# **Foundation & Setup: Haberman Institute for Jewish Studies - July 10**

[**VIEW RECORDING - 68 mins (No highlights)**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-)

[@2:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=120.0) - **Sim Borodach (Hatch)**

Wealth Signals. Hey, Hey, Matthew.

[@2:54](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=174.88) - **Haberman Institute Programs**

Hey, buddy. Hi.

[@2:57](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=177.62) - **Sim Borodach (Hatch)**

Nice to be here with you guys. Thanks for Thanks for hanging out for me just a minute while I got roped into something else there.

[@3:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=186.52) - **Haberman Institute Programs**

No worries. How are you doing today?

[@3:09](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=189.68) - **Sim Borodach (Hatch)**

Thank God. I'm doing well. I'd love for you guys just, you know, to give some opening background on what your experience has been like so far interacting with Hatch, and if you'd like to give a little background on the organization too.

Hopefully we'll be working closely together over the coming months, and just great to hear a little bit from you.

[@3:33](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=213.7) - **Haberman Institute Programs**

Sure, I can start. So I'll start by telling you a little a about the organization. The Haberman Institute for Jewish Studies has been around for over 40 years, offers adult Jewish education to the community.

We're a tiny nonprofit. There's just three of us. We're all part time.

[@3:56](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=236.86) - **Sim Borodach (Hatch)**

Okay.

[@3:57](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=237.62) - **Haberman Institute Programs**

The third person might actually show up also. We have a relatively significant number of potential names to put into Hatch to explore different opportunities.

Some people might show, we have offered different lectures and classes and somebody might show up once or twice and we don't really know that much about them.

They might even donate $50 or something, depending on who they are in the program and such. I don't know.

That's a very short background. don't know.

[@4:40](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=280.14) - **Sim Borodach (Hatch)**

Is there specific information? I can talk about how...

[@4:42](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=282.62) - **Haberman Institute Programs**

No, let's know.

[@4:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=285.2) - **Haberman Institute Programs**

It is worth noting we have 10,000 plus in our Constant Contact database and more in our CRM. So while we started local with the pandemic, you know, we didn't...

We didn't... We know what would happen with all our old people, and everybody went online fast, and we went from being a local organization to national, if not international.

So we, you know, we definitely have a... Matt, what do you think our numbers are now? Like, half and half between DC area and beyond?

[@5:22](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=322.62) - **Haberman Institute Programs**

It's even, it's more like 640 outside of the area now.

[@5:27](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=327.22) - **Sim Borodach (Hatch)**

Okay, wow.

[@5:28](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=328.6) - **Haberman Institute Programs**

So it's very significant, yeah. And so because we're not local anymore, where the board could say, oh, I knew that person, or I think I know somebody who knows him.

We have all these, you know, randos, as it started looking, coming in, we're finding professors and emeritus and doctors and...

Ex-pats living in South Africa, and, you know, all these different types of people that we, you know, we have to do our little Google searches to figure out who they are.

[@6:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=360.0) - **Sim Borodach (Hatch)**

We know that's not really very successful. Effective, right?

[@6:03](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=363.54) - **Haberman Institute Programs**

Yeah, a little more about, you know, who is coming to us and who we're speaking to.

[@6:10](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=370.04) - **Sim Borodach (Hatch)**

Yeah. Who just joined us?

[@6:13](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=373.3) - **Haberman Institute Programs**

This is Fania.

[@6:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=375.12) - **Sim Borodach (Hatch)**

Fania. Okay. Hey.

[@6:16](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=376.84) - **Haberman Institute Programs**

Nice to have you here.

[@6:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=378.26) - **Sim Borodach (Hatch)**

No worries. You're good. We're doing intros, but you can slide in seamlessly. feels natural. Yeah. So did you guys receive the elevated profiles that we've been sending out to you?

[@6:33](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=393.92) - **Haberman Institute Programs**

Yeah. I've, yeah, I've started looking at those and seeing, yeah, we've, so we started, you know, we started a couple of months ago and I haven't been very quick to use it more in depth.

[@6:49](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=409.08) - **Sim Borodach (Hatch)**

Yeah.

[@6:49](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=409.6) - **Haberman Institute Programs**

We uploaded an initial list of a couple hundred people or so that were donors that, you know, just to start off with.

[@7:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=420.0) - **Sim Borodach (Hatch)**

Yep.

[@7:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=420.58) - **Haberman Institute Programs**

And see, it's just sort of see how the system works. And so we've kind of played around with a little bit, but we haven't really got into depth into using the information that's there.

Becky and Fania, are you guys familiar with Elevated Profiles?

[@7:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=435.8) - **Haberman Institute Programs**

A little bit.

[@7:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=437.24) - **Sim Borodach (Hatch)**

Okay.

[@7:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=437.7) - **Haberman Institute Programs**

Matt gave us a little orientation.

[@7:20](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=440.28) - **Sim Borodach (Hatch)**

Awesome.

[@7:21](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=441.26) - **Haberman Institute Programs**

We're learning.

[@7:22](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=442.92) - **Sim Borodach (Hatch)**

Okay. Yeah, perfect. That's right where you want to be. If you guys are added as users, that might be something useful for us to do now.

You can, you'll both get those Elevated Profile alerts when they're sent out to, and they'll be sent out to, because they're sent out to your email, or whoever is the user on the account to your emails.

**ACTION ITEM: Add Becky and Fania as Hatch users. Go to My Organization > find 'seats' > add org member. -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=465.9999)

And you'll also be able to do things like request Elevated Profiles and access the, you know, the platform. Is that something you want to do?

[@7:52](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=472.78) - **Haberman Institute Programs**

Matt, are you cool with that?

[@7:53](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=473.92) - **Haberman Institute Programs**

Yeah. Yeah. Yeah, we can set everybody up.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=475.722215)

[@7:56](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=476.24) - **Sim Borodach (Hatch)**

Okay. I'm going to, I'm going to share my screen. mean, just, um. That's Yeah, um... You know, I think I'm going to do some balance of like doing things myself versus just kind of guiding you, Matt, because hopefully you can be doing things on your screen too while I'm showing everyone around.

So I'm not going to actually add them. I'll leave that to you. But where I went to get to this page, which covers like organization level settings, I'll try not to get too much into the weeds, but you're going to hit my organization over here.

And then you could do a command find for the word seats. And that takes you down to add an organization member.

And if you have any questions about this, you're trying to add anyone, just ask. And this is for all three of you guys.

What I'm about to say, whenever you're in the application, the best way to reach out for support is through our chatbot here.

Right now it's a human on the other side. We don't have like an AI. So that may change. That may change.

But then it's me. That's a little picture of me. And yeah, whatever the question Questions are like you're learning how to use the product, or you're not sure how something works, or what the impact of pushing a certain button will be.

You can reach out. A lot of the product is intuitive, but questions are totally appropriate, and I've temporarily disabled our help center, but that's going to be added back.

So you'll have a whole knowledge base to go into and peruse, ask questions. So just check back if you can in a couple days.

That should be online. Where you can, like, do, you know, further education and learning.

[@9:35](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=575.02) - **Haberman Institute Programs**

Okay, great.

[@9:36](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=576.06) - **Sim Borodach (Hatch)**

Sound good?

[@9:36](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=576.92) - **Haberman Institute Programs**

Yep.

[@9:38](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=578.56) - **Sim Borodach (Hatch)**

Okay.

[@9:40](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=580.68) - **Haberman Institute Programs**

And how many, I'm seeing, do we get three seats as part of our plan?

[@9:47](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=587.86) - **Sim Borodach (Hatch)**

Four.

[@9:48](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=588.98) - **Haberman Institute Programs**

Four. Okay, cool. So we're not messing anything up by adding the two of us in.

[@9:54](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=594.6) - **Sim Borodach (Hatch)**

Yep. Okay. Yeah. So Matt, you were starting to talk about like, You've uploaded these couple hundred folks. Becky, it sounds like there's some determination around how many are actually in your database.

Just to clue everybody in, you purchased 5,000 enrichment profiles. Those are a lifetime. So they don't ever expire. They also, as of now, we don't have any intention to renew credits annually or something for the bulk enrichment.

If you use, you know, 4,000 this year, when you log in January 1st of next year, you'll have 1,000 left still.

That won't change. We'll talk about quick searches and elevated profiles are like monthly quotas. So those will reset each month.

And you can actually see that terminology here is monthly quota. And then here you can see quick search this month's quota and elevated profiles this month's quota.

Okay. So this may be the right number for you. Amen. It sounds like you may have some consideration around additional prospects.

If you decide that that's the case, you could just hit that upgrade subscription button and I'm opening the new tab, which is my preferred way of navigating.

don't know, it's like maybe, you know, I'm kind of a technical person. So sometimes I think about like efficiencies, then don't need to wait for the pages to refresh and you can see how the plans change.

You guys are on an annual plan, so you get that 10 percent discount automatically applied. You can do this on your own.

You don't have to reach out to us if you realize you're, you know, exceeding your bulk enrichment credits and want to purchase more.

[@11:39](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=699.8) - **Haberman Institute Programs**

Okay.

[@11:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=705.72) - **Sim Borodach (Hatch)**

Okay. Where are you guys feeling like you want to head next? I do, I tend to have like some things I want to cover, but it seems like you guys have some familiarity with the product already.

You may have some questions or topics that you want to cover.

[@11:59](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=719.94) - **Haberman Institute Programs**

for? you you Go I I'm happy for you to sort of lead us, at least, you know, initially into some of the things that you think are most important.

I shared it with them also, but I'm still very novice at it, so...

[@12:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=735.54) - **Sim Borodach (Hatch)**

Mm-hmm. Okay. Do you guys have a, like, I don't know, it might help me a little bit, do you have your heads wrapped around to any extent, like, what you're each planning to do within Hatch, or how, how do your relationships work in terms of, sounds like you have a good handle on, like, Hatch is a prospecting tool, like, helping you identify, you know, folks who participate in your organization or have you been donated and, you know, find out that they can give more.

So we'll definitely talk more about that and some of the other features that help build relationships, because Hatch is, in addition to the monetary aspect, we also provide data that's useful on, like, understanding how to relate to donors.

Donors or Perspective Donors, but yeah, do you guys, I'm forgetting what my original question was, oh yeah, like what's the dynamic between, kind of like between, in your team, how, do you have a sense of how you're planning to use Hatch, day to day, week to week?

[@13:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=798.34) - **Haberman Institute Programs**

I mean, we're just, we're beginning to talk that through. I mean, in general, like, there's some information that's more helpful to us than others, but like, like you mentioned, some of it, just relationship building, things like birthdays, and those kind of, that kind of information we can add to our database, or, you know, if we can find out what their jobs are, interests are, ways that we can connect with them, maybe there's a program that they would be interested in, or something like that, you program they're interested in sponsoring based on where they've given money to in the past, or where their interests lie.

[@13:56](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=836.38) - **Sim Borodach (Hatch)**

Yeah.

[@13:57](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=837.5) - **Haberman Institute Programs**

Yeah. Yeah.

[@13:58](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=838.66) - **Sim Borodach (Hatch)**

That makes sense. So far I'm hearing like bringing data back to your CRM and also like identifying opportunity-specific asks.

[@14:11](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=851.84) - **Haberman Institute Programs**

Yeah, I mean...

[@14:12](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=852.86) - **Haberman Institute Programs**

you integrate between, like, do you have one of those integration tools that our CRM could talk to Hatch to export data between the two or not so much?

[@14:22](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=862.88) - **Sim Borodach (Hatch)**

Remind me which CRM you are, which CRM you're in.

[@14:27](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=867.46) - **Haberman Institute Programs**

We have Neon.

[@14:30](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=870.24) - **Sim Borodach (Hatch)**

Okay, you're the second customer I've interacted with that has Neon. Unfortunately, we do not integrate with Neon.

[@14:38](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=878.78) - **Haberman Institute Programs**

I know Neon is a BlackBaud product, right? It's BlackBaud product. Yeah, I think so.

[@14:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=885.06) - **Haberman Institute Programs**

It's okay. It's probably better for us at this stage to be able to, like, see the date, like to really handle the data that's going from one place to the other.

But I was just, you know, thinking down the line. So, no worries. okay. okay. Thank you.

[@15:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=900.0) - **Sim Borodach (Hatch)**

Sorry, my screen glitched out for a second. The last thing I heard you say was, it's probably better for us to be able to...

[@15:05](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=905.88) - **Haberman Institute Programs**

I that's it, and we're done then. It's the calls that I've done. No, I said, no worries. It's probably better for us at this stage to have our hands on the data, because it's the three of us and we're talking all the time and talking to our board.

So it's probably better at this stage that they don't just automate, but I was just wondering down the line if there's a way to move data from one to the other, but no worries.

[@15:29](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=929.32) - **Sim Borodach (Hatch)**

Just to clarify, I'll say a word on this, because you guys aren't with a product that we were integrated with, so this is just a small tangent.

Just a little comment on what you're suggesting. The integration is not like we update all of your CRM fields like it's a Wild West, just kind of free for all.

We pull in specific constituent records, donor records. It's from the CRM that you want to bring over to Hatch, we produce the enriched profile and then we send very specific data in a very neatly packaged way back to the CRM and it's very clearly marked and sectioned off like this is Hatch Enrichment Insight data.

So you you'll still have like in the CRM integration there's still a very strong control of what data is coming into Hatch from your CRM and also we're not we're not I'd say particularly close to a stage where we're like editing CRM data from the Hatch Enrichment data.

[@16:44](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1004.16) - **Haberman Institute Programs**

Cool makes sense.

[@16:46](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1006.38) - **Sim Borodach (Hatch)**

Cool. over. Okay, so anything else? So, so far CRM integration and like opportunity matching those are both great.

[@16:58](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1018.84) - **Haberman Institute Programs**

Yeah, mean We we have, I mean, we have a lot of, I mean, we probably have around 5,000 unique individuals in a given year come to our programs, and just only a fraction of them are donors, and so just sort of prioritizing who would, you know, who to build relationships with, or maybe they get $18 or something, and who could be a $1,000 donor or something, you know, just that general stuff is really our, Totally, okay.

Or small staff, so it's really just, just narrowing down, you know, if we could find, even if we found like 30 people or something to really, that we didn't know about before, it was really the overall goal.

[@17:41](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1061.68) - **Sim Borodach (Hatch)**

Okay, I'm getting excited for you guys. You're a great, great use case for this, for our product, and I'm not trying to delay here, it's just like it's great to collect these, you know, little clues.

I think the last thing I'm wondering, at least for now, is do any of you have experience, Experience with, like, analogous tools like Hatch.

I can name some if that's helpful.

[@18:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1086.64) - **Haberman Institute Programs**

Sure, if you can name some, I'm not sure.

[@18:09](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1089.52) - **Sim Borodach (Hatch)**

iWave, Hindsight, Donor Search, Wealth Engine.

[@18:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1095.0) - **Haberman Institute Programs**

Just a little bit. Not really. We're not familiar so much.

[@18:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1098.64) - **Sim Borodach (Hatch)**

Awesome. Okay, so it's even more fun because there's no, like, baggage, you know, no need to compare to what you're used to.

You're just coming in with fresh eyes, which is really fun. So we're gonna, I guess, let's look back inside the product at some of the core features, which you guys, you can already be using because you've uploaded folks already, Matt, and you have been getting those elevated profiles.

Sounds like you guys understand generally what an elevated profile is, but if you want more context on that at some point, just ask.

And, uh, in terms of bringing. Data back to your CRM. We have an export function. So you just say, hey, I want to export these records, these Hatch records, these Hatch profiles, and you choose which data points you're going to export.

It's really easy. And using, right, you have a user ID in your CRM or in Constant Contact, right? Like an ID connected to every person.

So that's how you're going to map the data back, back and forth. So really straightforward. I mean, it's not an integration.

You have to export the data from Hatch, upload it, map the fields properly, et cetera. So, but that, that's good.

So glad you guys want to do that.

[@19:41](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1181.28) - **Haberman Institute Programs**

And you will, I you can do that right now. We're used to that. So that's cool.

[@19:46](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1186.5) - **Sim Borodach (Hatch)**

Okay. Like the export and upload part. Yeah. Which tools are you using? not like a, one of the tools I mentioned, is that with like MailChimp?

[@19:56](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1196.4) - **Haberman Institute Programs**

Contact and Neon. Oh, okay.

[@19:58](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1198.72) - **Sim Borodach (Hatch)**

For most Communicating between those two. Gotcha. Yeah. So. All Constant Contact is like mass email outreach to your subscribers, right?

[@20:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1206.1) - **Haberman Institute Programs**

Yeah.

[@20:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1206.46) - **Sim Borodach (Hatch)**

Cool. And then for the second piece, I'm forgetting what was the second, the third one I know was like, popping prospective donors to the top who would be good fits.

What was the second one? Do you remember what it was? Anybody remember what was?

[@20:23](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1223.94) - **Haberman Institute Programs**

Interests?

[@20:25](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1225.64) - **Sim Borodach (Hatch)**

Was it Interests? Okay, it's okay if anyone else remembers. Okay. Well, for the third one, for identifying those prospects, that is really our bread and butter.

So I'm going to pull up on the screen that segment of, you know, I guess subscribers that Matt has already uploaded.

And, you know, hopefully you guys are going to upload everybody else or, you know, a significant portion of who you have.

And you'll be able to repeat these. These essential steps with that same group of people, because you're able to search across your database, it's not really a donor database, your subscriber database in Hatch, and the number of records will increase as you add more, and the tool is really designed to help you identify those individuals or those segments.

So, you'll be able to create lists, you know, say like look at a certain geographic area of folks who also maybe fit like in a certain wealth demographic, and you'll also be able to just target those individuals and say, okay, I want to look more at this individual person.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1308.132737)

So, without further ado, here we go, I'm to take us away from this page. And so, I just closed out that upgrade subscription page, I'm just going to click off the screen.

to-by. I'm to to Yeah, looking Close that little button here in the top right corner, and I'm going to head over to Profiles.

So the buttons here on the left side are pretty much where you're going to navigate to the different parts of the platform.

Lists is that segment ability I was talking about earlier. You can view your lists on this page. QuickSearch we'll come back to.

Has anyone used QuickSearch?

[@22:26](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1346.68) - **Haberman Institute Programs**

Have you used QuickSearch yet, Matt? Yeah, think I used it once. Yeah.

[@22:35](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1355.04) - **Sim Borodach (Hatch)**

Becky, Fania, that familiar? QuickSearch, the term? Okay. I mean, it is what it sounds like. It's searching an individual person once, doing a QuickSearch on that person, and we'll come back to that one.

And then there's some other, you know, core functionality here that you get to by clicking any of these buttons.

We're going to start with all profiles. This is, you know, sort of where it all begins, because you're... You're looking at your entire community, right?

You're looking at everybody here on this page, all profiles, in contrast to a segment that you've already stored in the list.

So lists actually look the same, almost identical. I'm just going to open one. These are your two pre-created lists, favorites and default.

So I'll go into favorites just because it has one prospect in it. I guess at some point someone favored today a profile and you can see it looks more or less the same.

Oh, my thumbs up. I made a thumbs up. don't know how to get rid of that now. Okay, one more.

It looks more or less the same, but all profiles is where you'll see every time you click on this button, you're going to see everybody.

It kind of takes you back to the beginning. You can apply filters to refine who you're looking at. From this entire set of donors.

And again, you can apply those same filters from any list segment here by clicking this button. So obviously there's not a large group to filter on here.

It's just one person. So I'm going to click it. You're going to see a lot of options here on the side.

We're not going to cover all of these. Whenever you log into the platform, just explore what's here. There's so many different fields to filter by that can help you narrow down the group of folks you're looking at.

You could really get really hyper specific. And I'll just stop here because some of these might be a little bit less intuitive in this prospect management section.

Here you can filter by things like upload ID, which will correspond to different uploads that you make at different points.

You might upload in segments or on different dates. And you can visit that in your upload panel over here.

You can also filter by custom profile tags, which you guys haven't created any yet, but you can select multiple profiles and add a specific tag that you define to those individuals, such as, let's say you're using that opportunity mechanism, right?

Like identifying folks for a specific opportunity. So you can obviously put them into a list, but the tags are a bit more dynamic, and so I could put, let's say, like, Learning Lab and save that tag with these particular individuals, and then when I...

[@25:39](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1539.72) - **Haberman Institute Programs**

I'm sorry, Sim, would that be a good place to do, like, local versus national, like, to kind of differentiate them there as, like, a local prospect or a Midwest prospect?

Or no, because I do think that's a good idea.

[@25:58](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1558.24) - **Sim Borodach (Hatch)**

Yeah, do think that's a good idea. There's some thought around how it fits into your overall workflow, and when you see what other filters are available with geography specifically, you may decide that those tags are extraneous.

may decide that a list is a better option, but it's totally a good idea.

[@26:20](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1580.92) - **Haberman Institute Programs**

You're saying it would just be as easy to pull a list like that? Yeah. Sure.

[@26:26](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1586.22) - **Sim Borodach (Hatch)**

Okay, makes sense. Yeah, you can apply these filters in real time. Because, right, if you, the tags don't update dynamically, and the same is true of lists.

You can't say, like, every time a new prospect fits this criteria, automatically add them to a list or automatically apply this tag.

That would be great functionality. We just, you know, it's an obvious thing to do. We're just not, we're, we don't have in mind to build that right now.

So, so yeah, having these things in your. Your awareness is going to be key and hopefully the Help Center is going to be back live very soon and this information will be contained in the Help Center that we're talking about now so you'll be able to think through how to design the system in the most effective way.

Okay, we're getting into a lot of sort of workflow details that are a little bit less exciting and interesting.

Why do we really think Hatch is so amazing, guys? Because we've introduced this incredible way to blow through all of this filtering and sorting and strategic thinking.

Let's just get to the bottom line. Who are the most relevant prospects in your database to your organization? So we have refined the labels or what we call our scores and insights.

insights. sites that are applied to every single person in your donor database to help you surface who's most relevant to you.

And there are five specific criteria, some of which you're seeing on the screen here, and we call them our scores.

As I mentioned, each one has score in its title. And I'm actually going to open up a specific profile here.

Let's pick Raymond... I don't know how to pronounce his last name. Scalatar?

[@28:30](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1710.14) - **Haberman Institute Programs**

Yeah.

[@28:31](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=1711.18) - **Sim Borodach (Hatch)**

All right, not bad, not bad. Sorry, just jumping quickly to the insights section, because I want to stay focused on this aspect.

But you could see that there's all these... When you were talking about earlier, Becky, like wanting to be able to access all the data, it's all right here on every single person.

When you open the donor profile, and you can easily navigate to these different sections on the profile as I just did by hitting insights.

You can jump to any of them, or you could scroll. So I'm coming in here because I want to talk in more detail about these scores with you.

So that you can understand what I mean by how easy it is that you could pop people to the top that are of interest.

So we have these five subscores and the Hatch giving score, which is, it's the Hatch score, right? Hatch is proprietary.

This is our most amazing score that captures everything, but it's not really that complicated on its own. It's just a weighted average of these five scores, which are each, each one is more amazing than the next, or each next one is more amazing than the one before.

But the Hatch giving score is just a weighted average of the five scores, and you're able to customize the weighting, right?

So each is given 20% by default. And you can see that the more that it is filled out here, the more space that it takes up here, because they're each set to apply 20% by default.

Thank you. Thank you. Back in your My Organization settings you can actually edit the Hatch Giving Score. I'm going to open that tab and we'll come back to it in a few minutes after we go over the individual scores, but I think you'll see how that thread is drawn and how you might use the Hatch Giving Score.

So let's talk practically here. These are insights that bring to the top the people who are most relevant. aggregating together these disparate data points like the properties that he owns, his home value, and then we're going to go on to look at his propensity score and talk about donation history and the other affinity scores below.

So you're able to access these insights really easily on all of your donors. And I'm going to show you back on the All Profiles page how you could see most of this information without even going into a donor profile.

So let's imagine you segment for a specific geographic zip code. And then you want to see all of these scores and insights.

You don't even have to come into the donor profile to see most of them. So you're able to do your research really easily.

Let's go one by one now through these scores so that we can understand what they mean. There's Affluence Score, there's Propensity Score, there's Donations Affinity Score, that's three.

There's Profile Affinity Score, and finally there's MyOrg Donations. That makes five total. The Hatch Giving Score is the one that captures all of them in one number.

As mentioned, the Hatch Giving Score is simply a weighted sum of these five scores. So the Affluence Score represents how wealthy this person is based on all of their wealth indicators.

Here you're seeing that the AI explanation talks a lot about property value. There are other underlying data points that contribute to the score for this.

This individual, including their donation history, because we see that they made donations, so those impact the affluence score, but the ones that the AI surfaced are the ones that are most impactful, and in this case, it's the property relationship.

Other factors for the affluence score are inferred salary, public stock portfolios, okay, those also can impact the affluence score.

And the AI explanation, and this is going to be true for all five scores, surfaces the most relevant factors, so you're not going to see every single detail about what impacted the score.

You can explore the rest of the donor profile to see those details. And then moving on to the propensity score, you'll see the same thing is true.

The facts that are surfaced here in the explanation are the ones that were most impactful, $25,000 donation in 2021.

And we can see that there are two important details. There that that are surfaced is the size of that gift and the recency of that gift in 2021.

So those were the most important details was recency of the donation and also was the amount of the donation.

Okay. Now, one thing as we're going through here, that's obviously a curiosity is like how relevant is this number 23 out of 100 59 out of 100.

So for each one, it's going to work a little bit differently. And you'll find in the Help Center more context on this.

And you're going have to go there to read more about it. I'll give you, you know, the essentials right now for each one of these.

And right after we go through the four, we'll talk about how significant that number is for that individual score.

So moving on to donations affinity and profile affinity. see. hear that opportunity. ... We'll talk about these together because they both have the word affinity in it, right?

They're both tracking the relationship that this person has to your organization. How much do they like your organization or your type of organization based on information that we know about them and the names express what the two different scores are based on.

For donations affinity we're looking for all of the historical donations that this person has made and how those donations demonstrate affinity for your organization.

The higher the donations affinity, the higher the correspondence between where they've given their philanthropy and your organization. And both of these use AI.

So we'll come back in a second to talk about how donations affinity uses AI. And profile affinity also uses AI.

right. All right. It's looking at all of the information about this person outside of their donation history. All of those data points, like where they work, what their interests are, what their skills are, where they live in relation to your organization.

Now, when we say your organization, what do we mean by that, right? How are we comparing who this person is relative to your organization?

So we use a mission statement about your organization, which you can actually edit. I mean, I'm going to encourage you to edit it.

And it's also going to be in your My Organization settings. So we'll take a look at where that is when we head over to look at the weights for the Hatch score.

But editing that statement so that it properly reflects your organization is going to make sure that the context used to assess the

The affinity of this person relative to your organization is accurate. You guys know the mission of your organization best.

Not complicated to write this mission statement. We ask that you cap it, I think, at a thousand characters. There's already a draft in there that you can edit, so you don't need to go back to the drawing board.

That mission statement is what's used, and I'm going to show you a really cool feature here for the donations affinity, and you'll see a similar one for the profile affinity that highlights how this comparison actually works, comparing where they've given historically to your organization's mission.

So just reading through, does someone want to just read through this donations affinity score AI explanation? I'm talking a lot, it'd be nice to hear from you guys.

[@36:50](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2210.96) - **Haberman Institute Programs**

I'm going to volunteer.

[@36:51](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2211.7) - **Sim Borodach (Hatch)**

to volunteer.

[@36:52](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2212.76) - **Haberman Institute Programs**

Just Raymond, the power says Raymond has shown.

[@36:55](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2215.42) - **Sim Borodach (Hatch)**

Exactly.

[@36:56](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2216.44) - **Haberman Institute Programs**

Raymond has shown some interest in supporting causes related to Jewish history and culture. community? together. And With notable past donations to organizations like the Jewish Historical Society of Greater Washington and the L.A.

and Albert Small Capital Jewish Museum, suggesting a potential affinity with the Haberman Institute for Jewish Studies.

[@37:13](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2233.2) - **Sim Borodach (Hatch)**

Just candid, candid reactions on like that sentence. Pretty good.

[@37:19](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2239.08) - **Haberman Institute Programs**

Yeah, pretty good. Yeah, it's an organization that we have a lot of connections with, so definitely makes sense. Yeah.

[@37:29](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2249.74) - **Haberman Institute Programs**

Okay. It's interesting because Jewish Historical Society of Greater Washington then kind of became or merged into the Capital Jewish Museum.

So it's really the same organization. So with institutional knowledge, we can pop that together.

[@37:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2265.74) - **Sim Borodach (Hatch)**

Bingo. And that is the key to, as an AI technologist, that is the key to using AI, is using our brains in partnership with it.

I'm not expecting it to provide the answer. So, inserting content. So I'm going to hit this CY button so that you can see why this is the score and the explanation, right?

Not just why the 13 is populated. You sort of get a sense for why there's a 13 there, but to get a real understanding of how this explanation even came to be, we want to open this up.

So at the very top are going to be the organizations that this person is associated with donating to, that score the highest, and the score for each one of these is defined as a combination of recency frequency amount, and the mission comparison.

So taking your mission and comparing it to the mission of this organization. The strongest combination... One of those factors pushes the organizations to the top.

So you could have an organization that has made a smaller donation or even no, I mean, a zero dollar means that it was actually undisclosed.

That's just a little tidbit for you. But nonetheless, it's appearing here at the top. And it's probably because of the recency and also the strong association between or similarity between your organizations.

In contrast, you could... I'm sorry, do we have a mission statement in already?

[@39:35](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2375.14) - **Haberman Institute Programs**

Or is it just pulling from the name of our organization?

[@39:38](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2378.18) - **Sim Borodach (Hatch)**

We generated one on your behalf. You can edit it here in the organization settings, same spot as earlier. I'll pop it over really quickly.

It's right here at the top. Again, this is your my organization settings. Only at... You have an ability to have admins and editors.

... ... Only admins can edit the My Organization settings, and here is the mission that we came up with.

**ACTION ITEM: Edit org mission statement in Hatch My Organization settings. Refine auto-generated ver. Keep structure (location, reach, founding year). Add specifics on community focus, interests. -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2404.9999)

So it looks like it came from our website? Yeah, probably mostly. That looks right. Okay, well, it's definitely, you know, go in there and refine it.

The amount of minutes that it will take you to refine this will provide way more utility to get you better affinity results.

[@40:27](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2427.64) - **Haberman Institute Programs**

Do you have any hints for, like, keywords that should go in there or types of information?

[@40:33](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2433.86) - **Sim Borodach (Hatch)**

Keep the same structure that's here. Like, don't destroy the location. Don't destroy the geographic reach. The year it was founded.

Like, keep these key ingredients and try to complement it. Like, if it says, oh, our focus is on servicing such and such type of community, but you'd rather capture what that community is a bit differently, right?

If you're repositioning or something like that, that's a perfect opportunity to craft or to provide some more specificity.

[@41:08](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2468.66) - **Haberman Institute Programs**

Okay, this is good.

[@41:12](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2472.04) - **Sim Borodach (Hatch)**

The right way to think about this and generally prompting AI is you have an assistant sitting in front of you who you assume doesn't really have any outside.

In this case, there's no outside context. They're going to take you at face value here, what they tell you.

So the more general you are, the more general they will be in their evaluation of any donor's affinity. The more specific you are, the more specific your assistant will be.

[@41:39](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2499.16) - **Haberman Institute Programs**

Do we need to put in a category up there?

[@41:43](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2503.72) - **Sim Borodach (Hatch)**

You don't have to, but we can. And you can fill out all of these details in the My Organization settings.

We're not currently using these fields, which is why they're not required. But at some point we will be and it's definitely useful to you to put them in because later you'll get a notice like, hey, please fill out.

Okay, jumping back. Thank you. Yeah, no problem. Just any questions before we proceed on how the Donations Affinity works so far?

Clear?

[@42:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2535.64) - **Haberman Institute Programs**

Yep.

[@42:16](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2536.04) - **Sim Borodach (Hatch)**

So these explanations are coming soon. You'll actually have a sentence that reads like the one that you read, Matt, about the overall Donations Affinity score, explaining why your organization is similar to any other recipient organizations that were dissimilar, that same style AI explanation.

So you can understand where there are nonprofits that you're not familiar with, rather than needing to go and Google about that organization.

You'll get a quick sense of who that organization is. And of course, you could do more research. This is going to be a one sentence comparison.

You may want to do a deeper dive, but hopefully it gives you a jumpstart. Just candid reactions, you know, when we head back.

Back to all profiles in a bit, you'll be able to sort by Donation's Affinity, we're going to review how Donation's Affinity can affect the Hatch Giving score in smart ways, but before we move on to Profile Affinity, to look in a little bit more detail, just any candid reactions to Donation's Affinity?

Do you guys think that will be useful? Does seem interesting to you?

[@43:22](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2602.28) - **Haberman Institute Programs**

It's definitely useful to see, yeah, to be able to see other organizations that people have given to, even if, you know, even if the score is different, like, we might, you know, I don't know, we might even, like, put a higher score on someone based on the organizations that we see, but, but it's good, yeah, it's good to see them overall and such, definitely.

[@43:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2625.04) - **Haberman Institute Programs**

Especially if we see that they've given to some of our partners, then, you know, we, we, we, we can know how to get to them a little better.

[@43:54](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2634.82) - **Sim Borodach (Hatch)**

Right. Absolutely. And that, that's the idea. That's definitely the idea. Any, any, I mean, not, not necessary, but any critiques that you'd like to offer or, or investigative questions?

[@44:12](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2652.12) - **Haberman Institute Programs**

I mean, one, I don't, like, not necessarily on this page, but on the other one, we're just taking a quick glance at like how the numbers are.

I know that some, some, some of our, some people are donors that we know about, have much lower scores than people than, and, I mean, it's just some, some of it is just the data that, that's publicly available, I'm sure, but it, it is, I can, you know, it's, some of the, some of them are lower numbers than others who, who are, you know, the, I guess the AI doesn't really know who the person is, maybe.

[@44:48](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2688.98) - **Sim Borodach (Hatch)**

Like, yeah, yeah, just like, I don't, I don't know how, I don't know how exactly how AI works, as far as like how, can, how many connections it makes, but I'll just give you an example on this.

[@45:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2700.0) - **Haberman Institute Programs**

In case it's ever helpful, but the last person on the screen there, David Bruce Smith, is the grandson of somebody named Charles E.

Smith. don't know what city are you in? Where are you? I'm in Los Angeles. Or Los Angeles. So Charles E.

Smith is the day school here. It's called the Charles E. Smith Jewish Day School. The Jewish Light Communities is called Charles E.

Smith. Like, that family, you know, there's buildings in D.C. named after parts of that family. Like, just seeing the name and knowing the family, that's somebody who clearly just don't know that relationship that's potentially there as far as that number 37, versus other people above it who...

You know, aren't in that tier of, you know, wealth.

[@45:52](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2752.92) - **Sim Borodach (Hatch)**

So, there's a couple things that we need to discuss. Like, one... One is, like, accuracy of data and how you guys can do some, have some sense of, like, accuracy of data out of the gate, because you were sort of saying, like, does the AI, or you were asking about, like, does the AI know that it's looking at the right person, right?

How does it know that the data is correct? So we have to talk about that. And the other piece that we have to talk about is the completeness of a profile, and the relationship that we have with each other as user and a customer service provider, how can we interact around information that you may have that can help inform the system to work better?

And we can talk about that particular example with, it was Charles Smith as a grandfather, right?

[@46:58](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2818.48) - **Haberman Institute Programs**

Yeah.

[@46:59](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2819.3) - **Sim Borodach (Hatch)**

That's a, that's a perfect Perfect, really, really great example, where the knowledge that you have could help the way that the profile ultimately looks, and that's actually through the elevated profile mechanism.

Those elevated profiles are incredibly valuable. We market them at $10, the value is $10 a piece, which if we actually sold them at that rate, you know, the platform would be really expensive.

We've come up with some solutions to help drive that down. An elevated profile is the equivalent of you going and researching someone that you know nothing about other than what you see on their Hatch profile, and what someone who does know a bit about this person may sprinkle in details like you just did about Charles.

in relation to David. So you have 20 of them monthly, right? That's where you see that up here in your meter, or sorry, 15 misspoke.

These are the clincher for getting the utility out of Hatch. Because you asked that, how do I know if the data is fully accurate?

Again, we're going to come back to that conversation to talk about some markers on the profile that you can evaluate yourselves to understand what data is accurate or what data is semi-accurate or inaccurate or seemingly inaccurate.

And we're going to focus first on how can you get to that confirmed profile where everything is accurate and complete profile with the least amount of effort.

That is the elevated profile. And for all the elevated profiles that we've done for Haberman Institute, Matt have Have you requested any of those elevations, or have we just been sending them to you?

[@49:04](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2944.54) - **Haberman Institute Programs**

There are one or two or so that I definitely requested, yeah.

[@49:10](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2950.4) - **Sim Borodach (Hatch)**

Awesome. Becky and Fania, are you familiar with the idea of requesting an elevated profile?

[@49:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2957.52) - **Haberman Institute Programs**

Not yet.

[@49:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=2957.86) - **Sim Borodach (Hatch)**

Let's go over it. Even though Matt seems like you have a little bit of that experience, let's just go over it.

I know I'm going out, you know, we're kind of disrupting the profile affinity. So we'll come back to profile affinity.

We're going to come back to Hatch, or we're taking a quick detour for elevated profiles. It's what brings everything together.

And so on, let's say we're on Raymond's profile, right? And we have the same exact question. How do we get to a state of confirmed and complete, okay?

That I know all available data has been entered on the profile. And it's all accurate, that what's on here.

That is the element. Elevated Profile Mechanism. So you're on Raymond's profile and you say, I want Raymond's profile to be confirmed and completed.

How do you do that is by going to the top of the profile. I can see we already elevated Raymond's profile, so I'm going to actually go and pick someone else.

But here is what it looks like when it's done. The elevation status is elevated and you can see a date when it was elevated.

If I jump back for a moment, let's go with Michael Horowitz, since he's right here on our favorites list.

At the top of his profile, we see Elevate Profile. There's no consequence to hitting that button, folks. It's just going to open us up to see the side panel where we have a questionnaire.

And this is where Mac's idea of telling us that David is Charlie's grandson is key. There's a few questions here.

They are all optional. You can just scroll down to the bottom and hit send because you may not know anything more about this person.

You have thousands of subscribers. Someone may pop to the top because they have a high affluence score or a high donations affinity score and you really know very little about this person.

You want Hatch to tell you more about this person. Okay? You want that confirmed and completed profile. And we can talk about the accuracy markers, how to evaluate the profile for accuracy.

And we will. However, to get to that solution with the least amount of effort on your part, the least amount of time, you just elevate the profile and answer the questions to the best of your ability.

And that will guide our researcher to go in, confirm the whole profile, complete the whole profile and send you back that elevation.

that we talked about at the beginning of the call to whoever's emails are here. Those emails include a link to come into the profile and they have the high level details that can reasonably fit in an email for you.

[@52:12](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3132.9) - **Haberman Institute Programs**

What's the turnaround for that?

[@52:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3135.06) - **Sim Borodach (Hatch)**

Two business days where there are no issues that arise, which is often the case. If we're having trouble resolving who the person is or finding very little information about them, we will reach out to you through intercom to ask you for some additional perspective.

And once we reach out to you, the two day promise is it just disappears because, you know, it depends on how long you take to reply, how long the process actually takes.

I'll add that in a pinch or any situation where you have an upcoming donor meeting or something is pressing.

Let us know through intercom and we'll do our best to potentially get it back to you faster. There's just no guarantee.

no guarantee. We'll collect target parable. Is Every Profile 2 Business Days, Barring Exceptions. So, these scores, I'm going to jump back to the scores now.

These scores and insights, do they update based on changes on the profile? The answer is, of course they do.

They have to update. They can't be stagnant where we don't know that they're going to reliably represent all the changes that have been made.

And I'm going to show you an example of how this works. just going to temporarily add the letter D to his profile.

His middle name is not D, and we're going to remove that in a moment. I'm going to scroll to the bottom and hit save.

You guys can do this. You can edit data on a profile. This is essentially where we edit data also when we're researching the person.

I just hit the pencil in the floating toolbar at the bottom. There's a few other functions here. We're not going to go over them today, but feel free to play around.

Just a Maybe don't go too far into the, there's a delete, the trash bin, but there's a warning before you actually delete the profile.

I'm going to hit save, and now in Raymond's Insights section, you're going to see that little yellow spinner that pops up that says calculating scores.

That's your indicator that these scores do not represent the most recent changes made to the profile. There's a 10 minute buffer, because you or our researcher may be making a whole series of changes, so scores will run again 10 minutes after the last change has been made.

And once they're done running, that spinner is going to disappear. Now I'm going to delete that change that I made here, and the scores are still going to run again.

But again, they're, they're going to run without the D, since that's going to represent the latest version of the details.

So scores and insights always represent the most recent data that's contained on the profile. Let's go back to Profile Affinity.

Profile Affinity, as we said, represents all the data about this person aside from their donation history. And can I get, Becky or Fania, can you read this other sentence here?

[@55:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3318.58) - **Haberman Institute Programs**

Which one?

[@55:19](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3319.76) - **Sim Borodach (Hatch)**

The AI explanation here for Profile, Raymond's Profile Affinity.

[@55:24](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3324.08) - **Haberman Institute Programs**

Fania, do you want me to? You want to go next? This is the last one. Raymond's Jewish identity strongly aligns with the Haberman Institute's mission, complemented by his expressed interest in arts, culture, and education.

[@55:39](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3339.14) - **Sim Borodach (Hatch)**

Thoughts? Reflections?

[@55:44](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3344.1) - **Haberman Institute Programs**

I mean, based on, based on his, I mean, it's, I mean, I guess I'm going back based on his donations to the other places, it makes sense, but, and, and, you know, he's Jewish.

Um, this, I there's there more, other around I there's the it's

[@56:01](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3361.44) - **Sim Borodach (Hatch)**

And again, these, yeah, these, like the Profile Affinity is not even looking at the donations data.

[@56:09](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3369.2) - **Haberman Institute Programs**

Yeah.

[@56:09](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3369.88) - **Sim Borodach (Hatch)**

It's not served, it's like surface these insights based on all the other data. And when you hit CY, you get to look at the individual facts, which that AI summary that you just read, Becky, summarizes again the most important ones, but you get to come in here to see all the details.

And as you can tell, the score can, the values of the facts can exceed 100 and we cap the score at 100 and assume someone who's got a, you know, total score of 100 has a strong affinity for your organization already.

Okay. I'm sure you guys have to go relatively soon. I know we've been on for a little while. I think next time we'll talk more about gift capacity rating.

thing. Target ask amounts. These are going to be really useful to get, you know, the specific donation amount that you're looking for or to serve as a guide.

Again, I'm going to invoke that sentiment from earlier. You you want to combine your own sensibilities with the AI recommendations.

These are smart indicators, they're smart ask amounts, and these are smart numbers. They are not, I don't know, I mean, it'd be anything that anyone can come is always going to be a guess.

What the person wants to give is what the person wants to give. Everything else is just a suggestion. And I'll just make a mention, Gift Capacity Rating is an industry standard term, okay?

Prospect researchers and major gift officers at established nonprofits are very familiar with this term, so that is why we use it.

And it's widely accepted. And it's like, how valuable could this person possibly be to us in their totality? And...

Thank They gave to us what they'd be giving to all nonprofits over the next five years. You may find it useful, you may not.

So just to wrap up with the Hatch Giving Score, I'm going to hop back to your My Organization page.

Okay, sorry, just scroll down a little bit. And I'm actually going to scroll all the way to the bottom.

But you could also do a command find for like Hatch or Hatch Score. And here you see where you can set the weights for the Hatch Giving Score.

As I mentioned earlier, they're set default to 20%. I'm just going to arbitrarily change to make 50% for Affluence and Propensity and hit Save.

This is a low consequence activity. Just understand that it impacts all the users in your organization or on your team.

It's not localized to an individual account. And immediately when I head back over to Raymond's profile and refresh, we're going to see his Hatch Giving Score update.

6. to just include the colors from Affluence and Propensity, and you will have noticed that the number dropped because that significant profile affinity is now absent from the score.

I think it dropped, right? It was higher before? Was it higher before?

[@59:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3555.64) - **Haberman Institute Programs**

I don't remember.

[@59:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3557.12) - **Sim Borodach (Hatch)**

Yeah, neither do I.

[@59:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3558.06) - **Haberman Institute Programs**

It was similar. It was in the 40s.

[@59:19](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3559.72) - **Sim Borodach (Hatch)**

Okay. So, and then when we head back to the All Profiles page and I do the same refresh, we'll see that the Hatch Giving Score now only includes Propensity and Affluence.

So now when I sort by Hatch Giving Score, right, it means something a little bit different. So this is a small calculation, but it has a big impact.

And when you're trying to figure out what's the easiest or most effective criteria to sort by, you're going to use the Hatch Giving Score in a dynamic way.

And so, okay, well, want to pop the people to the top who have the most money, perhaps, but then maybe I'm going to want to look.

with my eyes and scan what's their affinity, right? Maybe you want to just say, okay, we want to focus on the richest people, but we want to be able to scan their affinity simultaneously.

And when I mentioned earlier that you don't need to go into the donor profile itself to see so much detail, this is what I'm talking about.

Watch what happens when I hover over, it's just a subtle movement, but it's really impactful, hover over profile affinity.

You get that AI explanation right there of what brought his profile affinity to the surface. So again, you can be doing such extensive research into these people from your All Profiles page, which is where there is so much power in filtering and sorting.

We're talking about thousands of subscribers, many of whom you guys know so little about. I'm going to stop. share.

[@1:00:57](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3657.6) - **Haberman Institute Programs**

Is that okay with everybody? Yep.

[@1:00:59](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3659.92) - **Sim Borodach (Hatch)**

Okay. Thank you so much for showing up today, for being present and engaging with me and listening and also sharing so much about your organization at the beginning.

I'm excited to go learn a little bit more about the Haberman Institute and see, I don't know, maybe you guys offer some classes that I'll want to attend also.

Then we'll have to look into you, you know, when you're a new person from LA. No, no, no, no, no.

[@1:01:26](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3686.52) - **Haberman Institute Programs**

With a younger demographic, you're gonna like pop up, so we can't.

[@1:01:30](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3690.72) - **Sim Borodach (Hatch)**

We can't cross-pollinate, we can't cross-pollinate.

[@1:01:35](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3695.54) - **Haberman Institute Programs**

You're like, oh, who's that? Let us know though, if you find anything, let us know, we'll guide you in the right direction for sure.

[@1:01:42](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3702.38) - **Sim Borodach (Hatch)**

Oh, appreciate you. Yeah. I hope you guys feel confident in what we've gone over today, that you can make your way into Hatch, okay?

**ACTION ITEM: Upload remaining donor data + donation history to Hatch. Ensure correct names per row. Don't stress perfection, Sim will review. -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3709.9999)

I want to say two success criteria for me. There's really, I mean, there's actually three, because you... You still have to do your data upload.

So I'll just mention that one first. Get that done as soon as possible. I have found that working with most of our users that they might be a big lift, like maybe you have a lot of data cleaning to do.

And by the way, don't worry too much, okay? So long as the right donors or the right names are in the file that you upload, I review it before it gets approved.

And Matt, you've already uploaded a file, so you know how this works. I review it. So I will make sure that all the I's are dotted and T's are crossed.

The thing that I cannot do is export it from your CRM for you and upload it into our system.

You guys have to do that. So it's not super complicated. Everything doesn't need to be perfect. You need to have the right names represented in each row.

And you're also going to want to upload the donation history associated with your contacts. Sounds like you guys don't necessarily have a ton, so it's not something to really share.

Stress over, if it's too complicated or...

[@1:03:04](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3784.14) - **Haberman Institute Programs**

No, we have it. Okay.

[@1:03:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3786.6) - **Sim Borodach (Hatch)**

So that's also on the upload page, Matt. There's instructions. Again, if you have questions, message an intercom or check the Help Center.

**ACTION ITEM: Request all 15 monthly elevated profiles in Hatch. Use 'Elevate Profile' button on indiv profiles. Answer questionnaire if known info. -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3792.9999)

Again, hopefully that will be back online in the next couple of days. So that will be number one. Number two is requesting your elevated profiles quota this month and every month.

Those do not roll over month to month. And as mentioned, they are really valuable. It's the equivalent of someone taking anywhere from 15 minutes to one hour and Googling and thinking through who this person is, resolving their data.

Make sure you use those elevations. And we sent a lot to you without you requesting them. We are ending that functionality in the platform and we are requiring that users request them.

**ACTION ITEM: Set target % for prospect pipeline expansion (e.g. 5-10%) over next 3 months. Discuss w/ team+board. Prep to share w/ Sim next mtg. -** [**WATCH**](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3838.9999)

We want... We want you to be proactive, we want you to be engaged, so that's the second thing. Any comments or questions before I go to the third?

Okay, the third is that within three months for you guys at the latest of using, of proactively now that we've had this meeting and engaging with the product and engaging with me, three months at the longest end, and hopefully it's within maybe a six-week window, you have actually expanded your prospect pipeline by some percentage, 5%, 10%.

You can actually come together with each other, with your board, and say, we have this many good prospects that we are queued up to meet with, cultivate, solicit, etc.

That is like the actionable thing. I mean, I would love for it to be something like that you've actually acquired X number more donations, but fundraising is a little bit more finicky than that.

much, Hatton GBCC. there have Don't do the asking part for you and, you know, building relationships sometimes takes time, so we do expect you to see that dollar ROI for sure, but I think adding those prospects to your Rolodex, to your prospecting pipeline and saying, we are confidently reaching out to these people, building relationships with them, you could think about what that percentage expansion looks like, how many you would target to add in July, over the summer, by the start of the new school year, whatever feels like the right, you know, you could think about that and bring that and we can talk about it next time.

[@1:05:40](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3940.62) - **Haberman Institute Programs**

Great.

[@1:05:41](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3941.8) - **Haberman Institute Programs**

Amazing.

[@1:05:43](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3943.1) - **Haberman Institute Programs**

Yeah, thanks for going through it all. As we get questions, we'll talk them through and then send them your way if we can't figure something out.

[@1:05:52](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3952.46) - **Haberman Institute Programs**

Is Intercom, when you mentioned Intercom, is that, that's what's integrated into Hatch?

[@1:05:57](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3957.96) - **Sim Borodach (Hatch)**

Yeah, the little blue dot, it's a blue dot in the bottom.

[@1:06:00](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3960.0) - **Haberman Institute Programs**

Right corner. So that's like the help button.

[@1:06:02](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3962.82) - **Sim Borodach (Hatch)**

Exactly.

[@1:06:03](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3963.74) - **Haberman Institute Programs**

Okay, cool.

[@1:06:04](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3964.76) - **Sim Borodach (Hatch)**

Yeah, and it's a chat that, as I mentioned, for right now it goes directly to me. It's not, no robots right now.

[@1:06:11](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3971.18) - **Haberman Institute Programs**

Okay, it's your info ad.

[@1:06:15](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3975.96) - **Sim Borodach (Hatch)**

Yeah.

[@1:06:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3977.46) - **Haberman Institute Programs**

Cool.

[@1:06:17](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3977.68) - **Sim Borodach (Hatch)**

Fania, anything that you want to add? We didn't really hear from you, so no pressure.

[@1:06:23](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3983.28) - **Haberman Institute Programs**

I'm just taking it all in.

[@1:06:25](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=3985.7) - **Sim Borodach (Hatch)**

Yeah. Yeah. It's definitely a lot. And, you we really believe that what we've built is pretty powerful and can be transformative for an organization like you guys.

So there's still a very strong meeting point of, you know, in terms of this research, like humans and computers.

We just don't do it all, but the computers are doing a lot. And our company is doing a lot, as I mentioned, we're researchers on our side.

There are actual people on our side who are completing the rest of the process. So, you know, there is some work for you guys to do.

And if you imagine. Imagine for a little bit what the amount of work would be to do anything that resembles this, you know, it's almost impossible.

[@1:07:06](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4026.96) - **Haberman Institute Programs**

Yeah, we've tried.

[@1:07:09](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4029.48) - **Sim Borodach (Hatch)**

Okay, okay.

[@1:07:11](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4031.4) - **Haberman Institute Programs**

Bonnie is actually really good at it. She's our expert, uh, hole digger or whatever.

[@1:07:16](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4036.96) - **Sim Borodach (Hatch)**

Oh, okay.

[@1:07:18](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4038.8) - **Haberman Institute Programs**

Finding who's divorced and where they live and we've definitely tried.

[@1:07:23](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4043.42) - **Sim Borodach (Hatch)**

Okay, maybe you'll be the one putting through those elevated profile requests.

[@1:07:28](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4048.34) - **Haberman Institute Programs**

That'd be great.

[@1:07:30](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4050.7) - **Sim Borodach (Hatch)**

Yeah, awesome.

[@1:07:33](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4053.6) - **Haberman Institute Programs**

Thank you so much.

[@1:07:35](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4055.34) - **Sim Borodach (Hatch)**

Okay, you're very welcome. Have a Shabbat Shalom.

[@1:07:39](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4059.14) - **Haberman Institute Programs**

Shabbat Shalom.

[@1:07:40](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4060.0) - **Sim Borodach (Hatch)**

And look forward to being in touch with you guys again soon.

[@1:07:42](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4062.16) - **Haberman Institute Programs**

Great.

[@1:07:43](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4063.0) - **Haberman Institute Programs**

Sounds good. Thanks.

[@1:07:45](https://fathom.video/share/5cxCNjZpXujSpba-itW7yEtagMDiJHW-?timestamp=4065.0) - **Haberman Institute Programs**

Bye. Bye. Bye. You