Prospect Identification Demo

Leveraging Advancement Information for Fundraising

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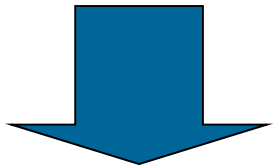
Need: Better Information Faster

- **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

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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"

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Scope of This Demo

Solutions We Offer → **Range of Questions** → **2 Demo Questions**

- **Advancement**
  - **General Management**
    - Staff Performance Mgnt
    - 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?**

→ **Who have historically been my best donors? Which of my younger prospects fit that same profile?**

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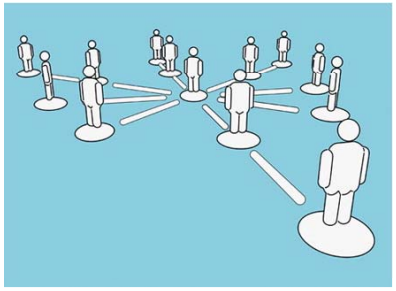
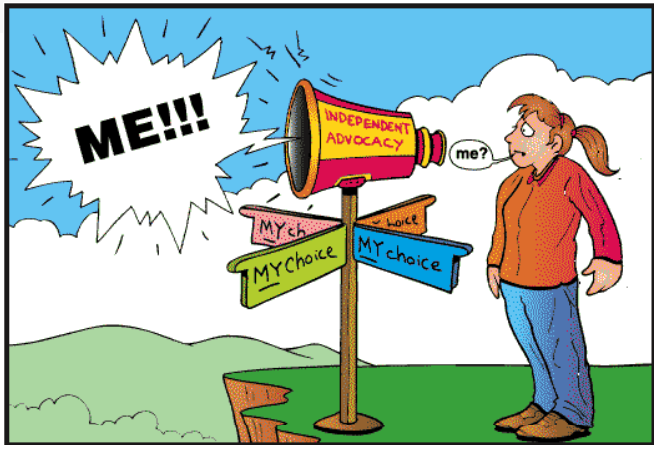
A Wealth of Information





VOLUNTEERING

Decisions

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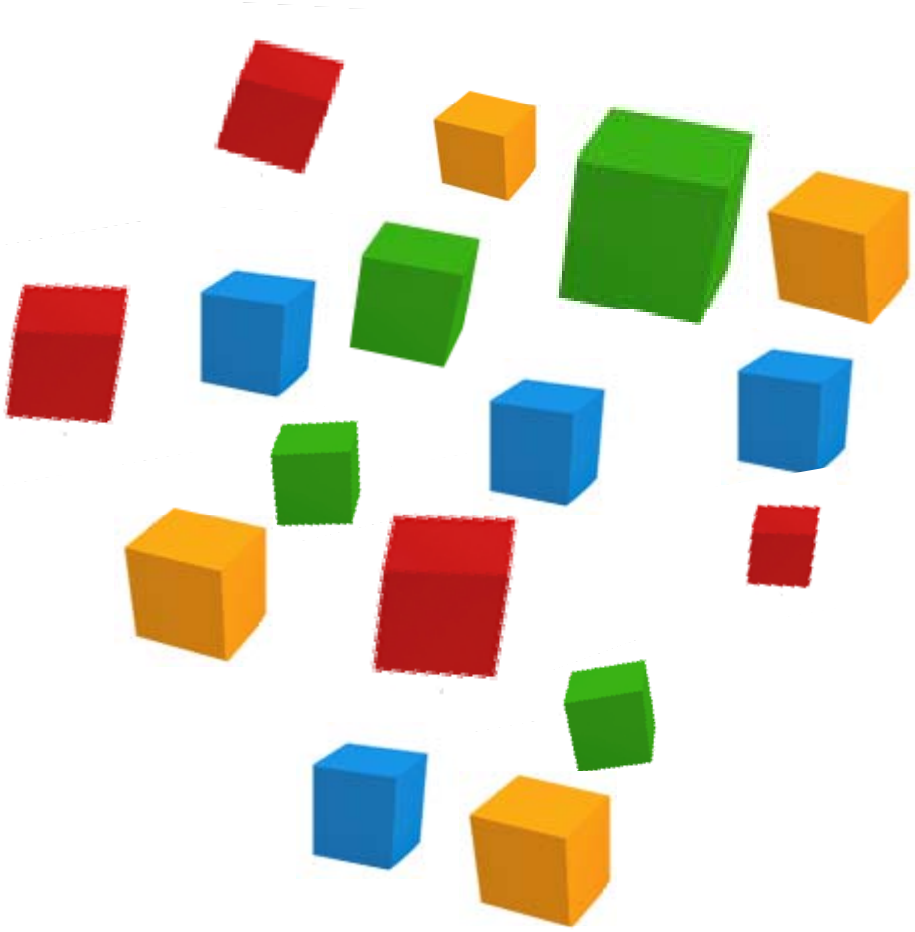
Information Fragmented and Hard To Access . . .



Demographic

Affinity / Capacity

Activities

Giving

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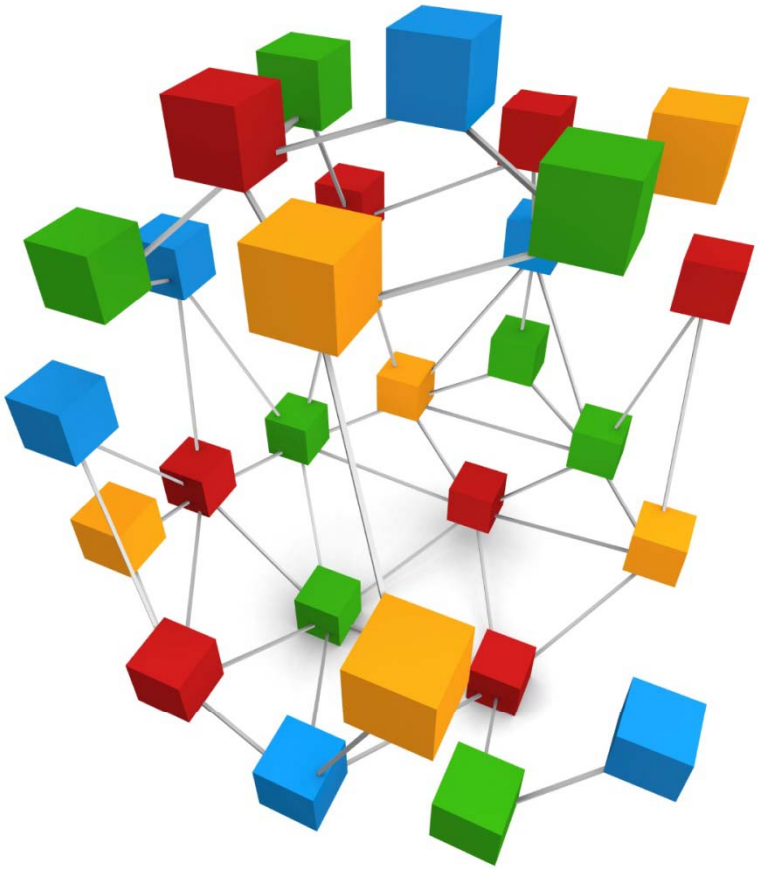
. . . Advizor Knits It Together



Demographic

Affinity / Capacity

Activities

Giving

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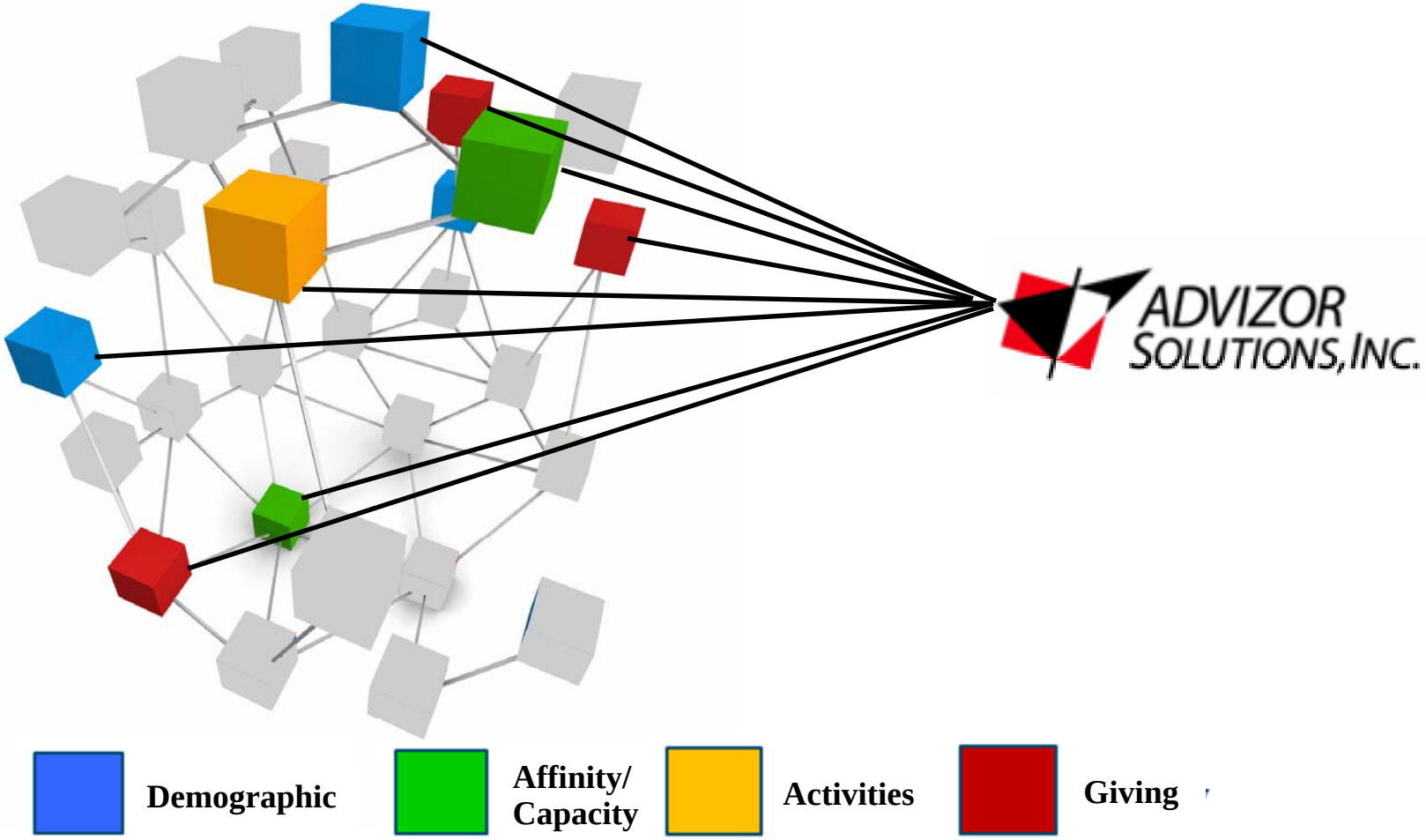
. . . Enabling Easy Answers to Key Questions.

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



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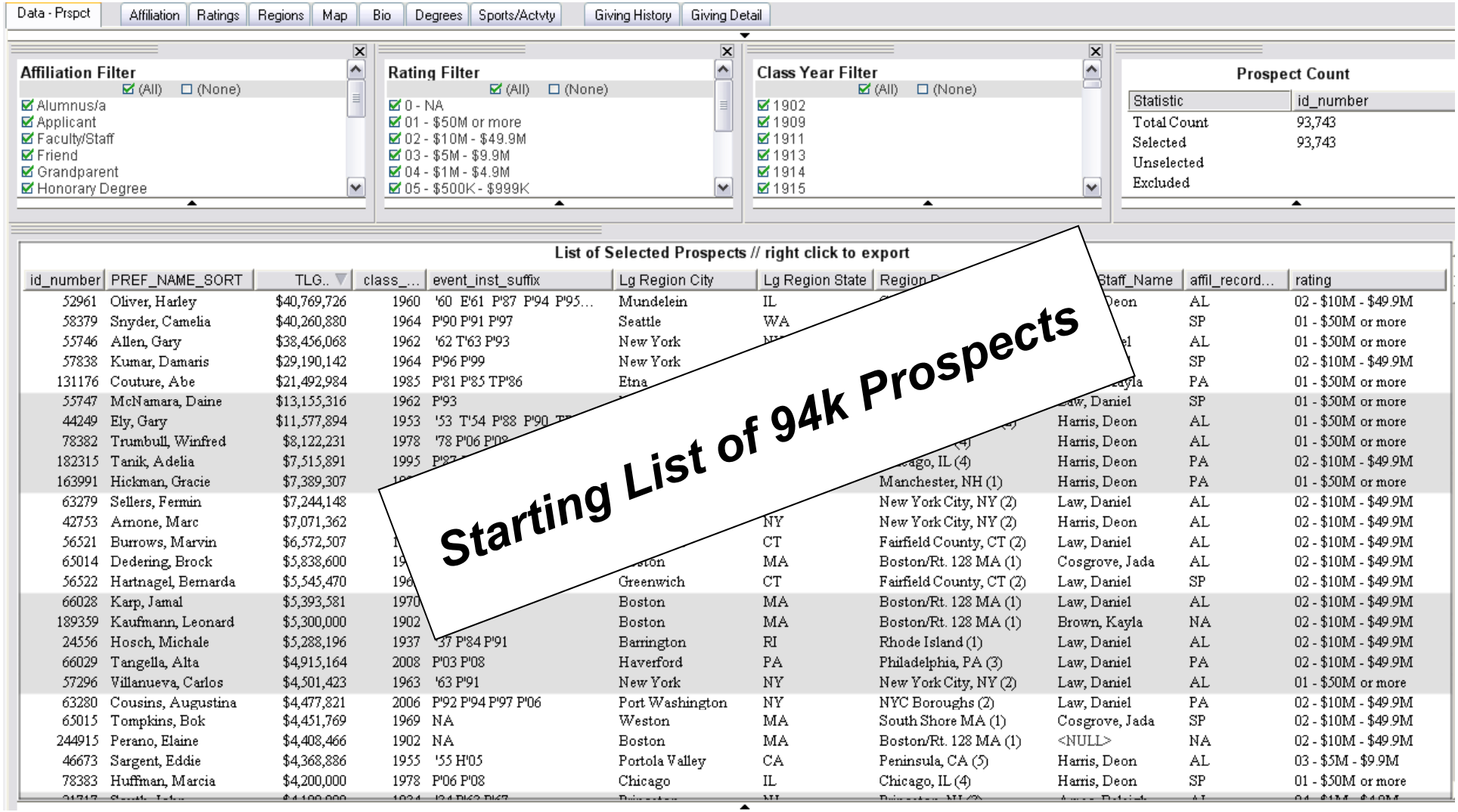
Demo: upcoming dinner in NYC, who should be invited? (Higher Education example)



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52961	Oliver, Harley	$40,769,726	1960	'60 E'61 P'87 P'94 P'95...	Mundelein	IL		Deon	AL	02 - $10M - $49.9M
58379	Snyder, Camelia	$40,260,880	1964	P'90 P'91 P'97	Seattle	WA			SP	01 - $50M or more
55746	Allen, Gary	$38,456,068	1962	'62 T'63 P'93	New York	NY		el	AL	01 - $50M or more
57838	Kumar, Damaris	$29,190,142	1964	P'96 P'99	New York	NY			SP	02 - $10M - $49.9M
131176	Couture, Abe	$21,492,984	1985	P'81 P'85 TP'86	Etna	NH		ayla	PA	01 - $50M or more
55747	McNamara, Daine	$13,155,316	1962	P'93				aw, Daniel	SP	01 - $50M or more
44249	Ely, Gary	$11,577,894	1953	'53 T'54 P'88 P'90 T...				Harris, Deon	AL	01 - $50M or more
78382	Trumbull, Winfred	$8,122,231	1978	'78 P'06 P'08				Harris, Deon	AL	01 - $50M or more
182315	Tanik, Adelia	$7,515,891	1995	P'87			ago, IL (4)	Harris, Deon	PA	02 - $10M - $49.9M
163991	Hickman, Gracie	$7,389,307					Manchester, NH (1)	Harris, Deon	PA	01 - $50M or more
63279	Sellers, Fermin	$7,244,148					New York City, NY (2)	Law, Daniel	AL	02 - $10M - $49.9M
42753	Arnone, Marc	$7,071,362				NY	New York City, NY (2)	Harris, Deon	AL	02 - $10M - $49.9M
56521	Burrows, Marvin	$6,572,507	1			CT	Fairfield County, CT (2)	Law, Daniel	AL	02 - $10M - $49.9M
65014	Dedering, Brock	$5,838,600	19		ston	MA	Boston/Rt. 128 MA (1)	Cosgrove, Jada	AL	02 - $10M - $49.9M
56522	Hartnagel, Bernarda	$5,545,470	196		Greenwich	CT	Fairfield County, CT (2)	Law, Daniel	SP	02 - $10M - $49.9M
66028	Karp, Jamal	$5,393,581	1970		Boston	MA	Boston/Rt. 128 MA (1)	Law, Daniel	AL	02 - $10M - $49.9M
189359	Kaufmann, Leonard	$5,300,000	1902		Boston	MA	Boston/Rt. 128 MA (1)	Brown, Kayla	NA	02 - $10M - $49.9M
24556	Hosch, Michale	$5,288,196	1937	'37 P'84 P'91	Barrington	RI	Rhode Island (1)	Law, Daniel	AL	02 - $10M - $49.9M
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

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Money Being Raised for?

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

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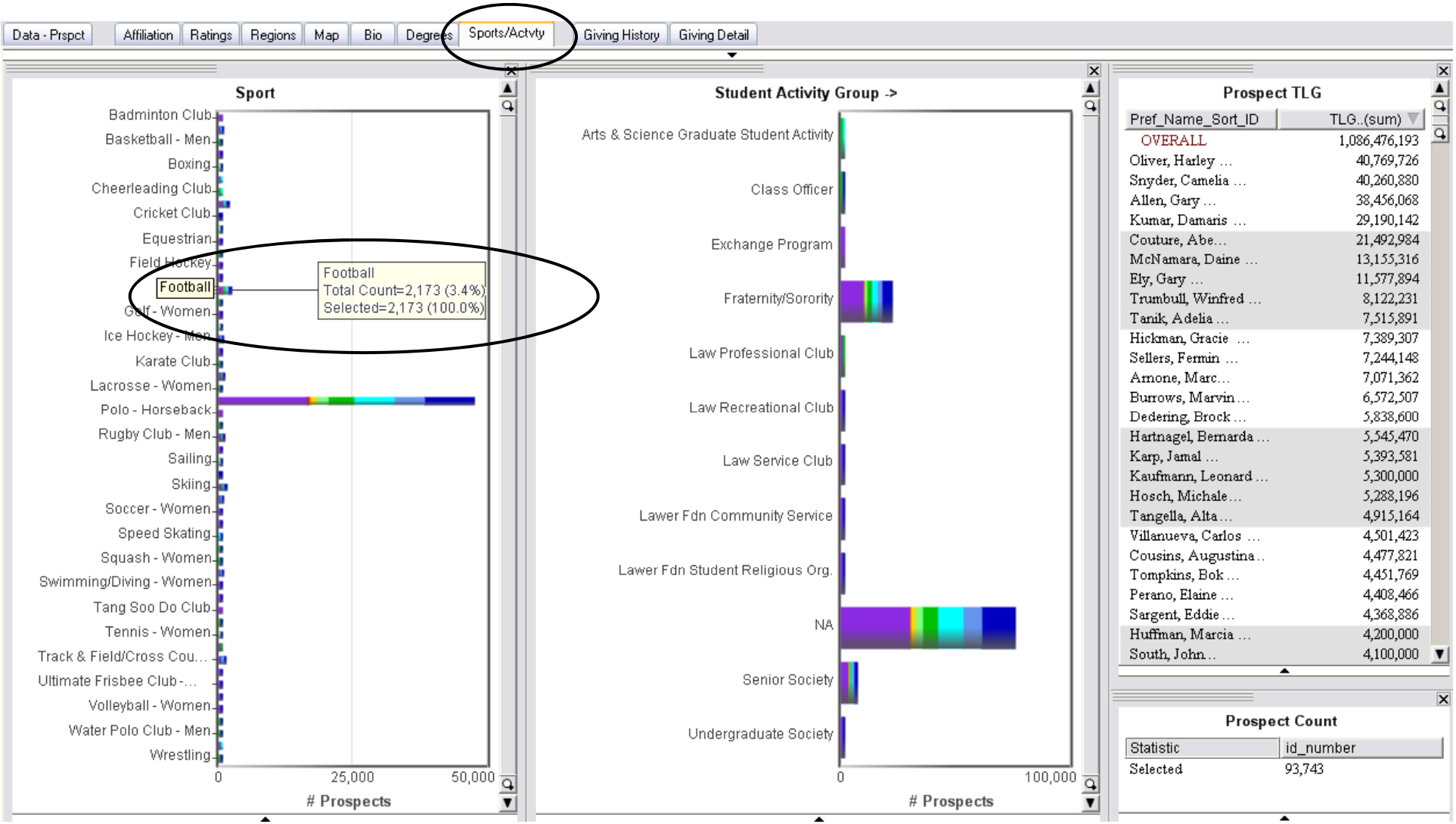
Click ➔ *2,173 Football Players . . .*



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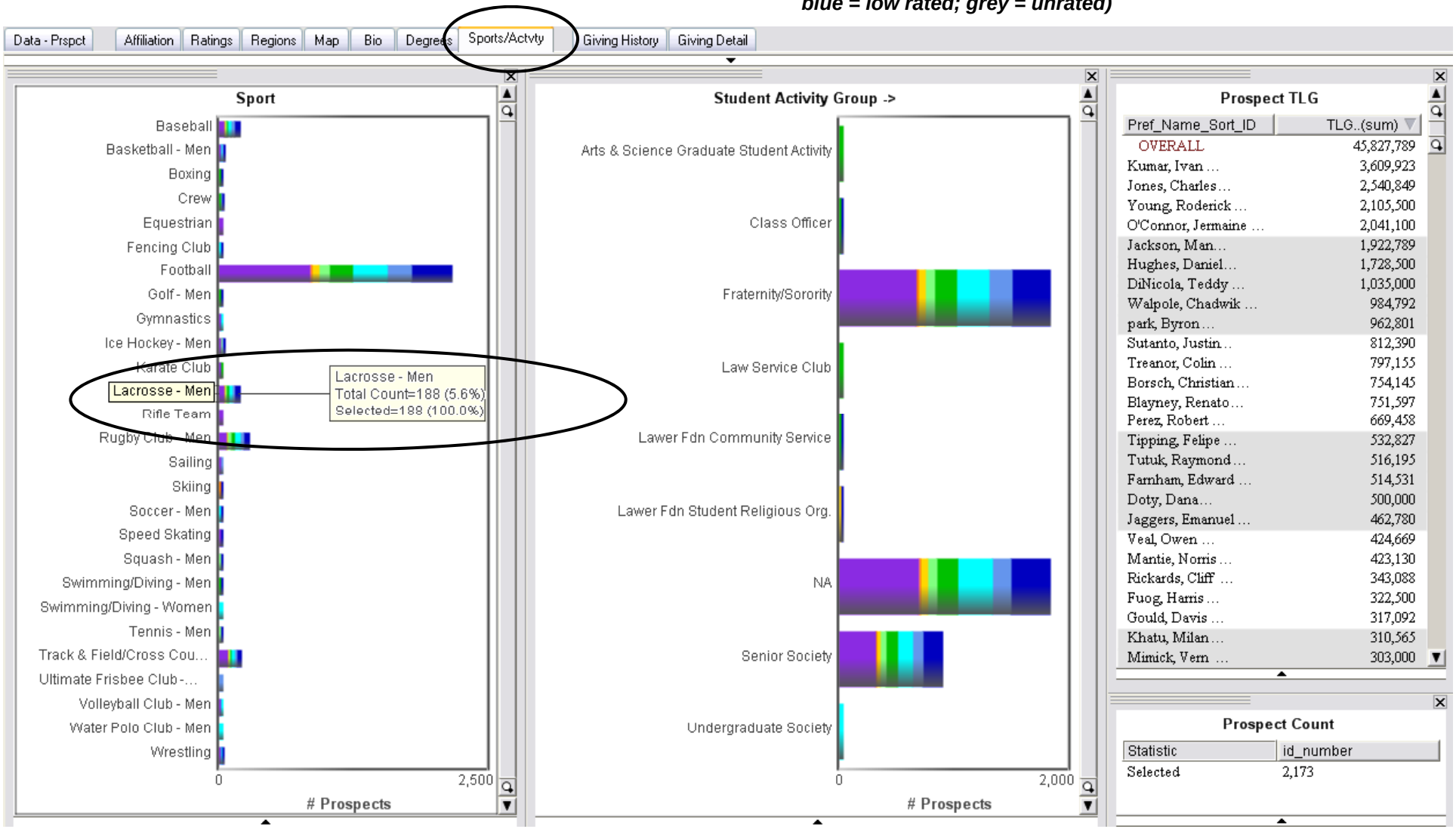
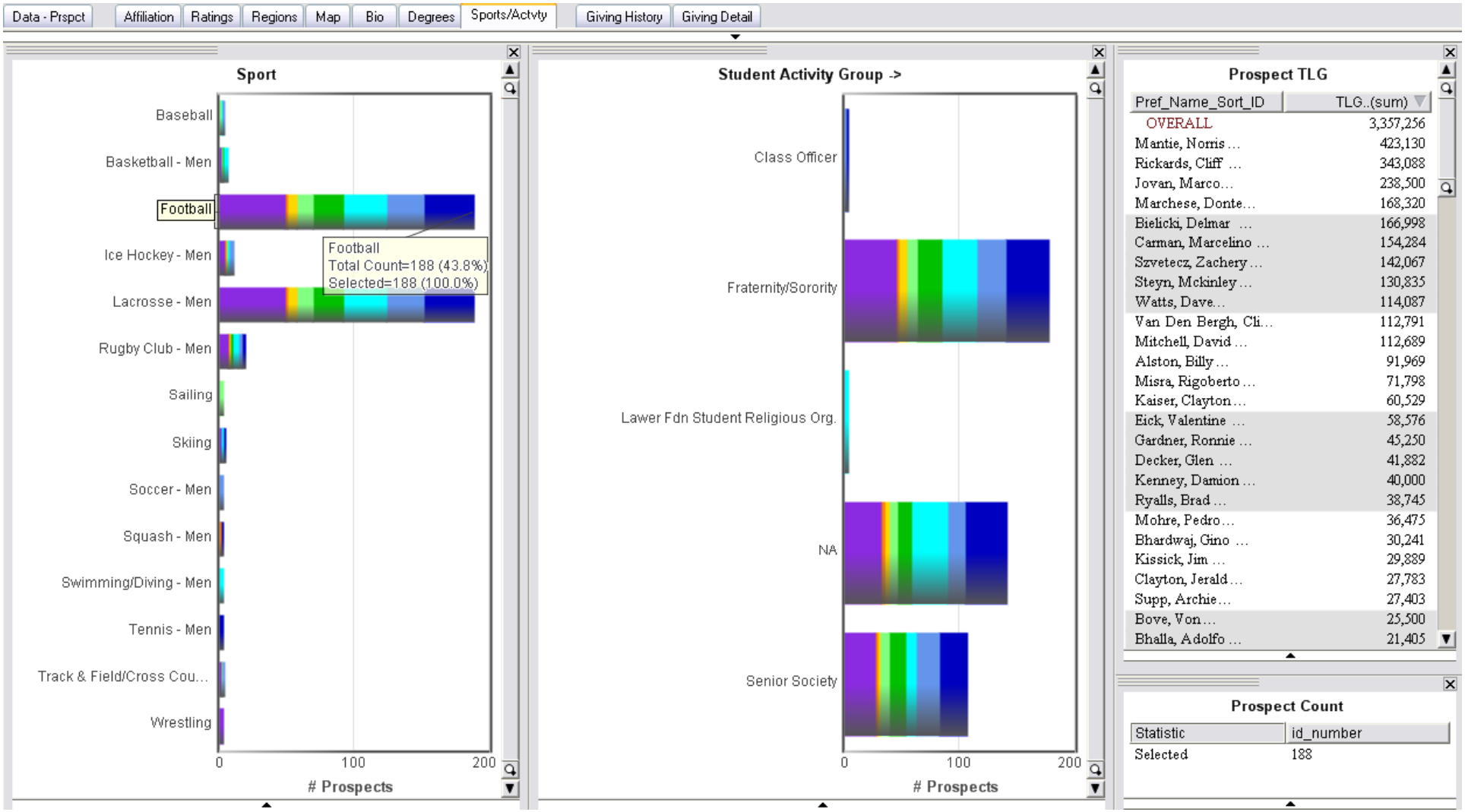
Click Again ➔ *188 Also Played Lacrosse*

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



. . . “Zoom In” on these 188 . . .



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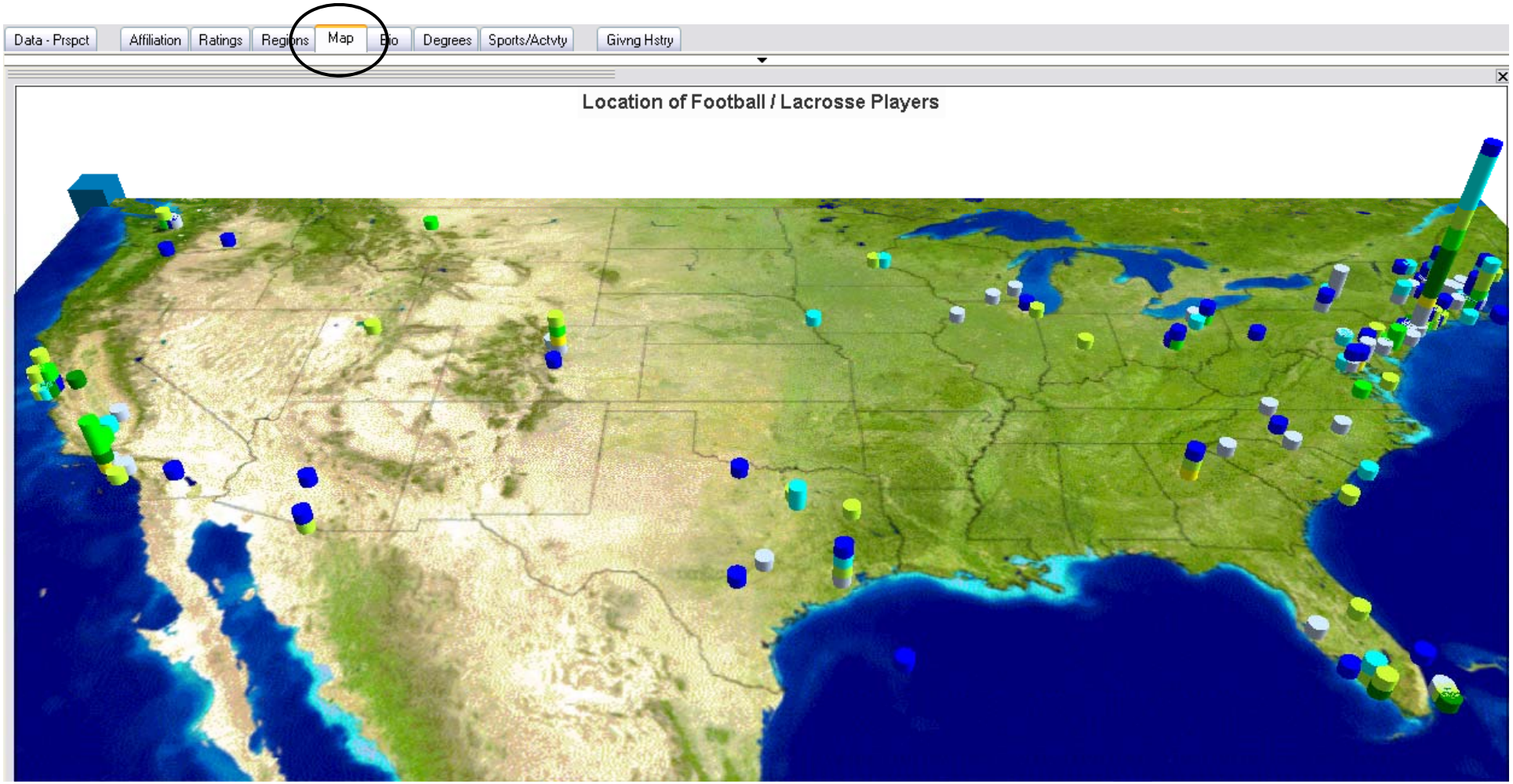
. . . Most Live in the Northeast . . .



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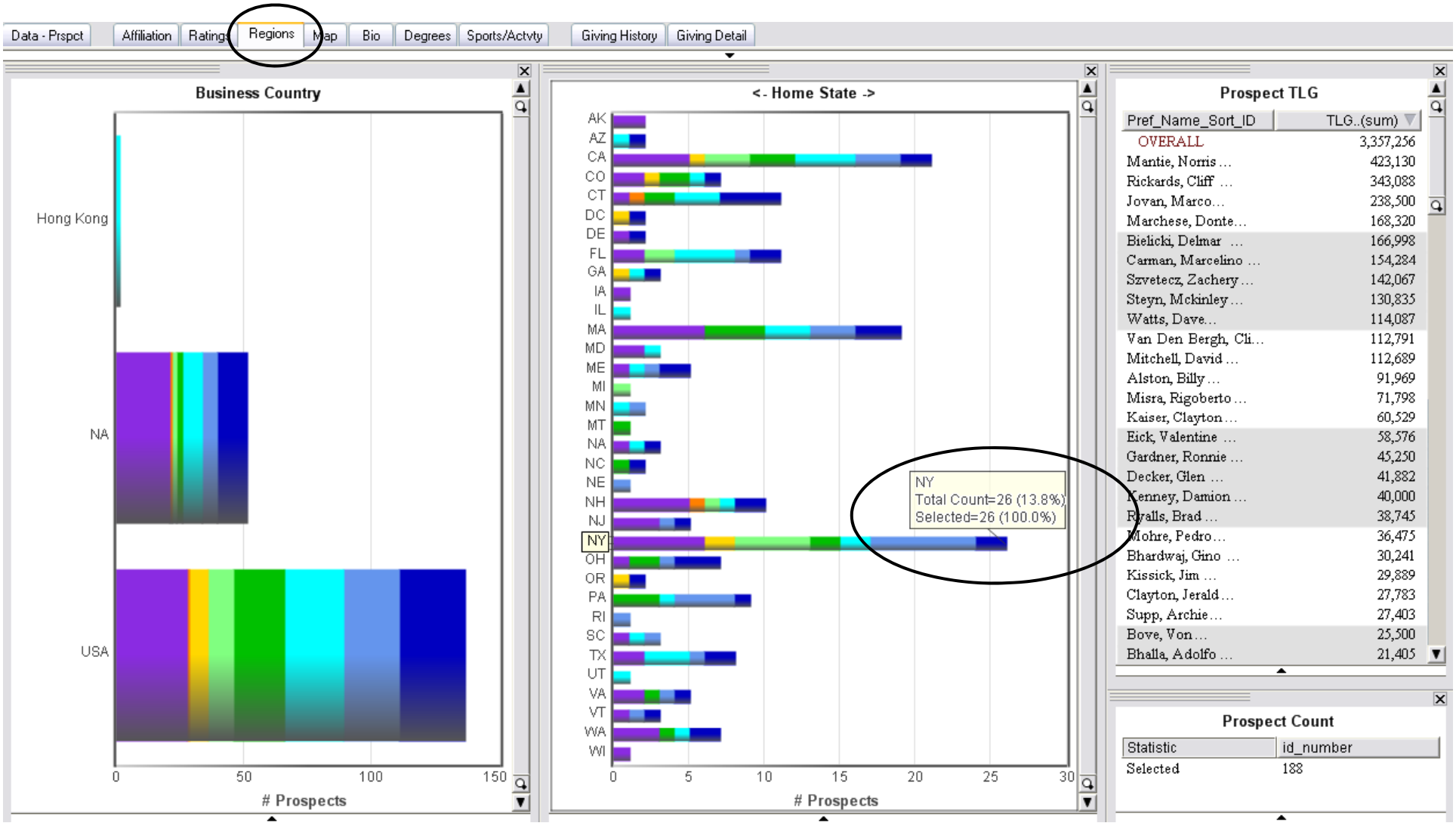
. . . 26 in NY State . . .



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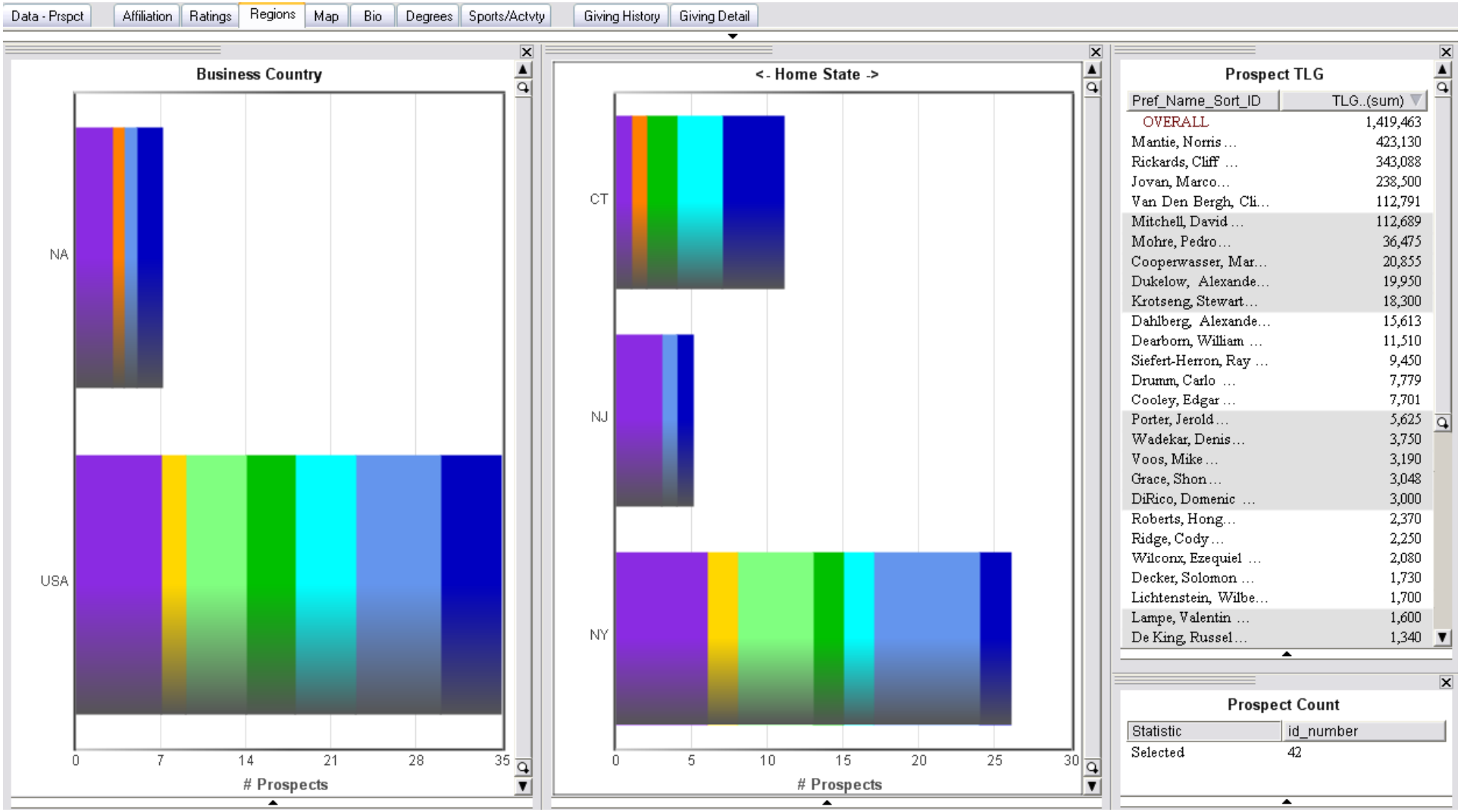
Click ➔ 42 in NY, CT, NJ . . .



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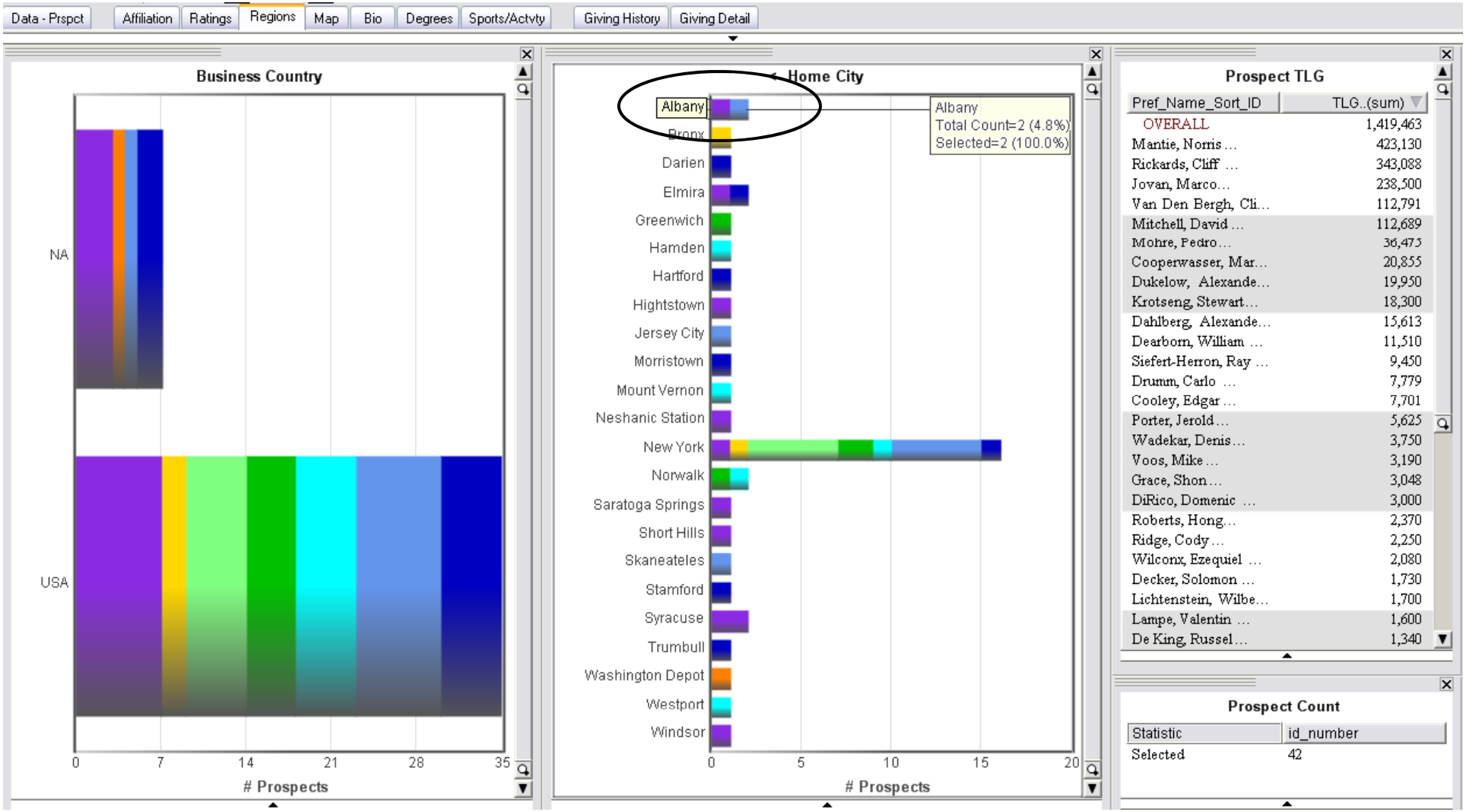
. . . Click to Remove 2 in Albany . . .



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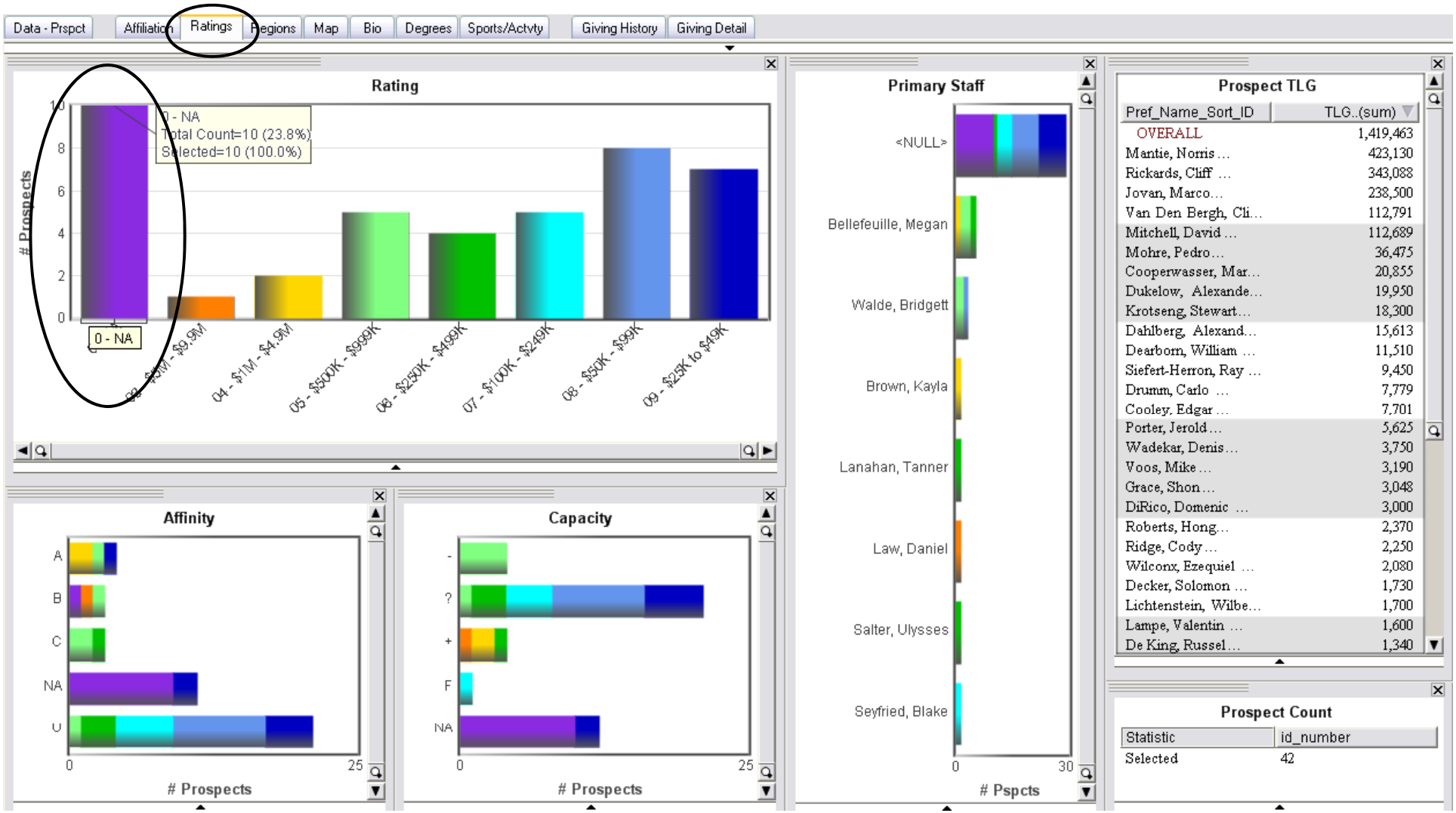
. . . Click to Remove 10 Who Aren't Rated . . .



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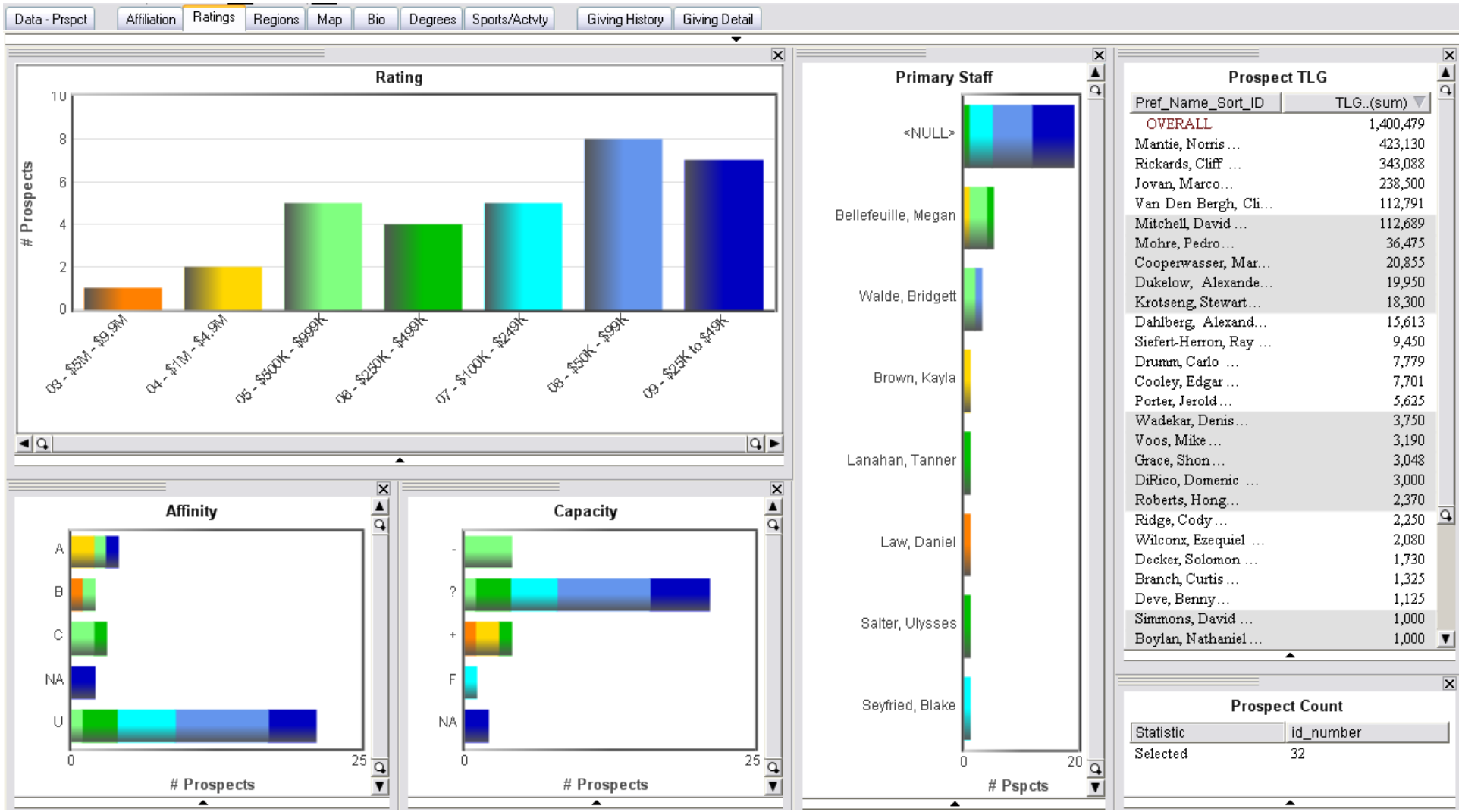
. . . 32 Prime Prospects.



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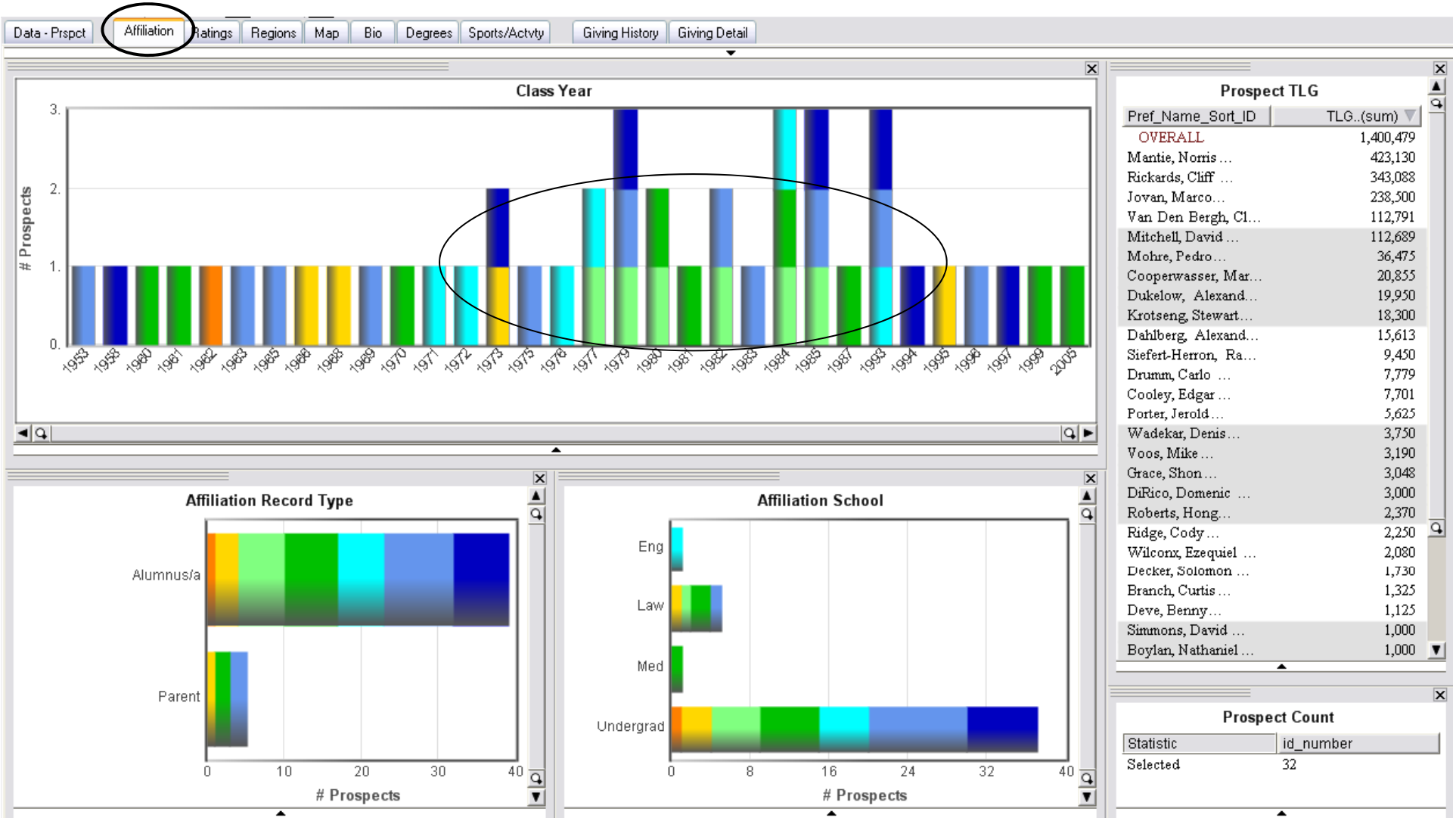
Clustered in the ’70’s and ’80’s.



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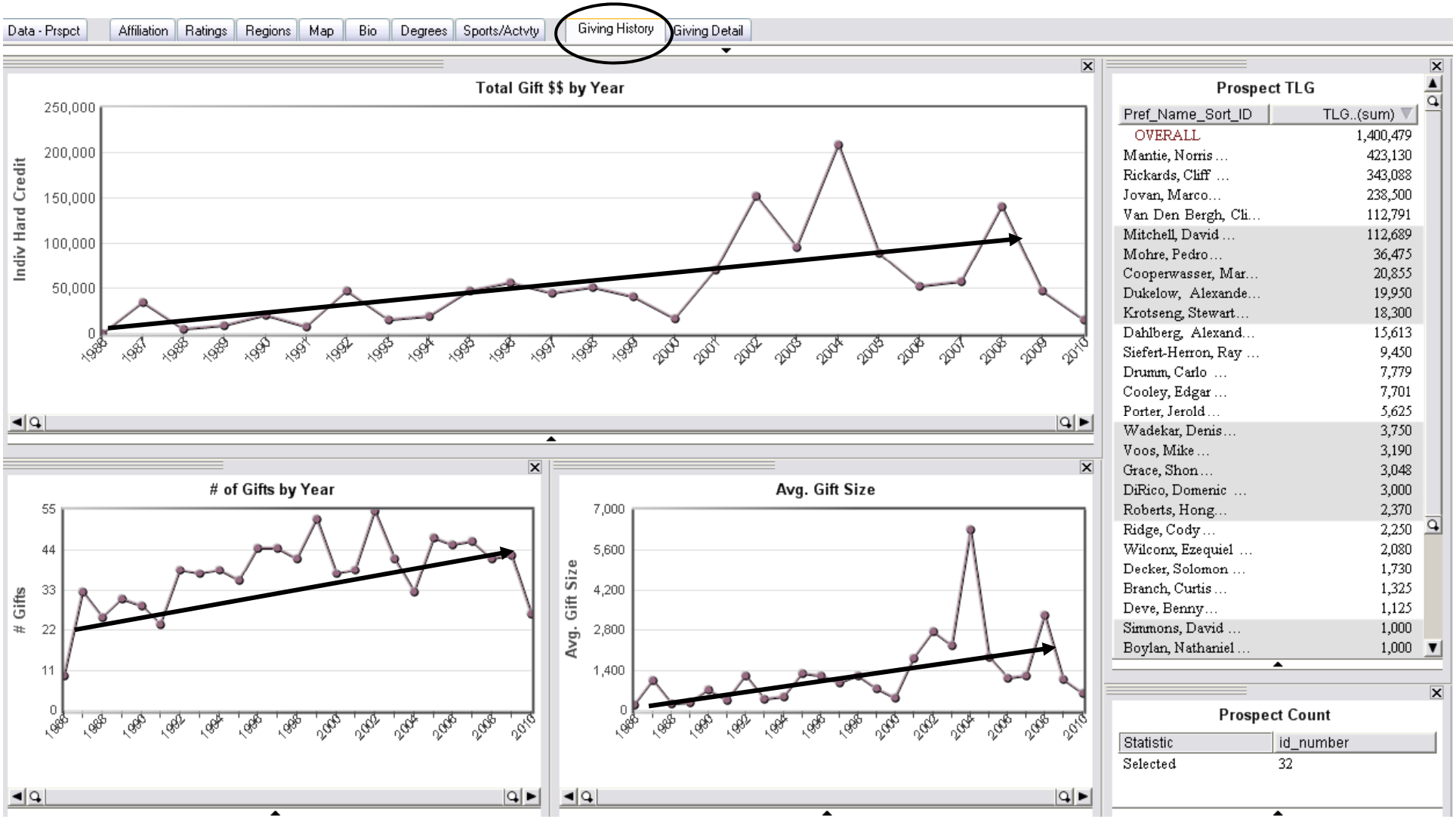
Reasonable Giving History.



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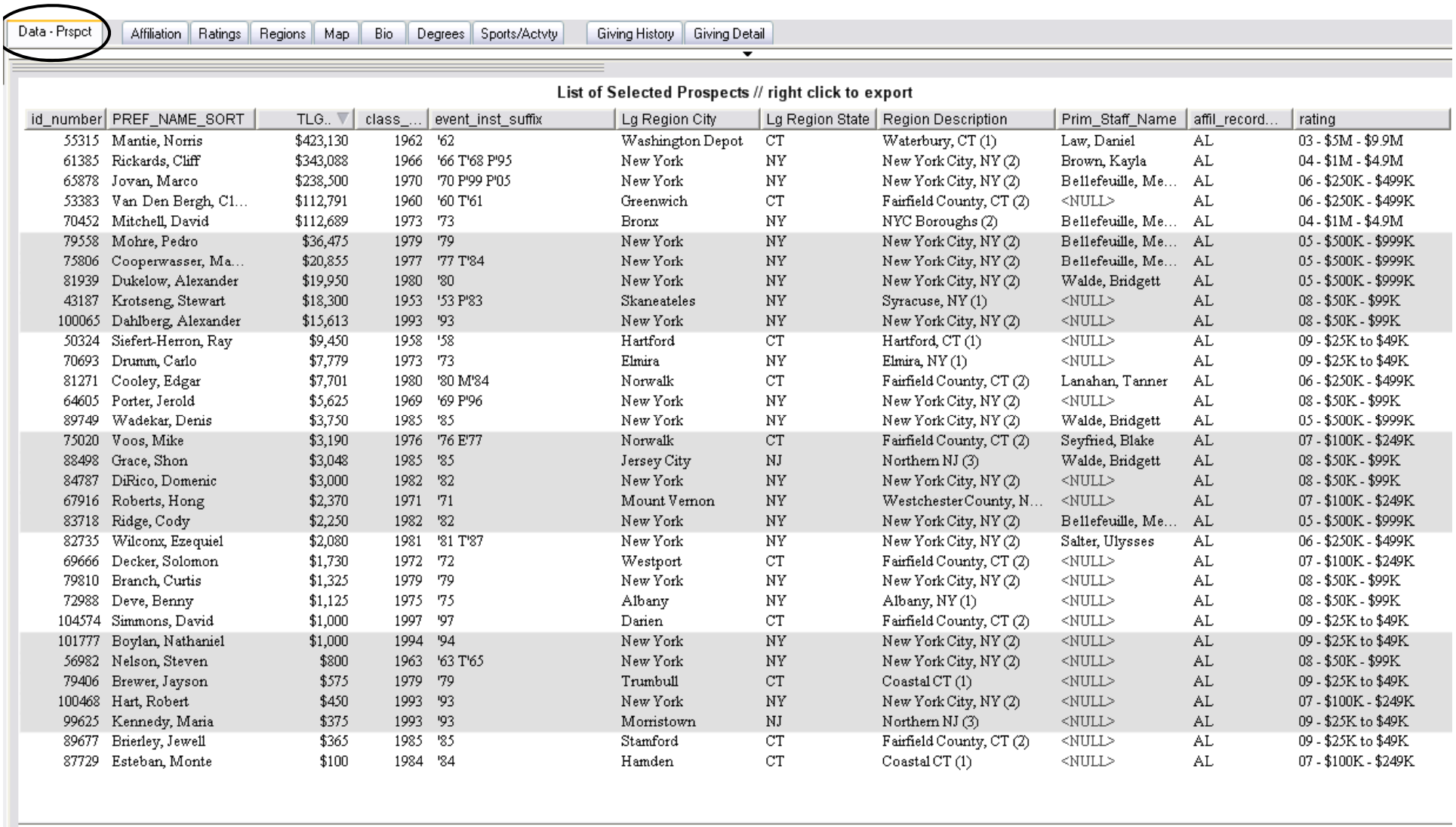
List of the 32.



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

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, C1...	$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	Drumm, 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	Wilconx, 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

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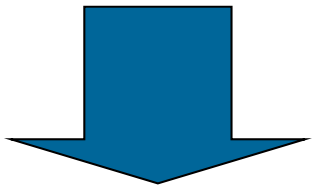
Summary:

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



- ***Found Major Donor!!***

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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

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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"**

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Predictive Analytics

ADVIZOR SOLUTIONS, INC.

Concepts:

- Target
- Base Population ("excluded" data not used)
- Explanatory Fields
  - Core Table
  - Calculated and joined from other tables
- Regression
- Correlation ≠ Causation

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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**

---

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

Collaborative Process

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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***

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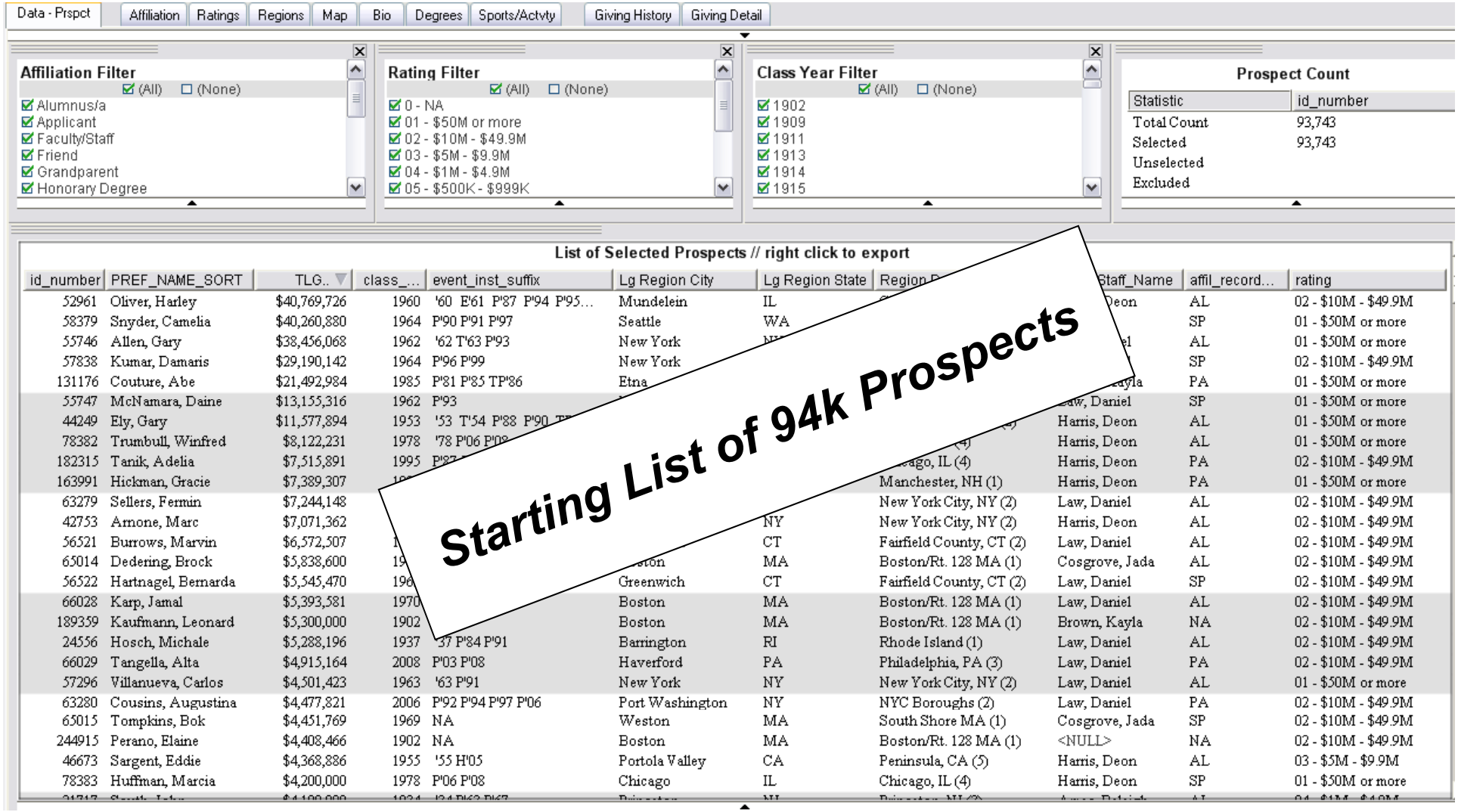
ADVIZOR Dashboard



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Giving History

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Select Target: 237 Current Million $$ Donors

(click with mouse)

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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+**

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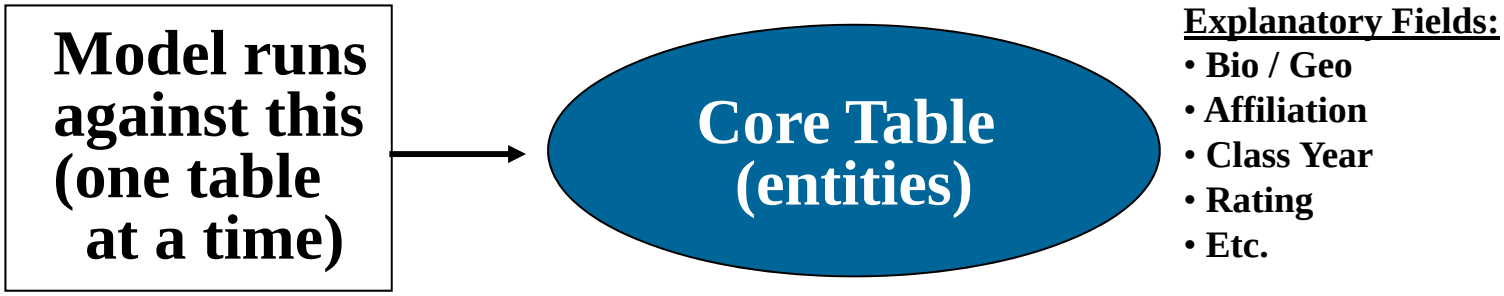
Explanatory Fields



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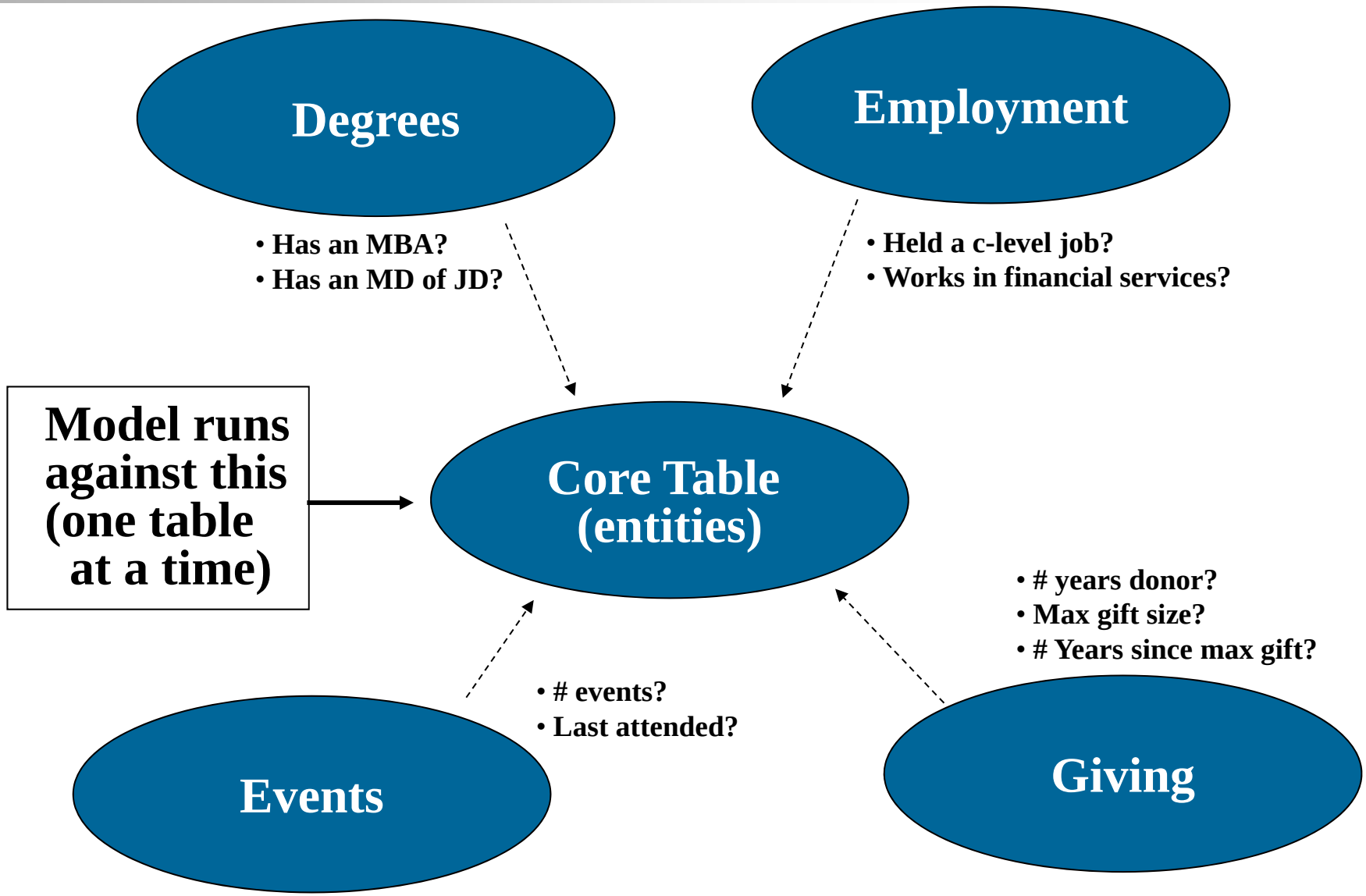
Fields From Other Tables



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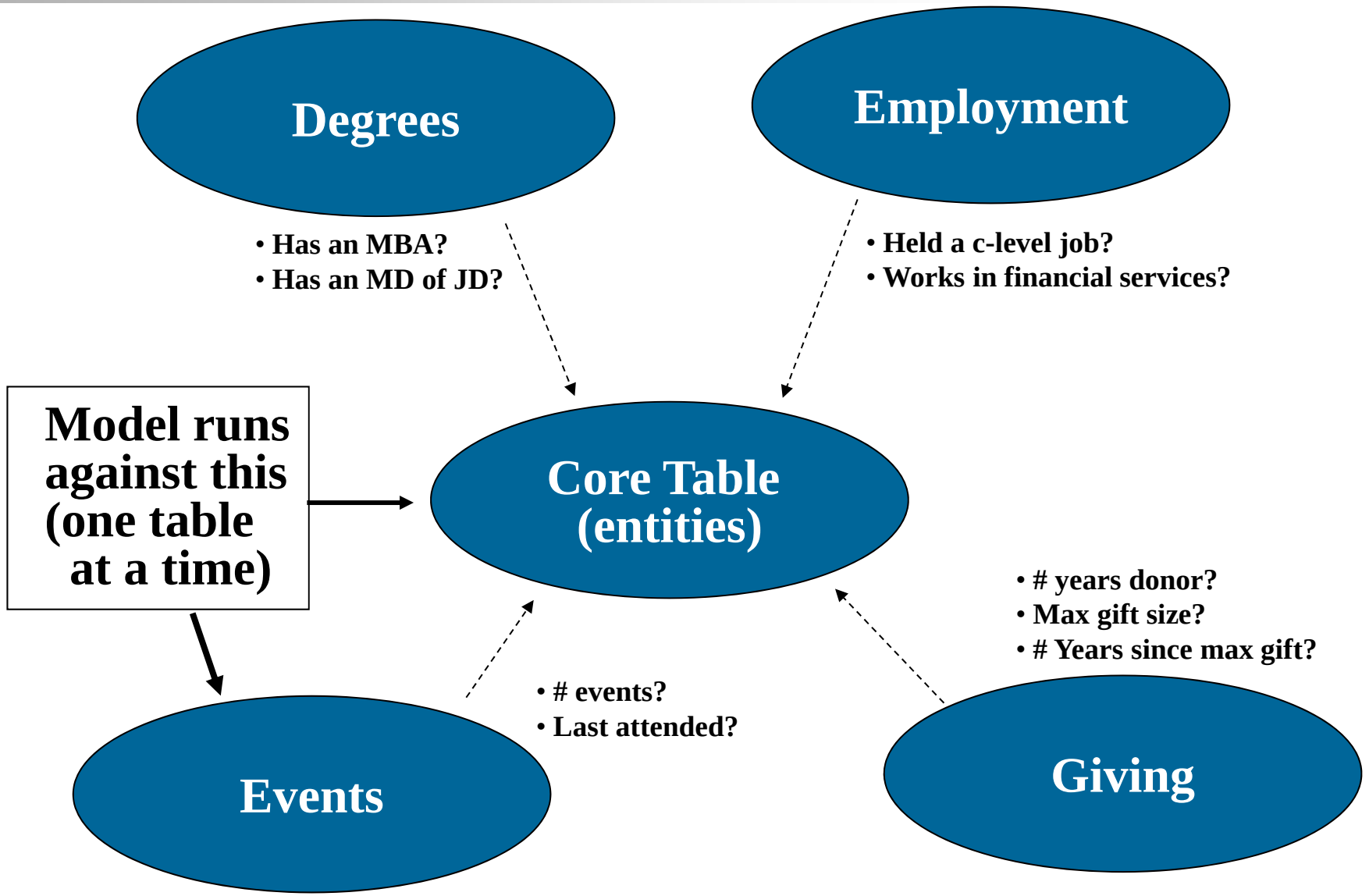
Run Model Against Other Tables



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Back to the demo!!!

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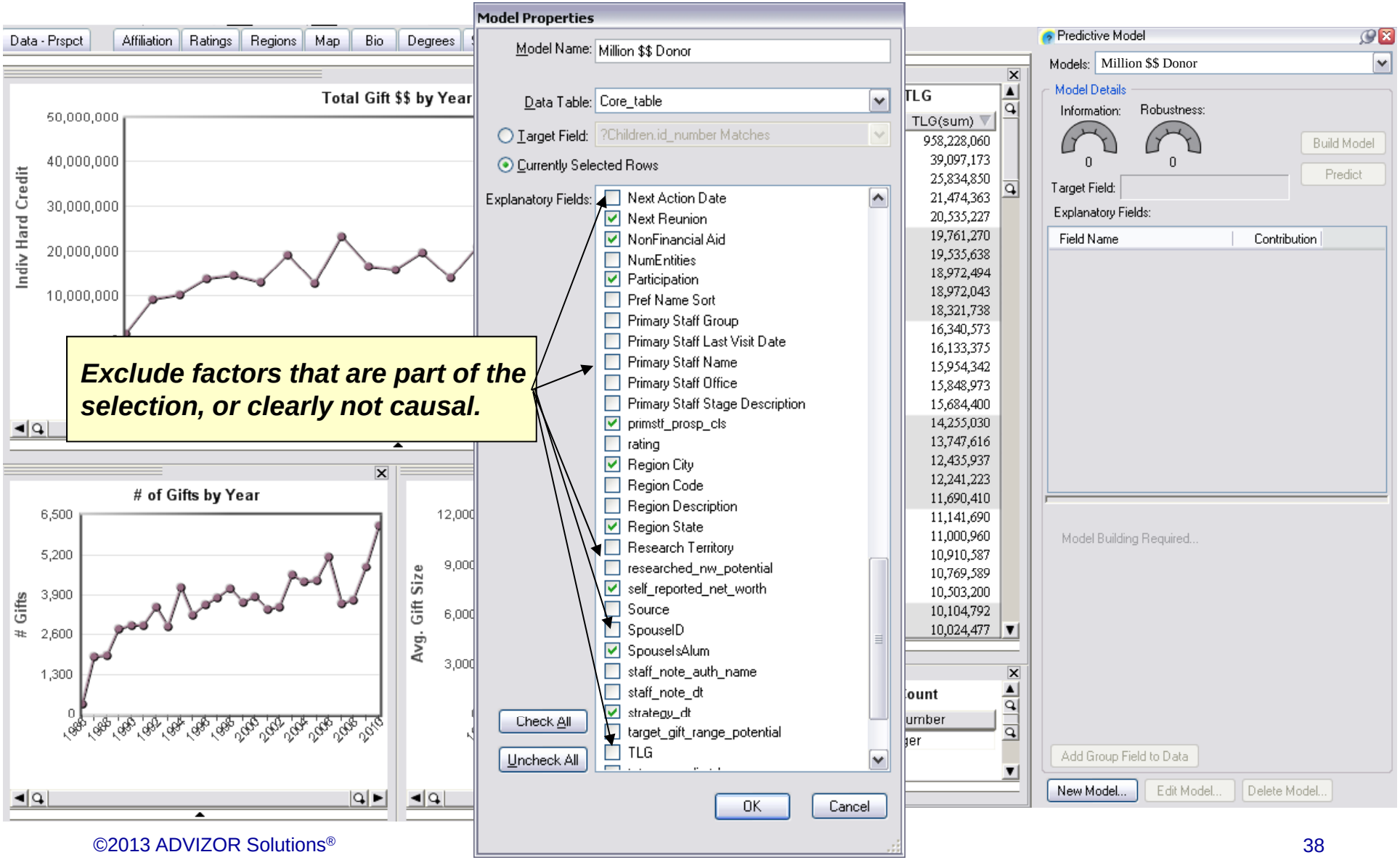
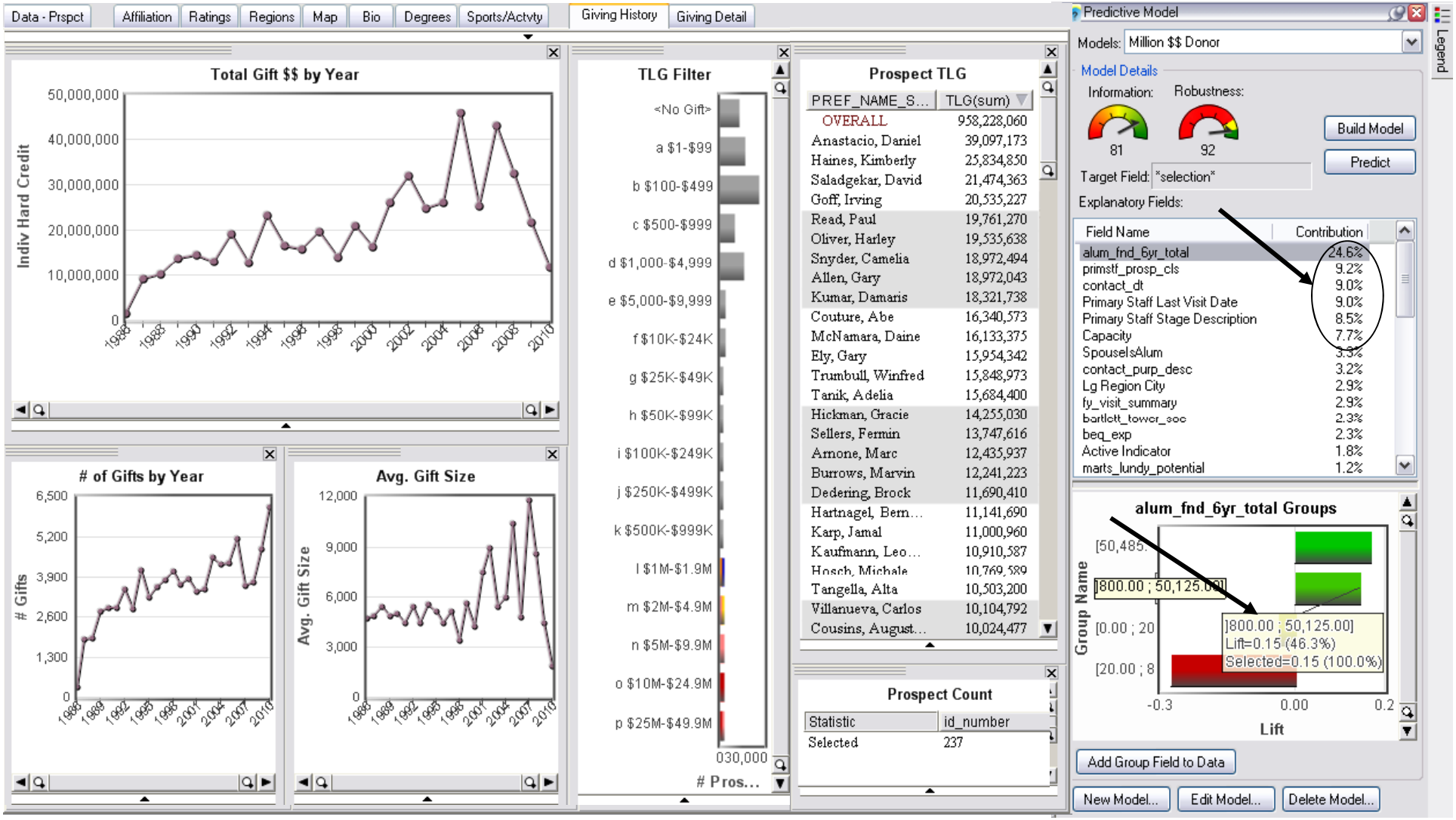
Open Modeling Panel
(click with mouse)

3 Steps to Build Model:

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



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



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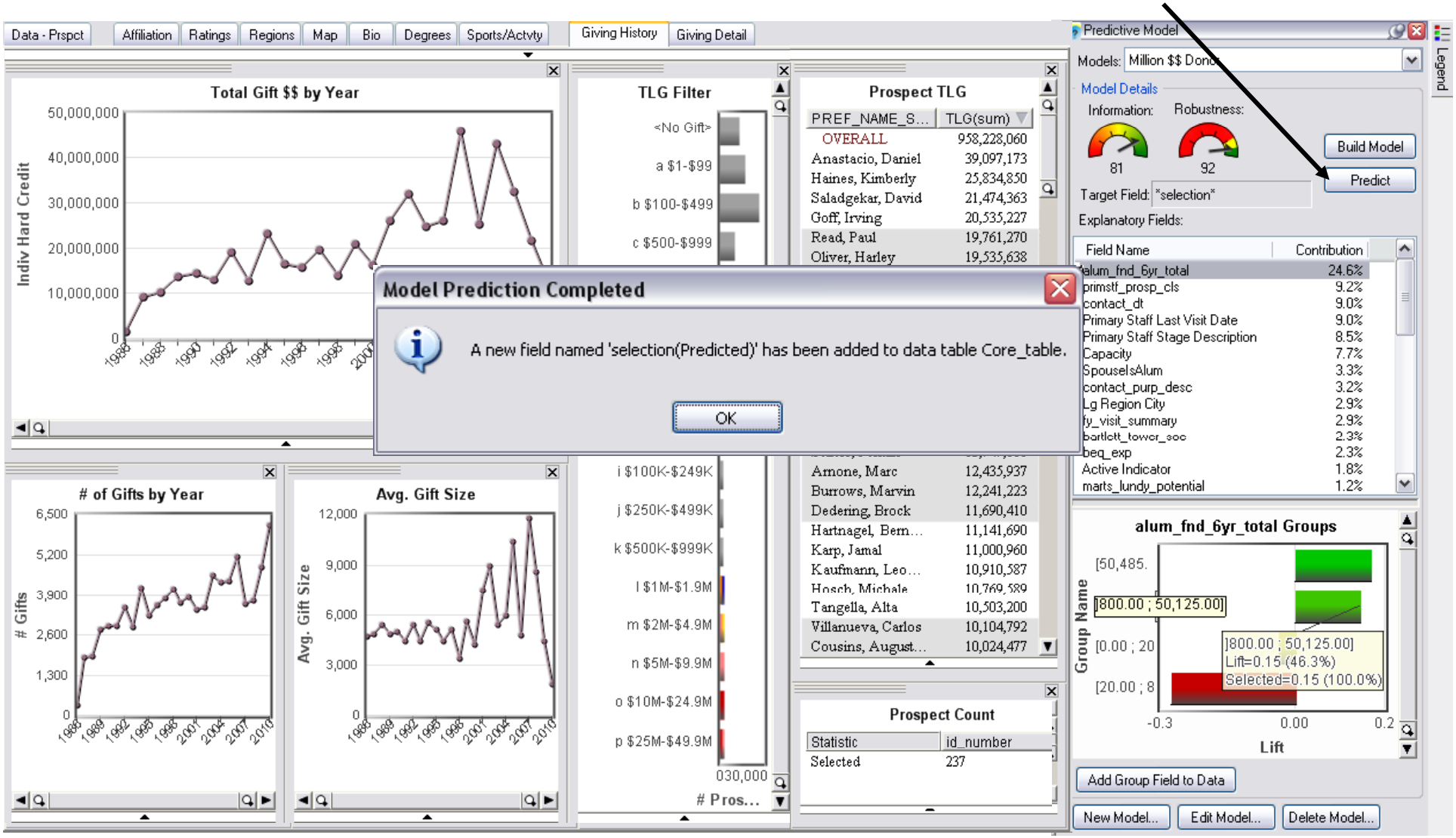
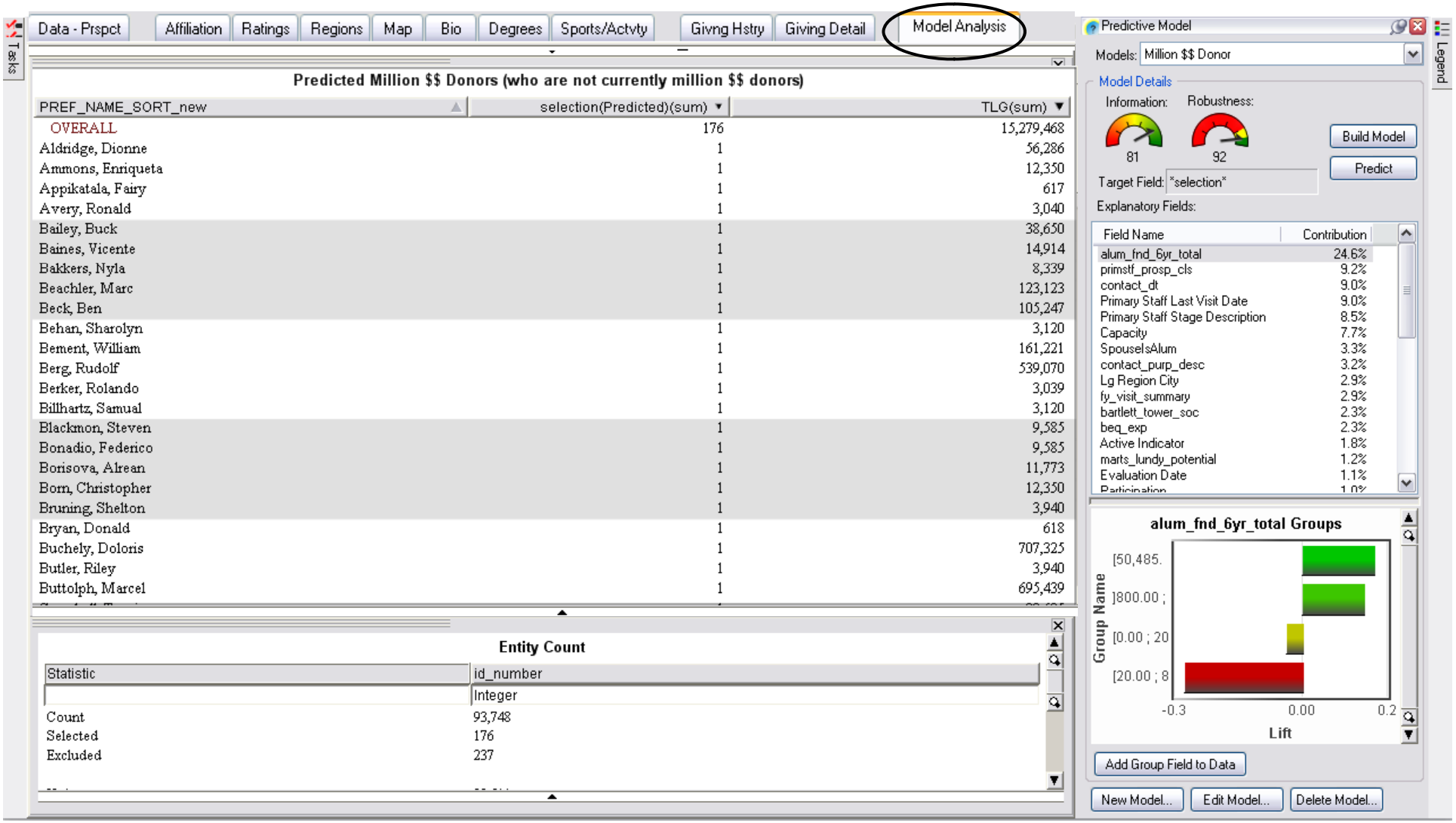
Score all other ~93k entities . . .

(click with mouse)



176 additional “Million $$ Donors” predicted. . . right click to export list.



Who Are They?

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

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

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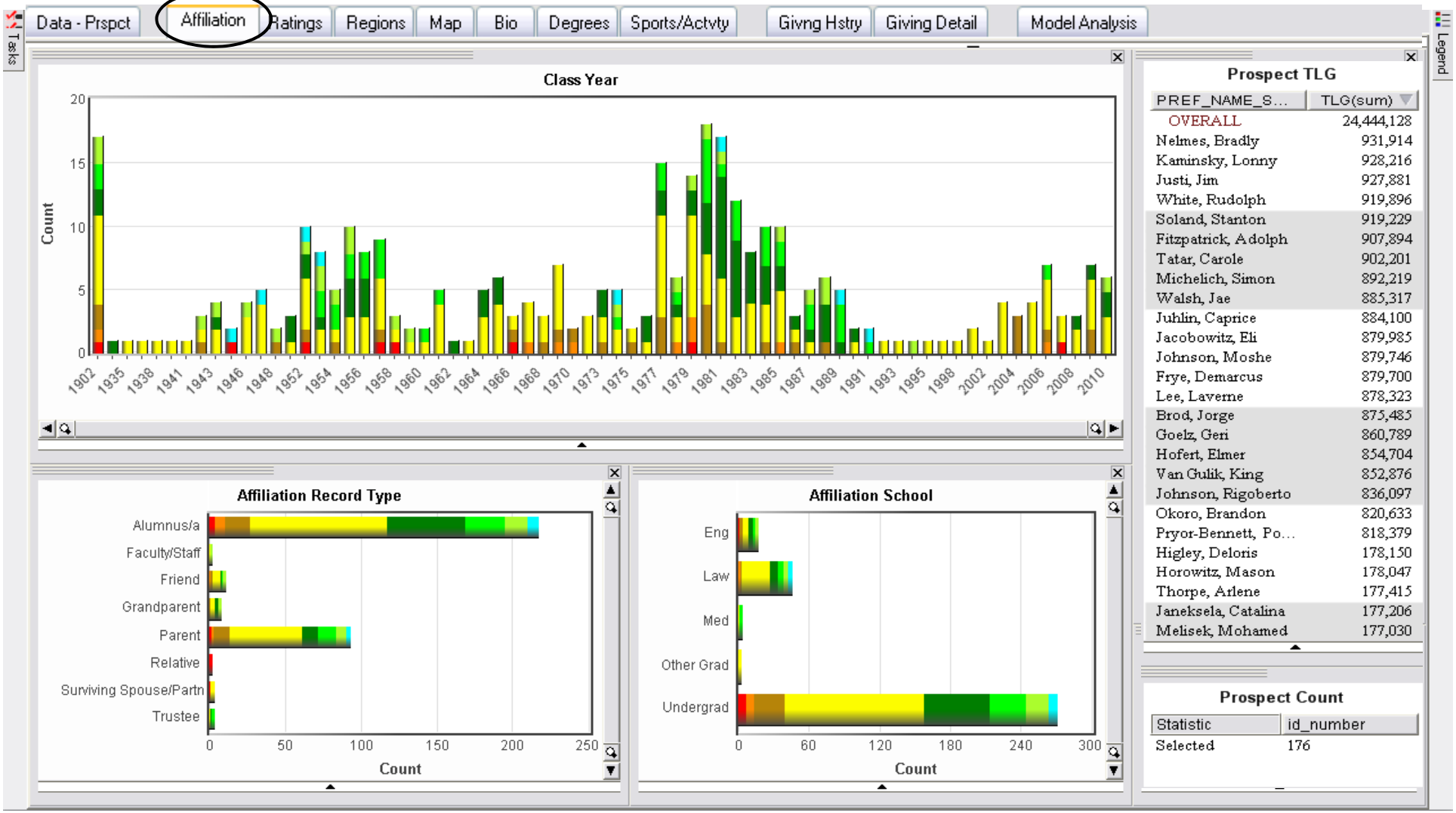
Primarily alumni from the ’80s . . .

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



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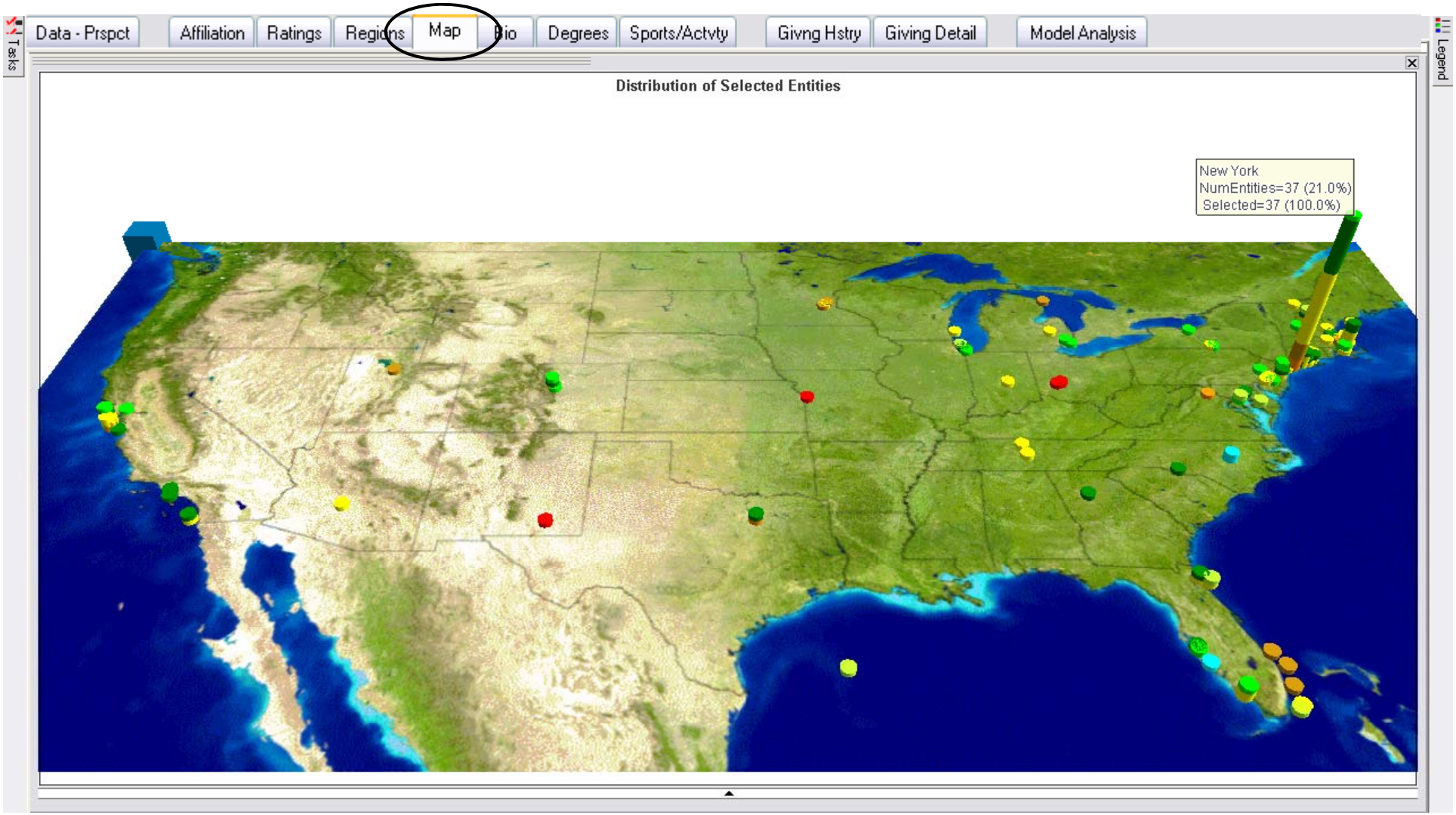
They live in NY, Boston, and South Florida.



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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**

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Who we are . . .

ADVIZOR Solutions

- **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

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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***

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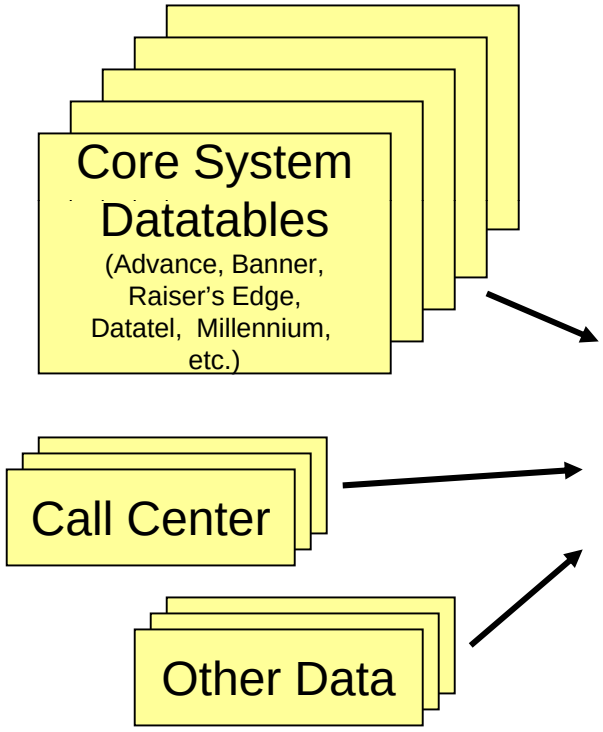
Portfolio of Solutions



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

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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

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Next Step:

➔ ***Contact us for a free assessment.***

Your data, your key questions.

Sales@advizorsolutions.com

630-971-5250

Appendix

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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"**