

# MojoMosaic™ VIP (Brooks Bollinger)

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## SUMMARY KEYWORDS

talking, ai, brooks, people, plan, connections, personal, david, work, build, database, put, staff, platform, email, alumni, documents, mass mailing, events, development

## SPEAKERS

David Matenaer

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11:03:55

Hello David. Hey



11:04:06

I just I just text my dad so he should be jumping on



David Matenaer 11:04:10

yeah he think he's on here but he's on the new there I see a picture yes I hear you I'm David.  
Hi. Nice to meet you.



11:04:29

Meet you



11:04:36

that's a that's a big crucifix that yeah, we need it. Yeah.



11:04:47

Every day we need it.



11:04:50

David did you get the email I sent over?

**D** David Matenaer 11:04:54

Yes. I didn't get a long time to look at it but I think it makes sense in terms of we open up the document here.

 11:05:11

So, you know, I think is never an easy place to, to kind of start and I'll kind of get it going and then you guys can fill in the gaps. But you know, David I've given you a little bit of background but um, you know, when you started talking about the sales enablement tool, and all the work you're doing, I think immediately resonated with me with the kind of work that my dad does in in the Development Office of raising money and building these capital campaigns in the way he supports and he can fill you in, but I think as we talked about all these offices, kind of at the college, high school, even private foundation level, I think with the environment we're in are going to have to continually, you know, they're always kind of playing catch up. From a technology efficiency standpoint, and especially I think in in the world we're in right now. They're gonna have to find ways to do more with less. In a lot of ways, it's it's basically building relationships but then you're trying to constantly execute on those relationships and and stay consistent and provide value and all those kinds of thing. So there's a lot of similarities but but maybe with that, David, I don't know if it makes more sense if you'd rather have you know, my dad kind of give his background and talk a little bit first or you want to start either way is fine with me.

**D** David Matenaer 11:07:01

Yeah, I don't know. Rob, how much Brooks has told you about what we're building and stuff but leveraging AI, you know, but putting guardrails on it because I'm sure you hear in the news and stuff. Oh, oh, boy, it hallucinate or it gives you the wrong information and all that. And just like any tool, you know, you need to use it correctly. And so for the last 18 months or so, I've been using it, you know, 1012 hours a day. And so I feel like I'm to this point where I can put these guardrails on it and really get it to return, you know, like to basically augment human capability or you know, human skills set and stuff. And so what I've already done here, I just took the two documents that Brooks sent over, and I've already kind of just put them into the AI just to kind of say, hey, you know, what would you what is this all about? Right? So it talks about building a culture of philanthropy and University Athletics talks about core principles, key strategies annual giving, annual engagement, Alumni Engagement mean major gifts planned giving campaigns, events, stewardship, marketing, promotions and roles coaches. So it's, is that so in terms of, I think what would be helpful to me is to maybe just kind of like Brooks and saying that if you just want to give me you know, like a background of a he's told me some that you've been doing this for a long time, and you're doing Are you still at cretin? Doing it for cretin? Yeah. And then, yeah, so it just, it just kind of give me like, you know, if I gave you a magic wand, you know, other than unlimited amounts of money, how could this system help you and support you and augment, again, not replace you, but augment what you do now? And allow

you to have more time to focus on building the human connections and relationships because that's what AI is really going to do. It's going to take care of some of the busy work and give us more time to be more human. Which which I think everyone wants to do.



11:09:39

It did. Did I think another way to think about that, too, is you know, because I know you're not super familiar with the platform or the technology but I think another way to think about it is just if you had a magic wand and kind of your ideal office, from a development standpoint, what value would you be able to execute on with every one of your donors and with your staff? And like what are the biggest hurdles today? of not only your office but other offices being able to kind of deliver on all those different areas?



11:10:21

Well, if I had a magic one, I do a lot of things but starting with my golf swing, but that'd be number one. You hear me? Yeah.



David Matenaer 11:10:34

You used one wish now you only got two left.



11:10:38


But I think either if I was a consultant, or if I had a development office, which like I do now. I think the hurdles now are most most places are going for whatever reason, they're going more automated and more. mass produced, if you will, and less personal. So if I had a magic wand, I would create a platform to use your word that could be valuable to an organization to share the effectiveness of personal engagement which would be in the case of development leading to closer involvement and support. I spent many years as a college football coach, and that's the way I looked at recruiting is that I I needed to make the kids I have recruited more close to me than the other the other coaches are talking to, and I think a lot of offices now we're going more to automated thank you emails, social media information. You got to do all that you got to do the mass mailings and stuff but it's, it's it's hard work to develop personal relationships and I mean, I do it every day. I love doing it. Today I sent a personal note to a guy in the class in 1943. He'll turn 100 May 28 May 26 next year. I in my personal note I cut and pasted a picture from his 1943 yearbook in which they list all the activities that were in and his ambition was to meet Lana Turner, the actress. So on my note, I said Hey, Bill, I love Lana Turner too. But how can you in a business separate yourself from other in our case, nonprofits that want to engage the same people I really believe it can be significant impact if if this platform and I think your your product or your idea is to have ai help with the materials or the busy work as you call that and allow at the same time appearing to be personal. I mean, that's, that's to me the idea.





11:13:48


Yeah, so it's kind of twofold. Right? It's enhancing the personal connection and also eliminating


Yeah, so it's kind of twofold. Right? It's enhancing the personal connection and also eliminating the amount of manual work it takes to do that consistently. Right. So like, dad right now, when you sent that note, you created the note you manually cut the picture, you manually looked up you know what his activities were etc. You put it on the note then you probably entered the note into a CRM or somewhere to store it to remember for next time and then you probably created a task to then follow up with him at a later date. Right? I'm assuming that's all kind of manually.


 11:14:32  
Yep.

 David Matenaer 11:14:37  
And so when he he said CRM, is that like something that the university has? Is that No

 11:14:47  
you tried like a like a Salesforce David like a client client relationship management platform. Yeah. Yeah. Our,

 11:14:57  
in our, in our development world is a number of database companies, but ours is Blackbaud and the offshoot of that is NXT. So you have all the data in there. You will put in documents, endowment agreement plan, giving agreement, and then you would record all actions. I would I would copy that note that I sent to bill in his record. So everything is based on the database and I think that's what you mean Brooks?

 11:15:42  
Yeah, I'm just kind of walking. I know, David's familiar. You know, but I just kind of walk through the steps.

 David Matenaer 11:15:52  
Because the platform we've built as we kind of put it all in one you know, where you would have all of the activities, you know, automatically recorded. And then documents and things like you said, playing giving or stuff like that are also housed in there and those can be automatically generated based on stuff that you order, you know, so if you think about, you go to this gentleman's, you know, dashboard, and you're like, What do I want to how do I want to engage him and what what are the next steps and things and you basically can like say, oh, I want to send you know, I want to create a plan giving document, you know, and these are the numbers they gave me, and then that would boom be stored in the database. And then when

you go to send him an email, you would send it from the platform. And you could say attach these documents. And you know, so it's all kind of like, taking care of you taking care of for you. And it's just a little more of just turning things on and off, you know, based on what what your relationship is and what you think how you're going to engage with them. And then what you can do is you can put people into different groups, you know, so like, you can say, hey, you know, you know, 75 years or older, you know, you can make a group for them. Or you can make a group for you know, new, you know, new college graduates and stuff and then from there, you can communicate with that whole group. And within the email, then you can have, you know, obviously, their names and stuff like that. So it feels like you wrote it out. And we could even put in, you know, a little field where if you wanted to add in something fun, maybe the first sentence to make it sound more, you know, personal is like, you know, hey, you know, I you know, I wish I could have met Lana Turner too. But let's talk about you. You're turning 100 Next year, and then the rest of it could be kind of the canned kind of thing, but it feels again, related to him. So because everyone can have like a profile, you know, in the system. And when you say I'm gonna go now talk to this person. The AI will look at their profile, and it could then recommend to you, you know, based on maybe their history of stuff, oh, they might be a good candidate to, to push to the next level, you know, this year, and they would say, hey, you've been giving for 10 years. I hope you know everything's going great for you. Have you considered increasing yours that into that, you know, so we could kind of build out all those kinds of workflows and things. But, you know, that's, quote unquote, the easy part. The hard part here is is trying to take your how many years of experience that probably isn't written down anywhere. How do we extract that? That humaneness from you? You know, like, you just gave me one example. Oh, I went and found his yearbook. I got that picture. I made that and you created a connection. You know, how else do you kind of create those connections? Because it's critical, right? To really kind of saying, Hey, you're talking to a human here, and you're trying to build that relationship?



11:19:33

Where I think my where I am right now, and I think we're BROOKS I think is coming from if I was to, say development, for lack of a better term, a consulting business and then there'll be a lot of work with technology and getting set up and so forth. But what I would want to be able to do is have a proposal for the nonprofits to go to them. And like I think Brooks was alluding to a lot of these schools, smaller schools, and private high schools and colleges. They don't have a large staff. So their only whole work wise is to do the general mass mailings in personal emails. So I think that's where we're coming from brochures and I would develop a hard to beat plan that I could go to that staff for X amount of dollars for whatever a three year contract to provide you with a more effective and personal way of connecting with who you need to connect with. Is that kind of crux.



11:21:03

Let me let me jump in. So I think to your question, David, I would say another way. And again, I think you're right and that he's done it for so long, and he doesn't so naturally. It's just what I do. But I do think one of the other key elements is kind of twofold. One being that you connect other similar alumni in their network, you create connection. So I'm doing it for Wisconsin right now. They're having a game at USC in LA you know, this fall, and I got like three different pockets of friends. And I'm shocked that they don't all know each other. Like the the more that

those guys had fun together. Not that that happens to be a geographic you know, kind of connection Hey, you're badgers and you live in LA. Some of you played football, so he didn't, but like, you guys should all know each other for business and whatever. And then once they get together, now they have relationships. So you're at the center of I think it's very key to development offices of creating those communities within the communities. That might be sports alumni group that might be a class of 65. But that might be geographic, it might be grandkids that were together. There's all these different layers and it gets really complex, and where the humans mess up. Unless they're really good and they just have 50 years at that school. They don't know the connections. So the more you can filter these things, because another layer that we have on here is like events. So events are up that we create connections. Well, these offices are really shitty, and inviting people to events. Because they have kind of one filter. They're either doing a mass mailing, or they're connecting to the 10 people that they know top of mind that are in that area are connected to that thing. Whereas you can have a more dynamic, complex system that could find all the relationships and then create those synergies, your, your kind of connection and your success becomes more exponential. And it feels more personal because it's like, you know, like, the guy that's 101 You know, you know the hockey he played hockey, or whatever. And the hockey team just went to the state tournament. Well, I'm not even thinking about that. Or maybe the woman that's, you know, 10 years or five years into the business and she's just trying to send them ask me to get through like she doesn't know that she's not thinking about it, but it automatically creates those synergies and those connections.



11:23:52

Well, I, Brooks, that's exactly what we try to do. And I believe



11:23:59

there's a key word in that sentence. And I think you guys do a great job and a lot of it's because you bust your ass it's not different than our industry is like the the intent and the hope. It could take years and cost millions of lives, right? It's the execution. And the bigger the institutions are the worst they are it right Dad, wouldn't you say?



11:24:22

Yeah, and I was gonna mention I've been on the board of my college on in North Dakota. And they're a very good example of the worse connect connectivity, because they they just think it should be the connection should come from the staff. And the people don't know the staff. So building a networking, whether it's AI or otherwise, but in your case, Brooks the football game, but it could be the music alumni, the theater alumni, the science majors. Excuse me. You develop volunteer leadership group within that now they're on the inside, and they know a classmate or teammate which the staff does not no and I think if the if the AI can help organize a coordinate the theater people, the football people or whatever, and the messaging, then I don't see any of these small operations could not take a hard look at it. Because the staff, as a staff have a lot of turnover. They don't know these people and the easiest way to do it is and they keep busy with a mass mass mailing in the fall. Yeah, you know,



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but then, on top of it, they're all government employees. Right? So it's like, Hey, I I could do more of a like, what, what the why, you know, why am I gonna? But, David, if you think about like the big bank, you know, you showed me some of the work you're doing. And you think about those products leaves. Is David still on?



11:26:16

Yeah.



David Matenaer 11:26:17

Yeah, yeah.



11:26:20

The, you know, do you think about those products leaves and how complex it gets with their, their clients. Well, it the university level, and to a certain extent, the high school level, but it really becomes apparent at the university level. Because you like at Wisconsin, we're just having this conversation. You got the Unum UW Alumni Association, you got the UW foundation. You got the Badger Fund, which is the fundraising for the athletic department, you get the W Club, which is the letter winners Association. You get the the school that you went through, right, like the art, arts and sciences or the history department or, you know, the engineering school. So at the end of the day, you probably have 40 or so different entities that are reaching out to kind of the same alumni base and and they can't get out of their own way. And all it does is it feels very impersonal when my connection is to my classmates and my teachers and my coaches and the people that attend the university as a whole and then they can't even figure out like which group I should be getting emailed from, right. They don't even know the left hand doesn't know what the right hand is doing. And all that does is is really diminished customer experience, and personalization and loyalty. I think that's a another huge problem that can be solved if you can aggregate you know, kind of like the thing you sent right but the sales enablement, right, that's personalizing and putting things in the proper order. And being able to unify kind of the awareness across you know, lines of business or different entities within the organization. I think, again, it's it doesn't do everything but that is such a barrier from the client standpoint of feeling like they are known and kind of valued.



11:28:26

Well, Brooks and I when I got into development, I visited the University of Iowa. I spent a week down there. That's when the bulk Bob Elliot went from coaching to the alumni of the of alumni office in a Foundation office. And that particular year they had gone to the Rose Bowl and they have separate and competing events. Yeah, they were actually enemies of each other. But Dave, I think if I was to go to a school, I think obviously, I'm assuming that one of the first things you have to address with that organization is their database of where they put in that they were in music or in science or nursing or whatever. And then from there, you get a chance

to build all the things you had on that list and you build a volunteer base and you build a plan but you know, my head is spinning even, you know, it set up a business but I think there's something there is a value. This this need to tighten down how to get it going.



11:29:54

Well, yeah, I think I think the important part is the conversation right now is just because, you know, we're we're David's so helpful and where this is, like, especially people in this space is like the magic wand is kind of real, like that question he asked. It's like, it kind of is a magic one, you know, compared to where we were 10 years ago. And and you know, in different parts of our economy in our marketplace, people are thinking about it and kind of implementing it but I promise you they're not in development yet. And it's such an you know, so much antiquated you know, kind of behaviors because of just like athletic departments right dad like a lot of these people just kind of came up through that world and they know the way it's always been done. So I think where we're starting is actually the most important part is like, hey, let's think outside the box is like what is the real value that could be provided to not just the organization but the end customer? Well,



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and I Brooks ever since I started working with you and Bill but not working with but sharing the ideas of the endowment program. Was that like three years ago? Yep. And this idea that I have a different way to approach development with personalization, and more volunteer engagement. That would work anyway even if you have the old horse and buggy. Manual, it would still be something you could sell. Right? But if you could sell the staff, working with the consultant, the staff, that it's not only more personal, it's easier to accomplish. The Form Letter is still a form letter, but it's a personalized form letter.



11:31:58

So today, here's the other side of this that we haven't talked about, like there's a lot more than just technology like David's kind of the sales enablement, tech guru, visionary, big thinker, but you know, Eric, who you met at your house. Yeah. David this what he's saying is really no different than kind of the activate project we discussion right is like, where he's found his success and why he's been so successful is because he's developed these ways and these processes and, and kind of an ideology to put the people first and really engage people. So it's no different than Eric human performance work, dad, and then David's kind of putting that into the platform. At the end of the day, it's personal, but it's also execution. Right? And that's where in our world when you look at the application of this, it's like, yeah, you go consult, and it's like, Man, that guy was awesome. And these are some good ideas, but fuck, we can't do it. Right. And all this is helping them do is take take that personal side and also adding a layer of execution, right and making it real so you can scale it and do more of it. And then on top of it that there's a lot of stuff we haven't even gotten into yet that I think we've been talking about kind of the wealth side and the activate side of developing a family legacy plan. You know, and having a framework and a program in here that's plug and play of like when you get into the



McMillan's and you get into whatever that you could actually lead and make it really dynamic from the family side of that process. They go through to really understand how and why they're giving.



11:33:44

Well, if you look at what could be done and isn't being done, for example, we have a young alumni happy hour event in Chicago and April, good event. You get a you get a picture of the group and you put it in the database, and then it just sits there till the next time they go back to Chicago. Where we tie in the fundraising is we have our annual gift day and end of October instead of this then we this getting the give day email everybody else is getting and it's a personalized message but it's Hey, great seeing you guys in Chicago. Here's remember the photo we had and give days coming up who look at supporting us, and we're looking at April 25 or next year. So how do you how do you tie any events into development? And I think the more the original concept of streamlining things and less staff time is really everything right.



11:35:01

Right, yeah, totally agree. Yeah, no, I think saying the same thing.



11:35:09

What I would need to do, and of course, is just in the very beginning of this whole conversation. But I've been thinking about the consulting thing for a long time. But what what I think I would want to do, I don't know when or how long away but I wouldn't want to have a you know, a test project. And I think once you know, you look at the bugs in that initial plan or an initial contact, and you got a really successful result. I think then, I think what happened I think ideally, it would be but I think you'd be off and running with staying as busy as I would want to stay and and really then I would be building the relationship on a personal level with that particular staff. And honestly, I'd be developing a relationship with their personal client or constituents and it's probably a lot of work to be done in between but I as I said earlier, I do think there's a need and a market for it. Because I've seen it for the last what 30 years



David Matenaer 11:36:40

so Rob, are you are you saying that you would become a consultant to different establishments or industrial institutions, and they would hire you to basically, you know, overhaul they're kind of planned giving and all of that. And you would use your 30 plus years of knowledge of creating connections of organizing things of just the way you thought through things and, and how you found success over the years. And what works and what doesn't work and that kind of stuff. And are you are you teaching a man to fish or you fishing for them? You know, I,



11:37:28

I think initially what I would what I would want to do is be a good salesman that was missing in their world and I know it is is the personal engagement. And then from there I would go into

their world and I know it is is the personal engagement. And then from there I would go into why I believe that and what the plan would be and then there'd be a menu and of course the that will depend on the contract that you're going to develop but it may just be an alumni relations, engagement plan. Okay, it may get into tie into the annual fund. It may tie into the endowment program and it may tie into the plan giving it all does have and then all the different events which would be support those different areas but I think I think I'd probably be my guess would be you want to sign a three year contract. So because you're going to start with the evaluation of where they're at with the database, with their staffing, and then build out and give them time to build the the database and the volunteer. And it takes some time to build the events. But I think I would start off with the first thing we got to do is aside from the database is establish what you evaluate your alumni engagement plan, and then and then develop that platform and then from there, you get into so many areas and actually you get an other software like prospect research, which is all public record. Who are the top 10 people you got to engage for a major gift. But I think you got to start at the beginning which most that I know of are most are the shooting from the hip and they just hope that like Burke said they send well my college like three years ago they had an alumni event in the Twin Cities Apple Valley. And the President was wife came the foundation guy and his wife came the alumni director came and our alumni came and alumni that came was me one person and all the Alicia said When will we send an email Okay, so we know that the way to do that is work way ahead of time to build a volunteer base to build a committee. And that committee is going to be built around who you need to engage. But then the work is that I think you're talking about this talent of AI is helping the information side of it. So it is more manageable and then they're not going to be overwhelmed and they can get it done. So that's the way I would do it is it's like recruiting for college football.

D

David Matenaer 11:40:52

I go to them, like me.



11:40:56

Did you know David, that helped I think with your question on top of what he said is I think very similar to kind of Eric You know if you taught thought of the true activate work, I think there's gonna be probably ideally there'd be like three or four kind of layers of engagement that an institution could have. One is more platform based, you know, with maybe a planning on the front end, all the way up to the top end, which is the white gloves. You know, Coach Bo, doing more of the fishing, instead of just teaching them how to fish where he's actually physically engaged with your people and your constituents and then I and again, my vision might be a little different than his but you know from there, it's like, how do you start building a staff to then go do more of that, you know, because the, you know, like with Eric's work, it's like, if you can, if you're doing all the fishing, you can work with two schools and you're full. You know what I mean? Like that's where I think the idea with the platform is like, hey, there's some scalability and hopefully some ability to leverage these planning tools and the execution and the engagement without having to actually be in there. And do the work for them so



11:42:19

to speak. mean yeah, you definitely want to build a program that can be a well oiled machine

after you're gone. You know, after your contract is done, with how to do it. And you hope that they, I mean, it's pretty much common sense that you're gonna have more success if you're more personal. If they have the time. Where they've got, as you said, they got to they got to have the right people on the staff and a lot of them don't have the right people. And then we'll understand really understand how to, how to engage and recruit. I go back to the football recruiting. It's all it's all challenging, but there's a there's a method to the madness to get it done. You know, if you have a good plan so what will be our next steps?

D

David Matenaer 11:43:35

So, our next step would be I think what, what we need to do is basically, probably just talk through this a little bit more in terms of, of what of like who you want to maybe kind of target first, and how we could, you know, kind of maybe take this phased approach, you know, and that that's like when you're ready to go to market. What I would need is probably more in depth, you know, understanding as to how you do things, you know, just to get more kind of context. So that, you know, I can kind of, you know, teach the AI exactly, you know, this is kind of what you're in charge of doing and stuff and to see how we could kind of automate that and augment you know, what you're doing now. And so, I built right here I can kind of using our conversation and talking with a that kind of helped me understand what we're talking about and how we could potentially roll this out. And so it, it's come up with some email, I can send this to you. But basically you're saying phase one is some of that foundation where we establish what are those maybe three core kind of workflows that, you know, potentially could solve 80% of the pain, you know, and one of them obviously, is the database and establishing kind of, you know, the you know, who is the audience for that particular institution, but you can kind of see how it starts to go through all of this and this, you know, it it gets a little long winded at times, but you know, basically, having more conversations with you will help to kind of like it like, hey, what I say it is like, you know, when I say here's your magic wand, in a sense, you're predicting your own future, you're trying to manifest, this is what I would this is what I want to do in three years from now, boom. That information is probably the most important of all of the information because we're giving you know, the AI an objective or target something to move towards OnStar then as we start working, you know, with lifestyle what I have on the screen here, the AI will always be saying okay, now we're trying to get to the outcome. What is the next best step? That I need to take to most efficiently get to that outcome? And surprisingly, it does a very, very good job in terms of, of predict predictions around what what needs to happen. And you know, some of the stuff and that was I was just showing you staying well built the platform of above. I'm like, we're already we already have the platform, you know, so like we can already kind of jump ahead to where we're at. It's just from my own, you know, knowledge of doing this for almost 30 years and you know, owning a creative agency and such. I always would say even before AI, you know client calls, tells me what they want to do. I want to do XYZ yada yada yada yada yada and then they say Well, do you have assets you can give us and stuff like that, then I would always say hey, here's your magic wand. Tell me now, once we have this thing done. Tell me, like each of the 10 of the stakeholders that are going into this platform, what are they feeling? And how are they you know? It's like so like you can do what you want to do is you want to, you want to make sure that you're not only targeting the outcome or what you want is, you know, to generate money XYZ, but you want to take care of everyone, you know, in regardless of what layer they're at, so you have your core people, you know, you have the family, the alumni is probably the most important here, right? Then you go out and level. Now you have the alumni office and then you add on all these other layers and stuff. And we want to like like you're you're saying is that eight, eight different groups are reaching out to the same person, and they don't know which group is what and so

it's just like, a whole I don't know how much you want to kind of go in and, you know, solve all of this or just kind of start small and, you know, crawl before you walk in terms of how you can implement this. So having that understanding as to what the magic wand is for everyone. I think that's pretty critical.



11:48:55

Would it be helpful if I just got him kind of set up to, to kind of like we did the voice recording, like have him talk through some case studies and capital campaigns and just like, instead of trying to type up and I'm sure there's other documents out there that he's used that could help kind of feed into from an acid standpoint, but if I got him just with an Air Bud and just just going off, you know, for Ohio, when that'd be helpful then to pile in on top of that and give you more color.



David Matenaer 11:49:31

Yeah, I mean, and I mean I've been using any use the sound recorder on your phone, or voice memo, that little red kind of icon. Yeah, just hit that and just, you know, hit record and boom, you know, that's all it is. And thinking through like because what we're trying to do is basically take what you've done as a human and not automate you out of a job. We're trying to reduce your suffering, of being human making mistakes. Yada yada yada all the forgiving stuff not looking as being overwhelmed, bump up up above but, and if you think about like, like Brooks was saying is that it's great to have this list of here's what you should do. But now someone's got to go do it. And that's what we want the AI to do is as much as possible, this busy work, to set you up to have more time to pick up the phone to call, you know, to create those connections. That's what we're trying to do. So



11:50:42

if I were you mentioned a minute ago about the outer layers and Brooks talked about Wisconsin, the different connection I think what I would recommend to a school is that anything with advancement comes from one place and and if the if the theater director was a partner that would but still come through one database in one place, so I think he can clean all that up. But I think it's pretty amazing what what the AI came up with even what you showed there.



David Matenaer 11:51:23

Yeah, I'll send that to you and Brooks after the call here because it's, it's, it's not reasoning, you know, you know, it's not thinking in a sense, what it's doing is just predicting the highest probability of what word should come next. So if it has the context, it don't it didn't I mean, it's, you know, so I have a funny story. It's a quick one it's, I call it the avocado button. I'm going to have a button on our on our platform it says the avocado button what it is, is that my niece and her fiance live out in California, and in their backyard, they have a giant avocado tree. I mean, they'd be great. Have you said they say the drips, avocados like 2030 a day. They said we've eaten so many avocados, I can't believe we're not green. And I said, Well, let's ask the AI for other recipes. Like what you could do with avocado and they're both like yeah, we've been

there done that. We know we've made everything avocado soup avocado, but I got to ask it, so I asked it. It comes back with a list of 10 prefers 123 they're like Yeah, yeah, yeah, yeah, we got down to eight, and they're like that. That sounds pretty good. And what's number nine, you know, so we came up with two recipes that they never even thought of, then they're like, ask it for the recipe. And, you know, and it's just like, that's what we're trying to do. You know, we're not trying to just, you know, I mean, obviously we're trying to take care of the busy work and all the the eight things that we've done, but we want to be able to kind of brainstorm and CO create new ways of communicating and building connections through humans. And when we talk about this person being a theater major and this this this this I basically for my, my tax accountant. I've been trying to help him kind of figure out his business because he's got 25 accountants in AI soon he's gonna start, you know, doing accounting, but he's like, and so what we want to do is we want to become more of, you know, the, the customer experience, you know, manager for them. Hey, yeah, we'll do your accounting. But if you're a small business owner, we will help consult. You know, how to, you know, do you know, buy a car and depreciate it know that it's more than just accounting but more of a consultant to have a rule. And so what I did is I took my tax return, I put it into AI, and I said, Build me a holistic profile based on the information I have. And you know, my kids aren't on it because they don't claim them anymore, but my wife is and my business and stuff. It comes back with a list of 100 things, basically building a profile of who I am, where I'm from, how much money I make and deducted and all that kind of stuff. And that data is just gold because now you put another person in not their texture. And now you say find the connections. And lo and behold, it will find them like that. So, data is king and that's why when we're talking I have my note taker here, because what we're doing is talking we're producing data, we're making words and these words, you know, if you're not recording them, these go into the ether, they go into your ear, whatever. But since I am recording them, I can now take that data and apply it in real time with questions. And so that's what maybe you were seeing when I was showing you that I'll clean up a little bit and send you hey, here's the game plan so So yeah, if you had a magic wand and say you know, by Monday, this was all working. And you who would you go talk to first. Right, whether it's an institution, or who would you go talk to? I mean, is there someone in mind that give me a profile as to how



11:55:50

to do one of those smaller colleges, either a local area that I know, in Minnesota or North Dakota, or even just in the cities here, but my question Dave is, so let's say I go to college, and I explain the program and the goals and like you sent us. So how do we connect their information, the end their database with the AI? How do we make that connection?



David Matenaer 11:56:29

So you're saying that we would ask for their data. And then, you know, we use all Amazon servers and all their security and stuff, by the way, so so it's like, people are always like, Well how do you know like, well, Amazon knows what they're doing. And so we just use all their stuff. And we just follow it to a tee and then you don't have any problems. So I think what would be easiest, is, you know, if you could just get a spreadsheet, you know, like export from, you know, their database, even just a sampling of, of whatever. And in the fields that you would look at as a human right, because you would probably look at Oh, what was their degree and What sports did they play? Have they given money before? You know, yada yada, yada, you

know, as much as as possible. And that's, that's enough for me to take that and then to put it into a into a live kind of demo where they could then go, you know, in a sense, we could implement this in less than a month or you know, or something and get this stolen. Here's my credit card. Because we work with Hormel Foods, and they have 75 different manufacturing plants and stuff around the country. And what we do is we help them communicate about their employee benefits. So you know, in California, they have different laws so their benefits are different. If you're, if you're a smoker, you're and they just couldn't wrangle it and some ways, so give me all of your communication around the plans. But then give me all the data on your 20,000 employees. So every Thursday night, their system uploads a copy of their database to our database. And then what our database does is that it goes through each line by line to say, hey, what groups does this person belong to? Oh, they worked part time. Okay. We they work at the Wilmington plant in Delaware. They are a smoker, they are single, yada, yada, yada. So one person can belong to many groups. Then what we do is you can make groups of groups. So you can say, hey, I want to send out an email to all of the smokers who are part time who work in California, right? There's your group. Yeah. So it's like, that's what I think you're talking about is trying to find those connections. But then I think tying it to like upcoming kind of events and things. I like how you're talking about kind of referencing previous things. Not only planning for things in the future in leveraging the past so yeah, looks like Brooks got a jump. So yeah, I think if you I mean, I don't know if even you have some data, like you know, something that you can share with that. You know, you trust me with I can kind of show you some ideas.



12:00:00

We have a lot of data. And I've got examples of things that we share manually and personalized and Belmont agreements, personalized scholarship agreements, awards, events, details and all that and then but I think what I got to think about is you know, setting up understanding more and giving me more information, but then how do I set up a consulting firm and then even if it's part time for me to start with to go to tech school, like I said, and I went a little bit I know now and plus what I already wanted to do I know that is going to be a really good possibility of making something happen. I just gotta get my arms around it. And, and, you know, I'm not a business guy. You know,



David Matenaer 12:01:13

bookstore never



12:01:14

had a business but in my perfect world, I would retire here. I would office at home and I would manage whatever amount of work I want to maybe I only have four clients. I don't know. You know, I don't want I don't want to work myself to death. But I also know that there's a product that needs to be out there. I just don't think enough. Enough. People understand the impact of this personal engagement, but plus the power of the AI. The power that those staffs cannot do. They cannot do it. So now where are you located?



David Matenaer 12:02:11

I'm in St. Paul. But I'm up at my cabin now. In holding Minnesota. We're pretty much come here on summer outing. Do you know where crosslake is?



12:02:24

Oh, yeah, yeah. We're taking the family to Breezy Point. Monday through



David Matenaer 12:02:32

Oh, yeah. We're about 25 miles north east of Breezy Point.



12:02:37

Okay, well, the whole family that we have the one Kevin and Dickens lodge that sleeps 24 Oh, wow. So it'll be crazy.



David Matenaer 12:02:50

grandkids and everyone come in and start.



12:02:53

We have our four kids, their spouses and 13 grandkids. So it'll be crazy. But yeah, I'll be on time with Brooks to talk about it. But maybe sometime when you are back in St. Paul. We could also connect a coffee or something.



David Matenaer 12:03:16

Yeah. Yeah, that'd be great. But



12:03:18

I might do either over the weekend, or whenever I can, as I just might send you some documents that enlighten AI a little bit on certain areas like the endowment. I think a plan which kind of ties in with all this personal and really what sets the plan apart from anyone else. That's what I want to try to do. Yeah.



David Matenaer 12:03:48

Do you? How do you think you would get those to do do you use Google Drive or anything? Or,



12:03:55

like could



David Matenaer 12:03:59

we do I just worry that sometimes if it's too big, sometimes that you know, doesn't stand? You know,



12:04:08

the best way to do it.



David Matenaer 12:04:10

That's a good one. Otherwise, there's this free one. You know, that you can that I use a lot to where you just put in my email, I can email to you. But if you know Google Drive, that would probably be the easiest just as I actually get a notification when you share it with with my email. Okay, that'd probably be the easiest.



12:04:31

I'll look at that. If not over the weekend, and we're going to go up Monday to Breezy Point, but we're going to be back in the office Friday, but I'll definitely get you this some stuff. And, like Brooke said that we've done and going way back to either philosophy or documents are and we try to do which we do, I think different than most and we do a lot of imbalance our minimum dominance \$50,000 And it's a boiler plate agreement. But we had the obviously the criteria for it's usually for a scholarship but then we had the story of the family or the from typically the grand picture, and typically a more if whatever, they want a more recent picture. So it's it's much more emotional and personal. And that's what I do is not just engage but connect emotionally. And we know how it works. And I'll say one last story. In the movie we show. Matthew McConaughey this when the football team from Marcia crash, the whole the whole team died. And Matthew McConaughey is the new coach. And at that time in nai the freshmen were who they were ineligible to play. So he had appeal to the NAI and he went to the president and he said, Mr. President, I've written five letters to any I have no response. And the President looked at him and said, Coach, let me ask you a question when you when you ask your wife to marry you, that you send a letter to her. And he goes, God and I'm gonna get on a flight to Kansas City. That had made yesterday in person. But how can you make if you're talking to a donor?



12:06:47

How can your you know the goal of everybody's is to get a donation?





12:06:54

How can you separate yourself from everybody else? And there's only one way to do it. And that's my personal even if it's AI generated. It's still personal because if we do know them directly, that communication indicates it's not this beer Joe and then a form complete Form Letter, right? Like you say you add into you know, they go to the Palm Desert in the winter. Now, it's an automatic PS oversee in Palm Desert. All of us can see a complete Form Letter a mile away, and typically even read it, you'll just throw it away. Because these people that we want to connect with. They get a lot of nonprofits trying to contact them. How are we how are we different? Off we're committed to being different by being more personal than we know. It'll work. So I'll send you some stuff and we'll connect. Yeah, at the latest and the next week. I'll get it to you and then we'll, we'll see where it goes. And I think I know they're just a matter of how and when we do it.



David Matenaer 12:08:14

Yeah, yeah. Even if you know of a couple of documents that Oh, I should slap them in the email today even because that would be great. Because I that would help me to kind of get you guys something that you guys could talk through next week, then, you know, so I've tried.



12:08:34

Okay, I'll try today to get a couple of those things. I'll figure out the Google Drive by then.



David Matenaer 12:08:42

We'll Yeah. Or I'll just slap them in the email too. Because if they're just Word docs and stuff, you know, that's not too bad or PDF.



12:08:51

Overly lengthy immunodominant agreement. They just so I'll try and email one way or I'll get you something. All right. We'll be in touch. Good luck.



David Matenaer 12:09:04

Thanks. Have a good weekend. Have fun next week. Yeah, enjoy the lake. Okay, thanks.