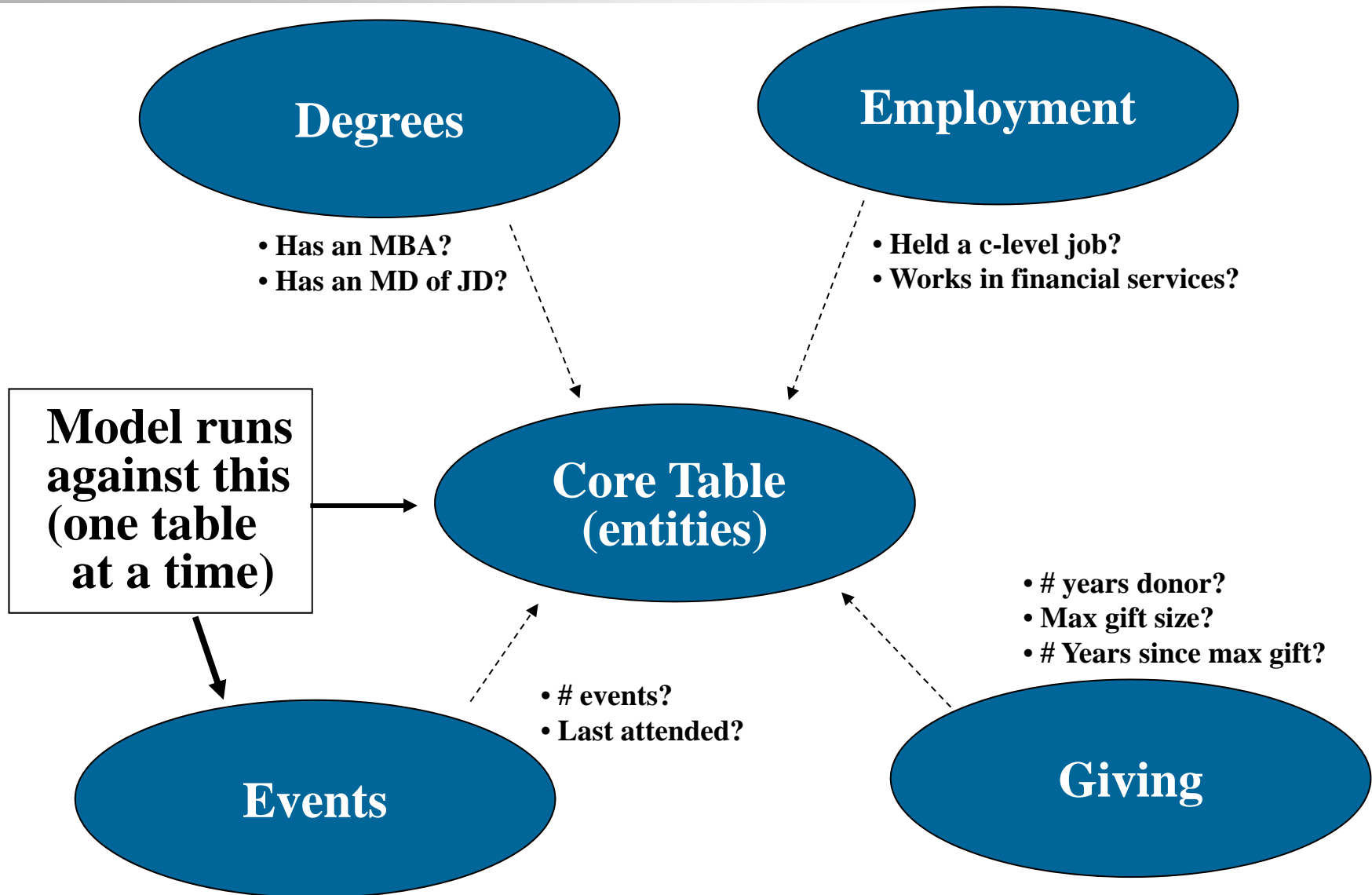
Explanatory Fields:

- Bio / Geo
- Affiliation
- Class Year
- Rating
- Etc.

Fields From Other Tables



Run Model Against Other Tables



Back to the demo!!!

Open Modeling Panel (click with mouse)



Tasks

Map Bio Degrees Sports/Actvty **Giving History** Giving Detail

Step 1: Load Data

- New Data Source
- Load Previous Data Source
- Refresh Data

Step 2: Design Pages

- Build Page
- Load Page Template

Step 3: Analyze Data

- Bookmark View
- Color Workshop
- Data Workshop
- Predictive Modeling**

Step 4: Share Results

- Export Current Page
- Export Presentation
- Export Data
- Publish Dashboard

Total Gift \$\$ by Year

TLG Filter

- <No Gift>
- a \$1-\$99
- b \$100-\$499
- c \$500-\$999
- d \$1,000-\$4,999
- e \$5,000-\$9,999
- f \$10K-\$24K
- g \$25K-\$49K
- h \$50K-\$99K
- i \$100K-\$249K
- j \$250K-\$499K
- k \$500K-\$999K
- l \$1M-\$1.9M**
- m \$2M-\$4.9M
- n \$5M-\$9.9M
- o \$10M-\$24.9M
- p \$25M-\$49.9M

Prospects

Prospect TLG

PREF_NAME_SOR...	TLG(sum)
OVERALL	958,228,060
Anastacio, Daniel	39,097,173
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McNamara, Daine	16,133,375
Ely, Gary	15,954,342
Trumbull, Winfred	15,848,973
Tanik, Adelia	15,684,400
Hickman, Gracie	14,255,030
Sellers, Fermin	13,747,616
Arnone, Marc	12,435,937
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Hartnagel, Bernarda	11,141,690
Karp, Jamal	11,000,960
Kaufmann, Leonard	10,910,587
Hosch, Michale	10,769,589
Tangella, Alta	10,503,200
Villanueva, Carlos	10,104,792
Cousins, Augustina	10,024,477

Avg. Gift Size

Prospect Count

Statistic	id_number
Selected	237

3 Steps to Build Model:

- (1) Set Target
- (2) Exclude Factors that are part of the selection or clearly not causal,
- (3) Click "OK"!!



Exclude factors that are part of the selection, or clearly not causal.

Examine Results . . . Iterate, Run Again . . .



Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | Giving History | Giving Detail

Total Gift \$\$ by Year

TLG Filter

- <No Gift>
- a \$1-\$99
- b \$100-\$499
- c \$500-\$999
- d \$1,000-\$4,999
- e \$5,000-\$9,999
- f \$10K-\$24K
- g \$25K-\$49K
- h \$50K-\$99K
- i \$100K-\$249K
- j \$250K-\$499K
- k \$500K-\$999K
- l \$1M-\$1.9M
- m \$2M-\$4.9M
- n \$5M-\$9.9M
- o \$10M-\$24.9M
- p \$25M-\$49.9M

Prospect TLG

PREF_NAME_S...	TLG(sum)
OVERALL	958,228,060
Anastacio, Daniel	39,097,173
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Saladgekar, David	21,474,363
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Kumar, Damaris	18,321,738
Couture, Abe	16,340,573
McNamara, Daine	16,133,375
Ely, Gary	15,954,342
Trumbull, Winfred	15,848,973
Tanik, Adelia	15,684,400
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Hosch, Michale	10,769,589
Tangella, Alta	10,503,200
Villanueva, Carlos	10,104,792
Cousins, August...	10,024,477

Prospect Count

Statistic	id_number
Selected	237

Predictive Model

Models: Million \$\$ Donor

Model Details

Information: Robustness:

Build Model Predict

Target Field: *selection*

Explanatory Fields:

Field Name	Contribution
alum_fnd_6yr_total	24.6%
primstf_prosp_cls	9.2%
contact_dt	9.0%
Primary Staff Last Visit Date	9.0%
Primary Staff Stage Description	8.5%
Capacity	7.7%
SpousesAlum	3.3%
contact_purp_desc	3.2%
Lg Region City	2.9%
fy_visit_summary	2.9%
bartlett_tower_00c	2.3%
beq_exp	2.3%
Active Indicator	1.8%
marts_lundy_potential	1.2%

alum_fnd_6yr_total Groups

Score all other ~93k entities . . .

(click with mouse)



Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | Giving History | Giving Detail

Total Gift \$\$ by Year

TLG Filter

- <No Gift>
- a \$1-\$99
- b \$100-\$499
- c \$500-\$999

Prospect TLG

PREF_NAME_S...	TLG(sum)
OVERALL	958,228,060
Anastacio, Daniel	39,097,173
Haines, Kimberly	25,834,850
Saladgekar, David	21,474,363
Goff, Irving	20,535,227
Read, Paul	19,761,270
Oliver, Harley	19,535,638

Predictive Model

Models: Million \$\$ Dono

Model Details

Information: Robustness:

Target Field: *selection*

Explanatory Fields:

Field Name	Contribution
alum_fnd_6yr_total	24.6%
primstf_prosp_cls	9.2%
contact_dt	9.0%
Primary Staff Last Visit Date	9.0%
Primary Staff Stage Description	8.5%
Capacity	7.7%
SpousesAlum	3.3%
contact_purp_desc	3.2%
Lg Region City	2.9%
fy_visit_summary	2.9%
bartlett_tower_soc	2.3%
beq_exp	2.3%
Active Indicator	1.8%
marts_lundy_potential	1.2%

Build Model | Predict

Model Prediction Completed

A new field named 'selection(Predicted)' has been added to data table Core_table.

OK

of Gifts by Year

Avg. Gift Size

TLG Filter Legend

- i \$100K-\$249K
- j \$250K-\$499K
- k \$500K-\$999K
- l \$1M-\$1.9M
- m \$2M-\$4.9M
- n \$5M-\$9.9M
- o \$10M-\$24.9M
- p \$25M-\$49.9M

030,000 # Pros...

Prospect TLG (Detailed)

Amone, Marc	12,435,937
Burrows, Marvin	12,241,223
Dederig, Brock	11,690,410
Hartnagel, Bern...	11,141,690
Karp, Jamal	11,000,960
Kaufmann, Leo...	10,910,587
Hosch, Michale	10,769,589
Tangella, Alta	10,503,200
Villanueva, Carlos	10,104,792
Cousins, August...	10,024,477

Prospect Count

Statistic	id_number
Selected	237

alum_fnd_6yr_total Groups

Group Name

Lift

Add Group Field to Data

New Model... | Edit Model... | Delete Model...

176 additional "Million \$\$ Donors" predicted. . . right click to export list.



Tasks | Data - Prspct | Affiliation | Ratings | Regions | Map | Bio | Degrees | Sports/Actvty | Giving Hstry | Giving Detail | **Model Analysis**

Predicted Million \$\$ Donors (who are not currently million \$\$ donors)

PREF_NAME_SORT_new	selection(Predicted)(sum)	TLG(sum)
OVERALL	176	15,279,468
Aldridge, Dionne	1	56,286
Ammons, Enriqueta	1	12,350
Appikatala, Fairy	1	617
Avery, Ronald	1	3,040
Bailey, Buck	1	38,650
Baines, Vicente	1	14,914
Bakkers, Nyla	1	8,339
Beachler, Marc	1	123,123
Beck, Ben	1	105,247
Behan, Sharolyn	1	3,120
Bement, William	1	161,221
Berg, Rudolf	1	539,070
Berker, Rolando	1	3,039
Billhartz, Samuel	1	3,120
Blackmon, Steven	1	9,585
Bonadio, Federico	1	9,585
Borisova, Alrean	1	11,773
Born, Christopher	1	12,350
Bruning, Shelton	1	3,940
Bryan, Donald	1	618
Buchely, Doloris	1	707,325
Butler, Riley	1	3,940
Buttolph, Marcel	1	695,439

Entity Count

Statistic	id_number
Count	93,748
Selected	176
Excluded	237

Predictive Model
 Models: Million \$\$ Donor

Model Details
 Information: 81 | Robustness: 92 | Build Model | Predict

Target Field: *selection*
 Explanatory Fields:

Field Name	Contribution
alum_fnd_6yr_total	24.6%
primstf_prosp_cls	9.2%
contact_dt	9.0%
Primary Staff Last Visit Date	9.0%
Primary Staff Stage Description	8.5%
Capacity	7.7%
SpoueselsAlum	3.3%
contact_purp_desc	3.2%
Lg Region City	2.9%
fy_visit_summary	2.9%
bartlett_tower_soc	2.3%
beq_exp	2.3%
Active Indicator	1.8%
marts_lundy_potential	1.2%
Evaluation Date	1.1%
Participation	1.0%

alum_fnd_6yr_total Groups

Add Group Field to Data | New Model... | Edit Model... | Delete Model...

Who Are They?

- Most are already rated and staffed
- But only half at the \$1mm+ level . . .



Note: Color = Prospect Rating (hotter colors = higher)



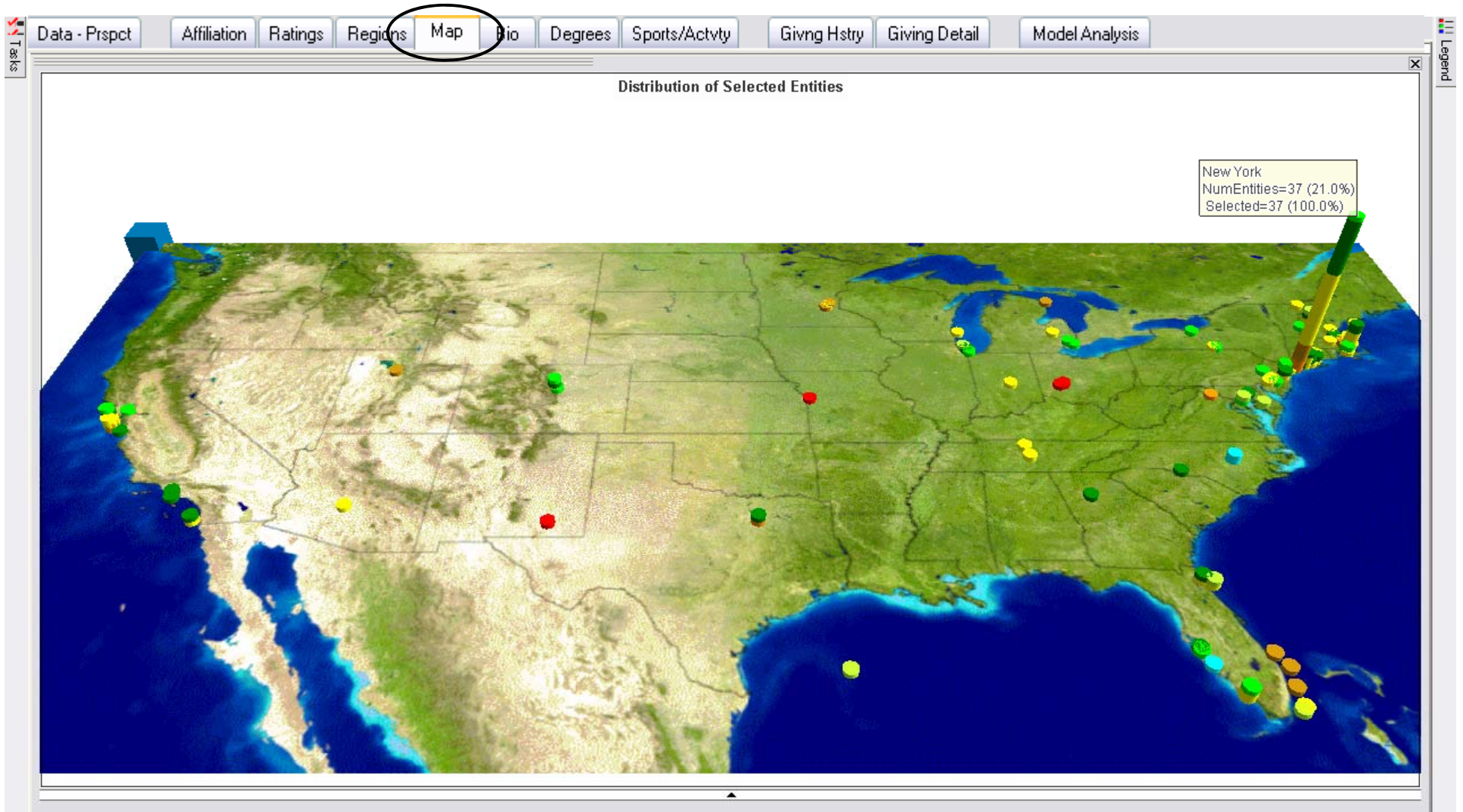
Primarily alumni from the '80s . . .



Note: Color = Prospect Rating (hotter colors = higher)



They live in NY, Boston, and South Florida.



Summary:

- ▲ **30 Minutes to do this analysis**
- ▲ **No statistics background needed**
- ▲ **176 prime prospects identified:**
 - **Assign the 4 who aren't currently assigned**
 - **Up rating on the 50% who are not at the \$1mm level**
 - **Plan an event in NY and possibly Boston and/or South Florida for this group**
 - **Leverage themes / affinities from the '80s**

Who we are . . .

- ▲ **Bell Labs Spin-off**
- ▲ **Over 1,000 Customers – mid market & up; variety of industries; higher ed focus**
- ▲ **Key Strategic Partners:** Alterian, Information Builders, Intel, Intellitactics, Microsoft, Salesforce.com, Sungard HE, Teradata
- ▲ **Well Regarded by key Industry Analysts:** Aberdeen, Forrester, Gartner, TDWI, etc.

Key Benefit: Collaboration



New Class of Software

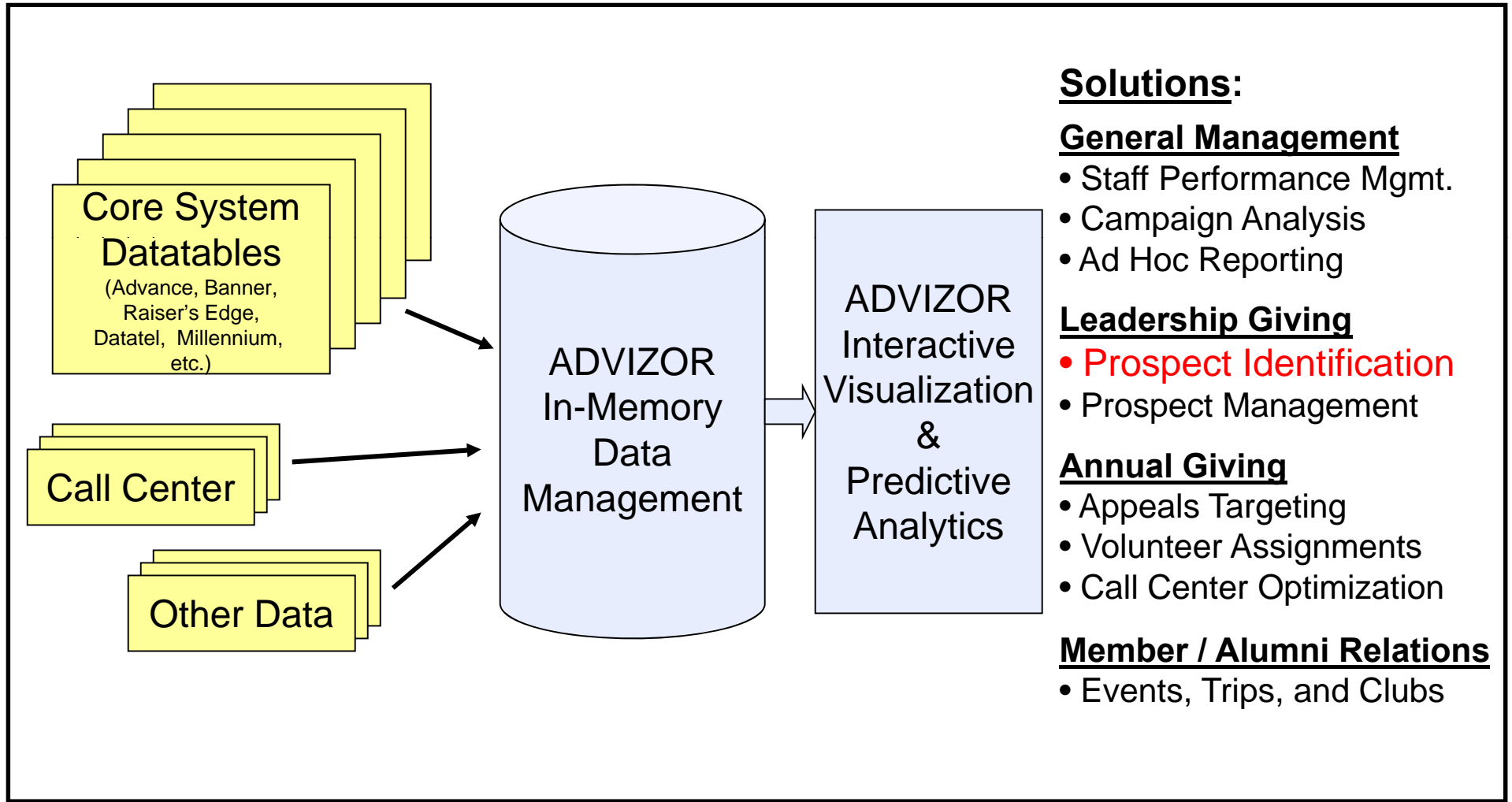


Visual Discovery™ Software

- *In-Memory-Data-Management*
- *Data Visualization*
- *Predictive Analytics*

Well regarded: Gartner “Cool Vendors in Business Intelligence”, “The Rise of Data Discovery Tools”; TDWI “Next-Generation Analytics

Portfolio of Solutions



Solutions:

General Management

- Staff Performance Mgmt.
- Campaign Analysis
- Ad Hoc Reporting

Leadership Giving

- **Prospect Identification**
- Prospect Management

Annual Giving

- Appeals Targeting
- Volunteer Assignments
- Call Center Optimization

Member / Alumni Relations

- Events, Trips, and Clubs

High ROI in Fundraising



▲ Solution Focus

- Leadership Giving:
 - Prospect Identification
 - Prospect Management
- General Management:
 - Staff Performance Mgmt.
 - Campaign Analysis
 - Ad Hoc Reporting
- Annual Giving:
 - Retention/Acquisition & Appeals Targeting
 - Volunteer Assignments
 - Call Center Optimization
- Member / Alumni Relations
 - Events, Trips, and Clubs

▲ Variety of Clients:

- Higher Education
- Healthcare
- Faith Based
- Philanthropic
- Social Services

Next Step:



**→ *Contact us for a free assessment.
Your data, your key questions.***

Sales@advizorsolutions.com

630-971-5250

Appendix

Demo Details



- ▲ **Disguised data from 5,500 student university**
- ▲ **24 datatables from SunGard Advance system** (*data scrambled and disguised*)
- ▲ **Types of questions being answered:**
 - Who have historically been my best donors? Which of my younger prospects fit that same profile?
 - Who is not being seen; who has high potential and is not giving?
 - Our football coach is going to NYC, who should he invite to dinner?
 - Who are all the alumni rated with an active rating over \$500k who are not assigned to a gift officer? Is there a pattern to who they are?
 - Who are all of the entities who are assigned to an FAS gift officer but who have never made a gift/pledge to FAS?
 - Etc.
- ▲ **Problem with status quo before ADVIZOR:**
 - Advancement Services bogged down creating custom reports
 - Big backlog and long delays (often weeks)
 - Difficult to cut multi-dimensional data in Excel
- ▲ **Current ADVIZOR deployment:**
 - ~25 client users in Research, Alumni Relations, Principle Giving, and Management
 - Plus . . . Annual Fund Volunteers and Alumni Club Managers over the web.
- ▲ **With Visual Discovery™, every item in every page is selectable. Hence, this dashboard is effectively a very wide “pivot table”**