# **Foundation & Setup - July 07**

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[@0:01](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1.46) - **Justin Foster**

Justin E.D.: How are going?

[@0:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=16.8) - **Sim Borodach (Hatch)**

Justin. Hi Justin.

[@0:18](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=18.88) - **Justin Foster**

Justin How are you? Good. Justin are you?

[@0:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=21.78) - **Sim Borodach (Hatch)**

Justin All right, do you remember me? We met maybe four months ago now?

[@0:28](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=28.36) - **Justin Foster**

Yeah.

[@0:29](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=29.08) - **Sim Borodach (Hatch)**

Justin We're in a couple of meetings last back yeah looking at the the ai scoring and insights yeah good to see you again hey too hey andrew hey hey how's it going awesome yes we're taking the time to meet with us in our expanded team today oh yeah it's it's so awesome to be here with you guys i've you know just after so many months of

You know, talking about what the, it's like the past now, right, we've come, we've come as far as we hope to, and you know, to us, yeah, to us, you know, the greatest sign is being in conversation with a customer like Oregon State University, and you, Andrew, and Justin, who had a ton of insight, insightful feedback on the product that we were building, and to be here now with you guys as a customer, it's It's so awesome, and it's great to be here with you, Jenna, and Anne, and Peggy.

I'm excited to get to know more about you guys, and learn more about your roles at the organization. I have to say, it's totally awesome that there are more folks here.

My first, or my second slide only has some of the people in the room, since I didn't know everyone was going to be here, but it's totally, totally great that...

[@1:54](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=114.78) - **Andrew Phillips (OSU Foundation)**

That's my fault.

[@1:55](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=115.64) - **Sim Borodach (Hatch)**

I should let you know, Sim. I'm sorry. No, I'm sorry, you know... know... You're not on this slide, but we can make a special slide for you next time.

I'm just kidding.

[@2:05](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=125.96) - **Jenna Proctor**

That is totally fine. I have two additional team members that might be joining the call a little bit later, Jayden and Andy, but I wasn't sure if they were going to be able to make it.

[@2:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=136.2) - **Sim Borodach (Hatch)**

So we can get started whenever you're ready. Yeah, awesome. Okay. I think Andy was the one that I knew about.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=148.71944)

And then, so maybe we'll just go around and be great to hear what team, everybody's representing today. But welcome.

This is your first official onboarding call for Oregon State University to hatch. This call is labeled Setup and Foundation.

And we'll have at least two other formal calls. The second one is data upload. And the third one is strategic implementation.

We'll reference those at the end of our call today. Any comments or questions before we jump in? Justin and Andrew?

Looking to you, because you're the two folks on the call that I know, but anybody want to just chime in before we get started?

[@3:07](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=187.0) - **Andrew Phillips (OSU Foundation)**

No, I I think that's, you know, it's great. Obviously, we have some folks who have never seen the platform at all.

Justin and have seen some of this at this point in time, so some of will be a little bit reviewed for us, but that's totally fine.

So we've got a lot of fresh eyes, and this is mostly for Jenna and Ann and Peggy and Andy and Jaden, if they can make it as well.

So yeah, starting fresh would be great. And that's kind of their introduction to the platform. They're going to be using it, you know, just as much as us.

So yeah, if we wanted quick introductions, we can certainly do that.

[@3:39](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=219.46) - **Sim Borodach (Hatch)**

That would be awesome. These are the, yeah, yeah, these are the four, you know, Andrew, you're first on this list, Justin, you're fourth.

And then Andy and Peggy, we were expecting you guys to be here. Oh, sorry, Andy's not even here yet.

So Jenna, sounds like you're on Andy's team.

[@3:55](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=235.62) - **Andy Lasselle**

I'm here.

[@3:56](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=236.18) - **Jenna Proctor**

Yeah.

[@3:57](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=237.14) - **Sim Borodach (Hatch)**

Oh, you are here.

[@3:58](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=238.26) - **Andy Lasselle**

Okay.

[@3:58](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=238.8) - **Jenna Proctor**

Yeah, Andy. Yeah, I can. Just give a quick introduction to me and my team and then give them a chance to introduce themselves.

So I'm Jenna Proctor. I'm the Associate Director of Relationship Insights. We'd also be known as Research to Prospect Research, for example.

We just have a different name at the OSU Foundation. And so our team will do a lot of the capacity verifications in collaboration with Drew and Justin's team.

And we're also, so we're interested in capabilities of this product for screenings and any other sort of research, Prospect Research type capabilities.

And so then on my team, Anne is a fellow Associate Director. And then we have Andy, Peggy, and Jaden.

Jaden may not be able to make it today. We have one new team member as well, but she has some other obligations today.

So right now it's just the smaller team. I can give everyone just a quick chance to say hello and introduce themselves.

[@5:01](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=301.68) - **Anne Wilson**

I can go. I'm Anne Wilson. As Jenna said, I'm an Associate Director on Relationship Insights as well, and I primarily work with our leadership team, so I'm really looking at high-level donors.

If they're going to be rated at like 5 million, 10 million, how can we figure out what that is and what their assets are and prospects for those higher-level donors?

[@5:24](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=324.66) - **Sim Borodach (Hatch)**

Awesome. Nice to meet you, Anne. Nice to meet you.

[@5:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=330.08) - **Peggy Pence-Polley**

Hey, I'm Peggy Pence-Polley, and you already have me on the list. I'm a Senior Analyst with Relationship Insights, and I primarily work with Foundation Relations and Scholarships and University Initiatives.

[@5:42](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=342.58) - **Sim Borodach (Hatch)**

Okay. Awesome.

[@5:45](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=345.08) - **Andy Lasselle**

I'm Andy Lasselle. I apologize, my camera does not seem to be working today. But I work primarily with our athletics team and our science

And I'm blanking on the name, but the sciences, so, arts and sciences. There we go.

[@6:07](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=367.02) - **Sim Borodach (Hatch)**

Yeah. Awesome. Cool. Good to know where everybody is sitting in the organization and we'll, you know, we've taken all of this down and we'll reflect a little bit and just try to have, you know, approach each of you as individuals.

We know you're part of a larger organization, but have different and varying functions and approach things differently. So, hopefully we can make our collaboration excellent.

And as I mentioned, you guys invested in us, Andrew and Justin, your time, your curiosity. And now with like an actual commitment to a subscription, we are really ready to invest back in you.

And hopefully, Hatch will be a very productive tool in your toolbox. So, I have this slide of key questions to address.

Prioritization of profiles, timeline expectations, success criteria. But just before we dive into these, And we'll also look at the platform today and make sure everything's set up and clear to move on to our second meeting in the near future.

You know, in meeting with you, Andrew and Justin, the main takeaway that we had is that Oregon State University has access to a lot of tools.

You guys are really seasoned with prospecting in various ways, wealth screening, relationship science. And there was something about the Hatch scores that maybe captured, you know, insights in a novel way that you hadn't seen before.

So that's sort of how I'm showing up, having worked with the two of you and, you know, Jenna and Peggy, everyone else on the call who I'm meeting at for the first time.

You know, I'm pretty curious to know what you're coming with, what your what your hopes are, what your expectations are.

And we can spend as much time here as feels comfortable for the entire team. I don't want to. to.

I don't want us to be here for longer than you guys want to be here, but I do find this a valuable place to spend.

So I know sort of at the highest level, kind of the why about what, you know, what is your purpose in coming to Hatch so that we can, you know, function most productively together.

So it's open ended. Andrew and Justin, you can respond to what I said specifically about you guys or anyone else, kind of what your hopes, expectations are and what problems you're hoping to solve with Hatch.

[@8:29](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=509.76) - **Andrew Phillips (OSU Foundation)**

Yeah, I mean, you know, as we've talked about in the past, as you mentioned, right, we do have a variety of tools available to us.

pretty comfortable with a lot of these, you know, similar platforms. We are current clients with iWave as well. I think we've talked about that.

We've had Wealth Engine in the past. We've had Donor Search in the past. We've had Weaponfall in the past.

We've had, you name it, we've probably had one of their services at some point in time. So, you know, we're certainly the Wealth Screening and Wealth Capacity is a big use case for us.

Share. Daniel. Thank Daniel. So we're keenly interested in any sort of other, you know, research and tools and scores that you guys might have.

Obviously, I there's some AI capabilities on your platform. AI is certainly, you know, something that's very much on our radar and something that we use currently, and it's going to be in all of our annual plans in some capacity or another at some point.

So, yeah, all that being said is like, this whole team is pretty comfortable with these types of tools that we've seen before.

think we've all used different versions of them for years now at this point. And so just sort of kind of, you know, so I don't think we need anything as far as like, hey, what sort of basic use cases can we do?

Or I think we're pretty comfortable with some of that stuff. But any, you know, Jenna, obviously, if there's anything I'm missing from your team's perspective, feel free to jump in.

[@9:47](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=587.72) - **Jenna Proctor**

Yeah, I mean, I think my team is not super familiar with the platform. Drew gave us a little bit of a preview of what to expect the platform.

So I think for my team, we'd be interested in just general overview, what are the functionalities of the platform, if you can of to.

Highlight some kind of key areas that we should know about early on. I think, as Drew said, we are generally interested in any sort of tools to augment our research capabilities.

We're interested in any sort of philanthropy to other organizations. If there's any international component, we'd be very interested in that as well.

But I think we're just kind of generally looking for, like you said, additional tools in our toolbox when it comes to research and being able to prioritize donors based off of various different factors.

So kind of more info, the better for us.

[@10:37](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=637.74) - **Sim Borodach (Hatch)**

Awesome. That's really helpful perspective. Well, so we'll definitely take a look today at some of the basics. Well, maybe I'll give someone else a moment just to kind of let things bubble under the surface.

One of the things that we You know, built in this AI scoring is donations affinity, so it's an AI use of comparing the missions of historical organizations that were given to by donors with the mission of Oregon State University, and you guys will be able to craft that your mission specifically so that it captures, the AI captures sort of what it is that you're after, you know, something like that your university maybe is not the most meaningful thing to emphasize.

It might be some more of the details about your science department or your athletics. Yeah. Does anyone else want to chime in here?

Just a few more seconds.

[@11:43](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=703.94) - **Anne Wilson**

I also just kind of want emphasize what Jenna said. We're coming to the end of a campaign and starting a new one, so part of my job is looking for those next big donors.

You know, we know who we know. Who do we not know that we can tap? tap? Thank Part of that is our international alumni, and so sort of a little bit harder to sort of figure out where they're giving to, what their affinity is, what their wealth is.

So I think, you know, the next big donor that international is something that I'm really interested in seeing.

[@12:24](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=744.1) - **Sim Borodach (Hatch)**

Awesome. Yeah, that's really helpful. One of the things that we like to say about Hathom is that you'll find the diamonds within your own stack, your hidden gems, right, using the bulk enrichment across 5,000, 10,000, 20,000 names, and easily surfacing to the top those folks who could be most relevant to you that you don't already know about.

So we'll look at that a little bit today. Awesome. Thanks, Anne. All right, anybody else Justin? Justin? Thanks, You good?

Okay.

[@13:02](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=782.42) - **Justin Foster**

I think we've pretty much touched on most of our main objectives.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=790.502131)

[@13:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=786.42) - **Sim Borodach (Hatch)**

Awesome. Cool. So I'll just pull up those slides one more time. We don't have to answer these questions by any means this moment, but before we jump in, I want you guys to know that these are some things that we want to address today.

So one question is, which of the 20,000 profiles are you going to upload? Obviously, Oregon State has a much larger database than that.

you know, identifying what, you know, which 20,000 are going to come in. And then, Anne, for example, it was actually insightful that you have this upcoming, right, you're going to want to plan for your next campaign.

So thinking about when you need those enrichments completed, by what time, so we make sure we're aligned on the schedule.

What success criteria look like? You know, how would you evaluate the ROI here? Is it hours saved from research?

Is it right-sizing ask amounts? Is it number of prospects identified that were not otherwise in your Rolodex? That might be some useful ways for us evaluating the ROI.

And then I have a quick slide about this, how we'll get data back into Ellucian after it's been enriched in Hatch.

And then finally, who needs access and what level of training do different people need? Will everyone come to each one of these onboarding calls?

Can we anticipate needing some further training? Assignment from these three calls? So, real quick, does anyone have anything burning for any of these?

These are things we can cover over the course of all three Zoom meetings that we're going to have as well.

Anything burning that anyone wants to bring up here?

[@14:49](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=889.72) - **Jenna Proctor**

You know, I'd say Drew Phillips is probably the best position to answer most of these questions. So, for the rest of us, aside from Justin, obviously, it's the first time that we

We have seen this platform or been kind of briefed on the platform, so I think the rest of us probably aren't in a position to answer a lot of these questions.

It would be more Drew. But to the last question, team training, my understanding is everyone on this call would need access to the platform and just at least an introduction, introductory training on how to use the platform, navigate some of the key features, that sort of thing.

And there may be, there's I think two additional people not on this call that are part of my team that would also need access and at least introductory levels of training.

But in terms of getting data to and from the platform, getting data into the platform and then back into our CRM, that would probably be more something that you'd work with Drew on.

[@15:43](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=943.86) - **Sim Borodach (Hatch)**

Awesome. Could you just drop, name drop those other two folks who are not here?

[@15:47](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=947.96) - **Jenna Proctor**

Yep. I'll put them in the chat.

[@15:50](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=950.16) - **Sim Borodach (Hatch)**

Oh, awesome. Even better. Okay. Drew, that sounds good to you. What, Jenna?

[@15:58](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=958.54) - **Andrew Phillips**

Yeah, I dropped off for a minute. I had to restart my router, but I, I, so I didn't catch that last, uh, piece there.

[@16:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=966.36) - **Jenna Proctor**

Yeah. Drew, was basically saying, I think you're probably the best position to answer these questions. Um, aside from the last question, I think everyone on my team, plus you and Justin, would need access to the tool and at least introductory levels of training on how to use the platform.

Does that sound right?

[@16:24](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=984.88) - **Andrew Phillips**

Yeah, I think so. And so, you know, Justin and I will be kind of the ones that do oversee the screening aspects.

[@16:29](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=989.86) - **Jenna Proctor**

Yeah.

[@16:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=990.48) - **Andrew Phillips**

So, um, since we do have the expanded team here, we can kind of, you know, talk about that later, and we can kind of more focus on the use cases that will be more helpful to the rest of the folks here.

[@16:40](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1000.8) - **Sim Borodach (Hatch)**

Awesome. Yeah, totally. That makes sense to me. Cool. Um, so it sounds like we're just, we're gonna come back to the first four.

Fifth one is what we're actually going to get into right now.

[@16:54](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1014.26) - **Andrew Phillips**

Yeah, perfect.

[@16:55](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1015.62) - **Sim Borodach (Hatch)**

Awesome.

[@16:56](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1016.92) - **Andrew Phillips**

Yeah, thank you for that flexibility.

[@16:58](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1018.5) - **Jenna Proctor**

Appreciate it. Mm-hmm.

[@16:59](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1019.94) - **Sim Borodach (Hatch)**

Totally. You know, just to make things a little bit less overwhelming, I want to, I'm just going to go through these couple of slides that highlight some key features, because there's so much on the platform, and I'm not trying to keep you guys from it at all, in fact, I want to get right to it, but this is just to put front and center a couple key details.

So this is the, the first key area focus of three that I'm going to highlight right now, is data accuracy on known donors.

So in the screening examples that, and we'll look at some of these in a moment, Patricia Reeser, Jensen Huang, we want to get this level of insight on all 20,000 contacts that we upload.

And, you know, you can read from this AI scores and insights, just these, these quick sentences, and these metrics that surface high level details about, let's see if I can zoom in, because I see everybody's squinting, I'm not sure.

Okay, well, you know, hopefully the colors and the big number on the left side at least covers what this is drawing us toward.

It's this AI scoring and insights that's going to be on every single profile and surfacing most obviously the relevant details that will help you prospect based on affinity, based on capacity, based on philanthropic history, and even get you towards specific target ask amounts.

And an overall gift capacity rating. And we'll talk in more detail about how all these numbers work. Any quick questions before going on to the next slide?

We'll be able to zoom in more easily on the dashboard itself. So here's this key area of focus two, which are the affinity insights.

And one of the ways that we differentiate from, you know, basic wealth screening is surfacing these connections through donations and you the end of the

Profile Affinity. So in the case of Donations Affinity, I mentioned earlier, we're comparing the missions of those organizations that have been donated to by, you know, in this case, it's Patricia, to your organization's mission, and then aggregating together how valuable all of those historical donations are, so taking into account recency and frequency and amount, and then also that comparison score, that AI comparison score, to bump them up in their Donations Affinity, and we'll see on the platform, you can, we can hit that CY button to view a table that shows this in more detail.

And then Profile Affinity, on the other hand, surfaces all of those insights in non-relation to donation history. So here you could see foundation board relationship, strong OSU ties, including the stadium naming, so obviously Patricia's a very well-known individual, but we'll capture where they're in alumnus, or where they have perhaps a deep interest in scientific research, and that might might surface their relationship.

to building a new laboratory or donating to that laboratory, types of insights like these. We've even seen where the spouse might be a doctor, right, is a doctor, and that that gets surfaced through the profile affinity.

Any comments or questions before moving on from this slide? Again, we'll see this on the donor profiles themselves. Awesome.

Okay, and then this is what you're going to see on the donor profile is this comprehensive variety of data.

The bullets here, snapshot, family and lifestyle, career, wealth, donor profile, social map and news. So we're really capturing the complete human profile.

I suggest here that you could replace multiple vendor relationships. That's just an idea, right, where we're pulling and aggregating a wide variety of data on a completed profile that has these AI scores and insights to easily surface who the person is.

The last thing, because I know this is This is important to you guys from our historical conversations. Andrew and Justin is importing data back into Ellucian.

There's two ways that this is going to be done. One is through a CSV file export, which can be requested by any user.

By the way, you don't need to have like an admin permission to just request a list be exported. On the right side, you could see the list of available fields.

When we're actually in the platform, you'll be able to scroll through and see everything that you can export to CSV for any list segment that you're looking at.

And then we also have an API, which could be a programmatic way of connecting Ellucian and Hatch to each other.

Okay, so that's pretty much it. Again, the platform is awesome. We're going to dive into it. This hopefully just gives a high level of some of the key features before we dive in deeper.

Any comments or questions? Okay. Thanks, Jenna. Thanks, Andrew. Okay. Okay. So, what we... We have, fortunately, is the existing OSU account to review, so we don't need to look at test data.

We could look at your actual data that Justin and Andrew faithfully uploaded to get a sense of how Hatch works.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1333.939956)

So welcome to the platform for those who are seeing it for the first time. And this is your all profiles page.

And as you could see, we're currently looking at a view of 100 out of 100 donors. I'm going to quickly take you all the way to the right side where you could apply a variety of filters that would narrow down the number of prospects in this result set.

Obviously, we're looking to get to, you know, 20,000 in this denominator, and then you'll be filtering by any criteria of interest to get that number down to a specific sub-segment.

And this could be really useful for you in your major gift prospecting where you're looking at donor level above a certain threshold or someone with a particularly high propensity score.

So, from from From this view, you could really do a lot of your work, but we're going to look at a donor profile, and maybe we'll pick Michael, but from this view, you could see a lot of detail into these donors, and by default, the page shows 10, you could show more at once, 25, 50, or 100, and you could change which columns you're looking at from this view as well.

So right now, we're looking at propensity score, donations affinity, profile affinity, and a manually assigned gift capacity rating. Here are all the different columns that you can choose to show on this page, and they'll change pretty dynamically.

So right now, I'm looking at how complete the profiles are, that's how much enrichment they got. I can also turn on different scores, and we have our six scores are here on the bottom, which we're going to talk about in probably the most detail today over any of these other aspects.

But again, this is sort of your quick way of evaluating a larger... This of individuals as opposed to specific individuals where, of course, you'll see all of this data in detail on the profile, but this is how you turn columns on and off, and as you can see, you can only select a maximum of four at any given time.

Also, I'll mention the sorting capabilities. You could sort by a lot of the fields, the different scores, of course, you could sort from top to bottom, by most complete, by highest accuracy, largest giving amount, largest home value, etc.

Comments or questions? I know we're going pretty quick. hope, can I just get like a head nod if this cadence is okay for you guys?

Good, Anne. Good for Jenna. Good for Peggy. Okay, good for Andrew. Awesome. Any comments or questions? All good so far.

Awesome. So, one of my favorite things about this view is that you can actually hover over the scores without going into the profile to read the AI explanation that justifies or...

Or sources, really, what data powered that score. So let's say I'm going to look at, we were talking about Patricia before, so let's come back to Patricia.

If I'm looking at her Affluence score, I can see what our AI surfaced about the data that underlies that score.

Patricia has made substantial individual charitable donations, totaling 22 million, with her total donations reaching 27. individual charitable donations in contrast to foundation donations or political donations.

And then her total donation amount is recorded here as 28 million dollars. So each one of the scores comes with an AI explanation like that.

And rather than some really broad stroke use of AI where we say here's a ton of information and surface for me, the most relevant details, we give the AI pretty specific instructions on which details to serve.

And it's packaging it in this really nice and neat sentence. So anytime questions come up about why certain data was included or how it came to that information, we can talk about that where you have those questions.

We want this to be very open, very honest, very transparent. And we'll talk more about how the scores are actually calculated on the donor profile.

I'll just show you another example for this person, David Young, and you can read it with donations affinity. That's a window into how that sentence reads, just one example.

So we currently have your mission statement defined in a certain way, and we can take a look at that.

You guys can decide as a team how to craft it best so that it captures kind of the overall ethos of your organization.

And that's used to compare to, you know, these other organizations moveon.org. So Emily's List, etc. So you'll see the same type of thing with Profile Affinity and also Propensity if I opened up that one.

Does anybody want to dive in to go look at an actual profile?

[@27:14](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1634.58) - **Jenna Proctor**

Yeah, that's going to be helpful.

[@27:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1636.62) - **Sim Borodach (Hatch)**

Awesome. Okay, so yeah, let's go look at Patricia's. So these sections here at the top are those same ones that I showed you on one of those slides where I just listed in bullets the sections available on the profile.

And you can click on any of these for easy navigation anywhere on the profile rather than scrolling up and down.

We'll come back to Elevated Profiles in just a bit. And we can scroll through the profile and see available data.

This is the summary card. On Elevated Profiles, again, which we'll come back to, you'll actually have AI summaries here at the top.

And then you have the occupation, the alma mater, the birth date, the age, emails. Here you see distinction between organization.

We emails that you provided and enriched emails that were found in our data sources just by hovering over to get that letter, but those change.

It's just spelling out with the sources. This is your CRM user ID so that we can map gifts that you can upload the donation history into Hatch and also when data is going back into your CRM.

And then you have social media accounts appear here on this bottom line, which are tied to the social influence score, which is a 0 to 100 of how socially influential the person is.

The closer they get to 100, the more likely they are to be a social influencer. The second section on the page is those AI scoring and insights.

So we're really trying to draw that seamless thread from the all profiles page where you can see most of this information, but I'll point out a couple things that you can't see.

And I'll just flag if anyone wants to dive into more detail about any of these scores. Just, you know, raise your hand or indicate so.

So there's a couple. Number one is that CY table that I mentioned earlier back on the slide deck. So we can hit CY here to get more detail as to where they gave, how recently they gave, how many times, and what the total amount was.

There's a sort of hidden column here, which is how similar the missions of these organizations actually are. And then the ones that have the strongest combination of all of these factors appear at the top.

So hopefully these names make sense to you guys. Obviously, Oregon State University is right in there. And then as we scroll further down in the table, the organizations become decreasingly relevant to your particular organization.

So that could be because of the amount that they gave, the recency of the gift. And obviously, the AI is capturing the relevance of that particular organization's mission to yours.

And as mentioned, those scores are added up to produce donations. Thank you. So in a certain sense, it is binary, meaning if you see some donation's affinity, that is a good sign.

It means that this person has some affinity for your organization based on where they've given. But obviously, as that number gets larger, it means they have a stronger and stronger affinity for your organization.

But hopefully by the time you guys are onboarded, this coming soon will work, and you'll see explanations essentially like this long, a one sentence, explaining the comparison between your organization and the organization in question, that here's why they are similar or dissimilar.

So you don't need to think or go open Google and research them, of course you can, but we're going to populate that information for you.

Any questions on donations affinity?

[@30:50](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1850.94) - **Andrew Phillips**

A quick question, tangentially related, I guess, to donations affinity. think, is it fair to say then, as we talked about, you you guys kind of have ingested our mission statement or our values.

or whatever, sort of kind of draft, made up a profile of like the broad type of organization that we are, the things that we have, some initiatives that we have, and you've done the same thing for all these other organizations, which is kind of how you're making those connections to how similar or dissimilar we are.

[@31:14](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1874.22) - **Sim Borodach (Hatch)**

that loosely kind of how that works? Yep, you got it.

[@31:18](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1878.42) - **Andrew Phillips**

Okay, cool.

[@31:25](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1885.02) - **Sim Borodach (Hatch)**

And the same is true for the profile affinity. It's going to use that mission statement to try to capture details about the person that are relevant and contribute to their profile affinity score.

And here too, you can click in to see why and read the particular facts that were generated about this person, which are then summarized in that sentence right under the score indicator.

And each fact is associated with the fact score, which is not about the accuracy of the fact. It's about how important is that fact to your mission?

How relevant relevant You'll also notice, with a little back of the envelope, oh, Jenna, yeah.

[@32:10](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1930.4) - **Jenna Proctor**

This is maybe a tangent, but I was just curious, as we're reviewing these profiles, if we see something here that is not accurate, is there any way for us to give feedback that this is the wrong person or this is an incorrect match?

[@32:24](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1944.38) - **Sim Borodach (Hatch)**

Absolutely. I'm really glad you asked that. Give me one second to come to that question.

[@32:28](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1948.56) - **Jenna Proctor**

Absolutely.

[@32:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1950.9) - **Sim Borodach (Hatch)**

The short and long answer is yes.

[@32:33](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1953.42) - **Jenna Proctor**

There are a couple ways to do that. Perfect.

[@32:36](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=1956.2) - **Sim Borodach (Hatch)**

Yep. Totally fine then, come back. Okay. Yeah. Awesome. With a little back of the envelope math, you'll notice that these scores exceed 100.

Right now, the score is capped at 100. We're considering to adjust it in some way, but once someone has multiple facts that demonstrate a strong relationship to the organization, you know, they hit that 100 mark.

And, by the way, the reason for… There may be some design consideration that I'm not privy to, but I don't believe that there is such a strong design consideration for these colorations.

So green is not, they don't change as they fill up more. Donation's affinity is always yellow, Affluence is always a dark blue.

Something cool is that the MyOrg Donation Score actually picks up public donations that Patricia's made. So I'm just going to, I'm going to do something, I'm to navigate to a different part of the profile, but, you know, stay with me here.

This MyOrganization's Donations table is what will populate when you upload your organization donations in relation to all these donors.

It's currently empty because, you know, in the demo, Andrew and Justin didn't do that particular thing, which I don't think was necessary.

But the matching algorithm picks up donations that were made. to Oregon State University or the Oregon State University Foundation, which is why there is an RFM MyOrg donation score here.

So it's kind of an interesting way that it works. We try to deduplicate pretty intentionally so that when you do upload your donations, you're not seeing that we're including duplicate records that are found.

But that's kind of a cool use case. I don't know. If there's something you guys didn't know, we may find that out.

If someone missed a donation recorded, but it was recorded publicly by the university, we may pick it up. Okay, let's talk about the Hatch Giving Score.

So the Hatch Giving Score is an average sum of the five scores, a weighted sum. And the default weighting is 20% to each score.

So 60 is after we added all of these together and then divided by five because they're each given 20% weighting.

I'll show you real quick. I'm going to pop. I'll this open, this is a little bit of a tangent, but this is where you're all going to have this view that references usage, what plan you're on, and you'll all have this My Organization button.

Not everybody will necessarily be able to edit the My Organization details, which currently affect account-wide. I'm going to scroll all the way to the bottom here, and we have these scoring weights.

So as I mentioned, each one is by default included 20%, but this can be toggled to be differently, and then just hit save.

And after doing so, I'll just do a quick little demo here. On every individual donor profile, and also on the All Profiles page, you'll see the Hatch Giving Score update to contain only those subscores that you included based on your weights on the previous page.

And I can even give just a quick C here. You see now the Hatch Giving Score has updated to only...

We only include those to affluence and propensity 50% off. Any questions about how that works? I mean, we, you I hope your imagination start to turn with what scores would you put in the HatchGiving score?

Which ones would you turn on to view on this page, right? Would you sort by the HatchGiving score and then keep open donations affinity, et cetera, to help surface the people that are interesting and relevant to you?

Any comments or questions there? Let's I'm going to reset this one. Let restart. We should see this refresh. Awesome.

I saw I'm manually. I'm manually refreshing the page, doesn't happen automatically for a page I'm already on. Awesome. So then we'll come finally to the Gift Capacity Rating and Target Ask Amounts.

so the gift capacity rating is actually Everybody familiar with that term? Okay. You guys were probably one of the organizations that were like, yeah, gift capacity rating, gift capacity rating.

So here it is. Here's our gift capacity rating. And then we introduced these target ask amounts first, engaged, and max.

Today, July 7th, 2025, these target ask amounts are based exclusively on the estimated net worth of the person. Okay, so we extrapolate the net worth based on wealth indicators like properties owned, public stock holdings, total public donations made, or even donations to your organization if that's where we see the largest indication of their wealth.

We extrapolate their net worth, and then we take some percentage to calculate their target ask amounts. As we speak, we are putting into production a much more advanced calculation for target ask amounts that takes into account what they've contributed to your organization.

If they've contributed to... Like organizations based on, you know, kind of the same numbers that Donation's Affinity is looking at, like, are the organizations similar?

We're getting to a much more advanced and what I think is a smart target ask amount that a bit more proprietary, maybe requires a bit more thinking of how we got there.

And hopefully, we hope soon we'll be introducing similar AI explanations that, you know, articulate how did we get to this number?

Because the calculation is ultimately going to have a certain degree of complexity that we can always explain. Like if we needed to, we could tell you because we wrote the formula ourselves.

We don't just hand AI the data and say, well, pick a number, you know, zero to a million. We really wrote those calculations ourselves.

It's just being able to communicate what went into, you know, the algorithm and the way that it goes through the branch in a succinct way can be complicated.

So we're trying to figure that out right now, but we know that would be a tremendous value to have.

You know, insight into what exactly went into it, but you really can see the underlying data, you know, across the different scores.

We'll just package it a little bit more neatly, and it will be somewhere over here next to these target ask amounts.

Comments or questions about the Hatch Giving score, gift capacity, target ask amounts, or any of these scores. And then we'll go on to talk about editing data, to your question, Jenna, and how to request for more full, complete, and confirmed data.

[@39:38](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2378.08) - **Andrew Phillips**

No questions on my end.

[@39:44](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2384.58) - **Sim Borodach (Hatch)**

Just post-checking.

[@39:45](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2385.82) - **Jenna Proctor**

Oh yeah, Jenna. Oh, just say agree. I think this is making sense so far.

[@39:50](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2390.26) - **Sim Borodach (Hatch)**

We'll probably have more questions as we dive in ourselves. Yeah. Awesome. I have a document that I will share with you guys that...

Highlight some particularities of how, you know, the platform works, like some details that you're going to want to know, some of which we'll cover today, some of which we'll cover in the next two weeks, but pretty much a one-page guide that here are, you know, some questions you probably have.

So hopefully, you know, that may answer some of the ones that are going to come up for you, but of course, always here to answer any questions you have.

Just, you know, I don't know if you guys do like bio breaks in your meetings, but is that something we would What do we Do we want to take a five-minute break, a two-minute break, whatever?

We don't have to, just putting it out there in you guys want to do that.

[@40:39](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2439.56) - **Andrew Phillips**

I'm okay, but if anyone wants to do, we certainly can.

[@40:42](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2442.94) - **Jenna Proctor**

It's fine.

[@40:43](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2443.7) - **Sim Borodach (Hatch)**

Okay. Let's keep going? Yeah, for sure. Okay, so we're not going to leave this page. You want to edit, the first thing that you might want to do is edit data.

You see something is incorrect or . . Or you want to add something that was missing, this toolbar down at the bottom is floating, so no matter where you go on the page, it will always be there, and I'm going to zoom in a little bit, there's a number of options here, that's a trash bin, delete the profile, that's to print the profile, and this is to edit the profile, we don't need to go over all these buttons right now, and when I hit edit profile, a panel's going to open up on the right side, and you can edit most of the information here, there's a couple spots where you actually are going to edit in place, but a lot of the data is available for you to edit, and when you or anyone edits data on the profile, I can even show you, I can, should I do this in real time, I don't know, is there anything that's missing, mean you guys all know Patricia really well, is there anything that's missing or could be added from what you've seen so far?

[@41:59](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2519.9) - **Anne Wilson**

I think there Is something that when you like, it was like a pop-up window, it said she was a current OSU Foundation trustee or OSU University?

Yeah. She's actually not currently a member. She is formerly a member.

[@42:15](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2535.38) - **Sim Borodach (Hatch)**

How recently did that change?

[@42:17](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2537.58) - **Anne Wilson**

That was several years ago, but I guess she is an emeritus trustee or a lifetime trustee, so I don't know if that's what's pulling it in, but as far as like an active trustee that's coming to our meetings, she hasn't been one in several years now.

I don't know if that's where the confusion is.

[@42:33](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2553.1) - **Sim Borodach (Hatch)**

Well, I don't know. I'll bring that to our product team and see. Like they said, that's really interesting. Yeah, that's really interesting.

[@42:41](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2561.98) - **Andrew Phillips**

I can think of one. I saw one that said that her alumni status was not as unknown, but she is an OSU alum.

So we could...

[@42:50](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2570.64) - **Sim Borodach (Hatch)**

Amazing.

[@42:51](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2571.6) - **Andrew Phillips**

Okay.

[@42:52](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2572.18) - **Sim Borodach (Hatch)**

Perfect. Perfect example. So I'm going to hit the pencil and I'm going to go to Alma Mater. I'm going to add her school as Oregon.

State University. Any idea what her degree is in, or when she was there?

[@43:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2586.02) - **Andrew Phillips**

Education? Gosh, like 60-something. I don't know. I was looking at you, hoping you would know.

[@43:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2596.62) - **Sim Borodach (Hatch)**

It's alright. I don't think it should affect anything.

[@43:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2601.48) - **Andrew Phillips**

I know it's education, but yeah.

[@43:23](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=2603.52) - **Sim Borodach (Hatch)**

Yeah, that's pretty good. So I'm gonna hit save, and you'll notice that the alma mater section here- Oh, it already started updating, but when I hit save, now it's in place.

And then when I jump down to the Insights section again, you could see that there's this Calculating Scores rotator, indicating that the scores are calculating.

So whenever you edit data on a profile, we recalculate the scores. Now, it could be very expensive to do that every single time.

You know, you make a small edit, add an initial, add the spouse name, mark one donation. As unconfirmed, which we'll look at briefly, so there's a 10-minute buffer window before we actually even start the recalculation process.

So from, you know, nine and a half minutes from now, if no other edits have been made, then scoring will rerun.

If we make another edit right now, that 10-minute clock resets and scoring will only rerun in 10 minutes from now.

Because we added her alma mater, we will probably see her profile affinity update. The other ones probably will not update, given that that data point can't really be captured in these other scores.

Some data points that you'll edit will impact multiple scores, you know, and you'll just have, you could, you could do something like if you want to see the Delta, you could just open, you could leave this window and then copy and open her profile in a new tab.

And then just tab back and forth or open both windows side by side, right, to see how the score has changed.

list of ask come Are all Does that make sense, how these scores recalculate everybody? Okay. So there's another way to give feedback, which is really what you asked, Jenna.

You didn't ask about editing data, but I wanted to show you that method. And there's a couple other places where you can edit data on the profile outside the side panel, and we'll come to those.

But there's a totally alternative mechanism that we've introduced for Hatch profiles. So when we upload, whether it's 20,000 at once or in different segments, the data passes through our automated enrichment, which is what Patricia went through.

All the data that was collected about her was our automated enrichment system based on what you guys told us.

So some things you told us were obviously her name, you told us her email, you told us her phone number.

I can go to the lifestyle section and see that you also told us her home address, which is a really additional helpful data point knowing where someone lives.

about is the Anyway? And, I And the systems used all that data to aggregate who is the complete Patricia Valian research.

Let's say you wanted to have absolute certainty that this individual was researched in every corner of the web, that each data point on the profile was resolved by a human.

You would use an elevated profile, and those are our in-house prospect research mechanism. Where we have our team of data analysts, our team of prospect researchers, go through, comb through the profile and verify all the data and add in missing information that our automated system didn't capture.

So by hitting this button, nothing actually happens. know, it is a button to open this side panel, where you have a form that asks you, like you were alluding to, Jenna, what information in the profile is clearly enacted.

Do you have the approximate age of the person, current or former spouse, social media profiles, name variations, and finally, any additional direction for your Hatch Prospect researcher when they go to elevate this profile, and you hit send.

If you don't have any additional details, these are all optional, these questions. Obviously, the more direction that you give the prospect researcher, the better of a job that they're able to do.

You may have information stored in a CRM note that isn't captured in their Hatch profile, or that's simply not available publicly on the web, and therefore, there would be no way for the prospect researcher at Hatch to know this information.

So when you send the profile, we get a notification. We aim to turn around any elevated profile in two business days.

So if you requested Patricia today, you would likely see her back in your email on Wednesday with a big subject line elevated profile, Patricia Reser, some highlights contained.

In the email body, and then a link to open her profile in Fathom. So Elevated Profile is our in-house prospect research.

You have to lift a couple fingers. We do the majority of the work. We've been doing, our team has been doing this work for many years now, researching individuals, resolving their entity.

We have a multiple, we have a multi-step review process, where we have at least two sets of eyes on every single profile that goes out.

And we have a mechanism for communicating with you guys further if we need further guidance or insight, where we have difficulty resolving someone.

We try to avoid at all costs just sending you someone that we're not sure about, that we have questions about.

We try to communicate because you know, you know, you all know better than I do because you do this every day.

Resolving who a person is can be really complicated, and it's a very fine and delicate process. So this- Elevated Profile Mechanism has been built to account for the problem entity resolution, resolving who a person is, who they are as an entity, and your subscription comes with 20, I'm not sure if Sam, your account executive is still here, but I'm pretty sure that's the correct quota, and that resets every month, it'll bring you back here for a second and then I'm going to take a breath, if anyone has comments or questions, but you could see that your quota for all your usage stats is contained here, this is Andrew's picture, which I think I populated myself, Andrew, look very nice there, and so your bulk enrichment quota is out of 20,000, and I think that 99 is included from the free trial, but we could scratch those off, and then your QuickSearch imports and your elevated profiles are going to reset, that's where they're called this month's quota, they're going to reset every month on the 13th.

So, July's will Reset on July 13th, we haven't talked about QuickSearches yet, sort of in the name how that feature works, but you know, we can get their elevated profiles, we just went over and you've got 20 monthly, and you'll see the meter go up, by the way, as they're sent back to you, not as they're requested, so you can request beyond 20, but in your given monthly quota before the 13th of the month, only 20 will be done, and a blue, there's probably a little blue bar, there's no blue bar for the, because it's such a small fraction, the 99 out of 20,000, but the blue bar indicator will increment as you, as you use more.

All I'm going to take a breath, comments, questions, a lot of information today.

[@50:45](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3045.04) - **Andrew Phillips**

A clarifying question that I, I think this probably mostly isn't answered, but as I look at those enrichment profiles, so we have, 20,000 part of our contract, anytime we upload any, anyone's record, that would count towards that 20k,,000 of our contract.

20,000 part Does it automatically get well screened from via as a donor search as well? I believe as you guys, you contract with donor search.

[@51:05](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3065.38) - **Sim Borodach (Hatch)**

Is that right? Yeah.

[@51:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3066.8) - **Andrew Phillips**

Yeah. Yeah.

[@51:07](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3067.92) - **Sim Borodach (Hatch)**

So this, this little logo here. Yeah.

[@51:11](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3071.38) - **Andrew Phillips**

cool. So each upload has an automatic.

[@51:13](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3073.76) - **Sim Borodach (Hatch)**

Okay.

[@51:14](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3074.12) - **Andrew Phillips**

Sorry. Yeah.

[@51:15](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3075.38) - **Sim Borodach (Hatch)**

Yeah, no, you're good. Yeah.

[@51:17](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3077.04) - **Andrew Phillips**

Cool.

[@51:17](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3077.28) - **Sim Borodach (Hatch)**

Yeah.

[@51:17](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3077.7) - **Andrew Phillips**

Just wanted to confirm that. So.

[@51:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3079.7) - **Sim Borodach (Hatch)**

Mm-hmm. Anybody else? Yeah. Yeah.

[@51:31](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3091.34) - **Andrew Phillips**

I going to I guess, 20 immerge profiles a month feels great. That sounds something that we might want to use.

[@51:40](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3100.14) - **Sim Borodach (Hatch)**

Yeah. I'll mention, because it's here, there's this little comment here, including future five alive. We are transitioning right now from a, we're deprecating an old feature.

where Five Alive was we would send We non-requested elevated profiles to users, and so we would choose who to elevate, and we would elevate them so that your quota would be used every month, but we're moving to send an email that's generating five recommendations, so this little button will disappear from here, and that email will, you'll still get, you'll get an email that's, here are five folks that you might want to consider elevating based on, like, their high Hatch score, or some other mechanism for choosing that.

Another thing that we didn't mention is the, here's drafting letters with our AI tool to your constituents. This is, you know, fun, easy way of generating some content, different works, different lengths, different tone of letters, so definitely encourage you to play around and explore that.

You have 70, 750 drafts, and I, Sam, you gotta double check. Is he here? Yeah, Sam, double just fact-checked me there that those reset monthly.

Also, I'm just questioning myself because they're not contained here in the panel here, but I'm pretty sure that those reset monthly as well.

So, it's a lot of drafts to play with. Andrew, I'm just going to look to you or Justin for a little bit of guidance here.

Is there anywhere that, you know, based on what, how you've interacted with the platform so far, where you feel would be most useful for the team to go next?

Or, I'm happy to stay in the driver's seat and keep us moving.

[@53:44](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3224.42) - **Andrew Phillips**

Andrew, mean, one other thing that would be of interest to me, but I realize it's probably, again, more specific to Justin and myself specifically, is just like what that screening output looks like.

I know we've looked at it before, kind of like that if we upload those, you know, the 199 people and what they're estimating.

The Wealth Capacity is from Donor Searches, but honestly, I don't know, I could go either way, I don't know if there's something more, you know, you know, honestly, Sam, I'll just roll, I'll give you the keys to this, yeah.

[@54:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3256.78) - **Sim Borodach (Hatch)**

No worries. Yeah, that's great, that's great. Justin, you're hanging tight?

[@54:24](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3264.24) - **Justin Foster**

Yeah, I think, again, like I think the screening component is going to be the part that's most relevant to me, but since we have Relationship Insights with us, I think just kind of walking through in the way that you think is best.

[@54:38](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3278.5) - **Sim Borodach (Hatch)**

Cool. And what about from the Relationship Insights team or others on the call? Is there anything that you'd like to drill into further so far?

There are other areas for us to explore. But anything that we've seen so far that you want to drill into further?

[@54:56](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3296.48) - **Jenna Proctor**

Anne, I might defer to you, your kind of higher priority.

[@55:00](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3300.0) - **Anne Wilson**

Yeah, I don't think so at the moment, and I actually have to dip out as I have some meeting with the university at two, but this looks awesome, and I'm looking forward to using it, you know, getting more training, but I'm going to head out now, guys.

[@55:15](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3315.96) - **Sim Borodach (Hatch)**

Okay, awesome. Well, hopefully we'll see you at the, I think probably the second session data upload will probably be, you know, Justin and Andrew, so hopefully we'll see you at the third one for the strategic implementation.

[@55:28](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3328.2) - **Anne Wilson**

Yeah, probably.

[@55:29](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3329.48) - **Sim Borodach (Hatch)**

Great, thanks. Okay.

[@55:31](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3331.3) - **Anne Wilson**

Thanks.

[@55:32](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3332.22) - **Andrew Phillips**

Thanks.

[@55:32](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3332.68) - **Jenna Proctor**

Ian.

[@55:39](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3339.08) - **Andrew Phillips**

Sorry, I was going to have a completely random question that is totally irrelevant, actually, so just don't even worry about it.

[@55:44](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3344.8) - **Sim Borodach (Hatch)**

Okay. Yeah. Well, I guess, as I just mentioned, you know, I think for the second call, does it land with you, Justin and Andrew, that that will be the three of us?

[@55:54](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3354.68) - **Andrew Phillips**

Yeah, I think so.

[@55:55](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3355.66) - **Sim Borodach (Hatch)**

That makes sense.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3359.315538)

[@55:56](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3356.88) - **Andrew Phillips**

Yeah. And I can always, you know, add Jen as an optional invite, but. It'll probably just be Justin and me.

[@56:02](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3362.52) - **Sim Borodach (Hatch)**

Yeah.

[@56:02](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3362.84) - **Jenna Proctor**

Yeah.

[@56:03](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3363.72) - **Sim Borodach (Hatch)**

Awesome. Okay, this was for the relationships team. This is another place where we highlight some enrichment data that's powerful.

These are the board connections, and in some cases professional connections that this individual has. And if you want to see the full name of the company, just hover here.

Obviously, you know the name of your organization. And I'll bring us over to QuickSearch now. So, you know, Celia Austin may be of interest as a lead, right?

Someone who doesn't exist in the OSU ecosystem yet. Obviously, she does because she's a trustee. But when I go to hit that lightning bolt and I opened it in another tab, which is my preferred practice, so I don't need to constantly read the pages.

She's already searched here in our QuickSearch feature, which we call your effortless donor lookup. So with a minimal amount of information on someone, we can prospect them as a potential donor, potential strategic connection.

And just to reference back here, these are these 80 quick searches that you have monthly, which reset every single month.

A good number of them, we hope that you use all 80, because you can create and then destroy profiles.

I mean, got, you know, Andrew, you may have some oversight here in terms of how this is done exactly.

But you can create, it's like doing a search and then if you, you know, don't need what you've seen or don't want it to clutter the database, you can delete that profile.

There's also a trash bin that you can access deleted profiles that hang out there for 30 days. But this works like a matching algorithm.

So different pieces of information that you include will change the match score for these different results. So we found seven people whose name is Celia Strickland and by inputting different details here.

E-scores will jump up. They don't jump down so long as the name is a match. Really key matching terms would be phone, email, LinkedIn handles, since those are typically uniquely associated with someone with a specific name.

State is definitely useful, but there could be multiple people with the same name in one state, similar with city.

But if you're going to provide a full street address and we do match by that, that will be a strong data point to match on.

One of the coolest ones is the keyword search, which will surface someone, you know, you could put in the words Oregon State or even trustee.

And that could affect the results that we see here. And then I'm scrolling all the way down to the bottom because if you, you know, if you find the person you're looking for, you'll preview the match and you'll walk through the steps to import the person.

But even where you don't find a match, because in many cases, folks don't have strong online. So profiles, which is how this search works.

It's really using their online profile, but you could still import the person, and you're seeing sort of this blurred out, these blurred out details, but until you import the person, we don't show you all the information, and I can hit step three or three, and it's not going to import the person yet.

Here's the step where you would include additional details about the person that you have. In particular, state is a really important data point, because that gives some geolocation to the individual, even if you don't know much more than her first name and last name, knowing what state she's in is super useful to enrich her profile.

And I can tell you, if you only put in city and, sorry, first and last name, it's unlikely that you're going to get much enrichment information at all.

And you don't see the phone number in the email here, because if those were relevant, they would have appeared on that QuickSearch page earlier.

So you can add in data points that may still be useful in enrichment. Thank that did not help at the matching step.

So again, if you had like phone or email or one of those keywords, you would find the relevant person on that previous page, but here you can enter some additional details that will help.

And this user ID, if for some reason you're importing someone who's in your CRM, but isn't in Hatch yet, and you want to just do that search, but you still want them to be connected.

mean, Andrew and Justin, this might be, you know, for you guys, that'll be how you, they ultimately connect back to the CRM.

If they're elevated and then you want that profile to be valuable in Hatch, not just like a one-off search that could, you know, be used or not used, then you'd want to be put in the user ID.

So if I hit complete import, the quick search would go through. You could actually see that here, you're indicated it resets in six days, which is the 13th of the month.

And you guys haven't used any quick searches, which is why you have 80 remaining. So I'm just going to hit off there.

And hit cancel. And now I'm back at this page. That button is here on the left side panel. By the way, your profiles button is also here on the left side panel.

That's going to take you right to your all profiles. Another button here are your lists, which are your segmented lists using the filters that I showed you at the beginning of the call.

We can revisit those in a second. You can create a new list from this page, add an emoji, a title, a description, save that list.

And then when you go back to your all profiles page, you can add folks to the list by using this select, you know, multi-select button.

You can check individual donor profiles. If you do a certain filter, so let's say they're, you know, we want to see that they're on a foundation, have any role at a foundation.

And I want to add these resulting people. Sorry, I could do it that way. Or you could add all to a list by clicking that button, add them to an existing list, create a new list.

Get over. Manage your lists. And then from within a list, this is what I was showing you in the slide deck, you can export a list to a CSV very easily.

Just hit the three dots here, select Export List, and then choose the fields you want to include in your list export.

And that list will be emailed directly to you. It's usually pretty quick within a couple seconds. If it's a larger list or there's more fields included, it may take, you know, up to 30 seconds or a minute.

So don't be disillusioned. Just be patient, please. Any comments or questions? Now I'm kind of just going rapid fire style.

I mean, you guys are really here for it. This is awesome.

[@1:02:38](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3758.74) - **Jenna Proctor**

I think this is all super helpful. I'm going to need to get going as well here. Yeah. I think this is a great overview of the product and this certainly gives us some better ideas of how we might be able to use the product.

[@1:02:49](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3769.94) - **Sim Borodach (Hatch)**

So thank you. You're very welcome. Just before you jump off Jenna and anyone else who needs to go, as you're in the application, questions that come up message here.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3772.795305)

We're the bottom right corner, and we'll get back to you in near real time. I'm actually on the West Coast as well in Los Angeles, California, so just message here, play around, have a good time, and I will see you and others on the call, hopefully in another couple weeks for the Strategic Implementation Session.

[@1:03:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3801.04) - **Jenna Proctor**

Sounds great. Thank you so much, Sim.

[@1:03:23](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3803.38) - **Sim Borodach (Hatch)**

Yeah, you're very welcome.

[@1:03:25](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3805.98) - **Andrew Phillips**

Yeah, I do want to be cognizant of time. I know we're scheduled until 2 and a couple minutes past.

I could go like an extra 5 or so, but if people need to jump off, obviously feel free to jump off, but I do have a stop here as well coming up.

So I'm going to do a little bit of prep for my 2.30 meeting, unfortunately.

[@1:03:43](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3823.84) - **Sim Borodach (Hatch)**

No, it's all good. It's all good. An hour is a really solid amount of time, and I really appreciate you guys sticking it out and staying focused.

I know for you, Andrew and Justin, this is a review, but it's a lot of information, Peggy and Andy, I know.

You're video, so... ... I feel like let's, you know, let's leave it here in terms of the demo because I want to make sure that everybody gets clued into anything else that we review, and we've covered quite a bit today, so...

[@1:04:12](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3852.16) - **Andrew Phillips**

Yeah, this has been, this really has been great, thanks.

[@1:04:14](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3854.48) - **Sim Borodach (Hatch)**

Thanks, Sam. Awesome.

[@1:04:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3856.1) - **Andrew Phillips**

I'm so if you guys have any sort of, like, high-level documentation, you know, tools on the platform or anything like that that'll be helpful for us to have, I'm sure we could, you know, love to see that as well.

So if you have something like that, I'll go ahead and spit it on. And I guess, as I think about one of the questions I should have asked, and maybe we can circle back to that in meeting two or three, et cetera, is what does your partnership Fundmetric look like?

And is that represented in the platform as well? Because we're Fundmetric partners as well. Yeah.

[@1:04:43](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3883.62) - **Sim Borodach (Hatch)**

So we don't need to answer that necessarily today, but just maybe a seeded for the next time.

[@1:04:48](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3888.46) - **Andrew Phillips**

Awesome. Chance to talk, so...

[@1:04:50](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3890.14) - **Sim Borodach (Hatch)**

Awesome. Yeah.

[@1:04:51](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3891.38) - **Andrew Phillips**

Yeah.

[@1:04:51](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3891.76) - **Sim Borodach (Hatch)**

Great.

[@1:04:58](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3898.04) - **Andrew Phillips**

We'll have some good things to share. Awesome. That's great to hear. It's funny, I noticed, I don't know if you guys had it already, or if it's because of this or not, or it's just coincidental, but the Fireflies.ai Notetaker is a tool that they've been using for years, and I've seen it, so just funny to see it pop up here as well.

[@1:05:15](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3915.26) - **Sim Borodach (Hatch)**

Yeah, cool.

[@1:05:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3916.8) - **Andrew Phillips**

That's a pretty new one for us.

[@1:05:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3919.04) - **Sim Borodach (Hatch)**

We generally use, as a team, use Fathom, which here is called Sim's AI, and I think it's Sam's Notetaker.

[@1:05:27](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3927.68) - **Andrew Phillips**

Yes. Yeah. Okay. Awesome. Well, it's been great. I really appreciate your guys' time, as always.

[@1:05:34](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3934.52) - **Sim Borodach (Hatch)**

Yeah.

[@1:05:35](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3935.26) - **Andrew Phillips**

I don't know, Peggy, Justin, any last questions or anything before we hop off?

[@1:05:39](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3939.78) - **Peggy Pence-Polley**

I think I'm good now. Thank you so much for your time and for the demo.

[@1:05:44](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3944.4) - **Sim Borodach (Hatch)**

Yeah. Yeah. Anything that stood out that was just most interesting or seems most curious to explore?

[@1:05:51](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3951.24) - **Peggy Pence-Polley**

I think I just need to dive into it and explore it, and then I'll probably have questions.

[@1:05:57](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3957.1) - **Sim Borodach (Hatch)**

Yeah. Yeah. Andrew and Justin, are we adding... I everyone has users now, more than that.

[@1:06:04](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3964.06) - **Andrew Phillips**

Yeah, yeah, we would want to add everybody. So I think I could probably just go in and send an invite to them, I would imagine, just throw the email address and titles in there or whatever, and send them an invite, so.

[@1:06:13](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3973.24) - **Sim Borodach (Hatch)**

You know where to do that in my organization settings?

[@1:06:16](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3976.16) - **Andrew Phillips**

Yeah, I think I can, I think I remember seeing it last time I was poking around in there.

[@1:06:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3979.96) - **Sim Borodach (Hatch)**

Okay. Awesome. Yeah, and you have the admin editor choice.

[@1:06:26](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3986.52) - **Andrew Phillips**

Perfect. Well, thank you, I'll appreciate it.

[@1:06:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=3990.56) - **Sim Borodach (Hatch)**

Yeah, so I guess the next step is to have the data upload call, which I'll send you guys, or I or Sam, I'll send you guys the link to, for you to schedule the two of you.

And we'll talk through, you know, a lot of those things that I put up on the slides. And maybe it could also be a little bit of a strategy session, you know, for some of those topics that don't pertain or at least aren't discussion worthy for the rest of the team.

[@1:06:55](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4015.12) - **Andrew Phillips**

Sure.

[@1:06:56](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4016.38) - **Sim Borodach (Hatch)**

And, and I do want to clue you guys in, I will be up. Thank God my wife is pregnant with our first child.

So, thank you.

[@1:07:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4026.68) - **Andrew Phillips**

That's awesome. I just had an anatomy scan for my wife's pregnant 20 weeks this morning.

[@1:07:11](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4031.5) - **Sim Borodach (Hatch)**

had an anatomy scan.

[@1:07:13](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4033.52) - **Andrew Phillips**

Oh, yeah.

[@1:07:14](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4034.08) - **Sim Borodach (Hatch)**

Congratulations. Oh, that's awesome. Oh, my gosh. It's like my heart.

[@1:07:17](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4037.48) - **Andrew Phillips**

It's so cool. It's the best.

[@1:07:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4039.58) - **Sim Borodach (Hatch)**

It's the best.

[@1:07:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4041.5) - **Andrew Phillips**

Yeah.

[@1:07:23](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4043.14) - **Sim Borodach (Hatch)**

Cool. How long is your wife? She's 37 plus weeks now.

[@1:07:29](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4049.28) - **Andrew Phillips**

Oh, you're close.

[@1:07:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4050.86) - **Sim Borodach (Hatch)**

Okay. Yeah.

[@1:07:32](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4052.12) - **Andrew Phillips**

Yeah.

[@1:07:32](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4052.58) - **Sim Borodach (Hatch)**

We're right at the end. So, I'll be, you know, hopefully out of office for the two weeks, first two weeks.

So, Sam's clued in, and hopefully we can, you know, it's sort of up to you guys, like, if we're able to do the data upload sooner.

You know, we don't want to rush things, but I'm always happy when things move along briskly. Um, so if we can get things done before, you know, later July, then that's great.

You know, otherwise maybe we'll, we'll. We'll back up. Sure.

[@1:08:02](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4082.58) - **Andrew Phillips**

It's no problem. Life happens.

[@1:08:04](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4084.68) - **Sim Borodach (Hatch)**

Okay.

[@1:08:05](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4085.1) - **Andrew Phillips**

So don't worry about it.

[@1:08:06](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4086.14) - **Sim Borodach (Hatch)**

I really appreciate that.

[@1:08:08](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4088.28) - **Andrew Phillips**

Appreciate it. Absolutely.

[@1:08:11](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4091.0) - **Sim Borodach (Hatch)**

Okay, guys, have a great week. And yeah, just so excited to be here with you. We're gonna, hopefully we're gonna do great things together.

[@1:08:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4099.04) - **Justin Foster**

All right.

[@1:08:19](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4099.6) - **Andrew Phillips**

That sounds good, Sam. Appreciate it.

[@1:08:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4101.1) - **Justin Foster**

Thanks, Sam.

[@1:08:21](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4101.56) - **Sim Borodach (Hatch)**

All right. You take care, guys.

[@1:08:23](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4103.54) - **Andy Lasselle**

We'll see ya.

[@1:08:30](https://fathom.video/share/ToVa5tf2tkUytPmfiGU7jBs6QNoBaz5s?timestamp=4110.1) - **Andrew Phillips**

We'll see