# **Data Upload - June 26**

[**VIEW RECORDING - 65 mins (No highlights)**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf)

[@0:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=8.4) - **Rivka Cohen (icei.org.il)**

Hello?

[@0:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=10.28) - **Sim Borodach (Hatch)**

Hey, can you guys hear me all right?

[@0:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=12.62) - **Nicole Cohen-Meged**

Yeah. Yes.

[@0:14](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=14.46) - **Sim Borodach (Hatch)**

Sweet. Awesome. So good to be with you guys. I know you've both been in Israel, right?

[@0:24](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=24.76) - **Rivka Cohen (icei.org.il)**

Yeah. Okay.

[@0:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=25.96) - **Nicole Cohen-Meged**

Yeah.

[@0:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=26.12) - **Sim Borodach (Hatch)**

you've been across time and planets and back.

[@0:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=30.86) - **Nicole Cohen-Meged**

Yes. Exactly.

[@0:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=32.9) - **Sim Borodach (Hatch)**

Oh my gosh. Well, I'm so glad to be here again and that you guys were able to make it today.

Hopefully we can accomplish good things and keep moving you forward. Yeah.

[@0:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=44.92) - **Rivka Cohen (icei.org.il)**

Thanks for your flexibility and understanding. Thanks for being so patient with us.

[@0:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=51.3) - **Sim Borodach (Hatch)**

Yeah. No thing. I'm not Israeli. I'm Jewish, obviously. And I'm with a couple of Israelis. our I you. back.

And I feel the, you know, I feel the connection to home, to family, that's there now. We also have family there.

So it's no sweat. We are, we sort of have a bubble around us of understanding for all our Israeli clients right now.

So we will, we will continue to hold space for that as much as possible. And should there be anything else that you guys need, please just, you know, say it.

We'll accommodate to the best that we can. And if we can't, we'll let you know.

[@1:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=90.0) - **Nicole Cohen-Meged**

Thank you so much. Thank you.

[@1:31](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=91.84) - **Sim Borodach (Hatch)**

Thank Yeah. So, what are we doing here today, people?

[@1:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=98.1) - **Nicole Cohen-Meged**

Are we ready to work with some data? Do you mind if I start off, Rivka? Okay.

[@1:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=103.02) - **Sim Borodach (Hatch)**

Okay.

[@1:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=104.82) - **Nicole Cohen-Meged**

So I filled in the Hatch spreadsheet template for the data upload. Um, and I last night, uh, went to upload it like to Hatch and, and.

Everything went fine, up till it comes to the page where it says, review your data, and some of the columns that were in the spreadsheet aren't showing up on the review page.

[@2:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=139.14) - **Sim Borodach (Hatch)**

Should I just share my screen? Yeah. Is that after you mapped the columns?

[@2:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=143.88) - **Nicole Cohen-Meged**

Yeah, so I went, so I made the columns are mapped.

[@2:29](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=149.08) - **Sim Borodach (Hatch)**

Okay.

[@2:29](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=149.74) - **Nicole Cohen-Meged**

Sorry, I skipped a step there.

[@2:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=152.44) - **Sim Borodach (Hatch)**

One second. It's okay.

**SCREEN SHARING: Nicole started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=156.180616)

[@2:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=160.46) - **Nicole Cohen-Meged**

I guess I should, I'll show you the webpage and then I can show you what the spreadsheet looks like, just so you can see.

Can you see that?

[@2:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=171.52) - **Sim Borodach (Hatch)**

Yeah.

[@2:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=171.84) - **Nicole Cohen-Meged**

So, the columns that aren't showing up for me are the middle name column, the deceased date column. The job position column and the nickname column.

[@3:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=184.0) - **Sim Borodach (Hatch)**

Okay. Can you go back to the map column step for a moment?

[@3:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=190.24) - **Nicole Cohen-Meged**

Yeah.

[@3:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=193.78) - **Sim Borodach (Hatch)**

Okay.

[@3:14](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=194.78) - **Nicole Cohen-Meged**

Do me to zoom in? It's kind of small.

[@3:17](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=197.26) - **Sim Borodach (Hatch)**

It's fine for me, but...

[@3:18](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=198.76) - **Nicole Cohen-Meged**

Okay.

[@3:20](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=200.48) - **Sim Borodach (Hatch)**

Rivka, is it okay for you?

[@3:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=203.36) - **Rivka Cohen (icei.org.il)**

Yeah.

[@3:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=203.98) - **Sim Borodach (Hatch)**

Okay, let's zoom in.

[@3:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=206.08) - **Rivka Cohen (icei.org.il)**

I'm, like, straining.

[@3:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=208.26) - **Sim Borodach (Hatch)**

Yeah.

[@3:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=208.66) - **Rivka Cohen (icei.org.il)**

Especially because I see, like, three something, but I can't see what's underneath it in, like, gray.

[@3:33](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=213.58) - **Sim Borodach (Hatch)**

Oh, yeah. It's a little bit hard to read.

[@3:35](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=215.28) - **Rivka Cohen (icei.org.il)**

Not on your own screen. Does it say blank?

[@3:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=217.9) - **Sim Borodach (Hatch)**

Yeah.

[@3:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=218.72) - **Nicole Cohen-Meged**

Yeah, because those are empty columns. Wait. no, wait. Because... Wait, wait, wait, wait. No, because see down here, there's, like, several different columns.

So here it says contact email, and these are filled in. And then if you scroll up, there are other, um, columns.

Like, here again, it's... It says e-mail, and this one's blank, but I'll show you the spreadsheet.

[@4:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=246.6) - **Sim Borodach (Hatch)**

Like, this is the spreadsheet, so all of the- I'm not seeing the spreadsheet. We're not seeing the spreadsheet yet.

Oh, okay.

[@4:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=253.14) - **Nicole Cohen-Meged**

It's okay.

[@4:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=253.92) - **Sim Borodach (Hatch)**

It's so, screen sharing and making sure you're not sharing your private things is tricky, so take a moment to make sure you get that right.

[@4:22](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=262.32) - **Nicole Cohen-Meged**

Okay, one second.

[@4:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=263.26) - **Sim Borodach (Hatch)**

I was on a call with someone who's a little bit older yesterday, and she just started sharing her entire desktop, and I was like, I don't know what I'm seeing.

[@4:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=272.02) - **Nicole Cohen-Meged**

I don't need to see this. want to look. Okay, I mean, there's nothing I have to hide, but you know.

**SCREEN SHARING: Nicole started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=279.049403)

[@4:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=284.48) - **Sim Borodach (Hatch)**

Right, yeah.

[@4:47](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=287.36) - **Nicole Cohen-Meged**

Okay, can you see the spreadsheet?

[@4:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=290.14) - **Sim Borodach (Hatch)**

Yeah.

[@4:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=291.14) - **Nicole Cohen-Meged**

Okay, so you can see job title filled in, contact, e-mail filled in where we have them, phone number. Phone Number, Middle Game.

Yeah, okay.

[@5:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=302.12) - **Sim Borodach (Hatch)**

I'm following you.

[@5:03](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=303.48) - **Nicole Cohen-Meged**

Right. Let's to the email column. Right. So, but there's several, like, there's duplicates, right? So right to the left, to the far left, there was already the email and phone number columns.

And now you can see them here again. So that's why in the mapping page, it's showing that some of those fields are blank.

So I don't know why. And those columns that I noted that are not showing up are all filled in here.

So middle name, deceased, job position, and nickname.

[@5:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=340.16) - **Sim Borodach (Hatch)**

Okay, so let's hold on. Let's slow down for a second.

[@5:42](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=342.9) - **Nicole Cohen-Meged**

Okay.

[@5:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=343.62) - **Sim Borodach (Hatch)**

If it's okay, I'm going to go in the driver's seat for a second just because I do this all the time.

Yeah, please. Show me the email column, the column that's just called email, please.

[@5:52](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=352.34) - **Nicole Cohen-Meged**

In the spreadsheet?

[@5:53](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=353.6) - **Sim Borodach (Hatch)**

Yeah.

[@5:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=357.82) - **Nicole Cohen-Meged**

Well, this is it.

[@5:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=359.46) - **Sim Borodach (Hatch)**

So there was another. It seems like there's another column that's called Email that's being brought into the Hatch Upload.

[@6:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=366.32) - **Nicole Cohen-Meged**

Well, I renamed it just Email, I think. Wait one second.

[@6:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=379.32) - **Sim Borodach (Hatch)**

Is that the exact spreadsheet you uploaded or is there a different version of Yeah, this is the exact one.

[@6:24](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=384.84) - **Nicole Cohen-Meged**

This is the exact one.

[@6:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=386.4) - **Sim Borodach (Hatch)**

So I'm asking in this spreadsheet, where is the column that's named Email?

[@6:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=392.84) - **Nicole Cohen-Meged**

It's this one.

[@6:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=394.82) - **Sim Borodach (Hatch)**

Well, what's not aligning for me is either Hatch is making up that there's a column called Email or what was actually uploaded is some other version of this file.

Because if you go back to the Hatch page, we don't create like on the leftmost column where it's showing your, like these ones all the way on the left.

We, I mean, I've never seen it make up columns for, um... ... ... ... Your spreadsheet, and those are just supposed to show which columns you uploaded, and then in the green and red in the center are what you map it to in Hatch, so we should see everything that was in the file on the left, and maybe there's a bug here, it happens, but I'm seeing, like in the fourth row here is called email, and that's not, we don't edit that, we just take it directly from the spreadsheet that you uploaded, so it leads me to believe that there's some column in here that's called just email.

[@7:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=450.0) - **Nicole Cohen-Meged**

Okay, let me, let me, let just see. Okay, I, I can't see that here.

[@7:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=463.6) - **Sim Borodach (Hatch)**

Oh, what, what's in F and D? Like if you click into F and D, is there any, no, there's nothing in there.

[@7:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=475.8) - **Nicole Cohen-Meged**

They're they're blank.

[@7:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=476.44) - **Sim Borodach (Hatch)**

What about, like just in the cell, just in this, D, D1, I suppose it is.

[@8:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=480.56) - **Nicole Cohen-Meged**

The name of the gray box, the gray box that shows the column header.

[@8:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=486.12) - **Sim Borodach (Hatch)**

This? that one. Yeah.

[@8:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=488.24) - **Nicole Cohen-Meged**

It's blank. Yeah.

[@8:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=490.22) - **Sim Borodach (Hatch)**

And what about F1?

[@8:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=492.88) - **Nicole Cohen-Meged**

Blank.

[@8:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=493.86) - **Sim Borodach (Hatch)**

Okay. And then go back all the way to the left for a sec. What about AT1? Are there any hidden columns?

Did you hide columns by any chance?

[@8:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=505.58) - **Nicole Cohen-Meged**

No.

[@8:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=506.64) - **Sim Borodach (Hatch)**

No. hidden columns. I don't.

[@8:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=508.88) - **Nicole Cohen-Meged**

Like, I, when I use spreadsheets, I always use Google Sheets. So I don't, when I use Excel, I don't use, like, weird functions.

[@8:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=518.4) - **Sim Borodach (Hatch)**

I just use... Oh, straight functionality.

[@8:41](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=521.4) - **Nicole Cohen-Meged**

Also, I wouldn't know how to hide columns, to be honest.

[@8:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=525.5) - **Sim Borodach (Hatch)**

I... Well, what's, if you're telling me that the correct column is contact, it's called contact email. That's the one that we're actually seeing on the Hatch interface, and you are correctly mapping to the email column.

Or an So we don't really have to worry about this. Do you have multiple email columns or there's just the one?

[@9:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=547.64) - **Nicole Cohen-Meged**

There's just the one that's filled in.

[@9:11](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=551.36) - **Sim Borodach (Hatch)**

Yeah, so I think it's working as expected. You're seeing that contact email appear, that field appear. It's filled with values.

If we head over there, we could see what the fill rate is. And you're able to map it to an email field in Hatch.

[@9:33](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=573.44) - **Nicole Cohen-Meged**

Okay, so how come when I go to the review my data page, it's not coming up?

[@9:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=580.68) - **Sim Borodach (Hatch)**

Okay, so let's check that out. Yeah, that would be, that might be, maybe it's behaving a little bit strangely.

[@9:47](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=587.64) - **Nicole Cohen-Meged**

Okay. Okay, one second.

**SCREEN SHARING: Nicole started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=603.936634)

[@9:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=599.0) - **Sim Borodach (Hatch)**

Okay. Let's go. go. You We're seeing the hatch window again.

[@10:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=612.02) - **Nicole Cohen-Meged**

Okay. Wait. So my question is, this is clearly, can you see where I'm highlighting?

[@10:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=619.42) - **Sim Borodach (Hatch)**

Yeah.

[@10:20](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=620.3) - **Nicole Cohen-Meged**

This is my question. Cause this is the column and it's clearly filled in and it's, I like renamed it email cause Yeah.

[@10:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=628.16) - **Sim Borodach (Hatch)**

Okay.

[@10:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=628.66) - **Nicole Cohen-Meged**

guess like, okay. So then should I go to review my data now?

[@10:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=632.98) - **Sim Borodach (Hatch)**

Yeah.

[@10:33](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=633.78) - **Nicole Cohen-Meged**

Okay.

[@10:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=634.4) - **Sim Borodach (Hatch)**

Well, yeah. I mean, we might want to, we'll see if, we'll see what, if there are other challenges that you're facing.

[@10:42](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=642.32) - **Nicole Cohen-Meged**

Okay.

[@10:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=643.06) - **Sim Borodach (Hatch)**

zoom out? Can you command minus on your keyboard?

[@10:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=646.12) - **Nicole Cohen-Meged**

Yeah.

[@10:47](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=647.9) - **Sim Borodach (Hatch)**

There we go.

[@10:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=649.54) - **Nicole Cohen-Meged**

Oh, oh my God. Okay. Wait, but wait, so how come? Um, yeah, it's, this is a little bit, um, it's cut off.

on. Okay. Thank So there's all these fields, but they're still blank, and the fields that are not supposed to be blank aren't there.

[@11:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=673.22) - **Sim Borodach (Hatch)**

I think they're probably over there on the right. I mean, this is weird. I usually see that you could scroll over to see the other columns.

[@11:22](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=682.14) - **Nicole Cohen-Meged**

Yeah, I can't scroll to the side.

[@11:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=687.5) - **Sim Borodach (Hatch)**

Yeah, and I appreciate that you're trying to be thorough here to review.

[@11:31](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=691.58) - **Nicole Cohen-Meged**

No, it's I'm just confused.

[@11:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=694.4) - **Sim Borodach (Hatch)**

So that's the issue there. if you want to see, like, you're only seeing here maybe 15 rows, right? And so these rows for that particular column are blank, but I would hope that if you click through to the different pages where you believe that there's filled in information, you'll see it populated.

Oh.

[@12:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=720.0) - **Nicole Cohen-Meged**

So... I'm going through the different...

[@12:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=724.64) - **Sim Borodach (Hatch)**

Do you know, do you have a trackpad?

[@12:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=728.86) - **Nicole Cohen-Meged**

Are you on a...

[@12:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=730.36) - **Sim Borodach (Hatch)**

I'm on like a double stream here. Okay, I wonder, maybe that's part of the reason? I'm gonna just bring this back to my engineers and have them figure out why this like weird zoom...

[@12:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=743.24) - **Nicole Cohen-Meged**

Do you think it's possible that in the actual spreadsheet that there's too many blank columns? So because there's a bunch of blank columns, it's sort of causing things not to show up here?

[@12:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=756.9) - **Sim Borodach (Hatch)**

have seen some funny behavior when there are blank columns in the spreadsheet. Okay.

[@12:42](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=762.08) - **Nicole Cohen-Meged**

it might help.

[@12:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=763.48) - **Sim Borodach (Hatch)**

I can't say for sure.

[@12:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=766.6) - **Nicole Cohen-Meged**

Okay. I just didn't want to click import when there's things missing.

[@12:53](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=773.6) - **Sim Borodach (Hatch)**

Totally. Totally. And maybe I didn't get a chance to explain this to you on one of our prior conversations.

But I review... You, the submission before it gets approved, so if some egregious mistake were made that I ought to have caught, we would reset everything, and it's because we, for a lot of reasons, this is a sensitive process, and we want to make sure it happens correctly.

[@13:24](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=804.24) - **Nicole Cohen-Meged**

Right, I didn't want to mess it up, like, to import it and for the information to be, you know, not correct.

[@13:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=812.84) - **Sim Borodach (Hatch)**

And I assume you're going to be doing further uploads, right?

[@13:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=816.82) - **Nicole Cohen-Meged**

Yes.

[@13:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=817.58) - **Sim Borodach (Hatch)**

So it's good for you to...

[@13:39](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=819.08) - **Nicole Cohen-Meged**

Oh, yeah.

[@13:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=820.56) - **Sim Borodach (Hatch)**

So it's good for you... Oh, sorry, yeah, go ahead.

[@13:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=823.36) - **Rivka Cohen (icei.org.il)**

Wait, finish what you were saying.

[@13:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=824.7) - **Sim Borodach (Hatch)**

It's good for you to learn, like, the practice, and, like, how this works, and, you know, just talking through...

We could have talked through these details in the abstract, right, without doing a live demo, and, like, you're actually trying to do this right now, which is, you know, often a great way to learn, so...

[@14:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=840.0) - **Nicole Cohen-Meged**

Yeah. Yeah, Rivka?

[@14:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=842.92) - **Rivka Cohen (icei.org.il)**

I was just going to say that I opened it up to see if I could scroll, and it's getting a little sticky, but I'm able to see.

[@14:18](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=858.0) - **Sim Borodach (Hatch)**

Okay.

[@14:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=859.54) - **Nicole Cohen-Meged**

You can see the email column in the review, the data page.

**SCREEN SHARING: Rivka started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=861.935208)

[@14:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=872.8) - **Rivka Cohen (icei.org.il)**

This email column, or?

[@14:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=876.08) - **Sim Borodach (Hatch)**

I get, yeah, yeah. What happens if you zoom out? Meaning, where did you get to on here? It looks like there's some columns maybe that you didn't get to either.

Can you zoom out, Rivka? Yeah. Yeah. Maybe Command Minus, or... or... both Soup Control minus.

[@15:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=902.5) - **Rivka Cohen (icei.org.il)**

It did, and it says 80%, but then it doesn't do anything.

[@15:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=907.74) - **Sim Borodach (Hatch)**

Oh, that's weird. Maybe if have those three vertical dots in the top right corner, but if it's not actually...

[@15:16](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=916.56) - **Nicole Cohen-Meged**

Okay, so I just, like, expanded the window a little bit, and I can see half of what looks like an e-mail.

But then it keeps sort of, like, cutting off and disappearing. So I'm wondering if it's there, and the web page, and the page is just a little bit...

Is there something wrong with the actual web page? I don't know. Yeah, I don't know why. And see deceased, I can...

But it keeps cutting off, so...

[@15:48](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=948.14) - **Sim Borodach (Hatch)**

Rivka, do you see, Rivka, do you see deceased anywhere? I think you might have... It's further to the right, I think.

Keep going... Yeah, there we go. So there's... Okay. So there's either something about the functionality of the monitor you're using, Nicole, or maybe you can scroll and it's just you don't, like you don't, I have the same, I'm having the same experience as Rivka where I'm not scrolling using a, like a line at the bottom.

I'm kind of just using my trackpad. So I wonder if you can scroll.

[@16:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=983.78) - **Nicole Cohen-Meged**

Okay, let me move it to my laptop and I'll use the trackpad. Okay. Oh, there we go.

[@16:31](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=991.7) - **Sim Borodach (Hatch)**

Yeah. Okay.

[@16:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=992.72) - **Nicole Cohen-Meged**

Oh, okay. Oh, I'm so sorry.

[@16:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=994.78) - **Sim Borodach (Hatch)**

I just... No, don't worry about it. Don't worry about it. I mean, it's good for me to learn and I didn't even realize that until Rivka went into...

[@16:42](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1002.0) - **Nicole Cohen-Meged**

Okay. All right. Now I can see everything.

[@16:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1005.88) - **Sim Borodach (Hatch)**

Okay.

[@16:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1006.98) - **Nicole Cohen-Meged**

Okay. Sorry.

[@16:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1009.0) - **Sim Borodach (Hatch)**

No, you're totally good. You're totally good. This is the first time I'm witnessing this. So next time it happens with another customer and I will know what to tell them straight away.

**ACTION ITEM: Import prepared data into Hatch -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1017.9999)

So sorry that we had to spend 10...

[@17:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1020.56) - **Nicole Cohen-Meged**

No, I'm sorry.

[@17:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1022.66) - **Sim Borodach (Hatch)**

I was so sure there was something wrong.

[@17:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1028.26) - **Nicole Cohen-Meged**

Should I import it then? Should I go ahead and import?

[@17:14](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1034.28) - **Sim Borodach (Hatch)**

If you feel good about everything, then yeah, you could go ahead and do the import. I can review it and approve it now, but I'd also like to talk about the donation history and whatever else is on your guys' mind and want to make sure we get to those things.

[@17:29](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1049.88) - **Nicole Cohen-Meged**

Okay, so I'll just, I'm sorry, Rivka, go ahead.

[@17:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1054.08) - **Rivka Cohen (icei.org.il)**

It's fine. First question is, is there a status update to the Salesforce integration?

[@17:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1065.24) - **Sim Borodach (Hatch)**

We are still awaiting, so they're like mid-security audit and like the Salesforce is reviewing our application. So it's totally, it's completely built.

We've tested it and we're waiting for... ... ... ... Or... We're essentially waiting for approval from Salesforce. They just have their process that they need to go through.

So we've reached out to their people and we've urged them to move things along. And we are very eager, very, very eager to get this done.

[@18:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1099.54) - **Rivka Cohen (icei.org.il)**

So you don't have a sense of how long it will take?

[@18:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1105.62) - **Sim Borodach (Hatch)**

I'm hopeful that it's weeks and not months. Like, I'm hopeful. I'm not. I'm not pessimistic about that timeline. Like I'm hopeful that it will be weeks and not months.

It's like, it's like whenever you submit something for official review, and they don't have a sense of urgency, because why would they have a sense of urgency?

They're a massive corporation. We're, we're at their mercy. So you're basically waiting for the other side, with basically what you're saying.

Okay. This is like the top. The three most urgent things that we are trying to get done as a business right now is launching this, launching Salesforce.

[@19:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1147.4) - **Rivka Cohen (icei.org.il)**

we were thinking that if it's weeks away, we don't want to spend all the time manually downloading, formatting, uploading.

If it's in a few weeks, we'll wait and it'll be much easier. So, also in terms of, like, uploading donation information and things like that, it doesn't seem worth the time and investment.

[@19:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1176.88) - **Sim Borodach (Hatch)**

How complicated would it be for you to just export your entire, how many contacts are in your CRM and how long would it take to export them?

Or, not, I don't even know what I mean by how long, like, how many are there?

[@19:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1191.12) - **Rivka Cohen (icei.org.il)**

Because it's simple to export everybody, right? It's... But I'm, I'm just thinking because it took, it took Nicole some time to, um...

artefz like, of the Eventually, This Önесте learned used missed opportunities, bezcono We had a spreadsheet. What Nicole is uploading now is a spreadsheet that we downloaded from iWave.

And that took her time to go through and map out on the template that you have and all that.

So I don't know what the answer is, but I think that it'll...

[@20:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1227.0) - **Sim Borodach (Hatch)**

So this was the...

[@20:29](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1229.56) - **Rivka Cohen (icei.org.il)**

It's not going to take an hour. I think it'll take longer than...

[@20:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1234.76) - **Sim Borodach (Hatch)**

To export a report from Salesforce?

[@20:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1237.58) - **Rivka Cohen (icei.org.il)**

I mean, first...

[@20:39](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1239.98) - **Sim Borodach (Hatch)**

Well, what I'm thinking is like, I want you guys to get going. And, you know, we want to work through the Salesforce integration too.

It makes things easier for everybody. Given the current circumstance, I want you to be able to move forward in light of this situation.

So that's why I'm asking like, is that the extent of the... If the answer is yes, then doing a Salesforce export and getting essentially everybody out, I can handle doing whatever like additional data manipulation needs to do if you can just get that file out and upload it through the dashboard and then I can download it on my side and make whatever edits need to be made.

But exporting a file from Salesforce is, it's what the CRM is for, right? It's easy functionality. Yeah.

[@21:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1287.76) - **Rivka Cohen (icei.org.il)**

you're saying we just need to do the, creating the report of all the relevant contacts that we would want to download and all their information, and then we can just put it in upload and you'll take care of the rest?

[@21:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1305.88) - **Sim Borodach (Hatch)**

I'll map it. I'll do the whole thing. Yeah. Even if, Nicole, even if you don't map columns, you're basically just uploading the file.

And then I'll map, like, but I'll receive the file with all of the columns that you have, whether The columns got mapped or not, and then I can download the file.

just, it's basically instead of transferring the file over email, which is not like a, you know, a secure way to transfer files.

Yeah.

[@22:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1332.14) - **Rivka Cohen (icei.org.il)**

The only other thing is that we were thinking, I mean, in terms of like tagging and, and I mean, I guess we would kind of, we would want to do, we wouldn't want to just do all contacts all together and then have to reorganize it once it's in Hatch.

Um, I think we would want to do batches of, these are contacts of our current foundations and these are like, it would be, um, Yeah, like different, yeah, sure.

[@22:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1360.64) - **Sim Borodach (Hatch)**

Either like tag them on the upload or separate uploads. Um, so is that because, so the way that it will work through the Salesforce integration is you can have, you'll create different lists and then you'll pull each of those lists over to Hatch and you'll be able to filter based on.

On a certain list. So you might have like foundation donors, right. And then you'll. So you're basically saying doing it the same way here, just you're going to create separate exports from Salesforce.

So in order for you to not do double work to accomplish this, you could just right now segment those donors into different lists in Salesforce, and then you're going to do the export function.

That's kind of the temporary measure we're taking until the integration's on. You'll upload the files, and we'll just set some operating procedure for making sure that I know how to orient myself if there's any specific instructions.

You'll upload them, I'll download them, I'll format them, I'll map them properly. So the only extra work you'll be doing is the actual export and upload and communicating with me a little bit.

[@23:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1430.8) - **Rivka Cohen (icei.org.il)**

Right. When we put it to upload, there's a place for like a tag.

[@23:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1439.16) - **Sim Borodach (Hatch)**

There is a tags column. Yeah, so you can, it's actually not in the upload instructions, Nicole, but there, you can create a column that's just called Tags, and in that column you can put, however you want, you can put Foundation Donor, you could put Alumni, you could put Student, and it's just comma-separated values.

You can use as many as you want, and you'll be able to filter by those in the platform.

[@24:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1465.24) - **Nicole Cohen-Meged**

Okay, this is on the, the upload page, and it's a, it's a donations import you're talking about?

[@24:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1474.66) - **Sim Borodach (Hatch)**

Well, so, so we're actually talking about the contact import.

[@24:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1478.64) - **Nicole Cohen-Meged**

Right, so, but is, is there a specific page where we're supposed to upload the contacts?

[@24:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1486.72) - **Sim Borodach (Hatch)**

Well, it's the process you did this time, that you did with this upload.

[@24:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1490.28) - **Nicole Cohen-Meged**

Okay, okay, and, okay, is there a specific template we're supposed to use?

[@24:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1499.76) - **Sim Borodach (Hatch)**

Okay, the contact? right.

[@25:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1500.0) - **Nicole Cohen-Meged**

Well, there was a template for these prospects, right?

[@25:05](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1505.98) - **Sim Borodach (Hatch)**

It was your guys' template.

[@25:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1507.98) - **Nicole Cohen-Meged**

Is there a specific template that we should be using for the contacts?

[@25:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1512.74) - **Sim Borodach (Hatch)**

Oh, great question. So fundamentally, prospects and donors are the same in Hatch. You're going to upload donors the same exact way.

The way that you'll differentiate is through the donations.

[@25:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1526.72) - **Rivka Cohen (icei.org.il)**

Oh, awesome.

[@25:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1527.72) - **Sim Borodach (Hatch)**

Or the tags. Or the tags. But you don't need to put a tag for donor, because that will be captured through the donation records, okay?

Which is also a pretty straightforward Salesforce export. You're just going to do line by line donations where you have the ID, the amount, and the date.

And there are other optional fields, but that's really all you need is a report of all your historical donations.

And they're only going to map to a Hatch record if the ID maps between the constituent, the donor, and the

Any donations that are included in that file, nothing will happen with them. We don't store them. We don't use them.

They'll just go into thin air.

[@26:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1573.82) - **Rivka Cohen (icei.org.il)**

All of our donations are to accounts, not contacts. Is that going to be an issue?

[@26:21](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1581.34) - **Sim Borodach (Hatch)**

I just had this yesterday with a different client and I'm learning exactly how to communicate about this. You can keep, like, as you see from the file that Nicole worked on, there's like a primary contact that we're enriching.

And then there can be a spouse of that contact that's used as like a secondary data point. But we don't have a household entity like you guys kind of have a household or an account.

So you can use the account ID for the donor and the donations. And it doesn't need to be the contact ID.

Whichever one is easier and makes more sense to you guys and is going to help you map back and forth.

The source donor is in

[@27:01](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1621.18) - **Rivka Cohen (icei.org.il)**

But I'm saying when we download from Salesforce, the ID in the report for the donation, it won't be the same ID as the contact, no?

[@27:15](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1635.86) - **Sim Borodach (Hatch)**

I don't think so, because if you're saying that the donation is to the account...

[@27:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1639.64) - **Rivka Cohen (icei.org.il)**

Right, that means that none of our donations are going to match up to...

[@27:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1645.98) - **Sim Borodach (Hatch)**

Well, so instead of using the contact ID, you would use the account ID, right, and use the primary donor's information, or the primary contact's information that you're enriching, right?

It's not making sense to you. So you're telling me that the donation has the account ID, right, and that's going to map to the account.

And in the account, you can have, like, two people, right, because it could be spouses, right? So you have to...

Choose which one of those people you're going to be enriching, because we don't enrich households, we enrich individuals, so when you create the report of donors from Salesforce, you're going to say, give me the account ID for that account, and then I want primary contact first name, primary contact last name, and then in the spouse field, you'll put the spouse name, and then in all the email fields, you could decide to only use the primary contact emails, or you can also use the secondary contact emails, right?

But the account, the ID will be the account ID, not the contact ID, because, as you said, if you use the contact ID, the donations won't map over.

[@28:53](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1733.06) - **Rivka Cohen (icei.org.il)**

So, we put the donations in with the account number, but then... The... The... The... The... Contacts are in, I guess, I guess they also have an account number, you're saying.

[@29:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1750.08) - **Sim Borodach (Hatch)**

Yeah, well, in Salesforce, that's how the donations map to the account.

[@29:18](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1758.8) - **Rivka Cohen (icei.org.il)**

Okay. Nicole, are you following this? It's okay if you're not, like, I know you've worked with Salesforce less.

[@29:31](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1771.24) - **Nicole Cohen-Meged**

I've worked with it less, but I also worked with it completely differently. I'll be honest right now, I'm really overwhelmed.

[@29:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1780.08) - **Sim Borodach (Hatch)**

Yeah, it's okay.

[@29:41](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1781.26) - **Rivka Cohen (icei.org.il)**

So we'll go through.

[@29:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1783.52) - **Nicole Cohen-Meged**

I have a question and I feel like it's a question and I'm like trying to figure out if it's relevant to what we're talking about, so I'm going to ask it.

Okay. We're talking about importing donations, but most of our donations are from foundations or federations.

[@30:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1800.0) - **Sim Borodach (Hatch)**

Oh.

[@30:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1802.06) - **Nicole Cohen-Meged**

But Hatch only enriches individuals.

[@30:05](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1805.4) - **Sim Borodach (Hatch)**

Correct.

[@30:05](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1805.94) - **Nicole Cohen-Meged**

How would we, would we, and I think that I asked this last time, I think that I asked, well, what if we take the trustee of the foundation and make it the name of the donor, and then I think the answer was that it wouldn't work.

So my question is, we have very few donors who are just individuals. Most of our donors are foundations or federations.

So my question is, will we have much to upload?

[@30:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1843.92) - **Rivka Cohen (icei.org.il)**

Right. So I think in terms of donation, so I think with contacts, we want to do all of them.

[@30:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1850.44) - **Nicole Cohen-Meged**

When you say contacts, we're talking about people, like names and phone numbers.

[@30:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1855.38) - **Rivka Cohen (icei.org.il)**

Yes.

[@30:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1856.56) - **Nicole Cohen-Meged**

Okay.

[@30:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1857.3) - **Rivka Cohen (icei.org.il)**

But then in terms of donations, we probably won't. Let's Okay. I mean, tell me what you think, Sim, but it sounds like we shouldn't upload all of our donations, only the donations that we can tie to an individual, whether it's actually an individual donation or there is a sole funder of a foundation, which means, which is again why I think it's going to be a lot more work than just creating a report and downloading it, because there's a lot of is the funder of this foundation, which to download, which to not.

[@31:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1903.42) - **Nicole Cohen-Meged**

I can tell you guys that I'm on Salesforce on my other screen now, on the reports page, and I'm trying to create a report of contacts, and then I'm trying to create a report of donations, and what I'm looking at is not straightforward.

[@31:58](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1918.74) - **Sim Borodach (Hatch)**

Okay.

[@31:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1919.62) - **Nicole Cohen-Meged**

One point is that. That it's not going to be like a simple task, which is fine, but I'm just saying that it's complicated, and so that's why it's a question mark for me.

[@32:11](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1931.1) - **Sim Borodach (Hatch)**

Right. Is it worth investing more in this?

[@32:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1933.96) - **Rivka Cohen (icei.org.il)**

Right. But it sounds like it might also be complicated with the Salesforce integration, depending on how it's built. It might be a problem for us anyway.

[@32:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=1943.68) - **Sim Borodach (Hatch)**

Yeah, that's really well said. So it's going to be complicated whether we wait for integration or not. think so, and Nicole, just to your question, you can take the trustee and assign them to those foundation gifts, and I think what will be informative is using either a tag that highlights, like, trustee, right?

And when you're in Hatch, you're going to know it will be very obvious to you that someone is a trustee, or you can tie the donations.

Somehow to indicate, and I can show you how, that they're a trustee, but yes, you can do that, and I actually do think that that would be quite smart, working with another Israeli non-profit right now, and I'm actually trying to encourage my, he's a very close friend, working with mental health and kids from Gaza border towns, and amazing, and I'm trying to encourage them to do what you guys have, which is connection, connections at foundations, right, that you know the person, you talk to the person, they were part of, I'm assuming that's who these trustees are, like these trustees exist in Salesforce, or they're people you would add from outside?

[@33:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2023.48) - **Nicole Cohen-Meged**

Well, I feel like we should differentiate between, because for foundations, there's the primary contact who we speak to, but then there's the person within the foundation who's the person that holds the money.

You know what I mean?

[@34:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2040.0) - **Sim Borodach (Hatch)**

Can I ask a more general question? Yes, you can.

[@34:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2044.08) - **Rivka Cohen (icei.org.il)**

What is the benefit of having the donations uploaded in Hatch? What do we gain?

[@34:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2052.26) - **Sim Borodach (Hatch)**

You get the... Gosh, I mean, it has a lot of benefit. It has a lot of benefit. But I think around individual donors, it's indisputable, like, the benefit.

And around, like, trust... Okay, around, like, someone who's, like, the secretary at the foundation, you know, the benefit definitely drops.

Yeah, I don't think it makes any sense to assign, like... Yeah, I think it will even make things confusing if they're just, like, working in the office.

Right.

[@34:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2083.2) - **Rivka Cohen (icei.org.il)**

No, I don't think it makes sense. That trustee, like, assigning it to... Even having, like, the president of the board, I think...

I think it's... I think it's not a good idea.

[@34:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2097.06) - **Sim Borodach (Hatch)**

How many people are we talking about that, like, meet that criteria that they're... If a trustee or on the board and their foundation gave you a gift and they exist in Salesforce, how many people are we talking about?

[@35:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2108.16) - **Rivka Cohen (icei.org.il)**

Well, basically we have around 40 donors and like 30 of them are foundations. So we're also not talking about huge numbers in general, but we're also talking about donations past 15 years.

Right. So, yeah.

[@35:32](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2132.14) - **Sim Borodach (Hatch)**

I'm more curious to talk about, yeah, this whole thing is like, I would want to see, I would want to see you use Hatch, number one, to like, branch out and work on those connections from...

Yeah. So when it comes to like those foundations, do you have connections to the trustees that work there or the presidents?

It's like, are you connected with those people or did you just apply through grants? Yeah. So you kind of just applied for grants.

Yeah. No, we haven't.

[@36:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2162.06) - **Rivka Cohen (icei.org.il)**

Okay. There's trustees who are, sometimes they give money, sometimes they don't, who are officially the people on, according to the banks or whatever, they're on the- totally.

The 990. That's, if we can get connected to them, that's great. But that's not who we're talking to day to day.

We're talking to the professionals. It's definitely not their money.

[@36:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2198.5) - **Sim Borodach (Hatch)**

Yeah, yeah, yeah.

[@36:39](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2199.92) - **Rivka Cohen (icei.org.il)**

Donations to them.

[@36:41](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2201.02) - **Sim Borodach (Hatch)**

Yeah, yeah, yeah. Yeah. But what's, so...

[@36:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2205.2) - **Nicole Cohen-Meged**

It tends to import those professionals into Hatch.

[@36:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2209.88) - **Sim Borodach (Hatch)**

It does. What was the last thing you said, Nicole? Sorry. Oh, it doesn't make any sense whatsoever.

[@37:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2220.1) - **Nicole Cohen-Meged**

Right. make no- It sense to import those professionals into Hatch.

[@37:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2224.04) - **Sim Borodach (Hatch)**

Yeah, yeah, yeah. It's not what Hatch is designed for.

[@37:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2227.9) - **Rivka Cohen (icei.org.il)**

in circles here.

[@37:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2228.96) - **Sim Borodach (Hatch)**

Yeah, I think we are going in circles.

[@37:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2230.58) - **Rivka Cohen (icei.org.il)**

I would think that any contact of any sort should go into Hatch. The question is around the donations.

[@37:21](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2241.4) - **Sim Borodach (Hatch)**

I suppose so, but like...

[@37:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2243.12) - **Rivka Cohen (icei.org.il)**

professional has capacity to give and we don't even know about it.

[@37:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2246.62) - **Sim Borodach (Hatch)**

Who works at the foundation that you got a grant from? Okay, that's possible. I would be more interested in like, where the foundations that you have strong connections, right?

Or that they're already investing in you. Like, can they make introductions to... Can the trustees at those foundations make introductions to their peers who work at other foundations and bring more grants in or even private funding that have alignment with your organization's mission.

Right. So, that's...

[@37:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2279.24) - **Rivka Cohen (icei.org.il)**

Yeah. There's I mean, Hatch, so... Connection, I guess like through the LinkedIn or whatever, they like show who's connected to them.

[@38:05](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2285.68) - **Sim Borodach (Hatch)**

So, let me just pull this up. I know you guys only have 12 people in here, so I'll go to like a demo account.

also have a couple of other questions, so I want to make sure we get there. Okay, good. Good, good, good.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2307.524782)

So, okay, let me share my screen for a second. Okay, so, I don't know. Do you know any of these people?

I assume you do.

[@38:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2314.66) - **Rivka Cohen (icei.org.il)**

Who are we? I can't.

[@38:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2317.48) - **Nicole Cohen-Meged**

That's Rosalind Goldstein, who we always talk about. We don't know her. Didn't she die?

[@38:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2324.06) - **Rivka Cohen (icei.org.il)**

No, no.

[@38:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2325.66) - **Nicole Cohen-Meged**

Her husband died, yeah.

[@38:48](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2328.34) - **Sim Borodach (Hatch)**

Okay, so, she's associated with all these 330 people from...

[@38:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2335.58) - **Rivka Cohen (icei.org.il)**

can't say you're too zoomed in.

[@38:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2337.32) - **Sim Borodach (Hatch)**

Oh, it's too zoomed in? Yeah. Now? Now, can you see?

[@39:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2346.96) - **Nicole Cohen-Meged**

I can see. Oh.

[@39:09](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2349.98) - **Sim Borodach (Hatch)**

Oh gosh, we're having like three different computer orientations today.

[@39:14](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2354.58) - **Nicole Cohen-Meged**

but I'm looking on a big screen.

[@39:18](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2358.06) - **Rivka Cohen (icei.org.il)**

It's not you, it's me. I was zoomed in.

[@39:20](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2360.1) - **Sim Borodach (Hatch)**

But Rivka was saying, oh, okay. She was saying it was too zoomed in before. Okay. So should I zoom in or it's good?

[@39:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2365.58) - **Rivka Cohen (icei.org.il)**

No, no, you're fine.

[@39:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2366.36) - **Sim Borodach (Hatch)**

Okay. So, so, so a few, not every profile and for you guys, it's four out of 12. Okay, here I applied a filter to show four out of 12 that has foundation colleagues.

And you can see the, like, these are colleagues that work at a foundation with this person. And you can see the year that they were associated and the company that they overlapped and the title.

Okay. So this can be, this concept can be one route of building. Right. And you get. You would do this through QuickSearch, and you have 60 monthly.

So I'll just say this, like, right off the bat, if you guys get really deep into QuickSearching, and you're using it, and you're QuickSearching people, because every time you QuickSearch someone, you're going to get these scores, right?

So it's going to be surfaced. Yeah, go ahead.

[@40:18](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2418.76) - **Rivka Cohen (icei.org.il)**

We wanted to ask for more clarity about the scores. Oh.

[@40:22](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2422.86) - **Sim Borodach (Hatch)**

Well, go ahead and ask your question, because I don't know if it might be so fundamental.

[@40:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2426.16) - **Nicole Cohen-Meged**

Well, let's finish, then finish what you were saying, and then we'll ask about this.

[@40:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2430.1) - **Sim Borodach (Hatch)**

So if you, like, QuickSearch, you could QuickSearch someone, or you could take a lot of these names. When you spot someone that looks like a good fit, maybe that they recently worked at this foundation, or they hold a title that seems relevant, or you even go into OpenGiving, and you look up the...

This is like a whole thread that I would take you down, and we would, I think, slow down a little bit more to do research, right?

Really be, like, the way that we work with... Most of our clients now is that they have a big database and they upload that whole database and they use the scores to sort and bring like the best prospects to the top.

You guys have a small database. So this is exciting for me because I don't get to do this so often.

You would really be using Hatch as a research tool where you're looking at a list of people picking out who actually makes sense to research further and then either quick searching them.

Did you guys quick search some people, right? Yeah. Or putting them into a spreadsheet, just like first name, last name, company name.

Maybe if you could find their LinkedIn, that would really help. And then you could upload a bunch at once in batches.

And you're doing this whole discovery where you're creating a prospect pool out of thin air from connections that you guys have.

So if you find out that one of these people is a warm lead because their scores indicate that they're affluent and they have an affinity for ICEI, you'd reach out to Rob.

Rosalyn, who you didn't even know if she was dead or alive five minutes ago, but so maybe someone else, you'd reach out to your donor or your supporter and say, hey, can you make an introduction to this person so that we can solicit them for a donation or whatever it would be.

And then in OpenGiving, you can search this organization and get more of a, you know, just do a deeper dive on what this organization is that she's associated with.

I don't know, maybe it's one that you want to, you know, prospect for providing a grant or look into the individuals who are associated with it in more detail, which you can see from this page.

[@42:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2557.46) - **Rivka Cohen (icei.org.il)**

to be in there? Because I tried searching a foundation that gives us, and they weren't in OpenGiving.

[@42:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2564.32) - **Sim Borodach (Hatch)**

What's the name?

[@42:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2565.86) - **Rivka Cohen (icei.org.il)**

Circle of Service. And I even, I looked up their, like, EIN. Why does it come up for you? But it didn't come up for me.

[@42:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2575.66) - **Sim Borodach (Hatch)**

This one? This That's really weird. All right. That's really strange. Well, I'll drop this link in the channel. Sorry, in the message thread.

But okay, I just said a lot of things. If that sounds interesting, we can come back to that, but I definitely want to make sure we get to the other questions you had.

And that whole thread may be like... Now it's just showing up, so I guess I was just having a problem yesterday.

I mean, it's a big, it's a really big database of 1.8 million entities, so...

[@43:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2614.34) - **Rivka Cohen (icei.org.il)**

I got the EIN number from... Maybe N is number, so that's... I got the EIN from...

[@43:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2623.64) - **Sim Borodach (Hatch)**

Yeah, that's what you're saying. I never thought about that.

[@43:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2625.9) - **Rivka Cohen (icei.org.il)**

I think it is. And it still didn't come up, but I guess there was just some...

[@43:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2630.82) - **Sim Borodach (Hatch)**

Oh, that when I did Jewish Vocational Service, but same thing. Yeah.

[@43:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2635.52) - **Rivka Cohen (icei.org.il)**

I don't know.

[@43:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2636.62) - **Sim Borodach (Hatch)**

mean, also bugs happen, so it might not be you.

[@43:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2639.02) - **Rivka Cohen (icei.org.il)**

So in terms of... of... You mentioned about not having households and doing individual, this is maybe more of a suggestion than a question, but we wanted to ask if there was any sort of way of searching a couple together, it doesn't really make sense for us to have, to quick search the husband, quick search the wife, and a lot of their donations are overlapped, and then but we don't have one profile that's the two of them.

So is there a way to have a couple profile?

[@44:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2677.86) - **Sim Borodach (Hatch)**

Usually when it comes to, so the short answer is no, unfortunately not, and we know that it's a very sought after feature, and I can't say we're going to get to it in 2025 because we have some pretty tolerated tasks to get done, but maybe we will, but it's on our minds, we've talked about it a lot.

[@44:58](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2698.34) - **Rivka Cohen (icei.org.il)**

We are to develop it, but it's. Yeah.

[@45:01](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2701.54) - **Sim Borodach (Hatch)**

Now, but just I'll say one thing. When it comes to the donations, that's specifically that area of the data, right?

Because you have career, you have donations, have news. The donations is the one that tends to capture the things that relate to both partners the most because they're often listed together on their donations.

Not always, but they're often listed together. And even when they're not, I've even seen where it's the spouse's name is what's associated, but it comes up on the primary donor's profile.

And especially if you guys full stop there. So, so when it comes to donations, it can often capture.

[@45:50](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2750.62) - **Rivka Cohen (icei.org.il)**

Right.

[@45:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2751.64) - **Sim Borodach (Hatch)**

Yeah. But it won't capture like for the career or the salary of the spouse, which totally a view where you could see them side by side or like a merged view would be fantastic.

And we've been talking about it for over a year or so. Yeah.

[@46:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2764.84) - **Rivka Cohen (icei.org.il)**

Also, a quick question. You had showed us last time, I don't know quite how to explain it, but I'll try.

And I was trying to figure out how to see it myself and I couldn't find it. Okay. You had like kind of like, I don't know if it was a filter or you like glossed over something and it showed like the top relevant donations of that person.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2798.116541)

[@46:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2796.28) - **Sim Borodach (Hatch)**

Oh, yeah. That is here. Figure out where that is. In the donations affinity score. Oh, there's this whole weird, okay.

I'm going to pick somebody else for the moment. What'd you say?

[@46:59](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2819.84) - **Rivka Cohen (icei.org.il)**

We, we... all... Do What's You changed the name because he's dead.

[@47:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2824.4) - **Sim Borodach (Hatch)**

Oh, right, you changed the name post-facto.

[@47:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2827.04) - **Rivka Cohen (icei.org.il)**

Yeah, yeah.

[@47:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2828.56) - **Sim Borodach (Hatch)**

Okay. So, okay, so yeah, that was in here.

[@47:13](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2833.28) - **Rivka Cohen (icei.org.il)**

it make sense for us to QuickSearch her instead? I don't know.

[@47:17](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2837.1) - **Sim Borodach (Hatch)**

I mean, that's, like, you're, I have to go out for a second. You're, like, getting, that's how we want you to use QuickSearch.

Like, QuickSearch, get 60 monthly, okay? Like, we want you to, and I'm telling you, I will get you more free.

I will have your QuickSearches up for free if you are really using them. Like, like, we could talk about other ways in which, like, you can upgrade or, like, expand how much your subscription is.

But for QuickSearches, like, if you're really doing that, I will be really happy. Okay. So if you get to 60, we we get a prize.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2878.272919)

see how many we have won. Exactly. You'll get a prize, yeah. Yeah. Yeah, if you're in, yeah.

[@48:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2882.46) - **Rivka Cohen (icei.org.il)**

Okay, yeah, donations.

[@48:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2884.62) - **Sim Borodach (Hatch)**

Sorry.

[@48:09](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2889.18) - **Nicole Cohen-Meged**

What house is possible? 12 out of 60? I feel like I've been, like, in the last week, I've pressed QuickSearch, like, a hundred times.

[@48:21](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2901.38) - **Sim Borodach (Hatch)**

Well, are you, are you going?

[@48:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2908.24) - **Nicole Cohen-Meged**

Sorry?

[@48:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2908.88) - **Sim Borodach (Hatch)**

Are you going, are you going through to the last step, Nicole?

[@48:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2917.5) - **Nicole Cohen-Meged**

Like, importing it?

[@48:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2920.24) - **Sim Borodach (Hatch)**

Yeah.

[@48:41](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2921.3) - **Nicole Cohen-Meged**

Oh, no. Okay, so it's only considered a full QuickSearch if I import it?

[@48:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2926.68) - **Sim Borodach (Hatch)**

Yeah, exactly. You have to do complete import.

[@48:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2929.54) - **Nicole Cohen-Meged**

Oh, it was the search itself.

[@48:52](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2932.5) - **Sim Borodach (Hatch)**

Nope. Yeah.

[@48:54](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2934.46) - **Nicole Cohen-Meged**

Okay, I got it.

[@48:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2935.52) - **Sim Borodach (Hatch)**

Okay. Do you want to talk about donations affinity, Rivka? No. And I, I think we all probably got to go pretty soon.

So this is where I was showing you the...

[@49:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2950.96) - **Rivka Cohen (icei.org.il)**

I'm like, I know this is somewhere.

[@49:14](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2954.0) - **Sim Borodach (Hatch)**

So this is, yeah, this is loading. And what it's really loading are these explanations over here on the right.

[@49:22](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2962.7) - **Rivka Cohen (icei.org.il)**

Okay. So it's the CY.

[@49:26](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2966.92) - **Sim Borodach (Hatch)**

Okay, that's fine.

[@49:28](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2968.12) - **Rivka Cohen (icei.org.il)**

We don't need to look, uh, okay, explanation. Okay. Um, I just, I also wanted to get like a brief overview of all these scores, um, and what they tell us.

Um.

[@49:47](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2987.4) - **Sim Borodach (Hatch)**

Do you want to rush through it really quickly now?

[@49:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2989.44) - **Nicole Cohen-Meged**

do you want, yeah? Okay. Can I just say what, I'm going to be really quick and then you can do it.

[@49:54](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=2994.52) - **Sim Borodach (Hatch)**

just, before the meeting ends, I, I just want to know, like a concrete next step for me. Thank you.

Yeah.

[@50:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3000.76) - **Nicole Cohen-Meged**

I just want to know what I should do next. I know.

[@50:04](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3004.84) - **Sim Borodach (Hatch)**

Well, no, that's what I wanted to talk about also.

[@50:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3007.26) - **Nicole Cohen-Meged**

Okay. Because I just feel very confused about, because this might not work and that might not work, but I just want to know, like, what is the next thing I could do next?

[@50:15](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3015.52) - **Sim Borodach (Hatch)**

Now we can go into this. Look, you guys have so few people in Salesforce. Like, I'm all for setting up effective systems and having systems that communicate with each other.

I just, with what you're telling me about, like, the complicated nature of, like, I feel like if you guys can use this quick search methodology to search people and bring them to the top and, like, find someone on LinkedIn who looks interesting, like, and drop that in the quick search, you're going to get, you're going to get good results.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3044.39638)

Yeah. I'm just showing you, like, reminding you that, you know, you put in the first...

[@50:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3051.66) - **Rivka Cohen (icei.org.il)**

are of next steps in terms of, in terms of downloading from Salesforce and things like that.

[@50:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3056.62) - **Nicole Cohen-Meged**

we'll...

[@50:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3056.88) - **Sim Borodach (Hatch)**

Okay.

[@50:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3057.22) - **Nicole Cohen-Meged**

should be downloaded? Like, are we talking about contacts?

[@51:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3060.8) - **Sim Borodach (Hatch)**

If you guys talk about that, I don't mean to be rude, but I'm going to be rude, you guys talk about that with each other, and I want to explain two scores before we have to go.

Okay. That's what I meant.

[@51:12](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3072.56) - **Rivka Cohen (icei.org.il)**

I had a sense of it, so Nicole, you and I will talk about it on Sunday.

[@51:19](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3079.32) - **Sim Borodach (Hatch)**

Okay, so, yeah.

[@51:22](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3082.24) - **Rivka Cohen (icei.org.il)**

Run through it, but also if you can send, if there's like, I don't know if there is already in here an explanation of, of each of them.

[@51:31](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3091.56) - **Sim Borodach (Hatch)**

explanation is like, so, it's not complicated. So, rushing through it just means like, we'll have less time for you to like, ask.

[@51:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3098.22) - **Rivka Cohen (icei.org.il)**

I understand. Oh, sorry.

[@51:40](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3100.62) - **Sim Borodach (Hatch)**

Perfect. another thing.

[@51:42](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3102.52) - **Rivka Cohen (icei.org.il)**

Yep. We had set in the like, settings, what's considered like a low donation versus a mid or whatever, but it doesn't show in the actual profile.

[@51:56](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3116.66) - **Sim Borodach (Hatch)**

It just shows down here. This is the only place that it shows. And if.

[@52:00](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3120.0) - **Rivka Cohen (icei.org.il)**

Wait, click on the eye next to donor level, let's see, it shows...

[@52:08](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3128.92) - **Sim Borodach (Hatch)**

Yeah, it might just not update in that info tab, which is a great observation. But yeah, she's at a major level and she's over 100,000.

have to find someone who is above 50,000.

[@52:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3147.78) - **Rivka Cohen (icei.org.il)**

Okay, I'll talk it if I see.

[@52:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3150.98) - **Sim Borodach (Hatch)**

Yeah, that's perfect. That would be perfect.

[@52:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3154.56) - **Rivka Cohen (icei.org.il)**

Right, so gifts, said... Okay, so 131. That is total of her life? What is that? A year? Five years?

[@52:48](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3168.52) - **Sim Borodach (Hatch)**

We can't do, we can't do, we can't do everything right now. But it's total donations, so it's everything. Sorry.

It's everything that appears in this, in any of these donation sections. Right, so... Any donations that have not been hidden are going to appear here in the total recorded donations.

Okay. Yeah.

[@53:11](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3191.98) - **Rivka Cohen (icei.org.il)**

I think next time we could just do more of an overview, because to me that's not a helpful number.

Like, okay, she gave us much money over her lifetime.

[@53:20](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3200.78) - **Sim Borodach (Hatch)**

Listen, we definitely are interested in product feedback, and we've got feedback on, like, this section specifically. Like, I want to know what they gave last year.

I want to know what they gave the last three years.

[@53:36](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3216.16) - **Rivka Cohen (icei.org.il)**

The largest and average is great.

[@53:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3218.86) - **Sim Borodach (Hatch)**

Good. So we focused on... We focused on the... We focused on, like, trying to give insights based on this information, and that's what we capture here.

So you can drill in to see more by heading down to the donor profile or any of the sections.

Like, if you see... For some people, you're going to get their... Annual salary, right? Is AI generated? And then we populate here if that's the most significant affluence factor.

So then if you want to drill in to understand more about their career, you go to the career section, right?

This person doesn't have any career data. And she hasn't been elevated, which is the other feature that you guys need to take advantage of is elevate your people.

You have 20 every month. They don't roll over. And I can't change that for you. And to be honest, I won't change that for you.

I'm the gatekeeper. I am the gatekeeper.

[@54:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3270.36) - **Rivka Cohen (icei.org.il)**

It's a, it's a calendar month, or?

[@54:34](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3274.0) - **Sim Borodach (Hatch)**

It's, no. Here's your renewal date is the 8th.

[@54:37](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3277.82) - **Rivka Cohen (icei.org.il)**

The 8th?

[@54:38](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3278.7) - **Sim Borodach (Hatch)**

Okay. So like here you can see your...

[@54:44](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3284.7) - **Rivka Cohen (icei.org.il)**

Someone from your team is going through it and seeing what they can add.

[@54:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3291.32) - **Sim Borodach (Hatch)**

Exactly. They can, we consider a non-elevated profile. Okay. Here's the language. If it's not elevated, it's unconfirmed and incomplete.

**ACTION ITEM: Elevate 20 Hatch profiles by 8th (renewal date) -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3299.9999)

Okay. We go through and complete it, and we confirm everything, and that's an elevated profile.

[@55:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3310.1) - **Rivka Cohen (icei.org.il)**

Nicole, I want a goal of elevating 20 profiles by the eighth.

[@55:17](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3317.5) - **Sim Borodach (Hatch)**

Yes, yes, yes. Okay.

[@55:25](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3325.58) - **Rivka Cohen (icei.org.il)**

I know that we asked you a lot of things and jumping around. Yeah, it's okay.

[@55:30](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3330.9) - **Sim Borodach (Hatch)**

It's okay. They're all important to cover, and you guys are also, like, you're annual, you know, you paid annually, so I'm, you know, for monthly subscribers, they're demonstrating that they're less invested, right?

Because they could leave any day, but you're, you've demonstrated that you're invested in learning.

[@55:48](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3348.72) - **Rivka Cohen (icei.org.il)**

So I'm happy to spend this time with you. It's just in one shot. I have to, at a certain point, I have to go.

[@55:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3355.72) - **Sim Borodach (Hatch)**

We also need to start our team, so.

[@55:58](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3358.64) - **Rivka Cohen (icei.org.il)**

I also really like this target ask. That's so smart.

[@56:02](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3362.24) - **Sim Borodach (Hatch)**

What would be fantastic is over time for you guys to actually record, like if you can in a spreadsheet, or you can message me and just tell me, but what you, like if you use this number, right, or what you ended up asking them for and what they actually gave.

We want to know like how accurate were we and did this help you make a smarter ask?

[@56:27](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3387.16) - **Rivka Cohen (icei.org.il)**

Right. I'm thinking like with this total capacity of giving to all organizations over the next five years, how, but I feel like having there also how many organizations they give to.

[@56:43](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3403.78) - **Sim Borodach (Hatch)**

Interesting. Okay. That's an interesting point.

[@56:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3406.7) - **Rivka Cohen (icei.org.il)**

I'm okay, obviously they're going to give low because if they can only give 32,000 to all organizations over the next five years, that means they're never going to give us That's 30,000.

[@56:58](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3418.96) - **Sim Borodach (Hatch)**

Yeah, totally. Totally, but something that's worth noting is this is a non-elevated profile, so you can easily see that we didn't capture her career data.

So the donations are not necessarily the data point that indicates the capacity of the person. This gift capacity rating and target ask amount, we're actually, please God, in the next couple months are adding an explanation to these two.

And just so you know, like, our explanations are not, we don't dump AI a lot of data and say, like, tell us, like, why we gave it this number.

We give it very specific instructions and it basically just turns it into a sentence that's, like, human readable instead of just showing you numbers, right?

It complements the number and it says, like, these are the primary data points that power the target ask amount.

Like, something like that, the same way that you see by affluence score, we don't just give it the whole profile and say, well, why did this person get an affluence score of 19?

We basically just give it the total charitable donation amount. That was the most significant data point in our calculation of this number, which is not an AI calculation.

That number is pure math that we come up with. So we can explain to you exactly how we got to 19.

And in the same way, we can explain to you exactly how we got to this number. So you'll get those explanations, please, God, in the next couple of months, which will be really insightful.

Now, why am I mentioning that? Because this profile is not elevated. She has no career data. If she had career data, she might have a higher annual salary, which would indicate higher giving.

[@58:33](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3513.58) - **Rivka Cohen (icei.org.il)**

Right. Because we know, I mean, I just also took a look at Frank, who's her husband. It shows the exact same gift capacity.

But from speaking to others, we know that they actually have a very high capacity. So, yeah.

[@58:49](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3529.12) - **Sim Borodach (Hatch)**

So we want, so what I want you to do is when you spot someone that you're going to add.

Exactly.

[@58:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3535.82) - **Rivka Cohen (icei.org.il)**

So we'll, we'll choose either Sandra or Frank. Probably doesn't make sense to do both of them. Fathom, and LVM.

[@59:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3546.28) - **Sim Borodach (Hatch)**

Yep. Yep. And then, like, hopefully you get into the flow and, you know, over the next couple months, you know, it's just, there's such a big learning, I mean, there's such a big learning curve, and you guys are doing a great job asking questions and staying engaged, like, especially for having, I think, minimal experience doing prospect research and, like, donor discovery through these tools.

We, a lot of our customers have a lot of experience, and that's, that's essentially who this is built for.

So they, they just have used a lot of these before, so they get it, as it were, because it's, you know, experience, there's some things that only experience can teach.

And you guys are doing, I think you're doing all the right things, and I, I believe you're stepping in a good direction to, you know, move forward productively.

So. Thank you.

[@59:55](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3595.06) - **Rivka Cohen (icei.org.il)**

Nicole, any final thoughts or questions?

**ACTION ITEM: Schedule Sunday morning meeting w/ Nicole re next steps -** [**WATCH**](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3596.9999)

[@59:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3597.94) - **Nicole Cohen-Meged**

thoughts? Okay? no. the no, no, no, always. No, no, So I'm gonna, we're, we should talk about on Sunday what our next step is, and yeah, that's my priority.

[@1:00:07](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3607.7) - **Rivka Cohen (icei.org.il)**

Okay, well, we'll schedule a time for Sunday morning.

[@1:00:10](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3610.42) - **Nicole Cohen-Meged**

Okay.

[@1:00:11](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3611.22) - **Sim Borodach (Hatch)**

In terms of the rest of the scores, take, like, just walk through each one of them. We, we try to make them very interpretable.

What you will have, for sure, are questions about the nuance of how they work. Like, once you're thinking about it, you're like, okay, what, how does this impact it, or how do these numbers add up?

And if those things are, you're, want to scratch that itch, then just ask away, and I can answer them.

But I think if you just step through them, they're, they're, um, yeah, it should be reason, reasonable to follow on your own.

Okay, great.

[@1:00:45](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3645.56) - **Rivka Cohen (icei.org.il)**

Okay. Thank you so much.

[@1:00:46](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3646.86) - **Nicole Cohen-Meged**

Thank you.

[@1:00:47](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3647.22) - **Sim Borodach (Hatch)**

Really appreciate You're very welcome. Have a Shabbat. Shalom.

[@1:00:51](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3651.44) - **Nicole Cohen-Meged**

Thank you. You too.

[@1:00:53](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3653.46) - **Sim Borodach (Hatch)**

Shalom al Yisrael. Praise God.

[@1:00:57](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3657.28) - **Rivka Cohen (icei.org.il)**

And yeah, we'll, we'll be in touch. I'm sure. Thank you. There'll be more questions.

[@1:01:01](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3661.98) - **Sim Borodach (Hatch)**

Look forward to it. Look forward to it. It's what I'm here for.

[@1:01:05](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3665.02) - **Nicole Cohen-Meged**

Bye. Thank you.

[@1:01:06](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3666.62) - **Rivka Cohen (icei.org.il)**

Bye.

[@1:01:23](https://fathom.video/share/FnH2YPZ1JXUfwyKpVKJszs-P4gFGvfjf?timestamp=3683.04) - **Sim Borodach (Hatch)**

They would rerun on a 10-minute delay, so it's possible this isn't a bug, which doesn't make sense to me because...

the fact P3D one within-minute 21, 26, 27, 29, 30, 29, 29, 30. You Or are you suggesting something else?

Question mark. mark. Question mark. Question mark. Question mark. Question mark. Question mark. You Wealth Signals. Hey, Sam, how you doing?

Hey, mate, what's going on? Well, not much. Just trucking away before meetings start today. Oh, hey, yo. Yeah, guess you're getting those good early hours.

Yeah, generally I like to start around 7. As you know, just running the business and stuff, I can kind of do my own thing.

So I generally try and start around seven, and I work to about one or two on SKC stuff, and I pick up market analysis.

Thank you very much. Thank you. very much. Thank Thank you.