EMPATHY MAP: BUSINESS LANDSCAPE

What are your business goals?

What are your successes today? Increase Reduce costs donation Reduce spending Optimize data **Enhance Profiling** associated with Priorities have been desirability based on focused Donors are targeting and Activities capital raising established for strategies thinking about analysis funding purposes leaving a legacy Increased Rebranding 8 – 10-year capital Targeted recognition capital raise campaign Strengthen communications to donors Setup for tracking activities donors' donors and their capital relationship Better target Raise more activities (manual **Identify** interests Big gifts have your efforts Technology updates process) money and ability to been received in have made the system Optimize donate the past dew management better process months (CRM) **External Challenges?** Internal difficulties or concerns? Lack of Academia is Lack of Lack of Outsource behind the specialized budget time vendors personnel curve Infrastructure is Recruiting new Contracts for Acquisition processes Jewish handled by IT vendor that donors for new technologies universities are lengthy create increase analysis competition Lengthy prospect cultivation

JOURNEY MAP: AS-IS DATA STRATEGY PHASES: COLLECT | ORGANIZE | ANALYZE | INFUSE

	•	Infuse
Alumni gets added to database as they graduate Parents get added to the system as students Erroll CRM Admissions direct the inquires to be added to database Connectors move data from admissions CRM Connectors move data from admissions	SSRS for reporting/ CSV output No advance graphing capabilities No freedom or ways to explore data	Dashboards exists but not currently used VP gets reports to keep track of raising capabilities No automation Siloed process/ Data ownership is rigid

STORYBOARDS: DATA USE CASE AND PERSONAS

Use Case

Incorporating AI to your workflow to better target donors

Data Source

CRM / structured data is donors' data

Capabilities

Vendors due low-level donor targeting /email campaigns etc.

Persona

Director of annual giving/ highly technical role

Automation enhancement

CRM / SSRS Reporting Layer (source system) –structured data

Reporting production and delivery (CSV with graphs / YOY)

Senior Director of Information Systems/ Highly technical role

Tech mining to remove noise on the data from news and reports / NLP

Source System / web scraping NLP – unstructured data

External Report / Setup by name

Director of Research/ Highly technical

PRIORITIZATION MATRIX

