

HOW TO

QUALIFY MAJOR & LEGACY PROSPECTS WITH PREDICTIVE ANALYTICS & SURVEYS



Katherine Swank
Principal at Blackbaud Target Analytics



Greg Warner
CEO & Founder



Introduction

We feel your pain

In light of the current situation...



Events canceled or postponed

Face-to-face visits halted

Money needs to be recouped

Budgets slashed or reprioritized

There will always be a need to identify and qualify those that want to make a difference



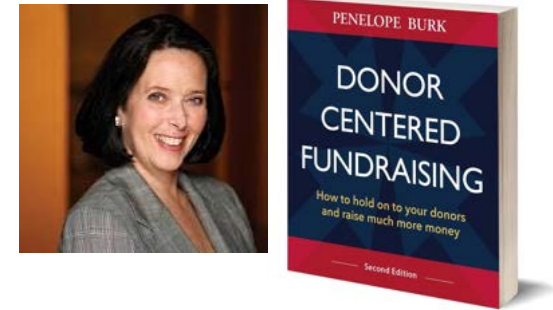
**Makes fundraisers
MORE EFFICIENT**

Introduction

We feel your pain

In light of the current situation...

Penelope
Burk

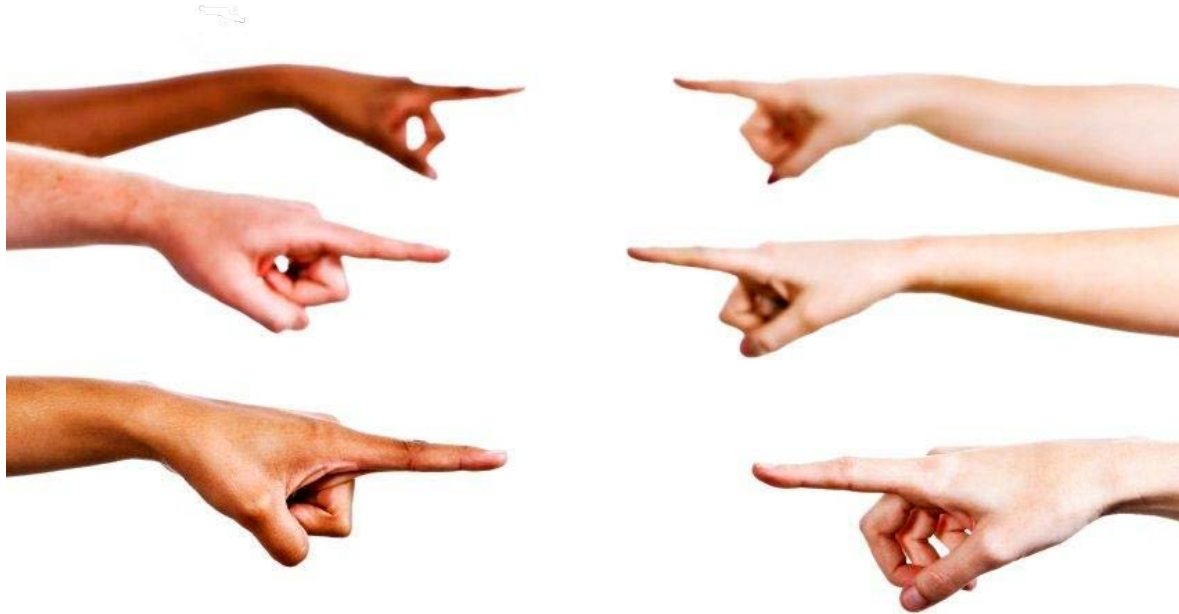


“during a crisis, donors continue to **support not-for-profits that they trust** and they find it much easier to drop those that they don’t.”

Introduction

We feel your pain

Who's to blame? Most likely, not you!



Introduction

We feel your pain

Lack of **time**

Not enough **staff**

Tight **budgets**

Travel is time-consuming and costly

Qualifying donor prospects is very **difficult**

Getting an appointment is nearly impossible



Introduction

imarketsmart.com/major-gift-benchmarks

We feel your pain

80% of nonprofits
want to raise
major gifts

but in 2019 **only 43%**
met their major gift fundraising goals



Introduction

imarketsmart.com/major-gift-benchmarks

We feel your pain

49% of major gift fundraising staff are **disappointed** with their **current pipeline of major gift prospects**



Introduction

We feel your pain

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

Only
27%

What % of **gift officers** reported that **wealth ratings** were “**quite effective**” or “**very effective**” for **focusing on the right prospects**?

Introduction

We feel your pain

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

What % of **gift officers** reported that **wealth ratings** were “**quite effective**” or “**very effective**” for **helping to determine ask amounts?**

Only
19%

Introduction

We feel your pain

2017 study conducted by Ruffalo Noel Levitz asked nonprofit gift officers:

What % of **newly assigned prospects** were “**truly qualified**” to be in your major and/or planned gift donor pool?

Only
37%

False positives



Introduction

We feel your pain

Pressure on fundraising teams



Introduction

We feel your pain

Donor distrust
is growing

Do you **trust charities**
today **more**, **less** or
the same as you did
5 years ago?



The Council of Better
Business Bureaus and the
Better Giving Alliance

<https://www.give.org/donortrust>



Non-Government Organizations

<https://www.edelman.com/trust-barometer>

-9%
drop
in trust
in 2018
in the USA

-18%
drop
in trust among
'informed public'
in the USA

Introduction

We feel your pain



“

It's harder to get an appointment than to secure a gift.”

“

Getting an appointment is 85% of getting the gift.”

QUALIFY MAJOR & LEGACY
PROSPECTS WITH PREDICTIVE
ANALYTICS & SURVEYS

imarketsmart.com/major-gift-benchmarks



When fundraising teams use **technology** for **prospect identification and qualification** they increase their chances for success



QUALIFY MAJOR & LEGACY
PROSPECTS WITH PREDICTIVE
ANALYTICS & SURVEYS

imarketsmart.com/major-gift-benchmarks



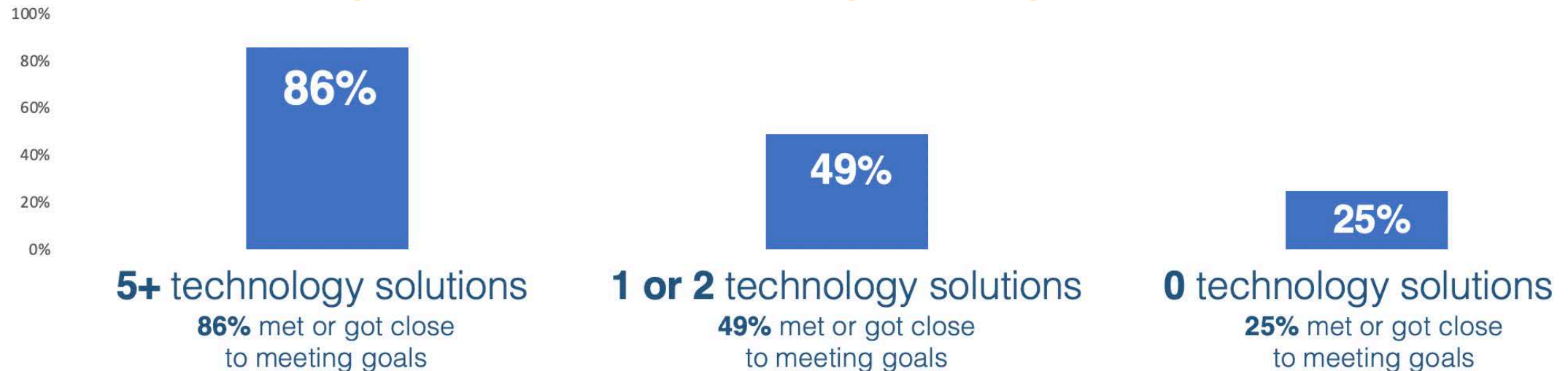
How fundraisers use **technology** for
prospect identification and qualification
to increase their chances for success matters

Analyze donation records in donor database





Using more technology solutions for **prospect identification and qualification** makes fundraisers more likely to **meet or get close to meeting their goals**



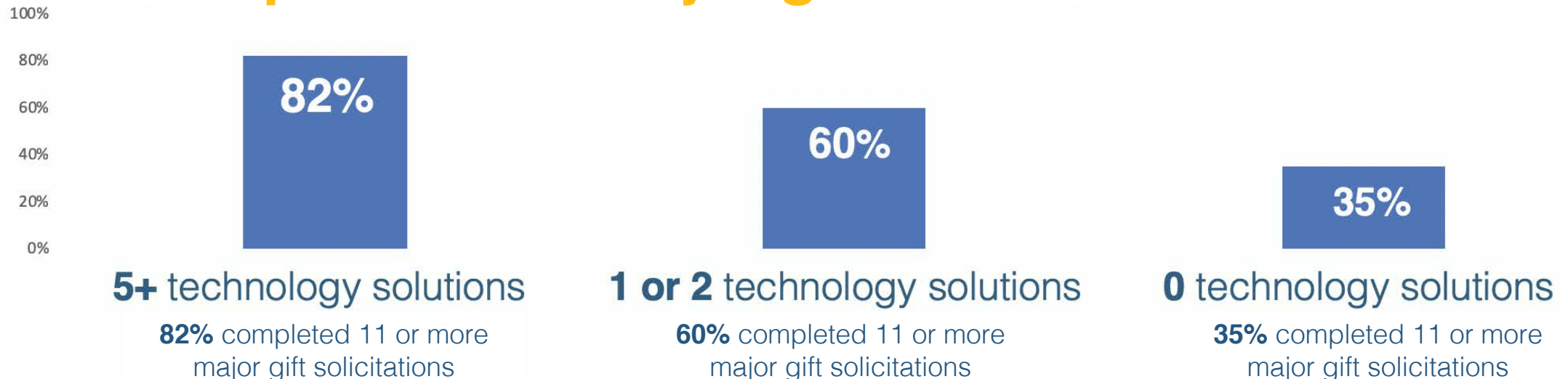


Using more technology solutions for prospect identification and qualification **makes fundraisers more satisfied with their prospect pipelines**



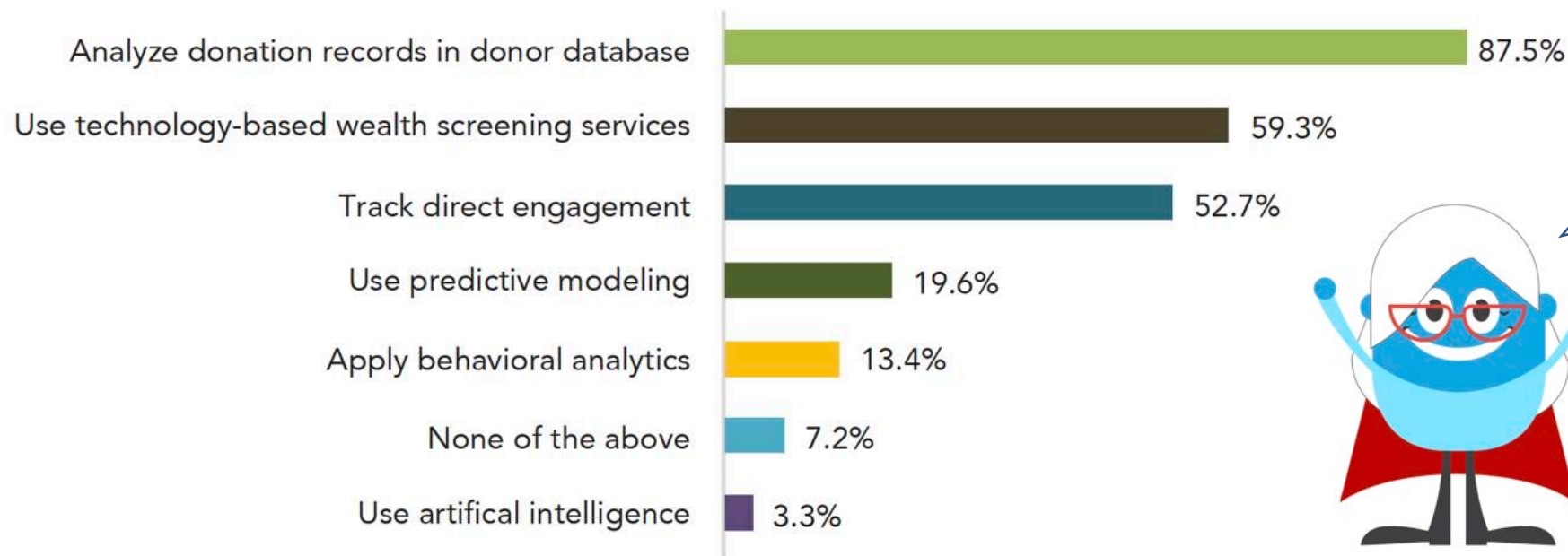


Using more technology solutions for prospect identification and qualification makes fundraisers more likely to complete more major gift solicitations





Using more technology solutions for
prospect identification and qualification
increases your chances for success



Use 3 or
more!

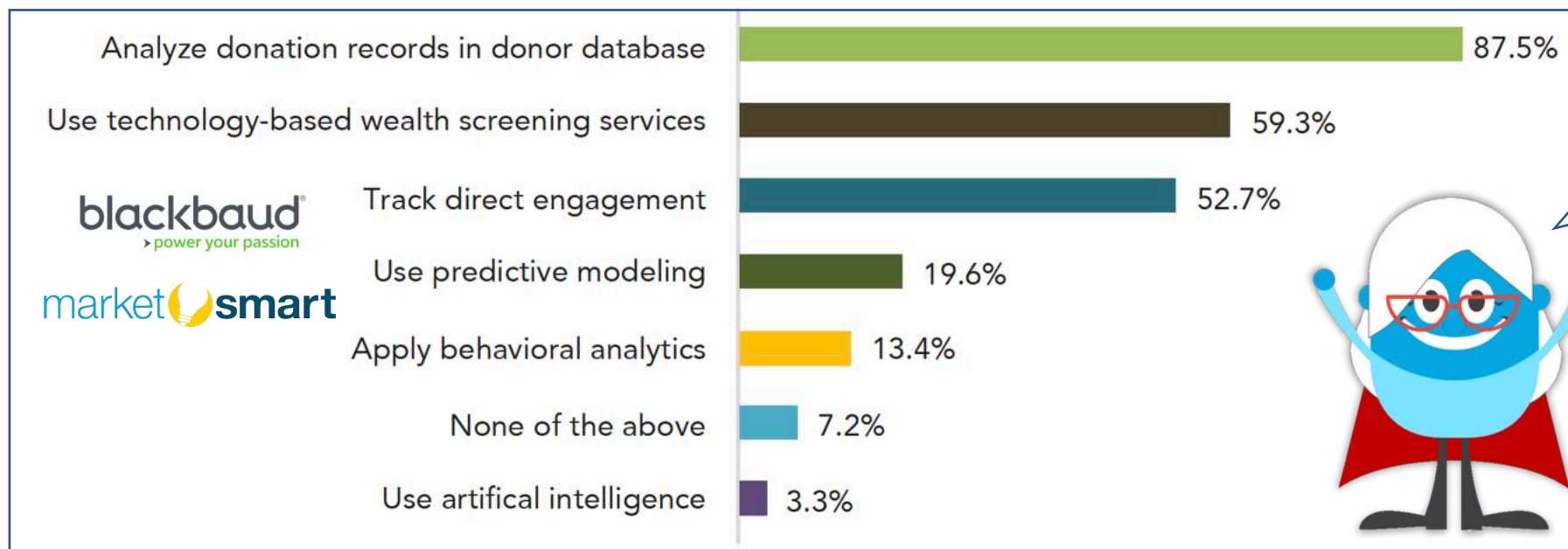


Melissa S. Brown
& Associates, LLC





Using **more technology solutions** for
prospect identification and qualification
increases your chances for success



Use 3 or
more!

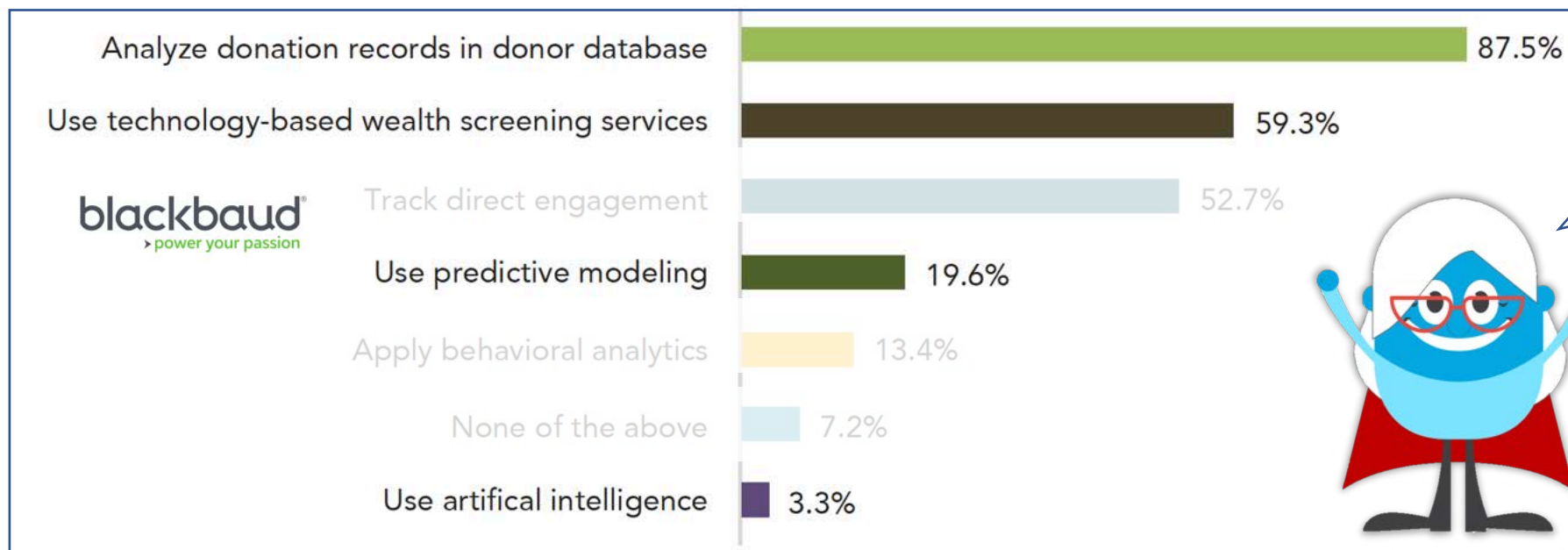


Melissa S. Brown
& Associates, LLC





Using **more technology solutions** for
prospect identification and qualification
increases your chances for success



Use 3 or
more!

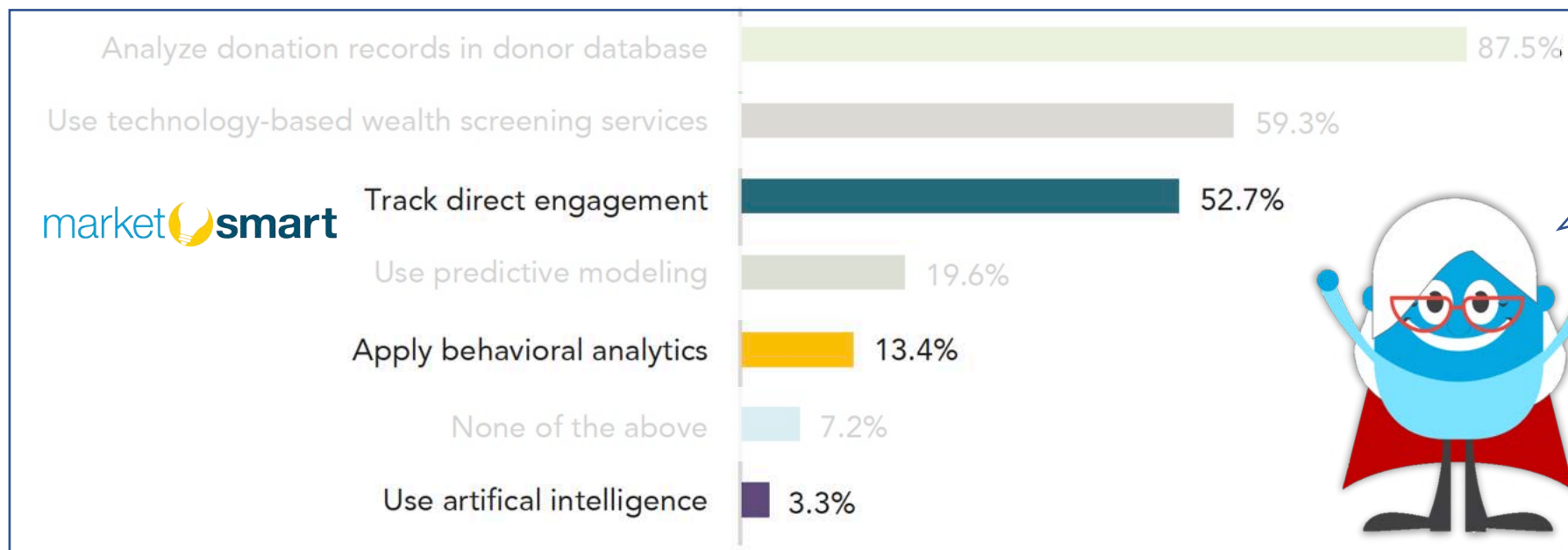


Melissa S. Brown
& Associates, LLC





Using **more technology solutions** for
prospect identification and qualification
increases your chances for success



Use 3 or
more!

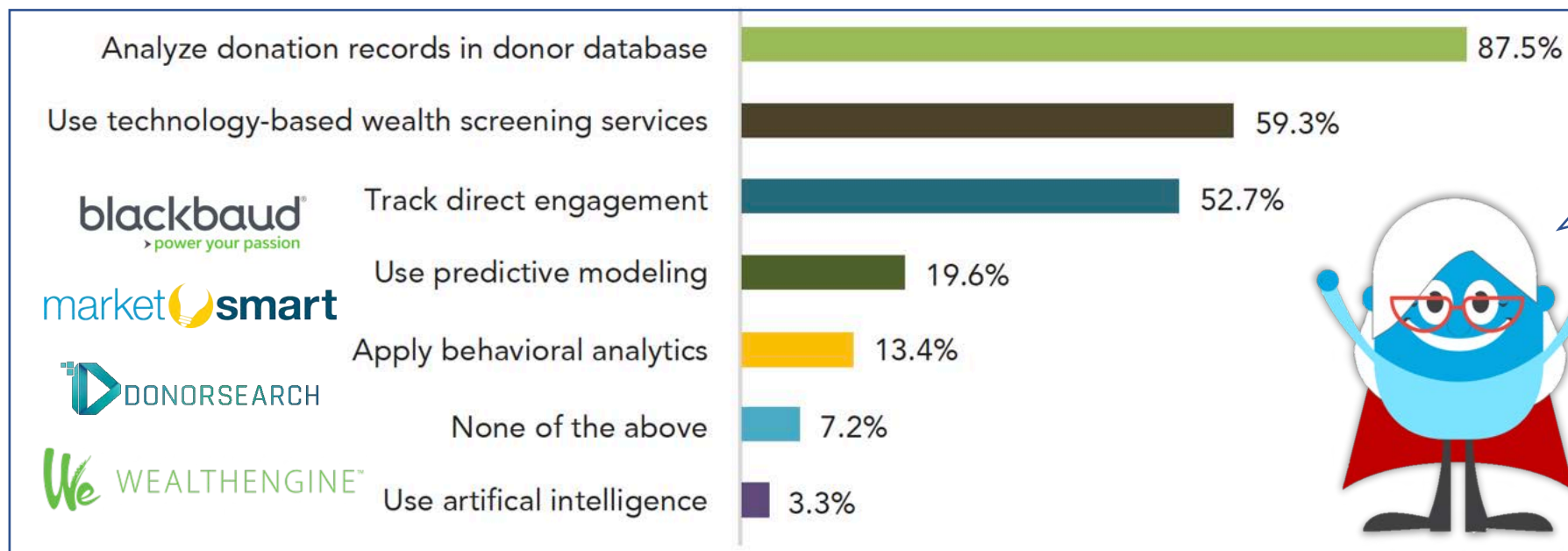


Melissa S. Brown
& Associates, LLC





Using **more technology solutions** for prospect identification and qualification **increases your chances for success**



Use 3 or more!

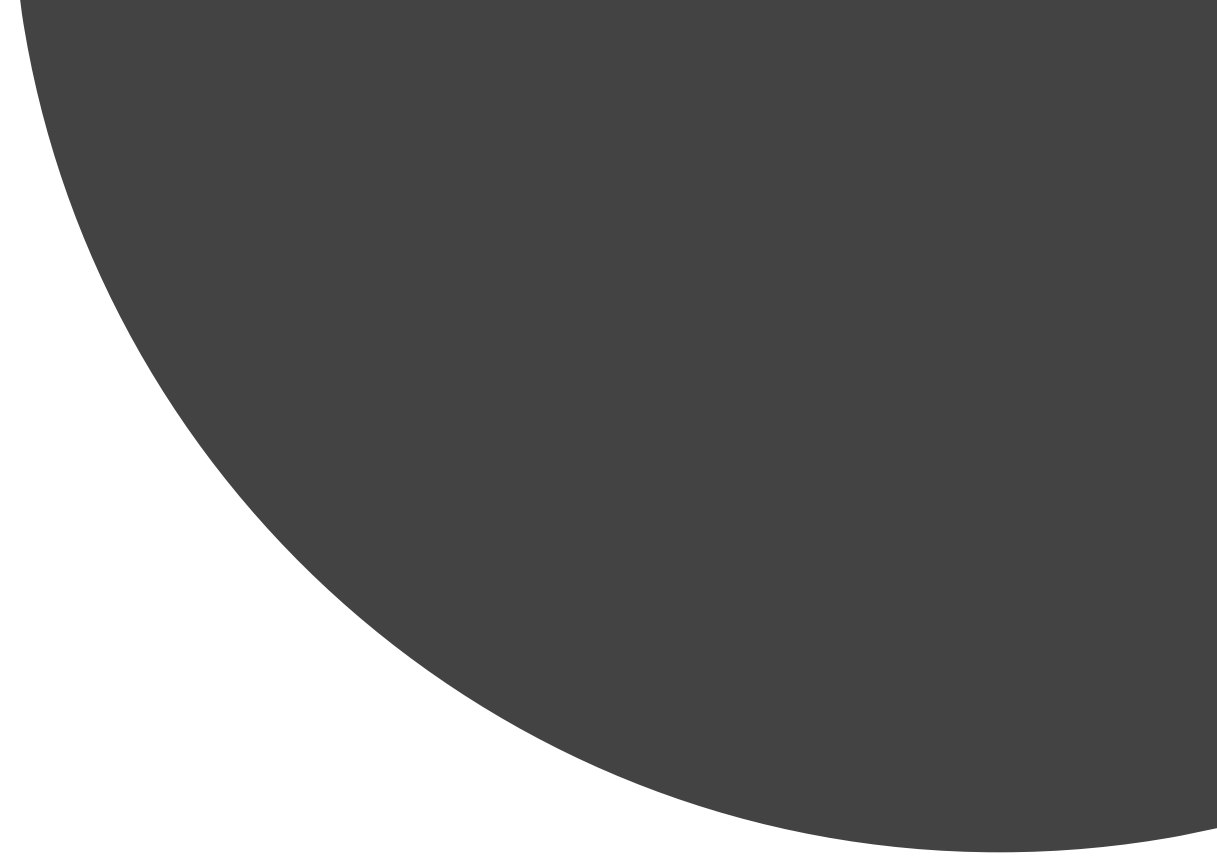
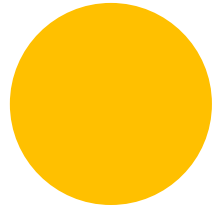
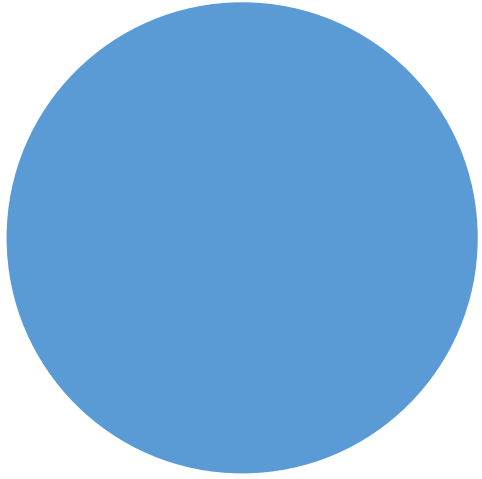


Melissa S. Brown
& Associates, LLC



Types of analytics

Types of analytics



Every constituent in your
database is more than just a
name and address

Each person has their own
motivations, engagement trigger
points and capacity to give to your
mission.

Analytics can get you in front of the
right people at the right time.

How Analytics Understands Donors

- Describe the *PAST*
- Predict the *FUTURE*
- Understand the *Motivation*



Descriptive Analytics

Uses data you already have like:

Constituency code | Constituent attributes

Gift type

Date of gift | Date of deferred gift notification

Gift amount

Acquisition gift type

Giving history | Gift trajectory | Length of time in DB

Donor's lifetime value

Age | Gender | Other biographical info



Descriptive Analytics

Average of current major donors: 48

48% couples; 27% single male; 25% single female

Average of 8 gifts prior to major gift

On file for 6 years on average prior to major gift

79% have acquired first gift through “End of Year Annual Appeal”; 12% through Special Event

Average first gift amount: \$268

Average gift amount prior to major gift: \$567

82% live within 25 miles of facility

Describes a current donor profile

Profiles can look similar from organization to organization

Individuals can look similar to more than one organization

The importance of each data point in comparison to the others is not apparent



Best Way to Apply a Descriptive Profile

Use for:

Data collection | Data purchases

Data entry | Data health | Data retention

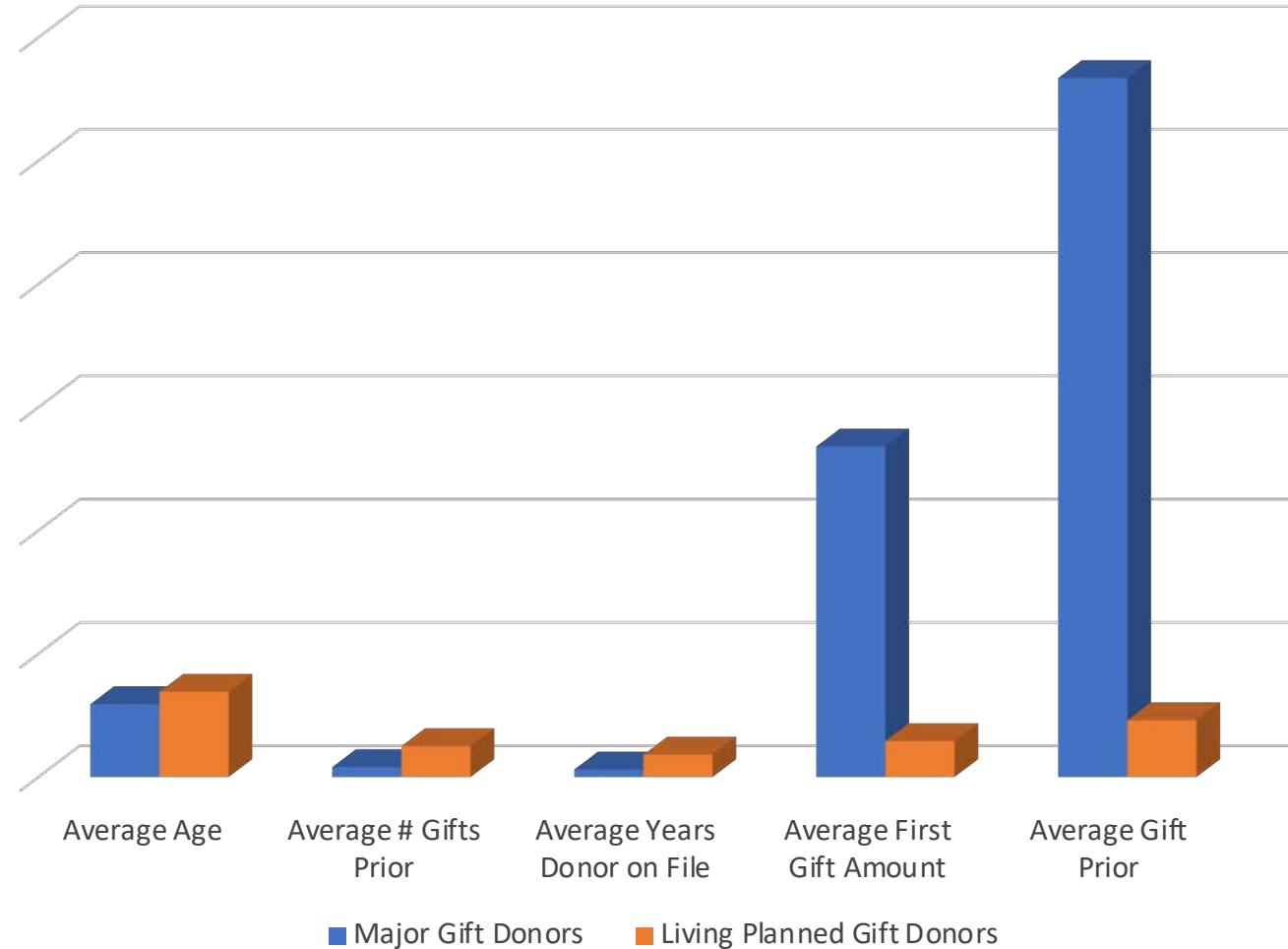
Marketing timing and expenditures

Marketing messages

Communication streams

Synergistic alliances

What Your Donors Did?



ELIMINATE

viable lapsed and non-donors
because they have no useful giving
data

Problem is....
most
descriptive
profiles...

Predictive Analytics



Combines data you already have with data you don't

Your Data:

Name and address

Historical gift data

Identified records that have exhibited the behavior you want to predict

External Data:

Consumer, marketing, financial, asset, wealth indicators, demographic, socio-demographic and philanthropic data

Predictive Analytics

Distinguishes Profiles between Organizations & Gift Types

EXAMPLE HIGHER EDUCATION ORGANIZATION

Have 3 or more auto-loans
Have larger amounts of home improvements
\$15,000+ discretionary spending dollars
Is in lifestyle cluster groups C, K or Q
Makes donations to global causes, public radio, advocacy, political, animal-related and arts & culture organizations

EXAMPLE SOCIAL SERVICES ORGANIZATION

Owens more than one real property
Has lived in the home for more than 12 years
Have low balances on home equity loans
Makes donations to health and animal-related organizations
No giving preference between mail, phone or online gifts

Descriptive Analytics

Average of current major donors: 48

48% couples; 27% single male; 25% single female

Average of 8 gifts prior to major gift

On file for 6 years on average prior to major gift

79% have acquired first gift through “End of Year Annual Appeal”; 12% through Special Event

Average first gift amount: \$268

Average gift amount prior to major gift: \$567

82% live within 25 miles of facility

Describes a current donor profile

Profiles can look similar from organization to organization

Individuals can look similar to more than one organization

The importance of each data point in comparison to the others is not apparent



Database Scoring



Best Way to Apply a Prescriptive Profile

Use for:

Gift type or types

Marketing messages

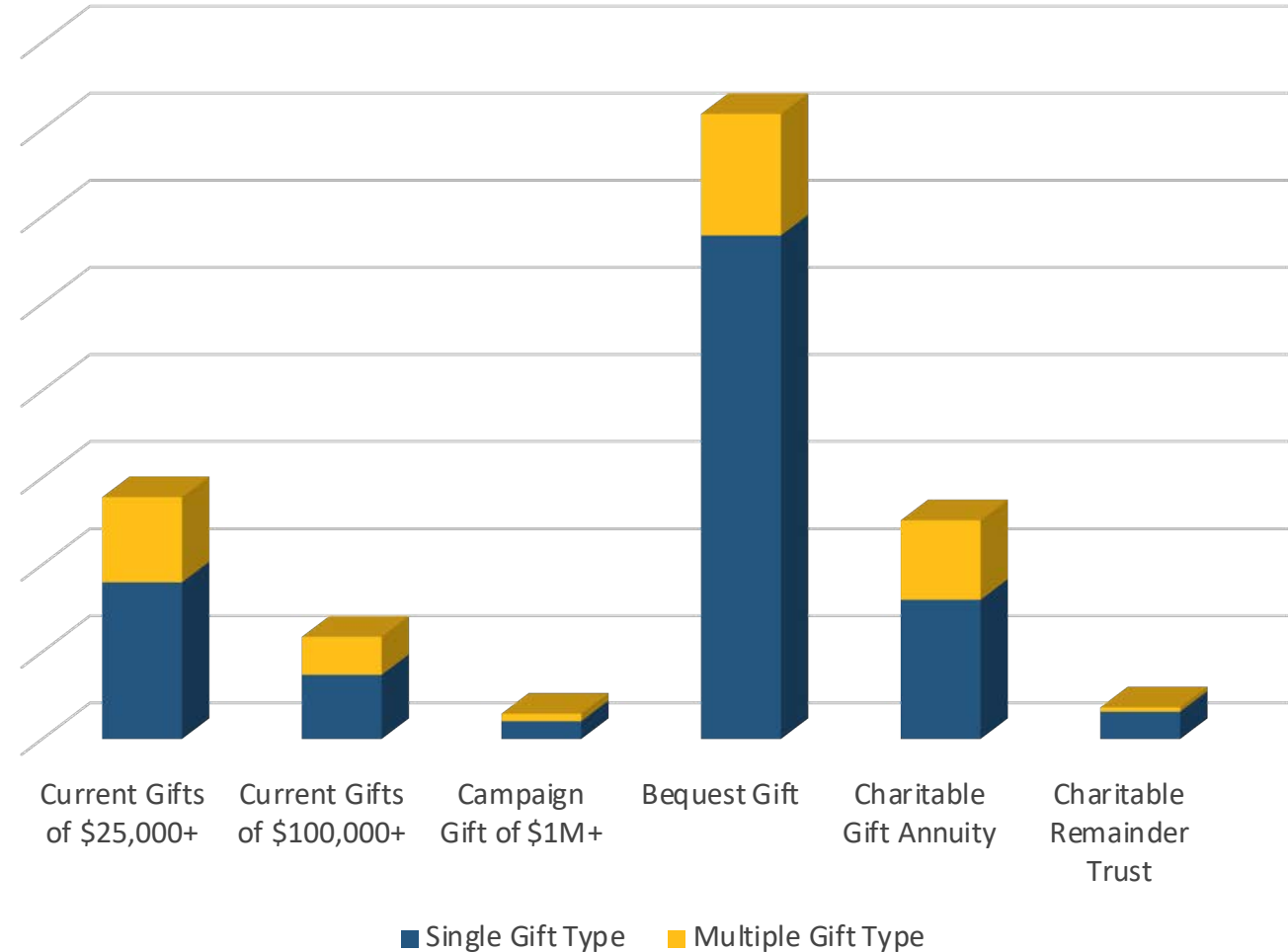
Marketing timing

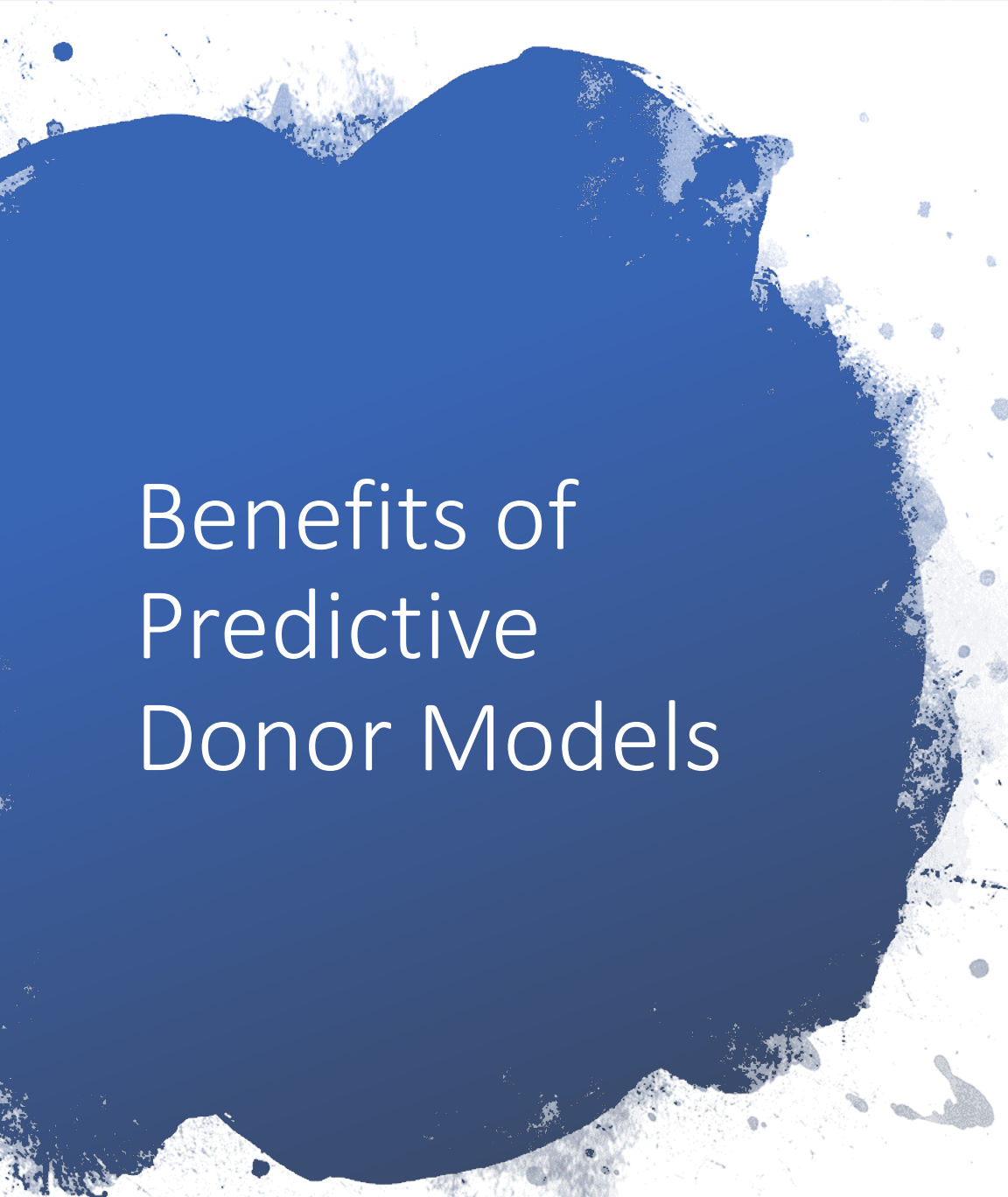
Communication streams

Internal team assignment

Synergistic alliances

What Your Donors Could Do?





Benefits of Predictive Donor Models

Very, very easy to apply

State-of-the-art methodology

Results are scalable

No changes to data entry process

No analytics expert needed

Focus on resource development

How constituent
surveys further
qualify major and
legacy gift prospects



Types of analytics

1. Descriptive analytics

What your donors did?



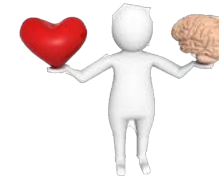
2. Predictive analytics

What your donors could do?



3. Diagnostic analytics

Why they did it?



4. Behavioral analytics

What they do when you aren't there?
+ Readiness for outreach?



Types of analytics

1. Descriptive analytics

What your donors did?



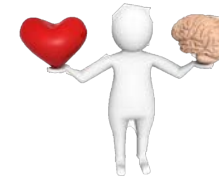
2. Predictive analytics

What your donors could do?



3. Diagnostic analytics *‘Verbatims’*

Why they did it?



4. Behavioral analytics *‘Digital body language’*

What they do when you aren't there?
+ Readiness for outreach?



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP

imarketsmart.com/major-gift-benchmarks



human-based sources



donors | board members | volunteers | staff

Melissa S. Brown
& Associates, LLC



‘DONOR DISCOVERY’



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION

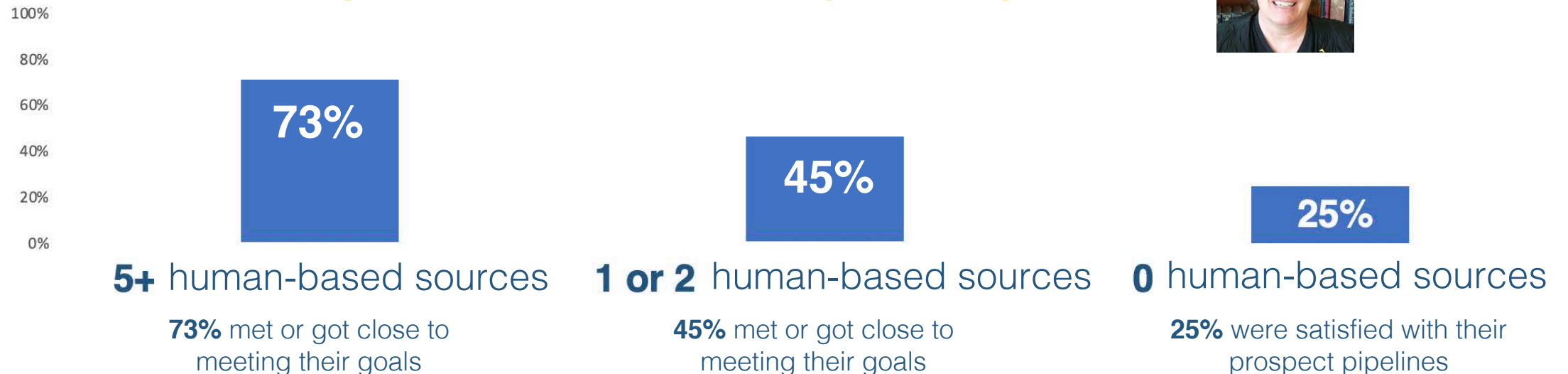


STEWARDSHIP



Using more human-based sources for prospect identification and qualification makes fundraisers more likely to **meet or get close to meeting their goals**

Melissa S. Brown
& Associates, LLC



Top human-based donor discovery/qualification methods

1. Face-to-face
2. Telephone
3. Survey

Top human-based donor discovery/qualification methods

	COST	QUALITY	SCALABILITY
1. Face-to-face	\$\$\$\$\$	👍👍👍👍👍	↑
2. Telephone	\$\$\$	👍👍👍👍👍	↑↑
3. Survey	\$	👍👍👍👍👍	↑↑↑↑↑

imarketsmart.com/major-gift-benchmarks

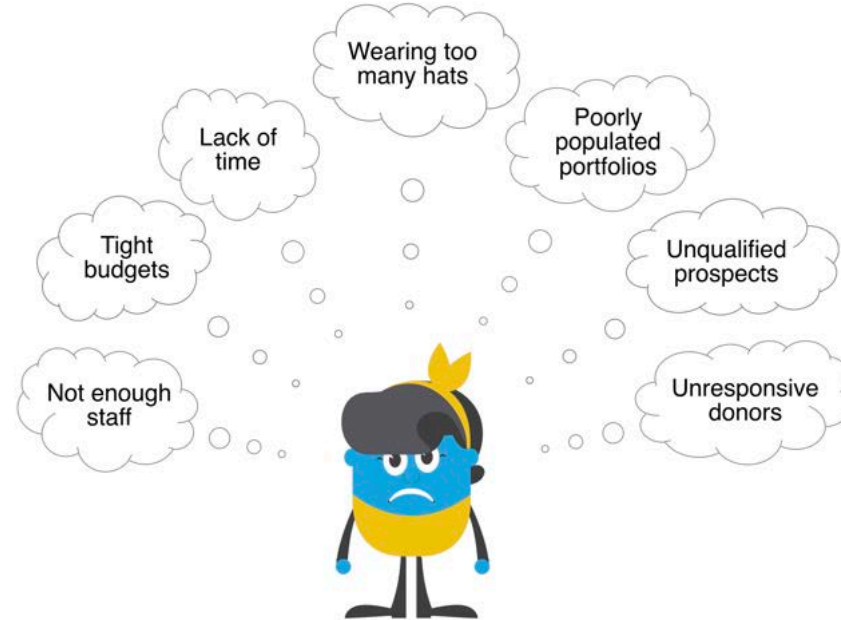


Melissa S. Brown
& Associates, LLC



Only 1 out of 5
survey their donors
to learn more about their
interest in making a major gift

imarketsmart.com/major-gift-benchmarks



Melissa S. Brown
& Associates, LLC



Only 1 out of 5
survey their donors
to learn more about their
interest in making a major gift

Types of analytics

1. Descriptive analytics

What your donors did?



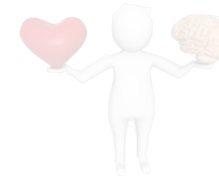
2. Predictive analytics

What your donors could do?



3. Diagnostic analytics ***‘Verbatims’***

Why they did it?



4. Behavioral analytics ***‘Digital body language’***

What they do when you aren't there?



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP

‘Verbatims’

‘Digital body language’



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP



‘Verbatims’

Why they care
Interests (programs)
Passions
Life stories
Who inspired them to care
The name/relationship of that person
Ranking of your cause compared to others
How important your mission is to them
How they want to give (cash/assets/legacy)
Consideration stage for giving/meeting
 Ready now
 Definitely later
 Maybe later
What information they want/need

‘Digital body language’



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP



‘Verbatims’

Have any children or not
Married or have life partner
Widow or widower
Age
Education level
Career (entrepreneur, nearing retirement)
Interest in giving their home or property
Have a donor advised fund, family
foundation or IRA and their interest in
giving from them
Interested in charitable gift annuity
Want to support capital campaign or not
Want to volunteer
Willing to refer or introduce friends

‘Digital body language’



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP



‘Verbatims’

Want to arrange a meeting
Update contact information (email, phone
number and/or mailing address)

‘Digital body language’



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP



‘Verbatims’

‘Digital body language’



What emails they open or click on
What pages they visit online
How long they stay on your web pages
Frequency of their engagement online
What videos they view
What they download
What they share/forward to others

Tracking cookie
Explicit opt-in



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP

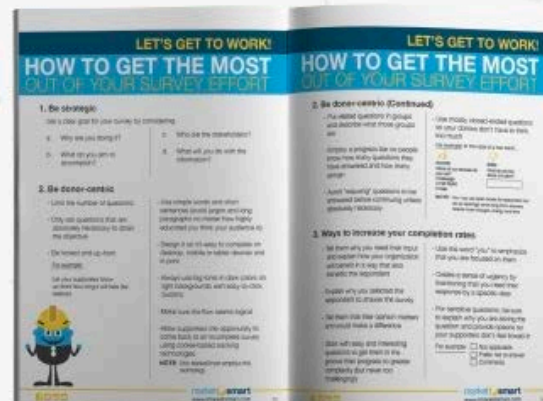


‘Verbatims’

‘Digital body language’

[imarketsmart.com](https://www.imarketsmart.com) > learn > reports

THE ULTIMATE **HOW-TO-GUIDE** FOR CONDUCTING **NONPROFIT** **DONOR SURVEYS**



[HOW WE HELP YOU](#) [RESULTS](#) [LEARN](#) [COMPANY](#) [CONTACT](#) [GET A 1-TO-1](#)

LEARN

- [SMARTIDEAS BLOG](#)
- [PODCASTS](#)
- [WEBINARS](#)
- [EBOOKS](#)
- [REPORTS](#)
- [ENGAGEMENT FUNDRAISING BOOK](#)

RESOURCES

- [FUNDRAISING REPORT CARD](#)
- [CALCULATE YOUR BEQUEST POTENTIAL](#)
- [3-TO-1 MAJOR GIFT FUNDRAISING](#)
- [MAJOR GIFT MOTIVATOR](#)
- [LEGACY GIVING ECOURSE](#)

info@imarketsmart.com



‘Verbatims’

‘Digital body language’

Will they respond? 1% - 34%

7 reasons why people take surveys





info@imarketsmart.com

How to increase response rates

1. Build trust using your brand in the design
 2. Let them know their input matters
 3. Create a sense of urgency
 4. Keep the survey short
 5. Include a progress bar
 6. Write at a 4th grade reading level
 7. Start with easy questions to get the ball rolling
 8. Make it easy for them to contact you
 9. Place 'touchy' questions near the end
 10. Ask them to opt-in for ongoing cultivation messages
- + Employ back-end form filling



Contact Information

Call us: (913) 360-7418

Email us



We strive to be one of the great Catholic colleges in America so we can provide a quality liberal arts education in state-of-the-art facilities that will enrich the lives of our students. But we can't do it without you! Your responses to this survey will help Benedictine College continue offering students, alumni and community members the means to achieve their highest potential.

Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10

Finished!

Has there been an influential person in your life who inspired you to care about Benedictine College and its mission?

☐ Yes

☐ No

NEXT

We strive to be one of the great Catholic colleges in America so we can provide a quality liberal arts education in state-of-the-art facilities that will enrich the lives of our students. But we can't do it without you! Your responses to this survey will help Benedictine College continue offering students, alumni and community members the means to achieve their highest potential.

Q1**Q2****Q3****Q4****Q5****Q6****Q7****Q8****Q9****Q10****Finished!**

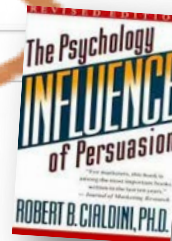
Has there been an influential person in your life who inspired you to care about Benedictine College and its mission?

☒ **Yes**☐ **No**

Please describe your relationship with this person:

☒ **Parent/Grandparent**☐ **Other Family Member**☐ **Teacher**☐ **Brother**☐ **Board Member**☐ **Spouse**☐ **Friend or Group of Friends**☐ **Sister**☐ **Priest**☐ **Other**

If you wish, please share the name of this person with us:





Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10


Finished!

Apart from visiting campus, there are many ways to engage with Benedictine College. In what ways do you or have you interacted with the college? Please select all that apply:

☐ Athletics☐ Reunion Weekend☐ Alumni events☐ Convocation☐ Regional Christmas Parties☐ Clubs or Organizations☐ Donations☐ Other☐ Commencement☐ Homecoming weekend☐ Golf Tournaments☐ Discovery Day☐ Scholarship Ball☐ Benedictine website and/or social media☐ Memorare Army[PREVIOUS](#)[NEXT](#)

Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Finished!
----	----	----	----	----	----	----	----	----	-----	-----------

Many times, Benedictine College alumni, friends, faculty and staff recognize the need to support our mission so that we can continue our goal to be one of America's great Catholic colleges. Please rate the following giving options according to the likelihood of your giving in this form.

	I give this way now	Likely	Somewhat likely	Not likely
Mailing a check	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating online with a credit card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talking with a Gift Officer face-to-face or by telephone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating from my Donor Advised Fund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating from a Family Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving property (such as jewelry, artwork or a car)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving appreciated assets (such as stocks, bonds, savings accounts, CDs, securities, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating to support the future of Benedictine through the 2020 Campaign 	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping students now and in the future pay for their college education by funding a scholarship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10

Finished!

Many people like to leave a gift to charity in their will, estate plan or by beneficiary designation. Would you consider making such a gift to Benedictine College to benefit future generations?

- ☐ I have already left a gift for Benedictine College in my will, estate plan, or by beneficiary designation.
- ☐ I am interested in making this type of gift to Benedictine College.
- ☐ Not now but in the future I would definitely be interested in making this type of gift to Benedictine College.
- ☐ Not now but in the future I might possibly be interested in making this type of gift to Benedictine College.
- ☐ I am not interested in this type of gift after my lifetime.

[PREVIOUS](#)[NEXT](#)



Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10

Finished!

Many people like to leave a gift to charity in their will, estate plan or by beneficiary designation. Would you consider making such a gift to Benedictine College to benefit future generations?

- ☒ I have already left a gift for Benedictine College in my will, estate plan, or by beneficiary designation.
- ☐ I am interested in making this type of gift to Benedictine College.
- ☐ Not now but in the future **I would definitely be interested** in making this type of gift to Benedictine College.
- ☐ Not now but in the future **I might possibly be interested** in making this type of gift to Benedictine College.
- ☐ I am not interested in this type of gift after my lifetime.

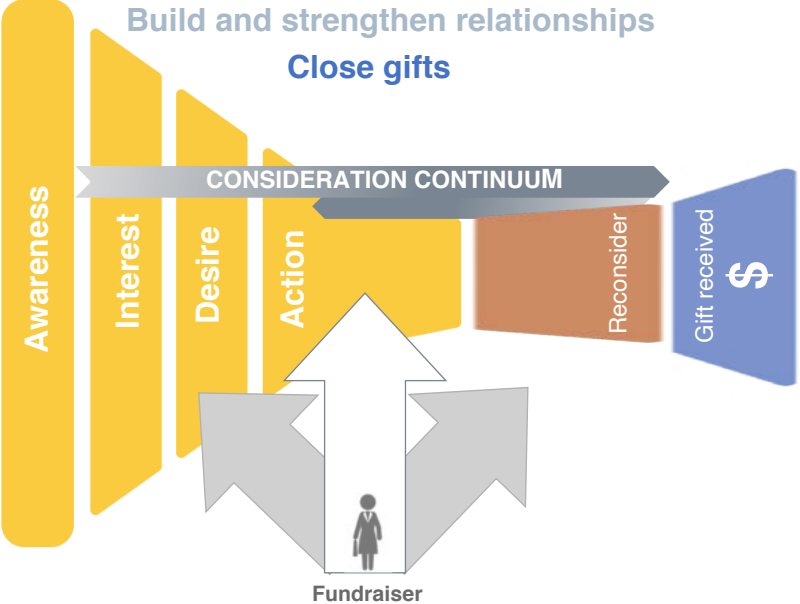
Please tell us about your gift:

- ☒ I planned this gift in honor of or in memory of someone.
- ☐ I would like this gift to go to a specific program or purpose.
- ☐ Benedictine College may use my gift where it is needed most.

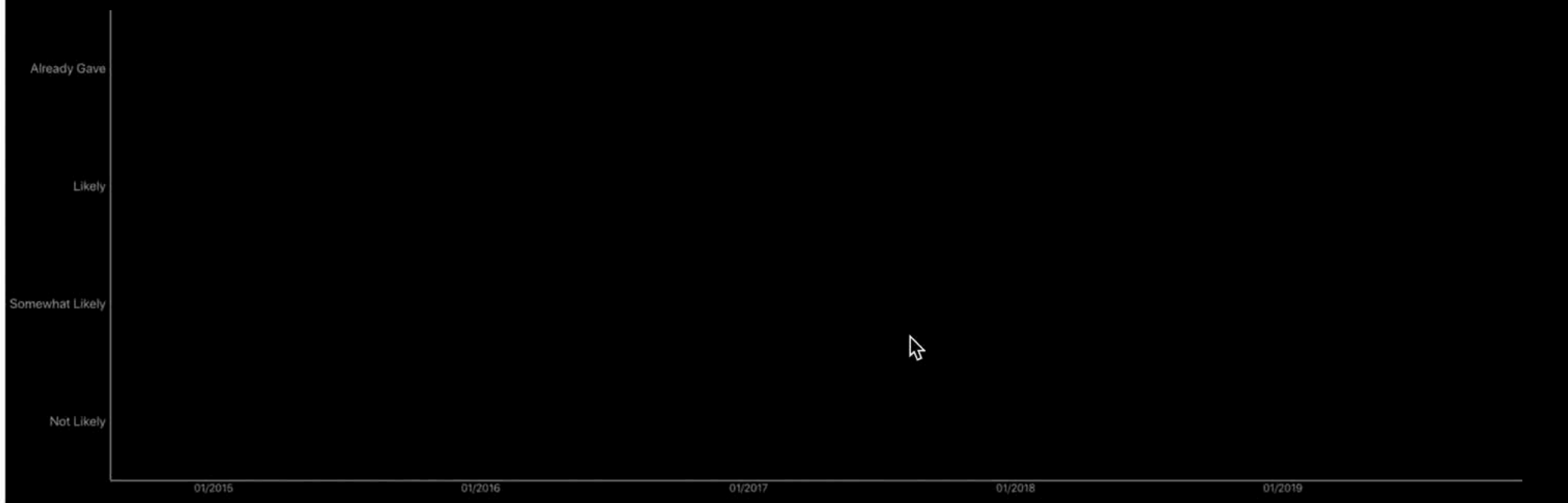
Please provide name or association with this person:

[PREVIOUS](#)[NEXT](#)

CASE STUDY



07/2014 10/2014



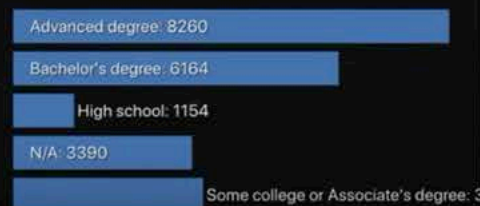
Prospects by Age Group



Prospects with Children



Education Background



Prospects Marital Status



Surveys Answered

- ☒ Single
- ☒ Multiple

Gift Types

- ☒ Legacy
- ☒ Check
- ☒ Credit Card
- ☒ Daf
- ☒ Property
- ☒ Assets

Colors

- Already Gave
- Likely
- Somewhat Likely
- Not Likely

Show Summary Text



Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10

Finished!

Anything else you would like to tell us? Perhaps you're interested in some of the college's latest advancements or endeavors?

☐ I want to assist current students and/or graduates in networking, internships or job placement.

[PREVIOUS](#)[NEXT](#)



Q1

Q2

Q3

Q4

Q5

Q6

Q7

Q8

Q9

Q10

Finished!

Age

- ☐ Under 40 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70-79 ☐ 80-89 ☐ 90+

Gender

- ☐ Male ☐ Female

What is your marital status?

- ☐ Married ☐ Not married ☐ Widowed

Which of the following best describes your family?

- ☐ No children ☐ One child ☐ Two or more children

Please tell us the highest level of education you completed:

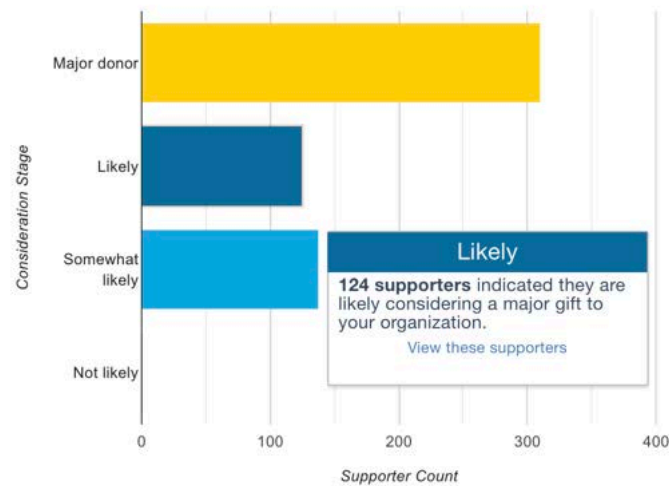
- ☐ High school graduate or equivalent ☐ Some college ☐ Associate's degree ☐ Bachelor's degree ☐ Advanced degree

[PREVIOUS](#)[NEXT](#)

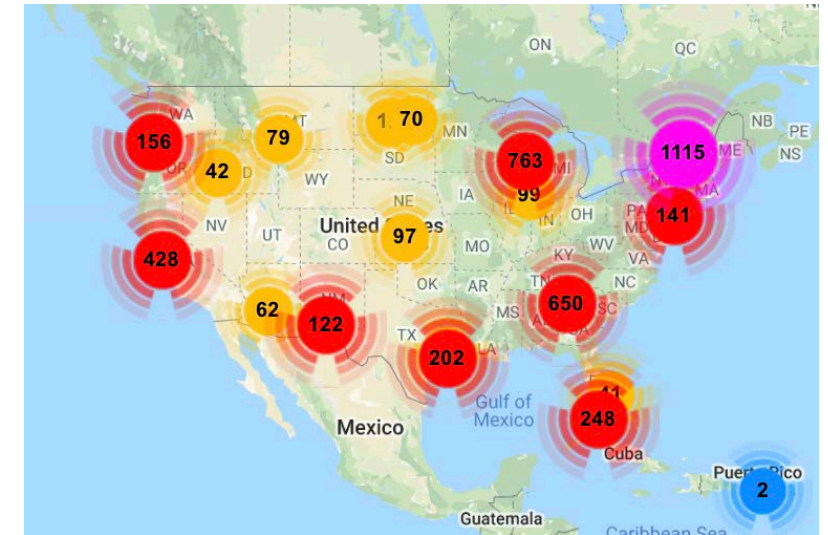
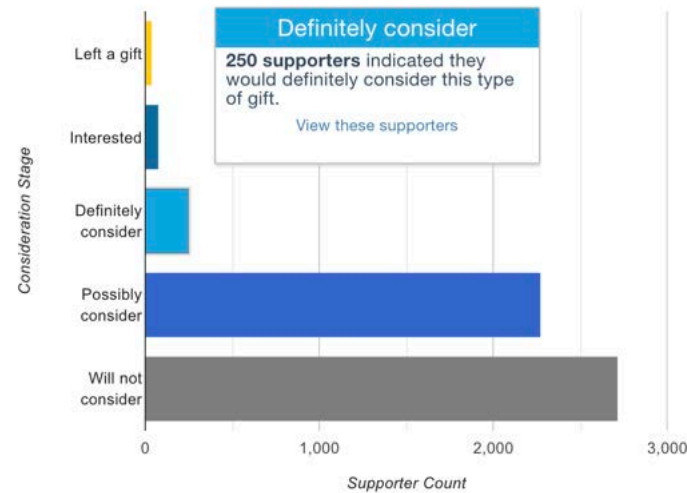
Fundraisers want meetings – not lists

BUILD PIPELINES THAT RESULT IN MEETINGS

Major Gift Pipeline



Legacy Gift Pipeline



Fundraisers want meetings – not lists

BUILD PIPELINES THAT RESULT IN MEETINGS

HOW TO UNCOVER READINESS



Make surveys ubiquitous and survey regularly

Use tracking cookies
with explicit opt-in



Monitor engagement and consideration migration



IDENTIFICATION



QUALIFICATION



CULTIVATION



SOLICITATION



NEGOTIATION



STEWARDSHIP

Supporters

This search contains 3,467 supporters

Page: 1 / 116




Recency Key:



Recency ▾	Lead Score ▾	Name ▾	Legacy Gift ▲	Major Gift ▲	Action
3/13/20	2460	Elizabeth	Definitely consider	Likely	
2/19/20	2150	Ronald	Left a gift	Major donor	
3/13/20	2060	Gary	Left a gift	Major donor	
12/18/18	1535	Jeff	Interested	Major donor	
3/13/20	1435	Tisha	Possibly consider	Likely	
2/20/20	1415	Larry	Left a gift	Major donor	
3/13/20	1375	Michael	Left a gift	Major donor	
10/22/18	1330	James	Interested	Major donor	
9/3/19	1285	Robert	Interested	Major donor	
3/13/20	1280	Jim	Interested	Likely	
8/24/16	1270	Amanda	Possibly consider	Likely	
3/13/20	1260	James	Left a gift	Major donor	
3/13/20	1235	Kim	Possibly consider	Major donor	
1/3/20	1205	Lee	Possibly consider	Likely	
3/2/20	1185	Brandon	Possibly consider	Major donor	
7/26/19	1185	Man Ching	Interested	Major donor	
1/2/19	1175	Ronald	Possibly consider	Somewhat likely	
6/5/19	1165	Kathleen	Left a gift	Major donor	
3/13/20	1150	Fred	Left a gift	Major donor	

2150

[< Previous](#)[Next >](#)**Ronald** **Legacy Gift:** Left a gift **Qualification:** Pending review [Close](#)Contact Demographics 

Age: 60-69
No children
Highest education: Bachelor's degree

Supporter CRM Data 

total lifetime giving

\$312,020.00

lifetime giving amount

\$12,120.00

largest gift amount

\$300,000.00

clientid

26360

lifetime # of gifts

57

[Save](#)Zillow  Verbatims Digital Body Language Score Impact Donor Journey

2019 Prospects Survey

Response from May 21, 2019 

Question

Answer

1) Why is Benedictine College important to you?
Please select all that apply.

I attended Benedictine.; Other; I care about the mission of Benedictine.; I am or have been faculty or staff at Benedictine.; I have a family member or friend who is attending or has attended Benedictine.

1a) Please specify - if selected "other"

Life long power of community is omnipresent through one's entire life.

2) There are many ways to engage with Benedictine College. Have you engaged with the College in any of the following ways? Please select all that apply:

Commencement; Regional Christmas Parties; Donations to Benedictine; Athletics; Plays, concerts or cultural events; Alumni Events; Campus clubs or organizations; Homecoming Weekend; Scholarship Ball; Reunion Weekend; Memorare Army

2b) How often do you engage with Benedictine College - if selected "other"

Monthly

3) Which aspect of Benedictine's mission is most important to you? Please select one:

I know that Benedictine provides a world-class faculty to educate men and women within a community of faith and scholarship.

4) When thinking about future generations, how important is it to you that Benedictine College is able to provide a quality liberal arts education and enrich the lives of its students?

Of utmost importance

Donating online with a credit card

I already have

Mailing a check

I already have

Making a recurring contribution

I already have

Talking with a gift officer face-to-face or on the phone about making a substantial impact

I already have





Email engagement

Subject line: *A heart-warming story*

- Jan 10 at 7:33 PM: Email Opened
- Jan 10 at 7:33 PM: Email Link Clicked
- Jan 10 at 1:01 PM: Email Delivered

[View Full Report](#)



Visited pages for a total of a few seconds

Jan 10 at 7:33 PM

- mybenedictinegiving.org/supporters-like-you/supporter-stories

December 2019



Email engagement

Subject line: *A quick update for you about what's happening on campus*

- Dec 16 at 7:18 PM: Email Opened
- Dec 6 at 9:18 AM: Email Opened
- Dec 6 at 9:14 AM: Email Opened
- Dec 5 at 4:47 PM: Email Opened
- Dec 5 at 4:22 PM: Email Opened
- Dec 5 at 4:21 PM: Email Opened
- Dec 5 at 3:48 PM: Email Opened
- Dec 5 at 3:39 PM: Email Opened
- Dec 5 at 3:38 PM: Email Opened
- Dec 5 at 1:39 PM: Email Opened
- Dec 5 at 12:50 PM: Email Opened
- Dec 5 at 11:41 AM: Email Opened
- Dec 5 at 11:28 AM: Email Opened
- Dec 5 at 10:08 AM: Email Opened



Fundraisers want meetings – not lists

BUILD PIPELINES THAT RESULT IN MEETINGS

100,000 total donors











DESCRIPTIVE & PREDICTIVE ANALYTICS

20,000 identified prospects

DIAGNOSTIC & BEHAVIORAL ANALYTICS



SELF-QUALIFICATION

A. 10	A. 10	A. 10	A. 10	A. 10	A. 10	A. 10	A. 10	A. 10	A. 10
B. 50	B. 50	B. 50	B. 50	B. 50	B. 50	B. 50	B. 50	B. 50	B. 50
C. 90	C. 90	C. 90	C. 90	C. 90	C. 90	C. 90	C. 90	C. 90	C. 90
									

1,500 assigned

READY

OPTIMIZE OVER TIME

USING MORE TECHNOLOGY SOURCES & MORE HUMAN BASED SOURCES

Use 3 or
more!



Melissa S. Brown
& Associates, LLC



Questions?