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Portfolio Horror Stories! Using Data-Driven Insights to Transform Frightening into Fantastic

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Meet your speaker

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Picture this:

You're walking through a meadow on a beautiful spring day...
The meadow is full of happy gift officers, enthusiastic donors,
and wonderful missions being accomplished...
You come to a crossroads, and you decide to turn toward an old
Victorian mansion in the distance...
As you get closer, your journey becomes more difficult. The
meadow is overrun with weeds...
The gift officers are complaining...
You've entered the realm of...

PORTFOLIO HORROR STORIES!



As you approach the mansion, you see a cemetery in the front yard. This is the cemetery of portfolio prospects who are unable or unwilling to make a major gift...

- The trendy celebrity entered into your database, despite no ties to your organization
- The lists of residents of the wealthy neighborhood next door, or the Forbes Billionaire list for your state
- The major gift officer's friend, who is a consistent \$100 annual supporter but lacks the means to be a major donor

Identifying Prospects to Remove from Portfolios

- Examine giving history: Have they ever given? If so, what is their largest gift? When is their most recent gift? Is their giving increasing, decreasing, or staying at the same level?
- Are they engaged with the organization in other ways? Do they attend events? Do they interact with social media posts? Do they open e-mails?

Identifying Prospects to Remove from Portfolios

- If a wealth screening has been completed, what is their identified major giving capacity? What are their assets?
- If you have predictive modeling or similar analytics projects, what is their likelihood score?

Identifying prospects to remove from portfolios

Curate your portfolio

Make room for new prospects ⓘ

- 159 Low likelihood prospects to review and engage
- 2 Smaller predicted gift prospects to downgrade
- 2 Smaller predicted gift prospects to remove from portfolio


BEST PRACTICE

Move prospects with high giving likelihood but lower giving amounts to lower giving tiers. Remove fundraiser assignments from prospects with low likelihood and lower giving amounts

Portfolio summary ⓘ

224 Prospects
20.4M Total target giving

Identifying prospects to remove from portfolios



Susan M. Taylor

Manage fundraisers

Add action

Analysis

Biographical


Prospect management

Giving


Wealth

Prospect Insights models


\$5K - \$10K

Target gift range 

Low

Giving likelihood 

\$5K - \$10K



Potential gift range 

Excellent

Planned giving likelihood

Analysis

Low target gift range and likelihood to give



Susan has a **target gift range of \$5K - \$10K** which is lower than recommended for prospects assigned to a major gift officer. Susan also has a **Low likelihood to give a gift**. They also have a low **potential gift range of \$5K - \$10K**, suggesting they are not likely to be able to give a major gift in the future.

Recommendation

- Consider removing this prospect from any major gift officers' portfolios.

Sensitivity: Confidential

You walk past the cemetery and approach the front steps of the mansion. As you get closer, bats start to circle around you. These are the major giving prospects hiding in your database, which haven't yet landed in portfolios

- That new \$50 donor who possesses tremendous capacity and is very philanthropic elsewhere, but whose recent gift hasn't attracted any attention
- The loyal annual donor who has the potential to give far more, if they are asked
- The prospect who was previously identified and pre-qualified, but who hasn't been added to a portfolio

Identifying Prospects to Add to Portfolios

- Examine giving history: Is their giving increasing? Are they giving at a lower level, but giving consistently?
- Are they engaged with the organization in other ways? Do they attend events? Do they interact with social media posts? Do they open e-mails?

Identifying Prospects to Remove from Portfolios

- If a wealth screening has been completed, what is their identified major giving capacity? What are their assets? Does your organization have the capability to screen all new donors when they make their first gift?
- Is there a system in place to track identified/referred prospects, to make sure that they are added to portfolios and contacted in a timely manner?

Identifying prospects to add to portfolios

Needs attention

Assign 28 initially qualified prospects




Review 33 undergiving major giving prospects



Reassign 5 major giving prospects assigned to non-active fundraisers



Identifying prospects to add to portfolios – qualified but not assigned



Marcus Marshall

✓ Qualified

Assign fundraiser

Add action

Add opportunity

Unmark as qualified

Analysis

Biographical

Prospect management

Giving

Wealth

Prospect Insights models

\$1M+
Target gift range ⓘ


Low
Giving likelihood ⓘ

\$1M+
Potential gift range ⓘ

Excellent
Planned giving likelihood

Analysis

High target gift range, low giving likelihood

 Marcus has a **target gift range of \$1M+** which is recommended for prospects assigned to a major gift officer. However, Marcus also has a **Low likelihood to give a gift**.

Recommendation

- Determine the priority of this prospect to be assigned to a fundraiser after reviewing giving indicators, giving behavior, and previous relationship and engagement information.

Identifying prospects to add to portfolios

Build a qualified prospect pool

Prospects to qualify ⓘ

638 Top prospects to qualify

31,820 Secondary prospects to qualify

660 Emerging prospects to qualify


BEST PRACTICE

Maintain an adequate pool of qualified prospects to facilitate efficient assignment when gift officers have capacity to take on new prospects.

Potential for giving ⓘ

	Qualified and unassigned	Unreviewed
# prospects	28	33,118
Total target giving	N/A	N/A
Potential increase	N/A	N/A

Identifying prospects to add to portfolios – top prospects



Amanda Payton

Mark as qualifiedAssign fundraiserAdd actionAdd opportunity

Analysis

Biographical

Prospect management

Giving

Wealth

Prospect Insights models

\$1M+
Target gift range ⓘ


Very Good
Giving likelihood ⓘ

\$25K - \$50K
Potential gift range ⓘ

Excellent
Planned giving likelihood ⓘ

Analysis

High target gift range, high giving likelihood



Amanda has a **target gift range of \$1M+** and a **Very Good likelihood to give a gift**. This means that giving history, financial, behavioral and demographic characteristics all predict that this prospect may be capable and willing to give your organization a major gift.

Recommendation

- Qualify Amanda for discovery and consider assigning to a fundraiser for relationship qualification.

Identifying prospects to add to portfolios – emerging prospects



Larry Stark

Mark as qualified

Assign fundraiser

Add action

Add opportunity

Analysis

Biographical

Prospect management

Giving

Wealth

Prospect Insights models

\$251 - \$500

Target gift range ⓘ

Good

Giving likelihood ⓘ

\$1M+

Potential gift range ⓘ

Low

Planned giving likelihood

Analysis

High potential gift range and likelihood to give, low target gift



Larry has a high **potential gift range of \$1M+** which is larger than their giving history to your organization would suggest. The lower target gift range indicates that they may not give a large gift now, but could give larger gifts in the future if they become more engaged with your organization.

Recommendation

- Qualify this prospect for discovery and consider them for mid-level giving programs with your organization in order to develop a stronger relationship with this prospect.

You finally enter the mansion, and you find yourself in a maze. This is the maze of ask amounts.


- How much is too much?
- How much is too little?
- How much is just right?



Determining Strategic Ask Amounts

- Is the individual's giving pattern increasing, decreasing, or staying the same?
- If the individual has been wealth screened, what is the level of their giving to other organizations?
- Does their wealth indicate that they are able to give at higher levels?

Ask amounts and strategy



Alexander D. Acosta

Manage fundraisersAdd actionAdd opportunity

Analysis

Biographical

Prospect management

Giving

Wealth

Prospect Insights models

\$10K - \$25K
Target gift range ⓘ


Low
Giving likelihood ⓘ

\$250K - \$500K
Potential gift range ⓘ

Low
Planned giving likelihood ⓘ

Analysis

High target gift range, low giving likelihood



Alexander has a **target gift range of \$10K - \$25K** which is recommended for prospects assigned to a major gift officer. However, Alexander also has a **Low likelihood to give a gift**.

Recommendation

- Review this prospect's previous relationship information and consider setting up an action to re-evaluate this prospect's interest in giving a major gift.

Sensitivity: Confidential

You successfully navigate the maze, which leads you to the back door of the mansion. You walk outside and find yourself back in the meadow full of happy gift officers and donors. Using data-driven insights, your portfolio horror story now has a happy ending!



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Thank you

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