# **AI Scoring & Insights Demo - July 02**

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[@0:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=0.0) - **Sim Borodach (Hatch)**

Good to see you. Good to see you as well.

[@0:02](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2.14) - **Paul Hamann (impactnps.com)**

Wow, you got some.

[@0:04](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=4.26) - **Sim Borodach (Hatch)**

Yeah, that's a cool painting you brought on in the back there.

[@0:07](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=7.84) - **Paul Hamann (impactnps.com)**

Which one is it? The one with the old lady in it?

[@0:14](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=14.2) - **Sim Borodach (Hatch)**

Yeah, I guess on the left here. Oh. Simon Museum from the Simon Museum.

[@0:18](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=18.3) - **Paul Hamann (impactnps.com)**

Oh, yeah, that is Diego Rivera. Print.

[@0:25](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=25.38) - **Sim Borodach (Hatch)**

Diego Rivera. Okay, I don't know part of my ignorance.

[@0:28](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=28.38) - **Paul Hamann (impactnps.com)**

No, Rivera, the Mexican artist, husband of Frida Kahlo. Yeah, I always loved that. That piece is very different from most of his artwork.

His other stuff is usually pretty revolutionary, but I always thought this one was really cool. When you say revolutionary, what do you mean?

It was, you know, he did a lot of work like back in the late 1800s, early 1900s. So a lot of it was around, you workers' rights.

A lot of it was around literally revolution in Mexico.

[@0:59](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=59.28) - **Sim Borodach (Hatch)**

Go.

[@1:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=60.0) - **Paul Hamann (impactnps.com)**

So, mean, really powerful stuff, but I'd always just like, this one was just a little bit more tame for my taste.

Okay, that's cool.

[@1:09](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=69.04) - **Sim Borodach (Hatch)**

That's cool. So, it's novel in the context of the artist. novel, yes.

[@1:17](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=77.24) - **Paul Hamann (impactnps.com)**

That's a good way of putting Yes, it is novel within the context of his work, and believe me, I'm not an art person at all, but I just always kind of like, just like the print, so.

[@1:27](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=87.4) - **Sim Borodach (Hatch)**

Oh, interesting. Okay. That's pretty sweet. Diego Rivera. Okay, I'm going to keep an eye out. mean, we, I live in, I'm sorry.

[@1:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=94.58) - **Paul Hamann (impactnps.com)**

Yeah, no, so like, so where do you live?

[@1:38](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=98.38) - **Sim Borodach (Hatch)**

In Los Angeles. In Los Angeles.

[@1:40](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=100.52) - **Paul Hamann (impactnps.com)**

actually, I think he's got some work in Los Angeles. So, during the Depression, when they had the public's work at, they did a, he was commissioned to do a lot of murals of public buildings.

So, he's probably, has actually got some very large murals, like, probably like an old city hall or something like that.

not. not. You're

[@2:01](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=121.32) - **Sim Borodach (Hatch)**

You know, his name is, his name is really familiar. Uh-huh, yeah. Really familiar. Yeah, so he, he's actually, I mean, I've only been here for, mm-hmm.

No, he's Mexican, he's done a lot, he did a lot of work in the United States. Okay. Yeah. I've only been here, I mean, I lived in Jersey, I grew up in Jersey, and I've only lived here for two, three years.

Okay. So, still getting familiar. I wonder if you, I mean, there's an incredible mural that they painted along the, what used to be the L.A.

River. Okay. And I, I wonder if he was involved with that. Yeah. when again was he painting?

[@2:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=164.4) - **Paul Hamann (impactnps.com)**

Well, it was mostly like, uh, late 1800s to about 1940, I think. Um, so a lot, a lot of his work, like, was during the Depression.

Um. Right. And, and that kind of stuff. Um. Um. Yeah, so I'm just looking. There actually is something in L.A.

called the Diego Rivera Learning Complex in L.A. I do stuff on South Central.

[@3:11](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=191.66) - **Sim Borodach (Hatch)**

South Central. The L.A. Learning Complex?.A.

[@3:18](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=198.7) - **Paul Hamann (impactnps.com)**

The Diego Rivera Learning Complex. It's a high school, evidently, but it looks like they might have a lot of his work, maybe?

[@3:27](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=207.2) - **Sim Borodach (Hatch)**

School of Performing Arts. Yeah. Lawrence Graham. Let's see if it's near. It looks just a little bit south of where I am.

Okay, yeah. Cool.

[@3:47](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=227.56) - **Paul Hamann (impactnps.com)**

And he actually did a lot of work in San Francisco, too, like at Coit Tower, the great big monument in San Francisco.

He basically did the whole interior of the base of that. I know. So, yeah, pretty cool stuff.

[@4:06](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=246.76) - **Sim Borodach (Hatch)**

Point Tower.

[@4:08](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=248.0) - **Paul Hamann (impactnps.com)**

Point, yeah, C-O-I-T, Quake Tower.

[@4:11](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=251.86) - **Sim Borodach (Hatch)**

Oh, C-O-I-T, Quake Tower. I've been to San Francisco a couple times, I don't think I know the Quake. Oh, yeah, okay, of course, of course, it's up on the hill.

[@4:22](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=262.44) - **Paul Hamann (impactnps.com)**

that's actually a monument to the firefighters who fought fires after the Earthquake. that tower is supposed to look like a fire nozzle, fire hose.

[@4:35](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=275.14) - **Sim Borodach (Hatch)**

A fire hose? Yeah, mean, it kind of does.

[@4:38](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=278.5) - **Paul Hamann (impactnps.com)**

Yeah, that's, I used to live, like, a mile from there for many years. But, yeah, Quake Tower is actually supposed to be like, it's supposed to look like a fire hose at the end of a fire hose.

the whole entire, like, face of it, he did.

[@4:58](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=298.04) - **Sim Borodach (Hatch)**

That, is it painted? It's painted at the base? Yeah. So cool. I'll have to check it out next time I'm up.

Well, now I'm much more – I just increased my cultural literacy as an L.A. resident by many folds.

[@5:16](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=316.56) - **Paul Hamann (impactnps.com)**

And from somebody who's not even an art person, believe me.

[@5:24](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=324.08) - **Sim Borodach (Hatch)**

Pull out anything else that you got up your sleeve.

[@5:30](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=330.0) - **Paul Hamann (impactnps.com)**

Pull out something, so.

[@5:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=334.2) - **Sim Borodach (Hatch)**

Yep. That's good. Exactly. So how are things at Hatch? Thank God they're going really well. Good. We're just launching our Salesforce integration right now.

[@5:47](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=347.98) - **Paul Hamann (impactnps.com)**

We just tested it with our first customer.

[@5:50](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=350.54) - **Sim Borodach (Hatch)**

Okay.

[@5:51](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=351.8) - **Paul Hamann (impactnps.com)**

So that's really exciting.

[@5:52](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=352.98) - **Sim Borodach (Hatch)**

Do you work with any customers? So my one client – Neither – Both of my bigger clients, both –

[@6:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=360.0) - **Paul Hamann (impactnps.com)**

It was Salesforce.

[@6:03](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=363.54) - **Sim Borodach (Hatch)**

Oh, amazing. Yeah.

[@6:06](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=366.5) - **Paul Hamann (impactnps.com)**

That's great to know.

[@6:08](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=368.0) - **Sim Borodach (Hatch)**

Yeah. So the integration means that, you know, you kind of had the, what are their names, by the way?

[@6:18](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=378.1) - **Paul Hamann (impactnps.com)**

One is SkillsUSA, Illinois. Oh, Skills, for sure.

[@6:24](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=384.2) - **Sim Borodach (Hatch)**

Yeah. And then the other one, YouthBuildLink County.

[@6:29](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=389.1) - **Paul Hamann (impactnps.com)**

Oh, okay.

[@6:30](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=390.62) - **Sim Borodach (Hatch)**

Yeah, both of those are on.

[@6:31](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=391.74) - **Paul Hamann (impactnps.com)**

So Skills, SkillsUSA's, there's much more, I think, the way Salesforce was designed to, like, a whole organization, RSM, you know, everything, all their stuff is in Salesforce, whereas YouthBuildLink County primarily uses it for advocacy and fundraising purposes.

[@6:54](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=414.28) - **Sim Borodach (Hatch)**

Advocacy and fundraising. Okay. Yeah, kind of like tracking. Uh But they, but they both. they Yeah, attracting community partners on that basis.

[@7:03](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=423.48) - **Paul Hamann (impactnps.com)**

Oh, okay.

[@7:05](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=425.76) - **Sim Borodach (Hatch)**

Oh, so maybe only the one would be relevant for using with Hatch, it sounds like.

[@7:12](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=432.22) - **Paul Hamann (impactnps.com)**

No, actually, Skills, I mean, if you're relevating for the fundraising purposes, it would be both of them. So, SkillsBuild is much further along in the use of Salesforce for fundraising than SkillsUSA is, much further along.

[@7:35](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=455.54) - **Sim Borodach (Hatch)**

And so, Skills, you were saying, uses it for, like, partners?

[@7:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=461.16) - **Paul Hamann (impactnps.com)**

SkillsUSA uses it for everything from registration for events, tracking their 2,500 members, keeping track of grants, deliverables, all that kind of stuff.

Whereas, YouthBuild uses it more just for... Tracking Community Partnerships and Fundraising. Okay.

[@8:05](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=485.78) - **Sim Borodach (Hatch)**

Yeah.

[@8:08](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=488.62) - **Paul Hamann (impactnps.com)**

And SkillsUSA just really started to make headway and really fully integrating Salesforce about five or six months ago. They've had some issues.

So they're kind of tripping over themselves. Well, sometimes they do it, but that's okay. Whereas YouthBuild Lake County, like I said, they've been using it, I think, for four or five years for fundraising purposes, for donor cultivating, you know, donor tracking and that kind of stuff.

[@8:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=524.84) - **Sim Borodach (Hatch)**

So maybe a next step for, you know, because, so let's play a little bit about how the integration works.

Yeah. I think especially for YouthBuild, this could be, this could be the way into getting them more proactively using the Hatch Intelligence.

Absolutely. Yeah. So let's. Thank you. Integration passes information between Hatch and Salesforce. Okay. So Hatch is pulling the data from Salesforce without the need to do any type of manual export to Salesforce and upload.

Okay. And it's going to do a poll every night on new donation records. So the Hatch data is, yeah, yeah, yeah, I mean, React away.

Yeah.

[@9:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=584.12) - **Paul Hamann (impactnps.com)**

Okay. And then, so Hatch will do that extraction from Salesforce and then kind of do research? Is that it or use it to confirm or?

[@9:59](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=599.34) - **Sim Borodach (Hatch)**

So, yeah. Oh, so the, so the donation, so right, okay, so, so the first important thing is that everything's automated, right?

There's no more need for the manual export and upload. Okay. So eating all that the Salesforce user needs to do, it takes about half an hour to get the integration set up initially.

But then once that's done, they have two mechanisms for, you know, deciding who comes over to Hatch. One is they could do one at a time.

They're on a constituent record in Salesforce and they say, I want to enrich this person in Hatch. And the second way is they can just allocate a list in Salesforce or a campaign, I think they're called, and say, bring these folks into Hatch.

And then once records are, they're now all being enriched in Hatch and they look the same way that you're used to seeing donor profiles.

But the key thing is that the scoring, you remember the scoring from the demo that we did, the AI scoring and insights?

[@10:54](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=654.18) - **Paul Hamann (impactnps.com)**

It's, that's what I thought we were supposed to be talking about today, but this other stuff. Oh, yeah.

[@10:58](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=658.94) - **Sim Borodach (Hatch)**

Important. Yeah. Oh, so you didn't come to the webinar, it sounds like. No, I didn't. It's totally fine. crazy few months, yeah.

[@11:09](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=669.04) - **Paul Hamann (impactnps.com)**

Okay.

[@11:09](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=669.92) - **Sim Borodach (Hatch)**

Yeah. It's totally fine. I don't know why in my memory you were there, but no worries. We'll take it from the top.

And so we'll look at in just a moment are the scores that are now being generated on all your donor profiles in both accounts.

And so the scores are going to be pushed back to the Salesforce, right? So there's a card because on the sales, every single Salesforce record, there is family relationships, contact information, donation history to organization.

So now there's going to be a tile for Hatch AI scores and insights. Okay. And hopefully you'll find that informative today as we go over it in just a moment.

Bye. Yeah, so let me just give a full pause and take a breath there. What do you think? How does that sound to you?

[@12:08](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=728.6) - **Paul Hamann (impactnps.com)**

Well, I think it sounds that could be a cool thing. I'm not sure if either client right now is ready for it, just because of some internal stuff that's going on, but I'm really, really glad to know that this is going to be a possibility.

Yeah, because like the whole thing about, you said, uploading records and all that kind of stuff as a bit of a, not for instance, but to be able to eliminate that step, that's fantastic.

So, yeah, no, I mean, yeah, so I'll be anxious to see this. Yeah, and then a couple weeks ago with Sam, he was like saying, he was telling me about the AI scoring, and that's why he set this up for you and I today, because I wasn't able to be at the webinar.

[@12:46](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=766.8) - **Sim Borodach (Hatch)**

So, yeah, so, yeah, so, yeah, so I get there going things going on internally. What it allows for is like once, when

We can set this up. It means that you, as the consultant, can sort of guide them to say, hey, when you're on a constituent record in your sales force, we can show them how to interpret the scores and see, oh, this person looks promising for us.

They've given us $1,000 annually. It looks like they could be giving us $10,000 annually. And then there's a next step for them to take where they can actually go right into Hatch and take a very meaningful next step without a lot of overhead.

It's like really, it's just a one, two, boom, boom. And then they're going to start getting into this cycle.

[@13:43](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=823.4) - **Paul Hamann (impactnps.com)**

Oh, I like the sounds of that.

[@13:46](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=826.9) - **Sim Borodach (Hatch)**

Okay, so let's take the theory and put it into reality. Okay, so we're going to look at this person in YouthBuilds.

account named Michael Conway. I know these are your clients, so you may not be as familiar with them, with the donors as, you know, Tamika would be.

So, so, so far this should look familiar to you, right? The, yeah, certainly. But then what, so this is the section that we added.

Okay. And we really believe that it's quite revolutionary. So I'm going to walk you through it step by step or component by component.

But just as a broad overview, this is basically broken down into three parts. Okay, you have Hatch, Giving Score, which is a composite of the five subscores, which is the second section here, the five subscores.

Okay. And then the third section is the, like these actual dollar amounts that you can use as guides for how much a prospect can be asked.

Depending on what phase they are in relation to the organization, and this is sort of a catch-all number that tells you, you know, their overall potential value to the organization.

Okay. And so we'll go over each component one by one now, but before we do, do you want to ask any questions or make any preliminary comments?

No.

[@15:22](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=922.48) - **Paul Hamann (impactnps.com)**

So I just ran a whole bunch of Wealth Engine reports on a lot of these donors. I'll be just going take out my Wealth Engine report and see how it compares to this.

But no, this is cool. I like it.

[@15:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=934.26) - **Sim Borodach (Hatch)**

Okay. Yeah. I mean, we definitely want to hear how those compare to the Wealth Engine reports. What types of metrics does the Wealth Engine report give you?

[@15:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=944.48) - **Paul Hamann (impactnps.com)**

So Wealth Engine, of course, uses, we've got to put in a lot of the same data. It's first gift, largest gift, most recent gift.

It's total giving, and then it provides scores that we really look at most of us. Is it an affinity score?

That is, how close is the person to the mission of the organization based on history of giving and frequency of giving?

It takes a look at capacity, but capacity can sometimes be misleading because the person may have their charitable giving in a foundation or trust or something like that.

And then it has their overall philanthropic score as far as their history of philanthropy to other organizations in general.

So, like for youth, Phil, because they really haven't done much to cultivate donors over the years, those affinity scores have been really important.

They just show kind of like how much of a connection the person has to the mission. So, I've been basing a lot of my research on those.

And then I come into Hatch, I kind of do more research on them and that kind of stuff.

[@17:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1020.0) - **Sim Borodach (Hatch)**

Do understand how the affinity score works, like, under the hood to any extent? Like, how they're determining the affinity of those prospects?

[@17:11](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1031.2) - **Paul Hamann (impactnps.com)**

By length of donation, the length of time they've been giving, the amount that they've given, and the frequency. It's those three pieces, I believe, is what the Wealth Engine affinity score looks like.

[@17:27](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1047.78) - **Sim Borodach (Hatch)**

So they look at, so really what I'm asking is, when they're kind of comparing organizations, right? Or is it just affinity based on, they're just saying, here's the affinity based on what they've given to you or to others?

[@17:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1061.06) - **Paul Hamann (impactnps.com)**

Affinity to my clients, so affinity to you, Bill, right?

[@17:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1065.06) - **Sim Borodach (Hatch)**

Oh, okay. Yeah, no, it's just affinity, Bill, yeah.

[@17:48](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1068.7) - **Paul Hamann (impactnps.com)**

Then there is, like, an overall philanthropic score, if they've been, you know, philanthropic towards other organizations as well. But we really look at the affinity score.

Okay.

[@18:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1080.0) - **Sim Borodach (Hatch)**

Okay. Awesome. Okay. So hopefully what I'm about to show you, again, we did a lot of research into the industry competitors.

So, you know, we built sort of what we built off of our knowledge of that. And I think I'm going to go here from the center outward, from the most novel to what I think is kind of the least novel.

So we took, I'm going to even zoom in here just so you can kind of focus on this. Okay.

So we're going to focus on donations affinity and profile affinity. And these are two of the five scorers. You could see the names of the other scorers, which should be kind of obvious what they refer to.

And these other ones, while there is some novelty in the details of their operation, it sounds like you're basically familiar with these from Wealth Engine.

And the only difference would be in naming. This is what they're calling their affinity score. This is what they're calling their philanthropy score.

And this is what they're calling their capacity score. Right. OK. Yeah. So we'll get back to those in a second.

In particular, this affluence score and also a detail about the MyOrg donation score. Why I feel like why I want to, you know, in some sense, convince you or just like convey that ours are different.

I'm to get to that in just a moment. So the real crux of the novelty for you, I believe, is going to be in these affinity scores.

So we took the concept of affinity and we number one, we we we are using data that is not available yet to the organization.

So this includes information that the organization provides, but goes way beyond that to publicly available data. Okay. And then.

then. And Um, we split that concept into two. So we broke it into donations and profile. And donations obviously refers to historical giving, both to the organization itself, but also to other entities.

And I'm going to explain how AI is used in a very relatable way. It's not a crazy use of AI.

It's just what we consider to be a maybe, you know, precision use case. Right. then profile affinity looks at all of the detail pertaining to the person outside of their philanthropy.

So I'm going to give you a minute just, or, you know, a few seconds just to read this sentence, which explains why this person got a 100 out of 100 for their profile affinity.

Okay. It makes sense. And I'm going to zoom out and I'm going to hit that CY button so you could read the detailed facts that we generated about this person.

[@20:57](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1257.4) - **Paul Hamann (impactnps.com)**

Okay. Okay. Okay.

[@21:03](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1263.34) - **Sim Borodach (Hatch)**

What do you think? What's your impression?

[@21:06](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1266.28) - **Paul Hamann (impactnps.com)**

Okay, so what I like about this is I don't – it's more instantaneous than what Wealth Engine is. So Wealth Engine spits out a report, lovely, but then I've got to kind of log in to kind of get the details behind the mess.

And I like the fact that this is more instantaneously available. I like this.

[@21:37](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1297.6) - **Sim Borodach (Hatch)**

When you say you have to log in, could you just say a little bit more about what you mean by that?

So here's the deal.

[@21:42](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1302.7) - **Paul Hamann (impactnps.com)**

So it's like I – the consulting firm that I work with on these two projects, they've got the Wealth Engine license.

So I've got to send them. A list. They spit back the report. And if I want any more detail, then I've got to log into their account and go into that and find all this matter.

But at least for me in my situation, this is much more accessible.

[@22:16](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1336.24) - **Sim Borodach (Hatch)**

Awesome. Yeah.

[@22:18](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1338.28) - **Paul Hamann (impactnps.com)**

Yeah.

[@22:18](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1338.8) - **Sim Borodach (Hatch)**

And this just to I don't want to I mean, it's a little bit hard to not get ahead of myself because we're having a couple of threads at the same time.

But what you're seeing this entire view, it's going to looks a little bit different. I'm not as, you know, tailored to the hatch design because we're restricted by the Salesforce interface.

But all of these details, exactly what you see here appears in the Salesforce card. OK.

[@22:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1364.38) - **Paul Hamann (impactnps.com)**

OK. OK. OK. So propensity. OK. Yeah. So propensity.

[@23:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1380.0) - **Sim Borodach (Hatch)**

Now, okay, so now I want to come over to Donation's Affinity. I think I'm probably, I'm going to probably pull up another profile here that has a slightly better illustration of how it works, but for the moment, you're still seeing the profile from Conway, right?

Right, yes.

[@23:20](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1400.9) - **Paul Hamann (impactnps.com)**

It looks like the Affinity score is trying to load. Okay, there we go.

[@23:27](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1407.88) - **Sim Borodach (Hatch)**

So how does this work? We take, we aggregate all of the donations that you've seen down in the donor profile, right, where you have one row per donation for public gifts.

So we aggregate all those details here. So let's look at ActBlue, where we say, okay, they've donated 40 times.

We kind of take that concept of RFM, right, frequency, monetary amount. And we take the most recent year they gave, many times they gave, and then the total amount.

And then we combine that with, and this is the AI use case. The AI Mission of this organization, and we compare it to the mission of your organization, this case YouthBuild Lake County, and give a score essentially 0 to 5 of how, and it's a really good use of AI because it can't really hallucinate.

We're saying, here's the mission of ActBlue, here's the mission of YouthBuild Lake County, assess how similar these two are, and give a score 0 to 5.

And then those numbers crunch together through a pretty simple formula, and then we add all the, you know, all of that data together and get a score between 0 and 100.

So it's saying, how much affinity does this person have based on their historical philanthropy, including to YouthBuild Lake County, for YouthBuild Lake County, based on their RFM to each one of these organizations and the similarity score.

And then you could read the explanation of how similar, you know, what the overlap is, right? Although both may appeal to individuals with progressive values, the specific missions and operational focuses differ, suggesting a model.

Or a donor overall potential. Nice. The ones that have the greatest kind of donations affinity score, which is the combination of all four of these factors, appear toward the top.

So ActBlue got the highest out of all of these other ones, and you can scroll down and see further.

So reaction, impression.

[@25:23](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1523.36) - **Paul Hamann (impactnps.com)**

This is really cool, because what this tells me about him, you know, you mentioned you might want to go to another donor that's got a bigger score.

But what this says is that we, at according to this, the only social service agency he contributes to, based on the history of AI he was able to find.

All these other ones are political.

[@25:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1541.12) - **Sim Borodach (Hatch)**

Exactly.

[@25:42](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1542.0) - **Paul Hamann (impactnps.com)**

So although it may be an affinity score of nine, it shows that there's something about the organization that has touched him in some way or moved him to contribute outside of the political realm.

So yeah, the opinion, the opinion score may be nine, but to me. That's much more powerful than that.

[@26:04](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1564.52) - **Sim Borodach (Hatch)**

Paul, you're doing my job for me. Well, I mean, yeah, that's what I think is really cool about this.

[@26:10](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1570.48) - **Paul Hamann (impactnps.com)**

Yeah. Yeah.

[@26:12](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1572.98) - **Sim Borodach (Hatch)**

A lot of more users who have less experience with tools like these see the low score and they're like, well, you know, they say almost the opposite.

So that's what I mean. You're doing my job for me. Yeah. Yes. Spot on. And here's an example of someone else who does have some more relevant donations.

So I'll you a second just to read this.

[@26:40](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1600.88) - **Paul Hamann (impactnps.com)**

Okay.

[@26:43](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1603.08) - **Sim Borodach (Hatch)**

And then if we hit the CY, it takes a second to load because we're actually generating these explanations. All the data has been calculated.

We just have to regenerate the explanations. Right. Right. And then the Whatever, it's technical. you're interested, I can tell you why we'd set it up that way.

[@27:04](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1624.98) - **Paul Hamann (impactnps.com)**

But like you said, though, if this were in Salesforce, I would just click on the tile and it would give me all this.

Is that what I mean? Yeah.

[@27:14](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1634.2) - **Sim Borodach (Hatch)**

The one thing I'm actually not sure, I don't think these explanations, you don't get this particular view. You don't get the CY view.

have to click, but there's a link in the tile. There's a link directly to the Hatch profile. So click that link.

They blend right here, hit Insights, hit CY, and that's it.

[@27:36](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1656.8) - **Paul Hamann (impactnps.com)**

Okay. So here's a great example.

[@27:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1661.46) - **Sim Borodach (Hatch)**

Yeah. I'm kind of curious to know if you think this is, if you think this is accurate. George Council, uh,

[@28:10](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1690.12) - **Paul Hamann (impactnps.com)**

That would be accurate, I think, yes. And obviously, he gives mostly to Jewish organizations, which is very common for a lot of YouthBuild donors, given the demographic where they're at.

So, yeah. Interesting. Is YouthBuild in, it's in Pennsylvania, right?

[@28:31](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1711.74) - **Sim Borodach (Hatch)**

YouthBuild is in Lake, the Chicago area.

[@28:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1714.6) - **Paul Hamann (impactnps.com)**

So, Chicago, you've got Cook County, and then Lake County, where YouthBuild is at, is the first county to the north.

And the last county. Yeah, it's what we call one of the collar counties. So, it's one of the counties, Lake County is one of the counties that surrounds Cook County, where Chicago is at.

[@28:55](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1735.64) - **Sim Borodach (Hatch)**

Okay. And because people from Cook County are...

[@28:59](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1739.64) - **Paul Hamann (impactnps.com)**

Okay. I learned this when I moved here 23 years ago. Anything that's not Cook County is considered to be downstate, even if it's to the north.

It's like there's Cook County, then there's the rest of El Limon. It's the way people view it. Yeah, so YouthBuild is in one of the Collar Counties.

Collar.

[@29:24](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1764.38) - **Sim Borodach (Hatch)**

Yeah, the collar. What does collar mean?

[@29:26](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1766.66) - **Paul Hamann (impactnps.com)**

Well, it's like the collar on your shirt. It's like surrounding the, just like a collar surrounding your neck. It's one of the counties that surrounds Lake Cook County.

The collars.

[@29:39](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1779.8) - **Sim Borodach (Hatch)**

They're called collar counties.

[@29:42](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1782.66) - **Paul Hamann (impactnps.com)**

Gotcha, gotcha, cool.

[@29:44](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1784.18) - **Sim Borodach (Hatch)**

Would you mind scrolling down a little more? No, not at all.

[@29:48](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1788.18) - **Paul Hamann (impactnps.com)**

So Chicago Scholars Foundation, Jewish Federal, yeah. Yeah, so interesting too. But again, here is one of the very few organizations.

Yeah, Um, that, um, that is not Jewish related, then he's giving it to us.

[@30:09](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1809.22) - **Sim Borodach (Hatch)**

Chicago Lights?

[@30:11](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1811.0) - **Paul Hamann (impactnps.com)**

Uh, Chicago Lights, but he hasn't given anything to that. Uh, it's, it's a pretty small, pretty small social service agency, but I think it's a spinoff, uh, from the Presbyterian Church.

But, uh, yeah.

[@30:27](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1827.44) - **Sim Borodach (Hatch)**

So, just in the interest of time, um, I wanna, I wanna just walk you through what I believe is unique about Affluence, Yeah, no.

Or donations. Yeah. And then, and then walk you through, uh, these last components, and then set out just kind of, where do you go from here?

Okay, yeah. Um, where do you go great stuff. This is really great stuff. Yeah, I'm, super glad to hear that.

And I'm gonna share some of your feedback with the team. I think they're really gonna appreciate, especially what you have.

To say that the value is immediately clear, and that seems totally novel to you, like an experience you haven't had with other products.

Yeah, yeah. Hopefully you feel that way even more as we continue. Okay, great. Go for it. So here's the quick little tidbits on these two.

The affluent score, so it's taking any wealth indicators on the profile, such as like philanthropy, right? And it's combining all of those to generate a score between zero and 100.

About above a 92, a 92 and above is a billionaire. And we don't have exact metrics on like how wealthy folks fall between in the rest of the scale.

But I think as you look at more cases, you'll get a sense for what these numbers mean. Now, why do I think the hatch affluent score is more unique than other capacity scores?

Because it's simply looking at more data points. Not only are we looking at philanthropy, but we're looking at properties owned.

We're also looking at properties lived in. So when you provide an address, we distinguish between whether they just live in the property, if it's in their lifestyle, it's just where they live, versus it's actually a property that they own.

These are not necessarily the same things. And we also have... Okay. All right.

[@32:28](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1948.44) - **Paul Hamann (impactnps.com)**

Okay. So this is property that they own, not necessarily live.

[@32:35](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1955.94) - **Sim Borodach (Hatch)**

Oh, wow.

[@32:36](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1956.74) - **Paul Hamann (impactnps.com)**

Okay. Okay. Great.

[@32:43](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=1963.3) - **Sim Borodach (Hatch)**

Typically, the insights will highlight, it will typically say, Lee owns this property, or Lee lives in this property, to distinguish that.

We do also strongly encourage, because this is AI, and we... ... We know that there is no perfect AI, that cross-referencing or validating is just good practice.

It's good form. It's still right the vast majority of the time. And then finally, you get also the career data.

So we actually generate, we use AI to generate an inferred salary for anyone who has their career history listed in Hatch based on the fact that he's the chairman at Maspero Wealth Advisors, and that also impacts the affluence score.

So in this one sentence summary, you're just seeing the one or two most important factors that impacted his score.

But there's all these other ones that are under the hood. So again, that's just kind of me stating why I think that our affluence score has all this power behind it, because it has more data that's intelligently generated to inform the affluence score.

And believe me, if he is the chairman of Maspero,

[@34:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2040.0) - **Paul Hamann (impactnps.com)**

Financial. That's huge in the Chicago area. That's really, really huge.

[@34:05](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2045.6) - **Sim Borodach (Hatch)**

Now, let's come over here, Paul. Okay. This is where everything might crystallize. Okay. How do you make this data actionable?

Okay. Obviously, you can call Lee and start talking about his personal interest in social services and education. You just call him and start schmoozing with him about these things, right?

You know, hey, I want to talk to you about social services. want to talk to you about children, supporting children, et cetera, et cetera, et cetera.

You could call him and start talking about his donations, where he's given otherwise, and talking about supporting local Chicago causes because you know it's important to him based on the Hatch Intelligence.

But at the end of that phone call, you or your client wants to ask him for a donation or maybe after two.

Phone calls or a coffee date. How much to ask him for? These are the anchors. And they should be fact-checked.

They should be cross-referenced. Think about them. But if this is the first donation that's being asked for from this guy, this is what we believe that his capacity to give is.

And then engage, and then a max single ask. And this is not really, maybe if you're going to ask him for like a five-year donation, right?

Right. Which is support a capital campaign. But again, this is giving to all organizations. So it would be if he took his entire philanthropic capacity and just gave it to your organization.

[@35:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2141.58) - **Paul Hamann (impactnps.com)**

Yeah.

[@35:43](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2143.28) - **Sim Borodach (Hatch)**

So some customers find these a bit more actionable as opposed to this a bit more theoretical. Right. Yeah. Passing it back to you.

This is cool.

[@35:54](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2154.72) - **Paul Hamann (impactnps.com)**

Yeah. This is great. This is really, really good. Thank you. I especially like the way the target ask amounts are done because on the Wealth Engine side, all I've seen is the capacity score or a capacity number.

But I like this. Like you said, this is a little bit more. This helps to provide a little bit more guidance, understanding that things need to be cost-referenced, etc.

But this actually provides a little bit more guidance. And for me as a consultant, so my, I'm not sure what told you, but my big challenge with YouthBuild is they have no history of cultivating their donors.

So they have a gala in April. They have a gala in April. Then they do an end of the year mailing.

[@36:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2205.5) - **Sim Borodach (Hatch)**

And that's it.

[@36:46](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2206.54) - **Paul Hamann (impactnps.com)**

They don't have any contact with their donors in between. So part of my job is getting them to understand, you've got to be talking to these people between these two events.

And now I can take a look at that first step score. Hey, if you cultivate these folks, if you cultivate this guy, here's what he could potentially offer you for a first real donation.

But you've got to do the cultivation. So for me, this is a huge, I don't want use the word weapon, but tool to be able to get them to understand the need for cultivation.

And I bet you if we did research on his $2,500 donations to YouthBuild, they've probably all been as a result of their annual gala, and that's it.

[@37:33](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2253.82) - **Sim Borodach (Hatch)**

Right.

[@37:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2254.6) - **Paul Hamann (impactnps.com)**

So this is really, really, for me, given how I'm trying to work with these organizations, what I'm trying to get them to do, that's a valuable tool.

**ACTION ITEM: Review 20 potential donors presented to Youth Build Capital Campaign Committee using new Hatch info -** [**WATCH**](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2269.9999)

[@37:47](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2267.88) - **Sim Borodach (Hatch)**

Amazing. That's pretty much it for me. There's more to show you about how these work, but I think I'd like to put the ball back in your court for what are next steps now for us.

Well,

[@38:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2280.0) - **Paul Hamann (impactnps.com)**

Give me some time to spend some time with all this, now that I understand it, and go back and take a look at, so here's the deal, I just, using Wealth Engine, I just, last week, the Youth Build Capital Campaign Committee presented 20 potential donors, but I didn't have this kind of information.

I just had their affinity score based on Wealth Engine. Now I can go back and say, hey, this, we know this much more.

[@38:26](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2306.6) - **Sim Borodach (Hatch)**

So, now let me, let me, let me put the, let me put the, the final, what's the opposite of pin in the coffin?

The final, open the door. Yeah, totally wrong.

[@38:41](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2321.92) - **Paul Hamann (impactnps.com)**

All right, all right, let's do it.

[@38:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2325.22) - **Sim Borodach (Hatch)**

So, you remember that any donor profile is considered unconfirmed and incomplete if it hasn't been elevated. Right. So, these scores are all, for, for Conway's profile, they're confirmed and complete, because they're

Based on confirmed and complete data. However, oh, so are Lee's. But for most of the folks in YouthBuild and for Skills, they're not going to be confirmed and complete.

So what to me would be an amazing sign of you using Hatch in these next, I'm just going to turn off the screen because you know how to do this already, would be for you to use the elevation quota that is remaining this month.

And to be honest with you, Paul, every month with your clients, because that's a tremendous value of what they're paying for.

To get 15 elevated profiles are basically valued at $150 monthly. And YouthBuild, for example, has 10 included in their package every month.

And they're only paying $90 monthly. So that, plus their bulk enrichment subscription, plus the QuickSearch that renew, it's closer to $200 of value that they're paying.

$90 for it, but of those $200, 50% are not really getting used because the elevated profiles aren't being requested.

Our team is like, we're like a, you know, just like a troop of data analysts that are ready to confirm and complete the profiles.

So you can come in, request those 20 people. Again, there's only 10 monthly, so between me and you, you know, because we always have to talk about, like, how to better service the company.

**ACTION ITEM: Request elevation for 9 donor profiles before 6th, then 10 more after renewal -** [**WATCH**](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2424.9999)

And how they, how meeting their interests meets our interests, right? So let's say you come into Hatch and you're going to go to profiles and start searching, you know, these 20 names and elevating them.

So you're going to get 10 by the 6th. Right, okay. Okay, because you have four days. So you can get those profiles and by the 6th.

They don't, well, there's actually nine left because one was already used in this cycle. Okay. Thank

[@41:00](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2460.0) - **Paul Hamann (impactnps.com)**

Yeah, I used, I requested one a couple weeks ago, yeah.

[@41:04](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2464.84) - **Sim Borodach (Hatch)**

And then they're going to renew on the 6th, 10, but, you know, we want you to fall in love with Elevated Profiles, so they fall in love with Elevated Profiles, so you're just like, you know, and when we set up, the sales force has to come because we're still testing it, but that's where we'll head later.

But for now, if they come to you with 20 donors, like, request them, and we're really, we're meeting, with exceptions, but we're meeting the two business day turnaround.

So when you make a request, if you request it today, you'll probably get it back on Monday because of the four days.

[@41:42](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2502.38) - **Paul Hamann (impactnps.com)**

Yeah, yeah, yeah, I think it was like two or three days, this last one I requested it, and that was somebody we got a $1,000 donation from, and he wasn't elevated, so I wanted to see it, so that was all, that was helpful.

This is great, so, well, I guess now I know what I'm doing tomorrow. So. No, this is really cool.

Use it to my ears.

[@42:05](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2525.82) - **Sim Borodach (Hatch)**

Use it to my ears.

[@42:07](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2527.74) - **Paul Hamann (impactnps.com)**

So this is good. This is really, really good. I'm really glad we did this. Thank you. This has been really helpful.

I really appreciate what you said. And I just tell you, I view it as being very user-friendly. So this is cool.

This is really good. I like it.

[@42:30](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2550.7) - **Sim Borodach (Hatch)**

In terms of SkillsUSA, where do they stand? Hold on a second.

[@42:37](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2557.5) - **Paul Hamann (impactnps.com)**

Let me poke my eye out with them. You just didn't see me do that.

[@42:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2565.82) - **Sim Borodach (Hatch)**

Strike it from the record.

[@42:51](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2571.26) - **Paul Hamann (impactnps.com)**

There is just a lot of internal chaos there and a lot of disagreement on strategy around philanthropic issues those issues that we're

Trying to work through. So I will continue to, so I have been diving into YouthBuild's Hatch account more than, more than skills, just because there's just a lot of happening, for lack of better words.

So I, you know, it's going to be several months until we can kind of get them settled, where they're going to be able to start making use of data.

We're just dealing with some higher, higher level stuff first. So, but I will continue to use it.

[@43:32](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2612.3) - **Sim Borodach (Hatch)**

Okay. Yeah. Okay. Yeah. Okay.

[@43:34](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2614.52) - **Paul Hamann (impactnps.com)**

So there are no, there are no way, anyway, that's whoever ready or to even, they're not in the headspace where I know to start thinking about individuals.

They just aren't. Okay.

[@43:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2625.08) - **Sim Borodach (Hatch)**

Yeah.

[@43:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2625.52) - **Paul Hamann (impactnps.com)**

They, they, they just aren't. In fact, I've got a meeting at three o'clock with the senior consultant whom I work with, with regard to them to figure out like what our next step is in the strategy and working with them.

And they're, they're just right now, very, very, very, very football. It's on the corporate side and sponsorships, and we need them to be on the individual side.

So that's where Hatch really comes in well.

[@44:12](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2652.64) - **Sim Borodach (Hatch)**

Okay, so you could conceive that at some point soon you're going to turn them, and then they'll be maybe more like youth build, and we'll configure it.

[@44:21](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2661.62) - **Paul Hamann (impactnps.com)**

Well, yes, yeah, that's going to be the ways to go, but there's going to be a series of meetings over the course of the next several months around needing to have them take a look at their overall strategy, and we'll just leave it at that.

Okay, okay. But nevertheless, I'm Okay, good to know. Yeah, I'm still, so if you don't see much log in on their side, don't worry about it.

It's okay. It's just a reflection of where things are at. And on the youth build side, see, they've been without a director of development since last October.

So I've been kind of working solo there, but they now have finally hired somebody internally for A two-year contract.

So now that she's on board and we're starting to figure out.

[@45:05](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2705.28) - **Sim Borodach (Hatch)**

amazing.

[@45:06](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2706.0) - **Paul Hamann (impactnps.com)**

Yeah. But of course, she's in Europe now on vacation. So when she comes back, she and I, we're starting to have a pretty good cadence of how we're working together.

So this is on the list of things to review with her and how to use Hatch and that kind of stuff.

[@45:24](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2724.04) - **Sim Borodach (Hatch)**

Amazing. Yeah. Okay. So there's a new DoD. That's huge that there's a new DoD. Yeah. Give me one second, please.

I just want to capture that.

[@45:42](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2742.0) - **Paul Hamann (impactnps.com)**

I'm not sure what your all's experience is of working with these smaller organizations, but it doesn't take much disruption internally on the personnel side to interrupt and to disrupt the entire process.

And that's really what's going on with both organizations. Yeah. Yeah. There's no backup. There's no one to take someone else's place.

It's all it takes is one person to cause a major disruption.

[@46:08](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2768.92) - **Sim Borodach (Hatch)**

Yeah, yeah, I'm familiar and I'm familiar enough. I've seen it a bit from a bit from the inside, mostly from the outside.

And, you know, it's it's, you know, thank you for sharing because it really helps me have a better sense of how to work with them and also how to work with consultants.

So it seems like you have your your next step is to request those elevated profiles.

[@46:32](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2792.04) - **Paul Hamann (impactnps.com)**

Yes, I'm going to take I'm going to take a look at those lists I presented to the Capital Campaign Committee and see if they're elevated already.

**ACTION ITEM: Resolve issue w/ running scoring for all profiles in Paul's account, notify Paul when fixed -** [**WATCH**](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2799.9999)

I think I about more than half of them already were. And then I'll get those together and send them off.

[@46:47](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2807.12) - **Sim Borodach (Hatch)**

Awesome. Just give me give me. OK, so just before the meeting, I was making sure that the scoring had been turned on in your whole account.

And unfortunately, like there's it's not it's not. It's an issue related to your account. It's just an issue with me being able to run the scoring for everyone.

So I'm able to do it on a one-by-one basis, and this is going to be resolved by tomorrow morning.

Okay. So you could wait for me to ping you, but I'd say in terms of the elevations, like, don't wait to do the elevations because we'll start them, but I'll ping you.

For some reason, was only able to run it, like, one at a time, and I need to be able to run it on everyone.

So, and then you should, that should happen again by tomorrow, and then it should just be everyone has their scoring.

Oh, good, good. Yeah.

[@47:38](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2858.62) - **Paul Hamann (impactnps.com)**

Yeah, meanwhile, I said I'll work on the list of elevations to send you. That's great.

[@47:43](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2863.1) - **Sim Borodach (Hatch)**

Oh, and one other thing, just in case you want to be able to see, this is, like, an important operations thing.

We added filters, so you could filter here by hitting filter. And then scrolling down to the bottom, right, we have all these different sections, Wealth, Giving, Demographic and Lifestyle, Social Career, and then Prospect Management.

You can filter by that have already been elevated or are in an elevating state. So you shouldn't have someone in here.

That's good.

[@48:20](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2900.4) - **Paul Hamann (impactnps.com)**

Okay. That's good.

[@48:22](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2902.76) - **Sim Borodach (Hatch)**

Unfortunately, there's no, like, functionality yet to, like, change the queue, put someone high or lower. So if you need something custom done, you can always message me in the chat in the bottom right corner.

That's better than email. Emails tend to take a little bit longer for me to answer. So, yeah. Perfect. Okay.

I love it.

[@48:45](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2925.72) - **Paul Hamann (impactnps.com)**

I cannot wait to get started on this now. That's great.

[@48:48](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2928.68) - **Sim Borodach (Hatch)**

Appreciate you, Tons, Paul. So glad to hear it. Good use of my time.

[@48:52](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2932.0) - **Paul Hamann (impactnps.com)**

Thank you very much. Have a great afternoon and enjoy your long weekend.

[@48:55](https://fathom.video/share/6w5CLzhTqotetYzk1pc_iqz2mQTm9m-T?timestamp=2935.8) - **Sim Borodach (Hatch)**

All right. All right. Take care. You too.