ADVANCED WEBINAR

# Optimizing Fundraising via WealthEngine and DonorTrends

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# Meet your Trainer...

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# Agenda

1. What is WealthEngine?
2. Setting Up the WealthEngine Integration in EveryAction
3. Generating WealthEngine Data
4. Leveraging WealthEngine Data
5. What is DonorTrends
6. Using the DonorTrends Reports through Fundraising Optimization Guide

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# What is WealthEngine?

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# A Prospective Tool For Gauging Your Prospects

WealthEngine provides deep insight into the potential to give and overall *value* of your supporter base. The tool will pull data from myriad public sources to provide an overview of things like:

- Estimated Annual Donation Giving
- Property Values and Amounts
- Cash On Hand
- Net Worth

As well as things like *does this person own a boat or airplane, are they a business owner, do they have stock holdings* and much more.

It should be noted that **only individuals can have their WealthEngine data pulled in EveryAction directly.**

# Setting up the integration in EveryAction

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# API Setup

Our first setup step will be to establish (request) activation of API integrations through EveryAction.

This process runs through the Client Services team and **cannot** be done through the User end of the system.

This process does require having an *established* WealthEngine account as well as access to your Developer API information from WealthEngine.

Links to assist you in this process will be provided in chat!

# Just Like Magic

Once the Client Services team processes your request and sends a confirmation notice, the WealthEngine integration will be enabled in your CRM database.

From this point forward, you can now use the integration in several ways, such as…

# Generating WealthEngine Data in EveryAction

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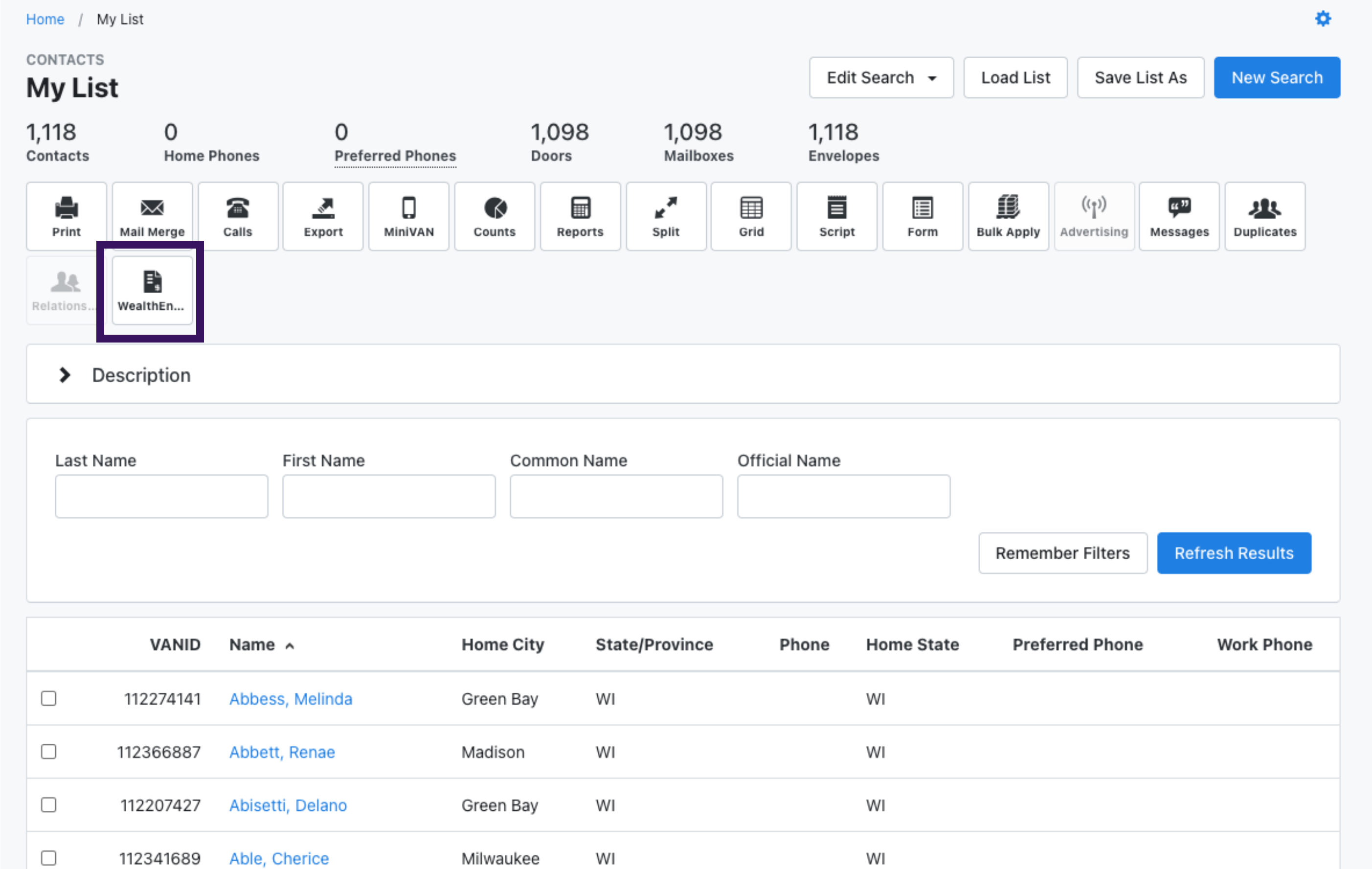
# Mass Addition of Data

The alternative method, and likely preferred based on your contact pool size, is to use Create A List's WealthEngine option.

Depending on the size of your contact base, there are limitations on how many records can be processed through this method. Again, this will only update ***Individual*** type contacts, as Organizations must be processed by Support.

This will process in a similar fashion to Bulk Apply/Bulk Upload changes, bringing you into the Upload Queue screen.

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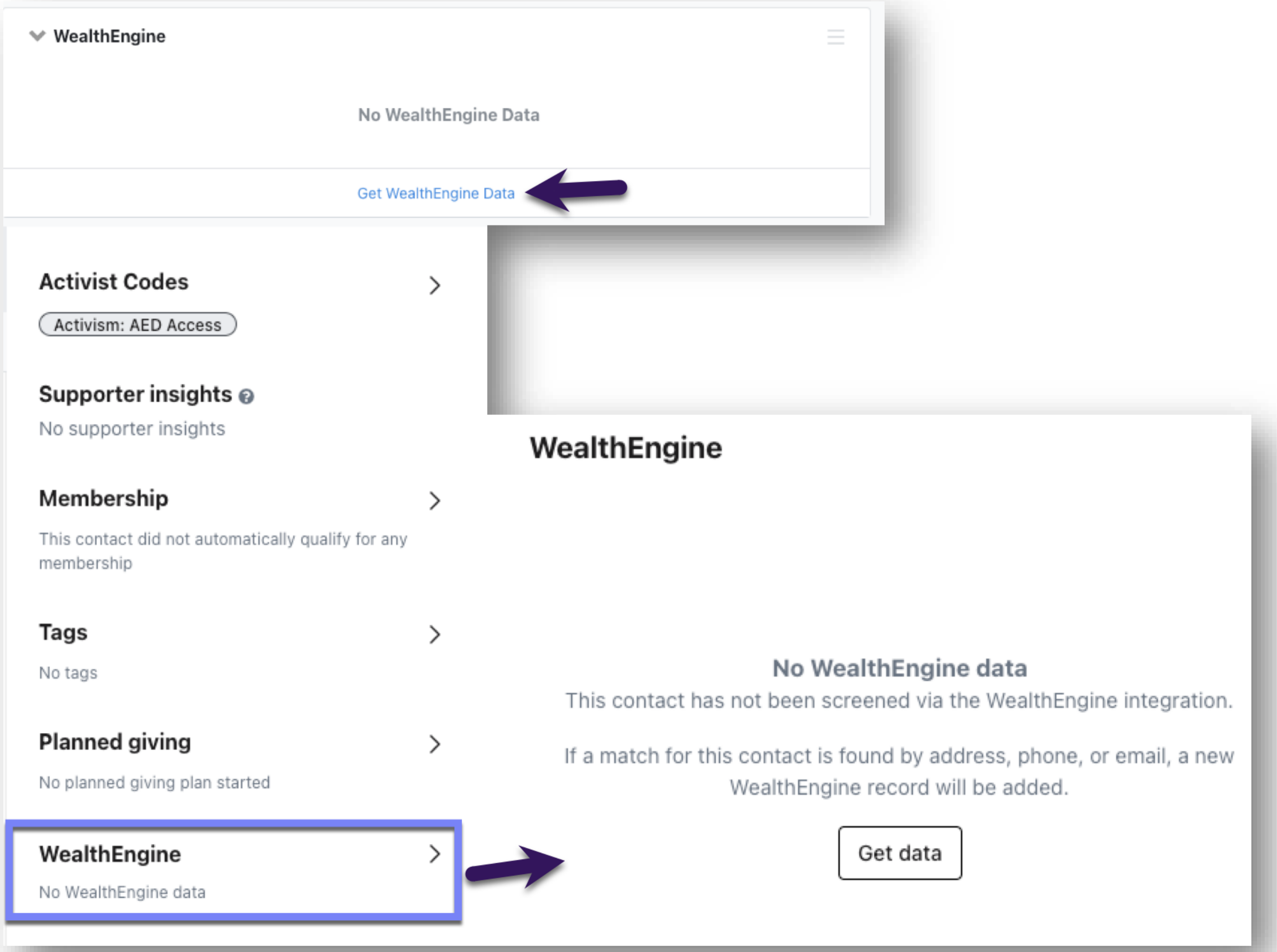
# Manual Addition and Review

For individual Contacts, both the All Details View as well as the Contact Record view feature drawers for WealthEngine data. These drawers will also allow users to pull WealthEngine data on the currently viewed contact.

Within this information drawer, it is also possible to refresh the data for a contact as long as their information was not updated within the last 24 hours.

This will allow you to see updated information on contacts of significant net worth that may rapidly or frequent increase their wealth.

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# Screening Your New Donors

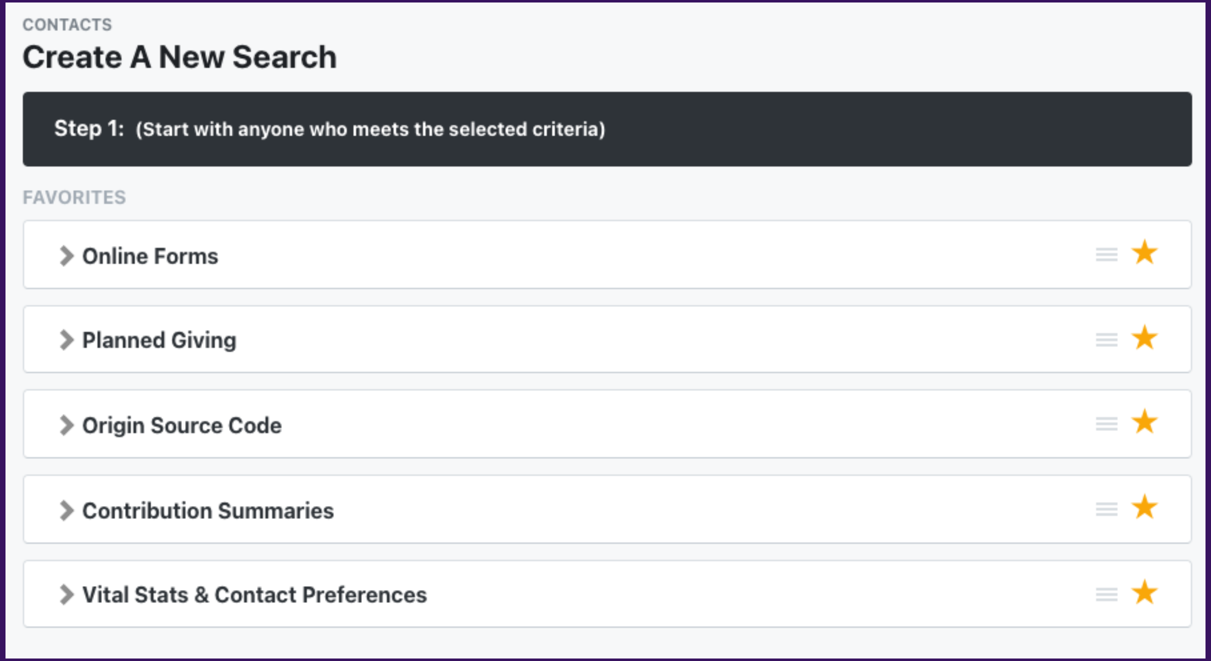
Through the Automation tool in EveryAction, workflows can be created to proactively gather WealthEngine data for new or established donors once they've hit a milestone of your preference, such as:

- Total gifts in a year hitting an amount
- A single gift being greater than or equal to X amount
- Donating year over year

# Automation Suggestions

Excellent kickoff points for screening donors would be by to first Create A List using information from drawers like:

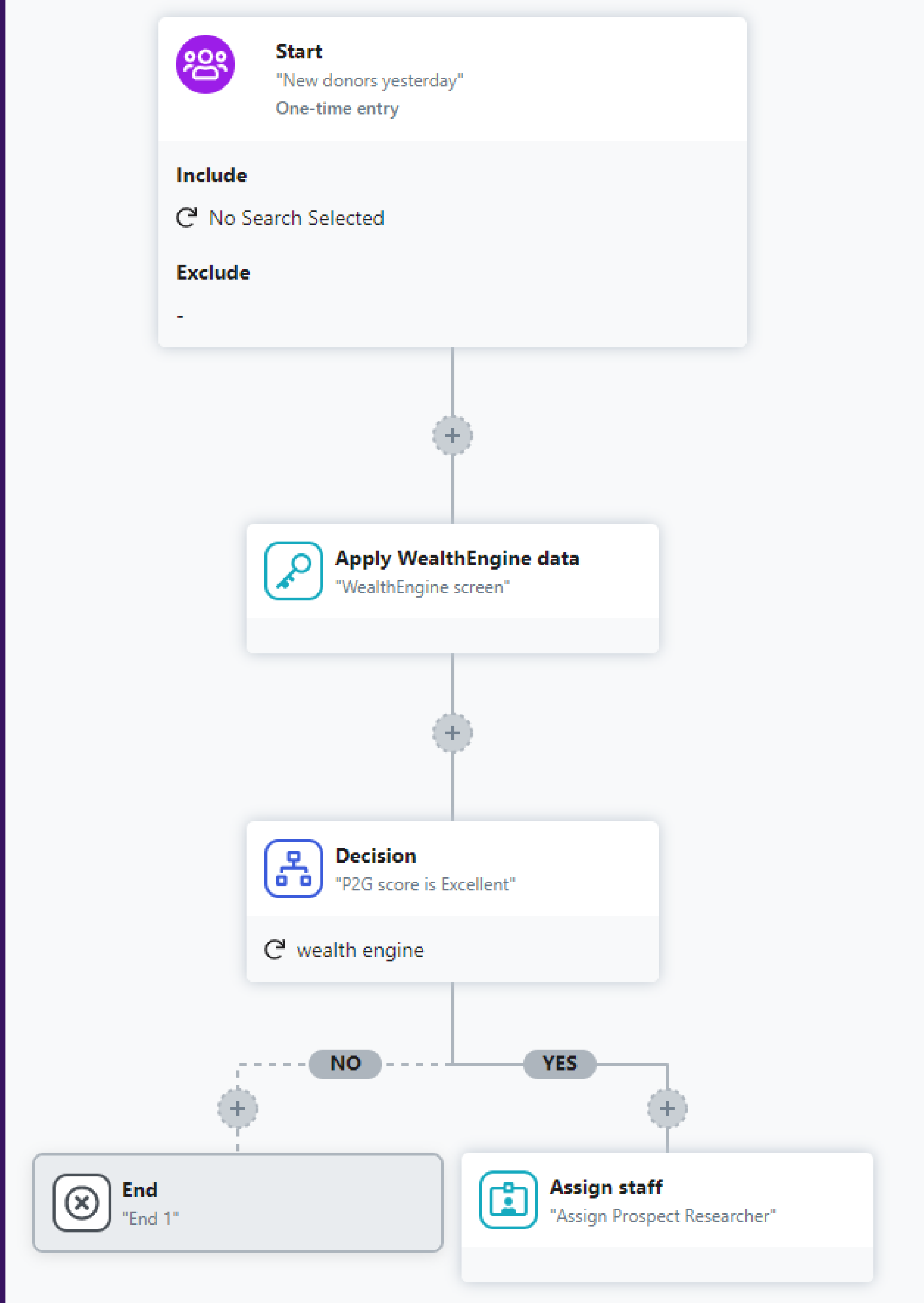
- **Online Forms**, specifically isolating Contribution Form submissions.
- **Planned Giving or Moves Management Action Plans** to allow for deeper insight to the donor's potential to give.
- **Contribution Summaries**, leaning on Lifetime or Highest Previous Contribution amounts.
- **Origin Source Codes**, identifying donors by a specific "creation" source code.
- **Vital Stats & Contact Preferences**, tied to Acquisition or Created Date, as well as to Creation method, like Contribution form.



# Automation Example

Once you've used **Create A List** to define your entrance criteria, you can use the **Prospect Research** automation template to:

- **Apply a WealthEngine data score** to your contacts.
- **Apply Activist Codes** to the supporters of a certain P2G (potential to give) score.
- **Assign Staff Members**, to those contacts for **Follow Ups**.

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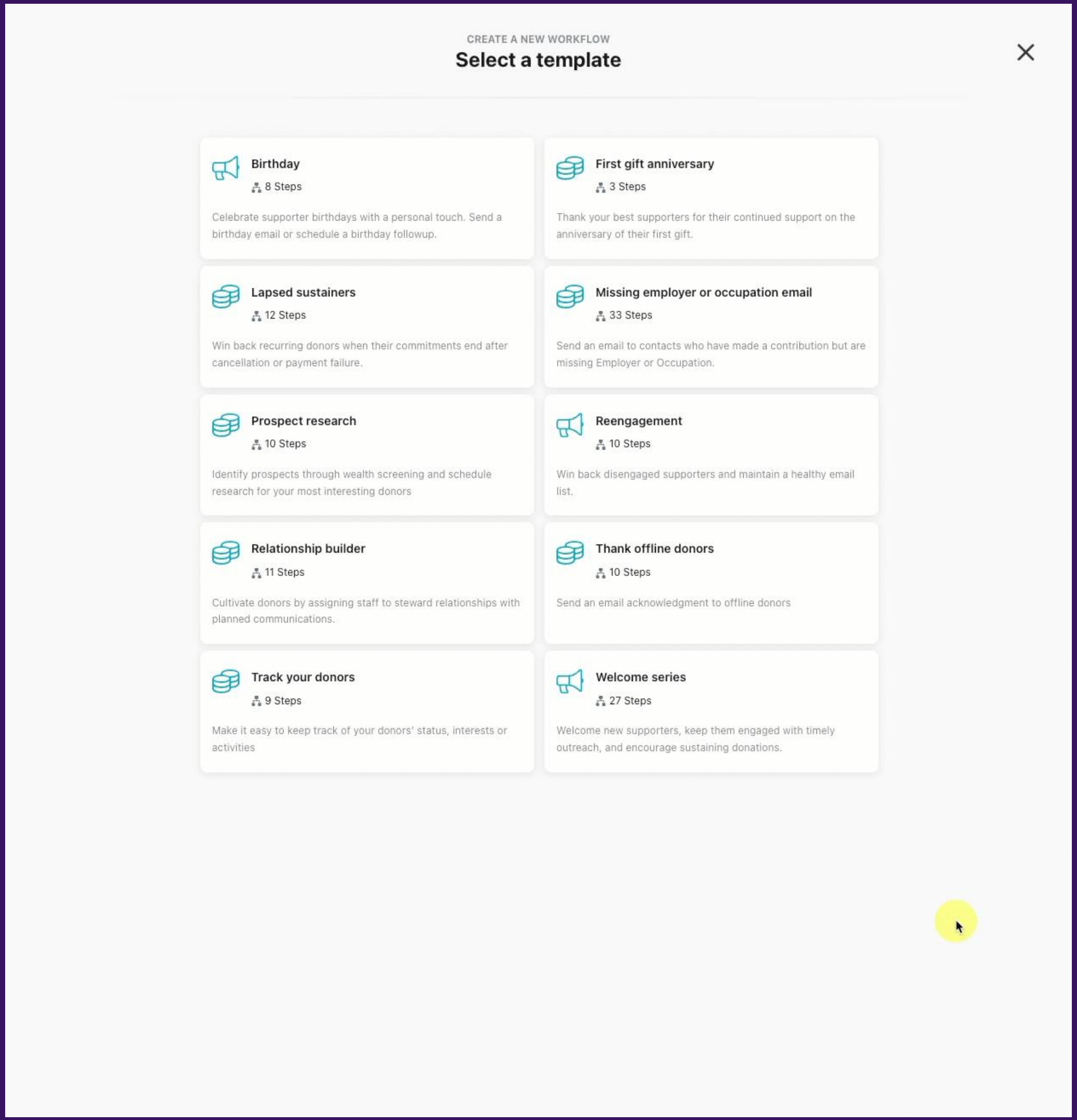
# Prospect Research Template

This is one of the pre-populated templates available within the Automation tool, andwill accomplish exactly what is needed with a few bonus steps, if they are appropriate.

The Prospect Research Template allows for the gathering of WealthEngine data and also includes steps for assigning those who have the highest **potential giving score** to a user for additional outreach.

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# Putting WealthEngine Data to Use

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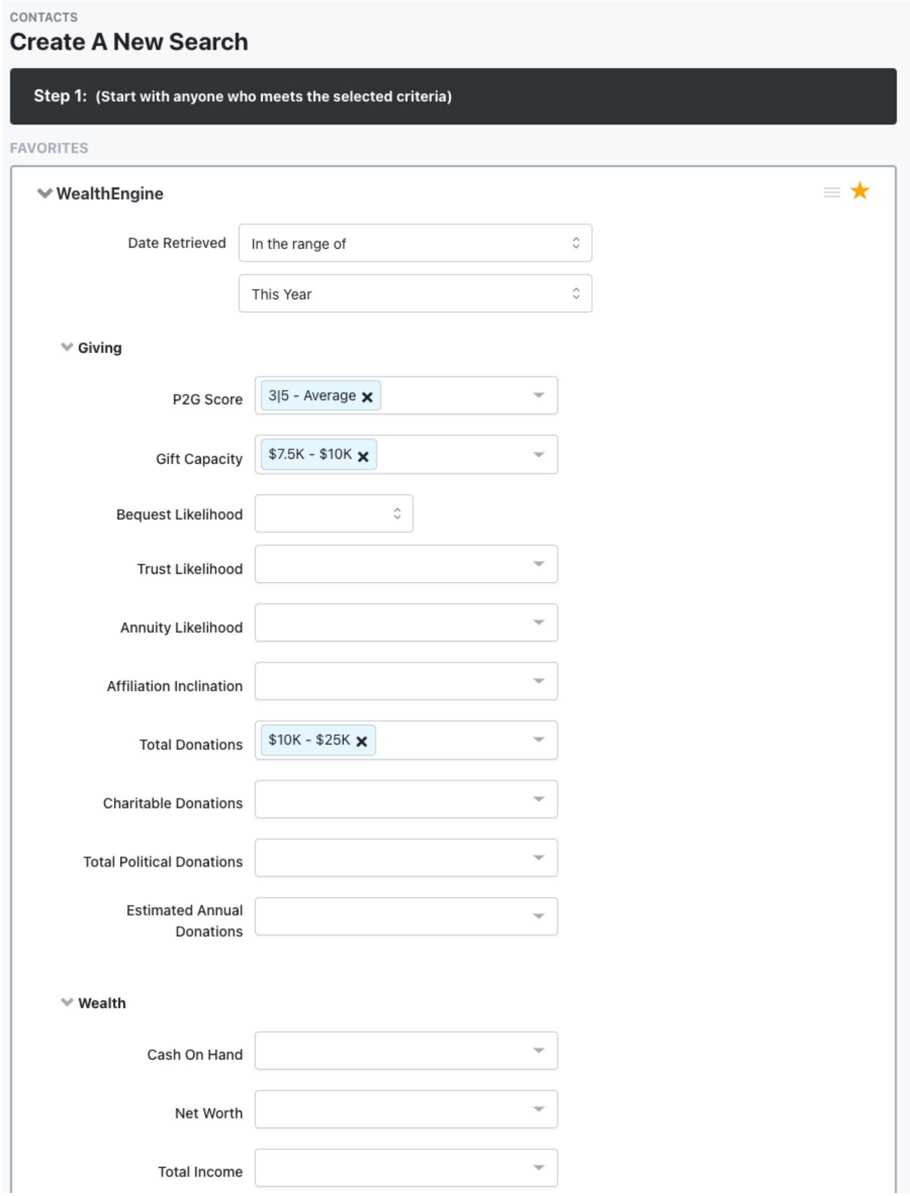
# Knowledge Is Power

Once the data for your donors has been scraped, the most likely method of using this data will be to segment out your donors to tiers, potential to give, net worth, or other factors that your organization defines to segment these prospects.

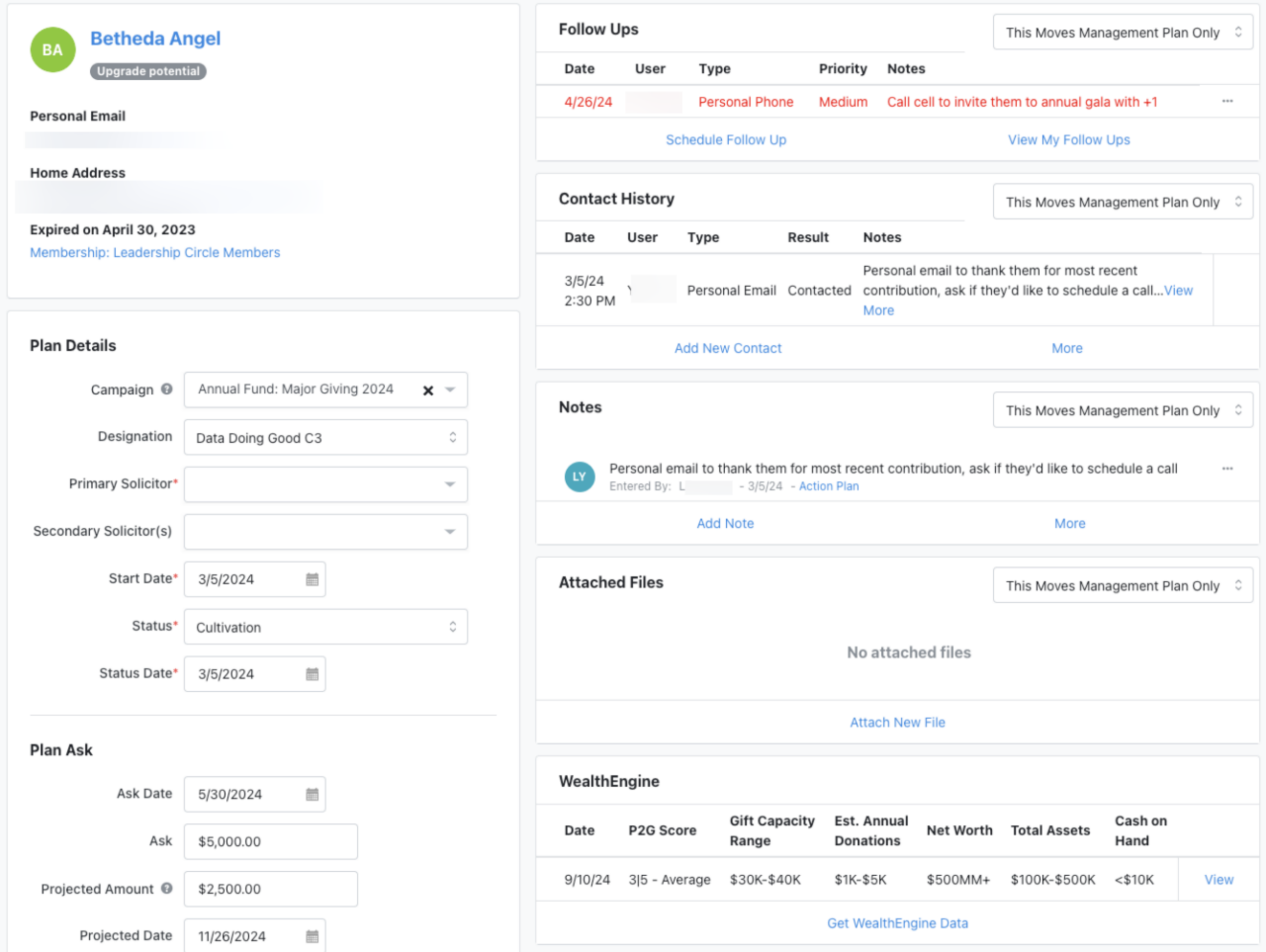
Through **Create A List**, these records can be separated into searches and then used to communicate with those donors directly or to assign the prospects to your relationship managers.



# MMAPs

The Moves Management Action Plans tool within EveryAction can be your “one stop shop” for bringing prospective high value donors on board with your organization through high-touch communication and deep research into their giving potential.

Pulling in WealthEngine data can boost your ability to accurately gauge how much should be asked for from within the plan’s detail page as you continue to communicate with your prospect.

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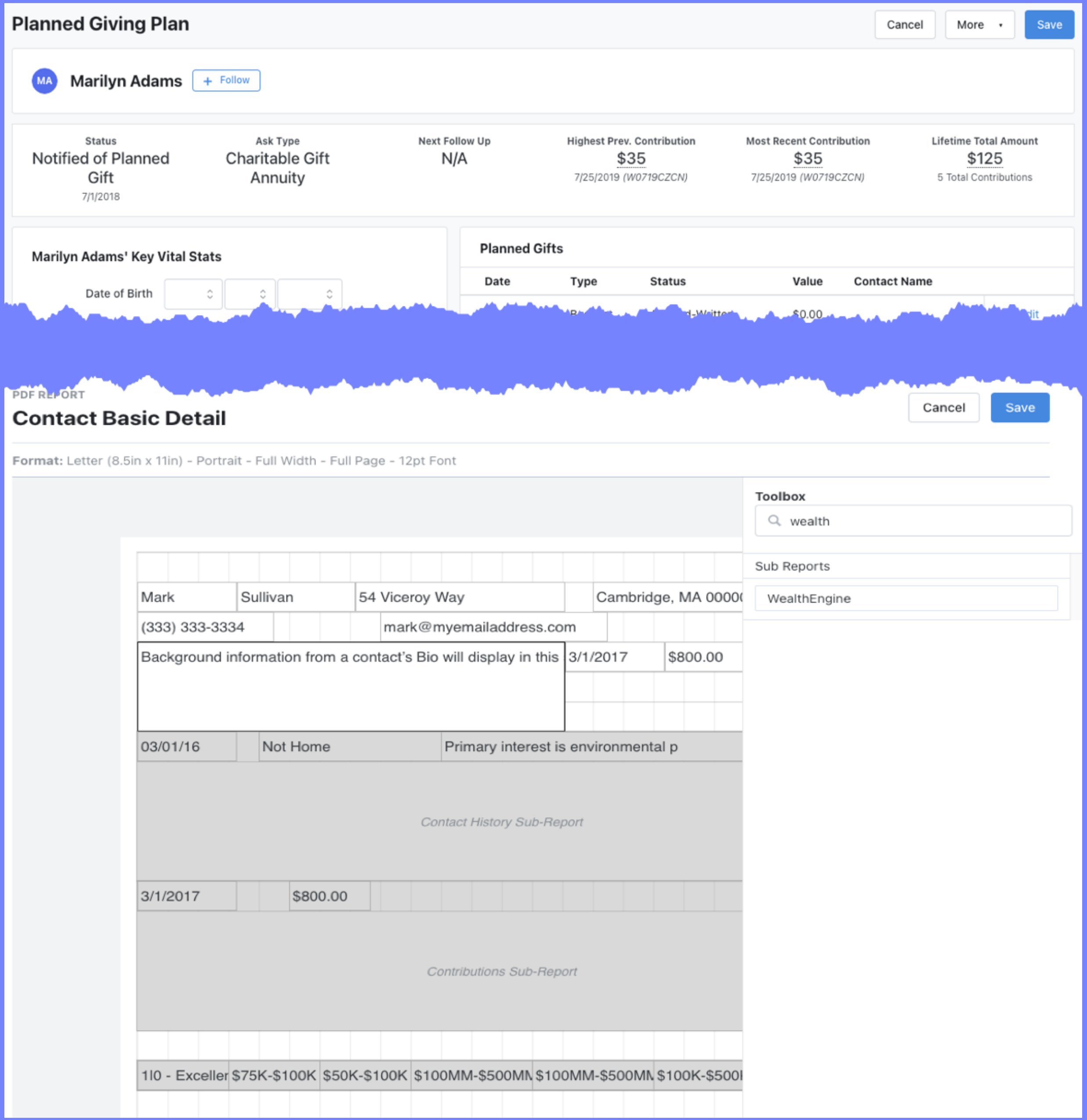
# Additional Areas of Value

As previously mentioned, there are other methods of using the WealthEngine data throughout EveryAction, including through:

- Planned Giving – like MMAPs, Planned Giving will also provide insight into a donor's potential to give if they're interested in participating in end-of-life, estate, or trust giving.
- The PDF Report Builder – WealthEngine data can be included within the report builder solely to indicate to walkers/callers what to expect if a contribution ask is planned for your effort.

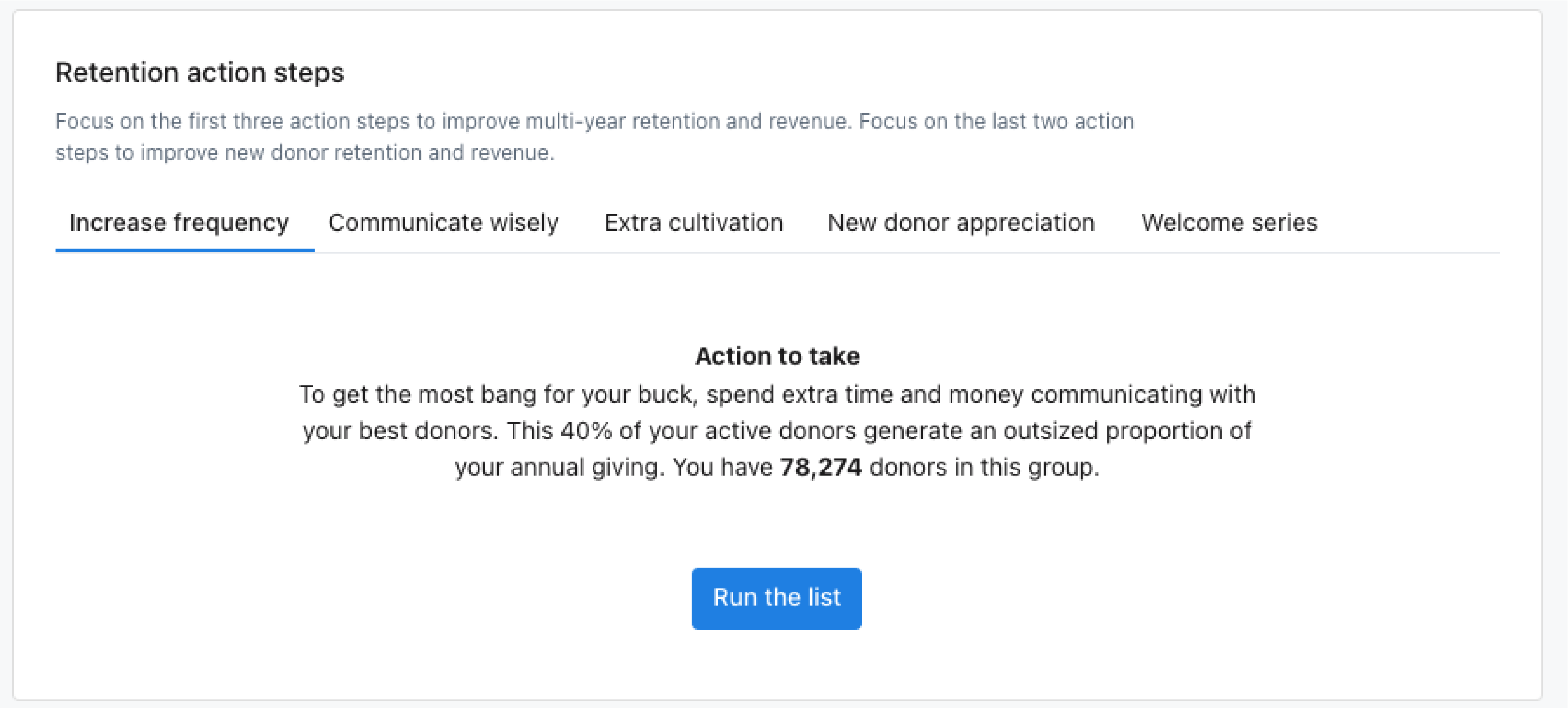


# DonorTrends and the Fundraising Optimization Guide

# What is DonorTrends

DonorTrends is a proprietary predictive model integrated within EveryAction that allows deep analysis and modeling of existing data from your donors to allow them to upkeep, upgrade, or update their giving.

This tool is exclusively available as an add-on feature, or under the Pro and Premier packages within EveryAction.



# The Fundraising Management Dashboard

As an intro, we'll talk about the Fundraising Management Dashboard, which can be set as your landing page, acts as the "overview" of all fundraising efforts across different programs.

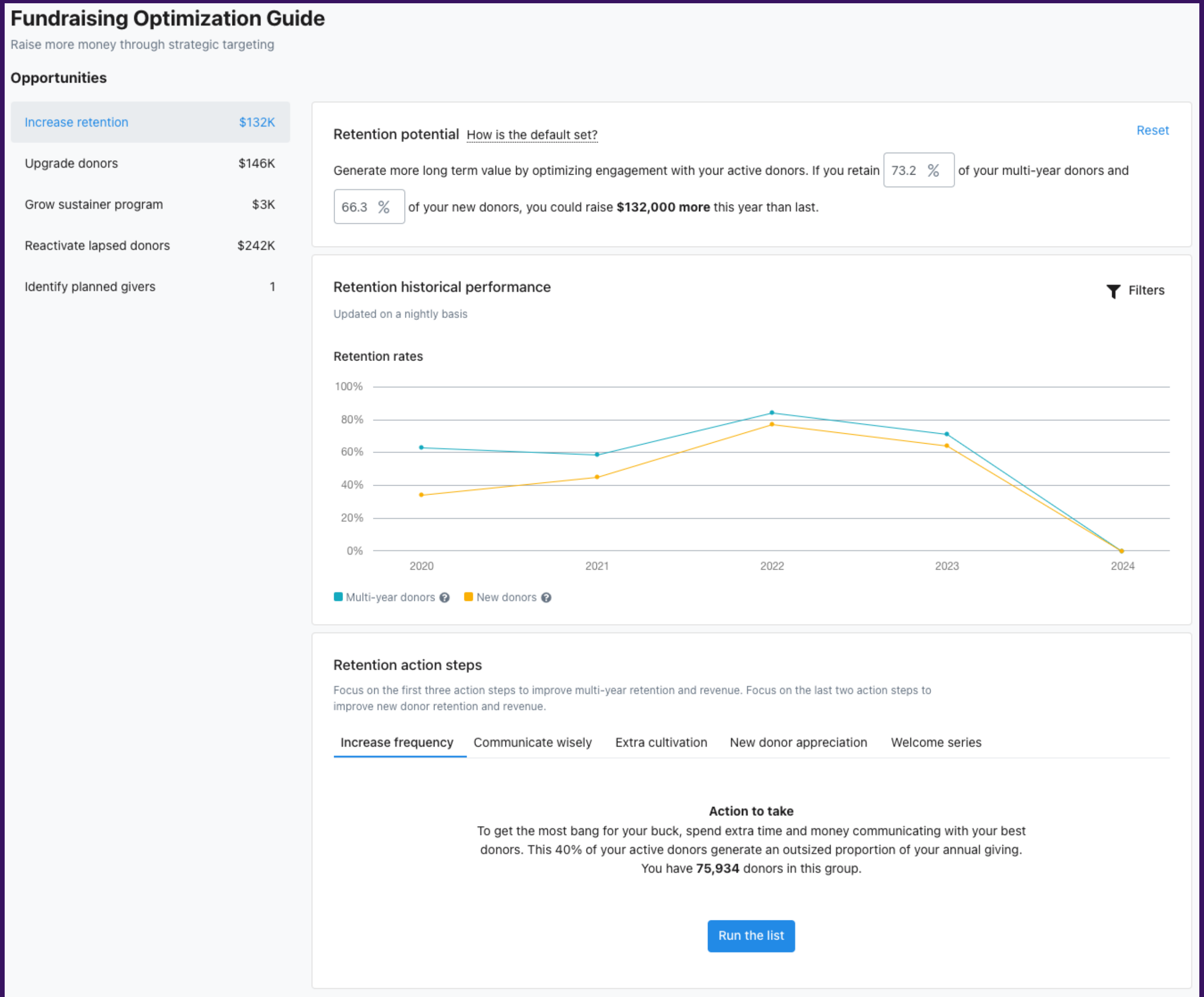
This is a key feature in having greater insight to how well your organization is performing based on your expectations, as well as performance year over year.

In addition to providing you the overview of performance, this dashboard also links to most of the common fundraising adjacent functions in EveryAction, like **Create a List, Reporting, Quick Lookup, and more.**

# Fundraising Optimization

The **Fundraising Optimization Guide (FOG)** within EveryAction will aggregate and parse your data from the last few years of your fundraising efforts to show trends for new and multi-year donors, as well as provide you ways to:

- Encourage donors to upgrade year-over-year
- Grow your sustaining donor base
- Re-engage lapsed donors
- Identify planned givers

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# Using the DonorTrends Reports through FOG

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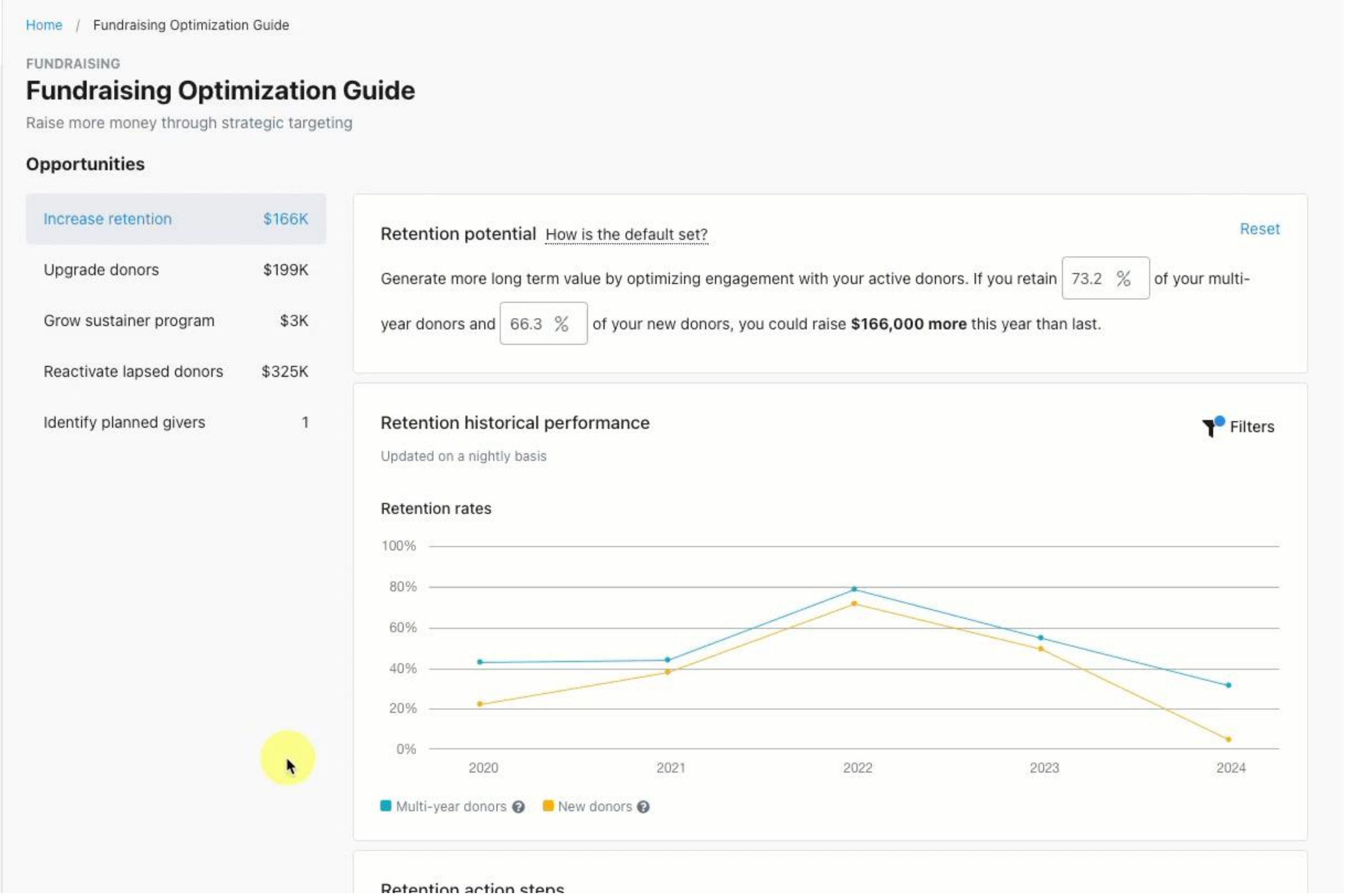
# Letting your Donor data take the lead

Each section of the Opportunities from the Fundraising Optimization Guide will provide new options for how to engage (or re-engage) the segments of your Contacts.

For example, sections like Increase Retention will guide you to running Lists of donors in certain DT tiers, and others will suggest actions to take for the donors within that segment.

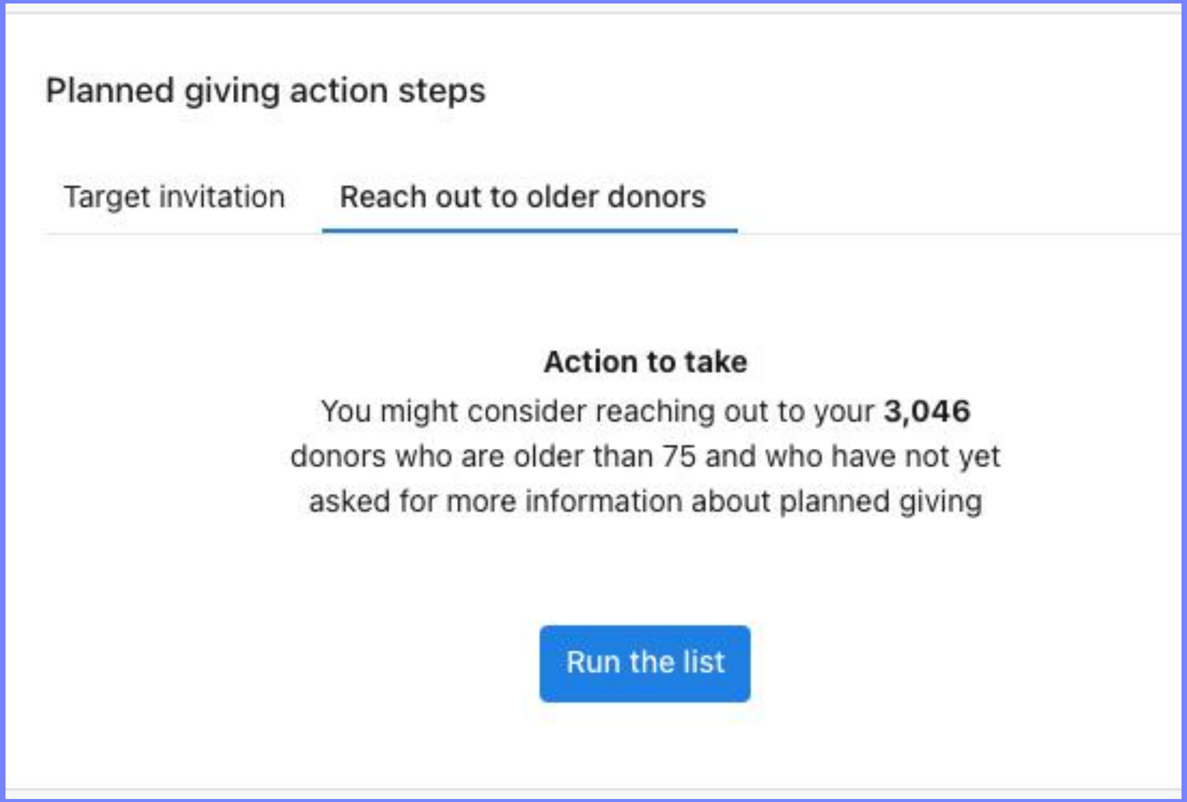
Each of these sub-tabs will provide context as to what the system is looking for in terms of pulling contacts back.



# Planned Giving Identification

The Fundraising Optimization Guide provides a great kickoff point for your organization to begin reaching out to your older Donor base for the planned giving opportunities.

This tool, similar to Moves Management tool (or the Cultivation tab in your Major Gifts Portfolio), will allow you to track all efforts being taken in bringing an older crowd into the fold with the intent of having you included in their estate planning or trust giving.

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# DonorTrends FAQs and Good-to-Knows

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# For Future Reference

Regarding Contacts:

- When merging records, it is expected that DonorTrends data will take a short time to equalize/repopulate (typically 24 hours),
  - This can result in changes to status for that recently merged contact, specifically in terms of where they fall in their DT segments until that data equalizes.

Who's Missing?

- Because this tool is running on certain Contribution factors such as if a donor has lapsed, if they're sustaining, and more, there is an expectation that if a Contact is in one segment of DonorTrends data that they may *not* be in others.
  - Always be aware that a contact missing from a certain list may not be a bad thing, it's simply they do not fit the mold of that report.

Through Create A List:

- DonorTrends data is not limited to just being usable in the Fundraising Optimization guide, but is also available through Create-A-List for even further customization of the lists generated by the Optimization Guide.

On the Built In Reports:

Finally, there is the opportunity to output DonorTrends data in the Built In Reports listed below:

- All contribution reports
- Contribution Aggregate Report
- All action plan reports
- Membership Report
- Count of Contacts Report
- Email Performance Report
- Online Activity Report

# Thank You for Attending!

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