# **Strategic Implementation - June 16**

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[@0:24](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=24.2) - **Sim Borodach (Hatch)**

Stephen, are you there?

[@0:25](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=25.98) - **Stephen Crary (FamilyLife Network)**

Yeah, I'm here. Can you hear me?

[@0:27](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=27.26) - **Sim Borodach (Hatch)**

Awesome. Yeah, sure can.

[@0:29](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=29.28) - **Stephen Crary (FamilyLife Network)**

Cool. Let's see if I can turn this camera on here.

[@0:35](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=35.9) - **Sim Borodach (Hatch)**

Yeah. There we go.

[@0:39](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=39.56) - **Stephen Crary (FamilyLife Network)**

Hey, how's your day going?

[@0:41](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=41.14) - **Sim Borodach (Hatch)**

All right, man. It's going well.

[@0:42](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=42.7) - **Stephen Crary (FamilyLife Network)**

How about you? Yeah, man. No complaints.

[@0:45](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=45.54) - **Sim Borodach (Hatch)**

Where are you out of? I'm in Los Angeles, California.

[@0:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=49.86) - **Stephen Crary (FamilyLife Network)**

Okay. How's Los Angeles going?

[@0:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=52.52) - **Sim Borodach (Hatch)**

Say again?

[@0:54](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=54.0) - **Stephen Crary (FamilyLife Network)**

How's LA doing?

[@0:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=56.16) - **Sim Borodach (Hatch)**

Yeah, it's been a lot recently, for sure. Yeah. Yeah, lot- Yeah, been I mean, You know, was, you know, it's whatever calm after a storm, it's just nice, not that we get those kinds of storms, but the natural kinds of rainstorms, we get firestorms.

[@1:14](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=74.5) - **Stephen Crary (FamilyLife Network)**

Sure, sure, sure.

[@1:15](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=75.86) - **Sim Borodach (Hatch)**

It's a little bit, it's been a little bit nicer just yesterday and today, just feeling relief from like all the stress that there's been.

So, personally been indirectly affected by things, so just trying to keep people in mind who are going through tough times.

[@1:36](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=96.44) - **Stephen Crary (FamilyLife Network)**

Yeah, yeah, yeah. There's still a lot of rioting happening over there?

[@1:41](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=101.8) - **Sim Borodach (Hatch)**

I think there still is some, but I don't believe to the same extent that there was.

[@1:47](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=107.22) - **Stephen Crary (FamilyLife Network)**

Okay.

[@1:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=109.56) - **Sim Borodach (Hatch)**

Where are you at?

[@1:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=111.54) - **Stephen Crary (FamilyLife Network)**

I'm in Pittsburgh.

[@1:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=112.64) - **Sim Borodach (Hatch)**

In Pittsburgh.

[@1:53](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=113.82) - **Stephen Crary (FamilyLife Network)**

Nice. Yeah, yeah. I'm far away from all that, man. Yeah, that's for sure. Yeah. Yeah, it's pretty quiet on our end.

I mean, we did have some protests, but not to the extent that you guys had it, that's for sure.

[@2:07](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=127.84) - **Sim Borodach (Hatch)**

Mm-hmm. Mm-hmm.

[@2:09](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=129.64) - **Stephen Crary (FamilyLife Network)**

I know it was pretty hot and heavy out there, and frankly, I was concerned, man. You know, I hear about people calling in the National Guard and the military, and it's like, oh, man, what's going on over there?

[@2:22](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=142.42) - **Sim Borodach (Hatch)**

Well, what's your impression of what's happening here? I mean, maybe you don't have one, but...

[@2:27](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=147.08) - **Stephen Crary (FamilyLife Network)**

I don't have one. I mean, it's so far from where I'm at that, like, it's hard for me to even wrap my head around it, to be honest with you, because I just don't know what's really true and what isn't true at this moment.

So I just kind of like, I don't think, you know, too much one way or the other. What's your overall impression of it?

[@2:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=172.98) - **Sim Borodach (Hatch)**

I mean, okay, yeah, I haven't really been asked that by someone who doesn't live here. So. Mm-hmm. Mm California has a tremendous amount of immigrants in this state and threatening that community like immigrant communities directly is just gets to the core of what what this state is of the people who live here, whether they're from South America or from Mexico or other countries or so it's I mean, the governor of California, you know, responded directly to many remarks the president has made and to the military aggression expressed by, I mean, what seems to be military aggression and, you know, raids of immigrant peoples with, you know, fighting fire with fire, I suppose, certainly when it comes to the language that he's used.

Sure. So, I mean, these are people that we know that We live on the streets with, and, well, I, well, personally, I can understand, like, in the current, you know, overly politicized climate, feeling a heightened sense of security, the way that things are being gone about, it's hard to not feel like it is to rile people up for one reason or another, certain things that the government or the government's doing, it's hard to not feel that way.

[@4:30](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=270.42) - **Stephen Crary (FamilyLife Network)**

Right. Right.

[@4:31](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=271.78) - **Sim Borodach (Hatch)**

And also even to think that way, like, to a, to a certain extent, to, you know, it sort of seems like things are being, a fire is being full, is being fanned, and why, to what end, I don't know, I mean, there's so many, you know, impetuses for that.

[@4:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=291.1) - **Stephen Crary (FamilyLife Network)**

Sure.

[@4:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=291.72) - **Sim Borodach (Hatch)**

So.

[@4:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=292.58) - **Stephen Crary (FamilyLife Network)**

Yeah. Yeah, I, I know I feel for you guys. I really do, because like, to your point, the. The number of immigrants you have in California and have built a life for themselves in California and are working hard, paying taxes, doing what they need to do, good law-abiding people, you know, I wish I had a better thought, but all I can say is I sincerely feel for you guys.

[@5:24](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=324.38) - **Sim Borodach (Hatch)**

Yeah, appreciate you, and for me, you know, again, I said only directly affected today, you know, interacting with people who are being directly impacted, it's just, I can't, I can only imagine how they're feeling, you know, it's...

[@5:42](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=342.16) - **Stephen Crary (FamilyLife Network)**

Right, right.

[@5:45](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=345.2) - **Sim Borodach (Hatch)**

Really bizarre was yesterday, bizarre sight was I was, went to play a soccer game at the end of the night, and it was near the Federal Building in Los Angeles.

[@5:55](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=355.84) - **Stephen Crary (FamilyLife Network)**

Okay.

[@5:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=356.5) - **Sim Borodach (Hatch)**

So when I was driving by the Federal Building, there were troops stationed. Yeah. So... And... And... ... Like federal troops in like their full military gear.

mean, dozens and dozens of them, you know, I must have seen 30 or 40 just around the parking lot, around the structure.

Yeah. So, they weren't bothering anybody, didn't seem like anybody was bothering them, you know. It's just, keep seeing these like signs of the time and, yeah, I don't know, just living through a lot of history, I suppose.

[@6:35](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=395.48) - **Stephen Crary (FamilyLife Network)**

That's a good way to put it. Yeah. That and I mean, just think what that does to people's psyche.

They have troops around them, you know, and it feels different than just walking out and not having them there.

But then there's like a heightened sense of security and cautiousness and alert, you know, when you're out there and, you know, it's.

It's got to do something to you emotionally a little bit.

[@7:03](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=423.1) - **Sim Borodach (Hatch)**

Yeah. Yeah. I mean, as a country, we've, you know, I think that we're a resilient country and it feels like, well, there are certainly some people who really are, you know, supportive of, like, greater military presence domestically and, you know, or what the President, like, deploying National Guard.

feel like most people probably aren't, but figuring out how to get people's voices together to articulate how we feel, why we feel when we come from different places, have different experiences is, and there were those no kings.

Did you guys have those no kings?

[@7:50](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=470.3) - **Stephen Crary (FamilyLife Network)**

Yeah, we had about 10 of them, just in the area that I'm, in Pittsburgh, there was about 10 different, I don't want to call them, like, they were, them.

I mean, they were protesting, you know, that's, that's what they were doing.

[@8:02](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=482.9) - **Sim Borodach (Hatch)**

Yeah, yeah, I mean, that's, the people are, I guess the people are gathering in some sense and, you know, coming from different, whether it's about immigration or about some type of overexertion of presidential power, foreign policy.

[@8:22](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=502.78) - **Stephen Crary (FamilyLife Network)**

Overstepping, yeah, for sure. It's interesting, because I feel like you saw that a lot with the college campuses around like the Ukraine, I'm sorry, the Israel and Palestinian war.

And, and I think that's kind of like that, that hunger for righteousness or vindication is kind of swelling in America, if you will, and more and more people want their voice to be heard, need their voice to be heard.

Maybe, maybe, that's a better way to say it. And, you know, I, I, I didn't see this during Obama.

I didn't see this during, you know. Some of the older presidents, but now it's like, it's really kind of accelerated.

[@9:05](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=545.84) - **Sim Borodach (Hatch)**

Yeah, I was just interacting with this fellow who works at the Sherwin-Williams down the street, you know, I don't know, probably about my age, late 20s, and I people are really being challenged to, like, have the right attitudes, adopt the right perspectives, and both a good thing, a good thing to challenge ourselves, challenge our preconceived notions, our beliefs, and also a destabilizing thing, because we have to have some balance between, like, passivity and activity, like, thinking and all, but also, like, taking some kind of bold actions, so.

[@9:55](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=595.06) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@9:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=596.32) - **Sim Borodach (Hatch)**

Or just interacting with him, like, I don't know, I mean, I'm like, It's, again, I'm like, it's good for people to feel, I just felt a lot of uncertainty from him, but also a really healthy sense of, hey, like, it's not so hard for me to identify what the right thing is here.

And he's like, people being, having their families torn apart. You know, he's like, that's just, he's like, I've colleagues.

He's like, that's not right. Yeah, definitely.

[@10:23](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=623.5) - **Stephen Crary (FamilyLife Network)**

Definitely. You know, whether we want to admit it or not, we've kind of become a land where we've accepted immigrants for years and years, not just under Trump or Biden, but I mean, you know, lot of presidents have just kind of opened their arms.

And I think we, we, whether we want to realize it or not, we've been sort of the gatherer of many, many countries that have come to us for need for aid, refugees, asylum seekers.

And to say now that like, we're done with that feels like not American, not genuine in what we've done in the past.

Yeah, don't know if there's an easy – I was just talking to one my coworkers today because I said the part that upsets me a lot is that you take these Haitian communities.

There's one in Ohio, which is close to Pennsylvania. And to say that we're going to round up all these Haitians and send them back to Haiti is crazy.

Because what are they going to do in Haiti? I mean, it's just gangs and violence. There's no jobs in Haiti.

So to think that you can round up 5,000, 10,000 Haitians and ship them back home is like a death sentence, really.

I mean, because there's nothing for them to do there but die. So I don't understand that. And it just seems counterintuitive to our own values as Americans.

[@11:42](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=702.98) - **Sim Borodach (Hatch)**

Yeah, I appreciate that formulation. I've heard that said about like other people being sent back to South America or Mexico.

[@11:54](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=714.16) - **Stephen Crary (FamilyLife Network)**

Great.

[@11:54](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=714.76) - **Sim Borodach (Hatch)**

I haven't looked into it too much myself. I think Haiti is a place also that we got really involved with.

[@12:00](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=720.54) - **Stephen Crary (FamilyLife Network)**

at. –

[@12:00](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=720.0) - **Sim Borodach (Hatch)**

We did. Yeah. Yeah.

[@12:03](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=723.98) - **Stephen Crary (FamilyLife Network)**

I mean, like many of those countries, they relied on USAID to survive. And so when the USAID was taken away, I really feel for them because it's going to be hard.

Either the other nonprofits have to step into that space and step up their giving, or what does Haiti do in that moment?

[@12:28](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=748.8) - **Sim Borodach (Hatch)**

Right.

[@12:30](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=750.82) - **Stephen Crary (FamilyLife Network)**

Yeah. Heavy, heavy, heavy stuff.

[@12:35](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=755.4) - **Sim Borodach (Hatch)**

Yeah. Yeah. And then there's, then there's the whole world of things that we're not told or we don't know about.

[@12:41](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=761.82) - **Stephen Crary (FamilyLife Network)**

Yeah. This is true. I often think that way about the whole Elon Musk fracture and how much of that is real and how much of that is, you know, there's some, some things going on that, you know, we don't even know.

is, is this like even real between what Musk and Trump are fighting about? Well then. Yeah. Yeah. Now, Hatch, are they based in LA?

[@13:06](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=786.56) - **Sim Borodach (Hatch)**

Is that why you're there? Mostly New York. I live out here and I work remotely.

[@13:11](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=791.98) - **Stephen Crary (FamilyLife Network)**

Okay. That's cool. Well, hey, I mean, it was awesome that you kind of got going on your own. We really appreciate when customers take initiative.

No worries. No worries. And I did look at the data, by the way. I've started to kind of pine through it a little bit.

And get to that. And so, you know, our first file that we uploaded was just over 2,500 donors, which was really cool.

And as I've started to kind of dig into that, I kind of just wanted to pick your brain a little bit in terms of that file.

Like, for me, like, I'm hoping to get to what I consider to be like the top 10% of those, of that donor.

Okay. of those 2,500 donor profiles, and like, maybe kind of get your advice on like, who do you think the best 10% of those, so 250-ish, of those profiles that I should prioritize in my outreach efforts and campaigns, if you had any thoughts that.

[@14:20](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=860.22) - **Sim Borodach (Hatch)**

Do you history? Do you have like a file of donation history?

[@14:25](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=865.36) - **Stephen Crary (FamilyLife Network)**

So when we uploaded the file, there was the last occurring donation and date was on the actual file.

[@14:34](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=874.08) - **Sim Borodach (Hatch)**

When I say donation file, or like a database of data, I mean like, where line by line you have individual donation records recorded.

[@14:43](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=883.9) - **Stephen Crary (FamilyLife Network)**

Yeah, we have a CRM called eKairos.

[@14:46](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=886.62) - **Sim Borodach (Hatch)**

That's what we use.

[@14:47](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=887.88) - **Stephen Crary (FamilyLife Network)**

A lot of pregnancy resource centers use eKairos.

[@14:50](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=890.66) - **Sim Borodach (Hatch)**

So we use that today.

[@14:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=892.94) - **Stephen Crary (FamilyLife Network)**

So we do have a complete history of what the donor has given.

[@14:58](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=898.64) - **Sim Borodach (Hatch)**

Okay. So yeah, you'll want... I mean, that will be, you can still start to get some insights even before you export that file and import it onto Hatch, but that will be the right balance of understanding what their existing relationship is to you against what we see their, you know, potential giving can be.

And it gets even stronger than that because when we, our target ask amounts and gift capacity rating, familiar with the term gift capacity rating, those, we're making a transition right now.

They're very rudimentary calculations that are just, you know, extrapolations of their wealth. So they're, they're somewhat useful today, but I would say minimally, minimally so.

[@15:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=951.54) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@15:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=952.14) - **Sim Borodach (Hatch)**

Very, very soon in the coming days. Okay. We're, we're putting out a new version of those target ask amounts where we are

Saying, based on all of the data, this is how much you should ask someone for a first gift, okay, and then if they're already given a first gift, this is how much you should ask them for in an engaged gift, so that data will be really powered in a meaningful way by what they've given to your organization already.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=973.595399)

[@16:22](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=982.34) - **Stephen Crary (FamilyLife Network)**

Yeah, yeah. I'm just opening up so we could see, just in the Insights section, exactly, but I'm sure this...

Yeah, and just FYI, I do have a hard stop at 4. I know this is supposed to go for an hour, but I apologize.

[@16:35](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=995.7) - **Sim Borodach (Hatch)**

I even have a little stop, potentially at 45, so...

[@16:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1000.84) - **Stephen Crary (FamilyLife Network)**

Okay, alright.

[@16:42](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1002.18) - **Sim Borodach (Hatch)**

Which I'm just juggling a couple of things today on a Monday, it's always tricky, right?

[@16:47](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1007.72) - **Stephen Crary (FamilyLife Network)**

Yep, I'm with ya.

[@16:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1009.72) - **Sim Borodach (Hatch)**

But we can definitely link up again later this week, or when it's convenient for you. So yeah, here are the target ask amounts.

So this whole display will look the same, but the math going on... Behind the scenes is just, it's going to be super smart.

You know, we're definitely curious to know how it lands for you. We're not the smartest people who ever lived who cracked the code of here's exactly how much someone's going to give when you pick up the phone, but when we make that change, and so that change will take into account what they've given to you.

[@17:23](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1043.8) - **Stephen Crary (FamilyLife Network)**

Whereas this right now doesn't really, in most cases, it's not, you wouldn't see this change necessarily. Even if you add the MyWord donations.

Okay. And then, will that automatically refresh all my profiles, or do I have to refresh that myself?

[@17:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1060.66) - **Sim Borodach (Hatch)**

It'll automatically, yeah, it'll automatically refresh, yeah.

[@17:44](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1064.28) - **Stephen Crary (FamilyLife Network)**

Okay. All right. Perfect. And you said that comes out in a few days, like by the end of the week?

[@17:48](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1068.42) - **Sim Borodach (Hatch)**

We'll see that? I wouldn't, I don't want to put a date on it because we're at, we believe that we're at the tail end.

[@17:55](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1075.86) - **Stephen Crary (FamilyLife Network)**

Okay.

[@17:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1076.38) - **Sim Borodach (Hatch)**

It takes a couple days to wire things up into the whole system, but. So I'd say if you could get this donation file out and up, that would be great, and then we'll keep a close tab, you know, let you know when things do really update.

Sure. Do you expect that that's something the donation export and upload you could turn around, like that you could handle pretty quickly?

[@18:19](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1099.3) - **Stephen Crary (FamilyLife Network)**

I don't think so, just because we didn't ever end up adding the unique identifier from eKairos.

[@18:25](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1105.44) - **Sim Borodach (Hatch)**

Right.

[@18:25](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1105.8) - **Stephen Crary (FamilyLife Network)**

So that's going to be probably our first challenge, is even if we exported those donations, it, you know, to marry them up, it might be a little tricky.

[@18:38](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1118.78) - **Sim Borodach (Hatch)**

Right. Right, right, right, right, right, right, right, right. Yeah, I mean, we really need those. Can you export me the same file that you uploaded initially with the IDs?

[@18:55](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1135.14) - **Stephen Crary (FamilyLife Network)**

I'm working on that now.

[@18:57](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1137.04) - **Sim Borodach (Hatch)**

Oh, okay.

[@18:57](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1137.56) - **Stephen Crary (FamilyLife Network)**

My director. Her finance and development is supposed to be pulling that. She just, she's supposed to have it by now.

Unfortunately, she fell sick and she's kind of recovering. So I would say maybe by the end of the week, she'd be, you know, feeling enough health-wise to share that with me.

But yeah, I have been trying to get it from her, but yeah, she just hasn't been feeling the best.

[@19:21](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1161.86) - **Sim Borodach (Hatch)**

Okay. Yeah, that would be, so maybe both of those things can happen. You can get us the same file that we uploaded with the IDs and then we can write the IDs.

And then if you can get the donation file, then we'll upload that subsequently.

[@19:36](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1176.96) - **Stephen Crary (FamilyLife Network)**

Then we'll run the scoring, please God, with the new Target Ask Amounts and Gift Capacity Rating. Sure, sure.

[@19:44](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1184.72) - **Sim Borodach (Hatch)**

Sure, Yep. Now you can still, when you were talking about trying to identify that top 10%, you could still be playing around in here to kind of surface.

Right, the folks who fit you best. So do you understand how Donations Affinity and Profile Affinity work?

[@20:08](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1208.18) - **Stephen Crary (FamilyLife Network)**

I I know what your definition is of it, but like in terms of the algorithm, I'm not 100% sure about, but I think I got a handle on how, you know, like being Profile Affinity, like how strong their, you know, social media accounts are, in alignment with our mission towards our organization versus like a donor giving Affinity, which is like how strong their donations to like causes are bubbling up around us, you know, to our mission.

Yeah.

[@20:39](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1239.98) - **Sim Borodach (Hatch)**

Spot on. Did you come in here to look inside these modals by hitting CY?

[@20:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1249.9) - **Stephen Crary (FamilyLife Network)**

I don't think I've ever seen this page before. I don't know, this looks like a tickets page is what I'm looking at.

[@20:57](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1257.8) - **Sim Borodach (Hatch)**

Oh, sorry about that.

[@20:59](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1259.94) - **Stephen Crary (FamilyLife Network)**

Yeah, that's all right. I was going say, this is a new feature for me that I haven't seen in Hatch.

[@21:05](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1265.84) - **Sim Borodach (Hatch)**

That's not what I wanted to mention.

[@21:07](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1267.6) - **Stephen Crary (FamilyLife Network)**

There we go.

[@21:10](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1270.5) - **Sim Borodach (Hatch)**

Sorry about that.

[@21:11](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1271.76) - **Stephen Crary (FamilyLife Network)**

That's all right. No worries.

[@21:14](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1274.64) - **Sim Borodach (Hatch)**

So, this you have seen?

[@21:16](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1276.84) - **Stephen Crary (FamilyLife Network)**

Yes, yes, yes.

[@21:18](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1278.12) - **Sim Borodach (Hatch)**

I've seen that. And have you clicked in here to the CY?

[@21:22](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1282.62) - **Stephen Crary (FamilyLife Network)**

I have not, no.

[@21:24](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1284.06) - **Sim Borodach (Hatch)**

Okay. So, when you hit into the CY here, you're going to get, for the Profile Affinity, you're going to get the individual facts that power the Profile Affinity score.

[@21:34](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1294.46) - **Stephen Crary (FamilyLife Network)**

Okay.

[@21:35](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1295.12) - **Sim Borodach (Hatch)**

It has a fact score associated with it. And then, on the other hand, by Donations Affinity, when you hit CY, you're going to get the name of the organization.

[@21:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1309.6) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@21:50](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1310.54) - **Sim Borodach (Hatch)**

How recently they got a gift from this person, and how frequently, and what the amount was. then, very soon, you'll see.

We were adding the explanation that compares this organization's mission to your organization's mission. So you have a context of what's similar between...

[@22:10](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1330.2) - **Stephen Crary (FamilyLife Network)**

Yeah, yeah.

[@22:11](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1331.44) - **Sim Borodach (Hatch)**

And how does it know, in terms of determining affinity, how does it know our organization mission, vision, values, where we land in the social sector?

How does it know all that? Yeah, so we defined the mission here using AI, but you're totally welcome to go in here and edit it.

would actually be... That would be great. That's usually what we do in the onboarding process, but I mean, you just want to go for it.

And then when we rerun the scoring later on, it will use the updated mission. So again, I just clicked your initials and then hit my organization.

[@22:48](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1368.42) - **Stephen Crary (FamilyLife Network)**

Okay, perfect. And do we have to do anything about the organization category? see that's not selected. Does that need to be...

[@22:54](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1374.2) - **Sim Borodach (Hatch)**

The rest of these items are not pertinent today. The AI will start to use them over time. And then, so as you define this, or you add your social media handles, et cetera, that will be useful in the future, but right now we're not using them, so...

**ACTION ITEM: Update org mission statement in Hatch (My Organization page) -** [**WATCH**](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1382.9999)

[@23:10](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1390.74) - **Stephen Crary (FamilyLife Network)**

Okay. Yeah.

[@23:12](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1392.34) - **Sim Borodach (Hatch)**

Perfect.

[@23:13](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1393.54) - **Stephen Crary (FamilyLife Network)**

Gotcha. Yeah, I'll take a look at that mission and update it if it needs to be updated.

[@23:24](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1404.12) - **Sim Borodach (Hatch)**

Okay. Yeah, that sounds good.

[@23:29](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1409.1) - **Stephen Crary (FamilyLife Network)**

Cool. But in terms of, like, just going back to it, like, the top 10%, like, if, since I don't have the donor history in my database today, like, would you recommend, like, using one of those scores, like the Hatch Giving score, or a combination thereof?

[@23:50](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1430.64) - **Sim Borodach (Hatch)**

Yeah. Yeah. So I'm going to jump back over to the My Organization page here, and... If you scroll down all the way to the bottom, you see that you can set the weights for the Hatch Giving Score.

[@24:06](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1446.92) - **Stephen Crary (FamilyLife Network)**

Yes.

[@24:08](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1448.0) - **Sim Borodach (Hatch)**

So I'm going to adjust it to be 50-50 from Affluence and Propensity, and then when I hit Save, this is something that you can adjust and it'll auto, not auto-update, but once I refresh the page here, the Hatch Score is going to update.

Now, I'm turning on the Hatch Score to only have Propensity and Affluence, because those are both of the wealth indicators.

Obviously, Affluence is just money, raw net worth, and Propensity is how philanthropic they are.

[@24:43](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1483.2) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@24:44](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1484.36) - **Sim Borodach (Hatch)**

But if I sort by the Hatch Score now, and this is just one example of how you can configure your sorting and what columns you show on this page and how you weight the Hatch Score.

I'm just giving you one method, but you can do them differently.

[@25:00](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1500.22) - **Stephen Crary (FamilyLife Network)**

excuse you is you.

[@25:01](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1501.44) - **Sim Borodach (Hatch)**

So I sorted by the highest Hatch score, you could see these are the two colors for propensity and for affluence.

[@25:09](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1509.0) - **Stephen Crary (FamilyLife Network)**

Sorry, I'm sorted by the highest donations affinity.

[@25:11](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1511.92) - **Sim Borodach (Hatch)**

So now I know the people at the top are the ones that basically are the richest people and the combination of being richest and most philanthropic.

And sometimes their capacity, their wealth, you know, affluence might come from their propensity. might be that their strongest wealth indicators are actually their philanthropy.

That could be. Okay. Now, I'm just going to show you. you hover here, you'll see it says propensity score and affluence score.

[@25:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1540.44) - **Stephen Crary (FamilyLife Network)**

Yep.

[@25:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1540.96) - **Sim Borodach (Hatch)**

Just to see what those numbers are. Now, it doesn't really matter what this number is right now because all that you need to know is that the people with the highest wealth plus philanthropy are at the top because I sorted by the highest Hatch score.

then what you can scan with your eye is see who's got affinity. Okay. Okay. Now, Profile Affinity is much more likely to be very high in more cases than Donations Affinity because it has many more data points to capitalize on, their workplace details, if you mentioned social media, if they were mentioned in the news, Donations Affinity is just looking at their public giving, and some people don't even have their giving published because it's, you know, they donated through a DAF, but if you look at Robert Bazone, I could see that he's got some Donations Affinity, and I can see why, okay, which is pretty cool, nice, I mean, that's good, we like seeing that, and he's Catholic, okay, so you could do a few things now, you could tick him, and let's just say, you you also decide Robert Anderson you're interested in, I could take both of them, and now I can add them to a list, I can add tags, or I could even edit their status, when go to add to a list, I can create a new list, I I can add to an existing list,

If I create a new list, I could give it an emoji, a name, and a description. Hit save. If I want to add tags, I'll just hit, do need a sec?

[@27:12](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1632.06) - **Stephen Crary (FamilyLife Network)**

No, I didn't say anything.

[@27:13](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1633.26) - **Sim Borodach (Hatch)**

Oh. Yeah, go ahead.

[@27:14](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1634.9) - **Stephen Crary (FamilyLife Network)**

Add tags, which you custom defined.

[@27:17](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1637.16) - **Sim Borodach (Hatch)**

So I could say, you know, I don't know. I'll show you why, I'll explain why in a second I'm going to use this language.

Potential Elevated Profile. And then hit enter and save. And now they'll have that tag. I'm going to skip gift capacity rating for now.

And the last thing you can actually do is you could edit the status. So these are the six stages of the solicitation cycle, right?

So this is how you can start configuring your entire database to be an active prospect management tool here. Now, you could change the columns to see, you know, the status.

Which was that Solicitation Cycle tag, Profile Tags, there's no way to see what lists people are on from this view, but on their individual profiles you can.

Okay, and now we're transitioning a little bit into Prospect Management because you're trying to get to that 10%, well you're going to have to move people around to kind of get a sense of who they are.

Now that elevated profile name that I started giving to that list is because every donor profile in Hatch is by default considered incomplete and unconfirmed.

Okay, in order for it to be complete and confirmed, someone needs to change the status of the profile, they need to elevate it.

[@28:44](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1724.82) - **Stephen Crary (FamilyLife Network)**

Okay.

[@28:46](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1726.16) - **Sim Borodach (Hatch)**

you get 15 elevations with your subscription per month, and you can elevate any person, which means someone on our team goes through and confirms and completes the profile.

Okay. And then we send you the. Completed Profile to your email. And you'll say, oh great, they elevated John.

Let me see, is he who I suspected him to be? This form over here is where you could put in information that you have, which wasn't captured in the profile initially, or where you can give us additional direction on what you need done.

I mean, we know our goal is to confirm and complete the data. So that's what we're going to try to do.

But if you have additional direction, you can. Yeah. And then the status up here will change. will say elevated.

Back on this page, you'll see a sticker next to any name that says elevated, indicating that they've been elevated.

And then you know they've been confirmed and completed. You could also filter. By the way, I'm going to send you this recording afterward because I know I'm sharing a lot of details here so that you can reference it.

But you could scroll down here to the bottom to the prospect management. You could filter by elevated or elevating.

And you know, hopefully after six months, you'll have six times 15 is 75, I know 90. You'll have 90 elevated profiles.

[@30:02](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1802.24) - **Stephen Crary (FamilyLife Network)**

You can also include or exclude profile tags.

[@30:05](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1805.56) - **Sim Borodach (Hatch)**

You don't have any yet, so there's nothing in here. Tags might be board member, trustee, something that you can't already find within the Hatch data.

You could exclude lists. So I think favorites should be here, which will mean show me everyone who's not on any of those lists.

And of course you can go into your lists to look already at some sub-segment that you've created, right? And now you're working just within that sub-segment.

You're not kind of actively filtering across everybody.

[@30:38](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1838.7) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@30:39](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1839.94) - **Sim Borodach (Hatch)**

There's a lot to do here and there's got to be some balance in the next, you know, two to four to six weeks where you're playing, but you're also, we want to see you getting value in the sense of like, it's not that hard to identify who are some folks that are worth elevating, right?

Right. Right. Maybe you're talking about with your fundraiser, some folks that are ongoing conversations, or your board members, you know, so you could see what elevated profiles are like, you could see what our target ask amounts are, you can, your colleague might have a donor meeting that's upcoming and you're, you're going to show them the AI scores and insights section and say, hey, you should use this before your meeting to just know what this person is about.

Yeah.

[@31:25](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1885.84) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@31:26](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1886.62) - **Sim Borodach (Hatch)**

Yeah.

[@31:26](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1886.86) - **Stephen Crary (FamilyLife Network)**

I mean, would it be, like, okay to just do what you did and just take, when you did the 50-50% on the Hatch Giving score, and just take like the first 250 of the highest-scored people, regardless of the profile affinity or donor donation affinity, just take the top 10% of that?

[@31:49](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1909.44) - **Sim Borodach (Hatch)**

Yeah, man.

[@31:50](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1910.68) - **Stephen Crary (FamilyLife Network)**

Absolutely. Okay. All right. I just wanted to double check because I know you kind of highlighted too, looking at obviously the donor profile, the donor affinity and the profile affinity.

I mean, I I think that makes sense, but like, I mean, just for sake of time and brevity, like, I would just probably take 250 of the top ones and then just call it a day and start soliciting them.

[@32:13](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1933.94) - **Sim Borodach (Hatch)**

Yeah, I mean, if you're going to do that and go for that simplicity route, I would highly recommend waiting until we get your donations in here and then rerun scoring with the new target ask amounts.

Because if you're literally going to pick up the phone and ask someone for a dollar amount, and you're just, I would definitely recommend using the number that we advise and at least benchmarking that against what you were planning to ask them for.

And then you can go into their scores to like figure out why. We also, I don't know if it's going to happen so soon, but we're going to have an AI explanation like these that explains why the target ask amount what it is.

So it'll be some kind of summary of these details.

[@32:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1972.14) - **Stephen Crary (FamilyLife Network)**

Okay.

[@32:53](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=1973.86) - **Sim Borodach (Hatch)**

But the target ask are going to be really smart because they're not just going to say Here's how much money the person has, but it's going to look at, here's how much they gave you, and here's how much they gave to organizations that are like you, and here's how much they gave to organizations that are not like you.

So the ask amount becomes actually a smart ask amount. It puts it into a single number. So I'd definitely recommend waiting to take that, you know, level of action until we give you a little bit more data.

You see data, but I think you're spot on. mean, you'll know, and you'll also be able to see here, right, when you toggle this on, before you call someone, you'll be able to see within Hatch, have they given to you and how much.

So you pretty much, I'm sure your CRM has some additional details, but you'll know a lot that you need to know before picking up the phone, just from right here.

[@33:48](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2028.48) - **Stephen Crary (FamilyLife Network)**

Yeah, yeah, yeah, yeah. Okay.

[@33:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2031.86) - **Sim Borodach (Hatch)**

I mean, I like, I really like where you're at, Steven. I, you know, if you guys had a full blown prospect research team, this, or the other, we'd be having a different conversation.

[@34:00](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2040.0) - **Stephen Crary (FamilyLife Network)**

I don't want to overly complicate it, Sim. I just want to get straight to the simplicity of it and then just shoot.

Because I can always pivot at some point down the road. And so let's just start now and then we can always pivot later.

But I did want to ask real quickly about, so can you click on one of the donors? I'll just kind of take you into something here real quick and into their profile.

Yeah, like so like when you go down and you get into their network of people that are like around them.

Yeah, when they start talking about colleagues and all that. So this guy doesn't have very many, unfortunately. But I guess my thought is, is that if I ever needed a report, right?

Let's say at some point I get exhausted chasing after my 2500, which came out of my CRM. So these people have a

But at some point, said, you know what, I've tapped all those people. I've solicited them enough. Could you run a report that says, like, maybe of my, let's say I gave my, again, top 10% and said, give me a report with all the colleagues and let's find out what that number is.

And then if it, you know, I think I have 5,000 profiles I can enrich. I've already done half that.

But let's say it's another 2,500 that I have remaining. I could then enrich that listing. And then I could chase after them, although they would be sort of cold calling because they would be kind of a second degree network, if you will.

But I'd be okay with that.

[@35:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2140.38) - **Sim Borodach (Hatch)**

So the challenge there is that the data that we have on those colleagues to enrich them is less than what you had on these 2,500 folks.

The key data point that we have is the workplace that they share.

[@35:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2156.34) - **Stephen Crary (FamilyLife Network)**

Yeah.

[@35:56](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2156.88) - **Sim Borodach (Hatch)**

And that's a fine data point to use. It's not. We're going to produce as accurate results, and we'll probably not produce results at all as often, but I do think that it's a reasonable, I do think that it's reasonable to approach that way, and that's a problem we can think through in a little bit, with a little bit more nuance.

[@36:16](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2176.08) - **Stephen Crary (FamilyLife Network)**

Okay.

[@36:16](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2176.98) - **Sim Borodach (Hatch)**

I do think that it's possible. I just want to see one quick thing. Another way that you could filter down the results set, let's say it's 5,000 colleagues, or 7,000, I I'd love for you to upgrade your subscription, but...

[@36:34](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2194.06) - **Stephen Crary (FamilyLife Network)**

Sure. I'm with you.

[@36:37](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2197.66) - **Sim Borodach (Hatch)**

But we could, yeah, so let's see, you know, but there might be some way we could filter it down if need be, to make the list shorter.

But, yeah, like, taking this list of people, we would basically say take George Davidson and look up his, and look him up against the Usher Family Foundation.

[@36:59](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2219.08) - **Stephen Crary (FamilyLife Network)**

Sure.

[@36:59](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2219.94) - **Sim Borodach (Hatch)**

And we'd also... So use the word trustee as a keyword. So you should probably go into that list, which you can easily, like if we do that, you could easily manage from your upload page where this is the upload we approved now.

But let's say it happens in June of 2026, you'd just be able to hit view profiles and go right into that list of people.

And you could look, we'll be able to look at accuracy markers. You'll know who you're engaging with, that this is this kind of second tier.

We could import them with a tag that tells you who they were connected with when you imported them. So you could definitely build out your database.

The other way that you could do it, and this is what I wanted to show you, is you could just copy this and then if I hit here, now you'll quick search the person and you get to be involved in what profile is selected.

So if you know, you can sort of use your... Subjective or non-super-defined knowledge about Robert, about the foundation. Looks like this is in Pennsylvania, too.

And see if you could narrow the results yourself. QuickSearch is always available to you, and I wonder if that's...

[@38:22](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2302.9) - **Stephen Crary (FamilyLife Network)**

I did a QuickSearch the other day. Do QuickSearchs count against your 5,000 left?

[@38:28](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2308.2) - **Sim Borodach (Hatch)**

No, they have their own quota, which is, for you it's 40, and they're going to reset every month on the 2nd.

[@38:36](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2316.24) - **Stephen Crary (FamilyLife Network)**

Okay.

[@38:37](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2317.54) - **Sim Borodach (Hatch)**

And that's true of your elevated profiles, too. Both of those are going to reset on the 2nd of the month.

Okay. Bulk Enrichment does not... I mean, it does not reset. You would have to purchase more credits for those profiles, too.

[@38:51](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2331.3) - **Stephen Crary (FamilyLife Network)**

Got it. Got it, got it, got it. Okay. No, that's really good. All right. And then... then... I think that's all I had.

Actually, I'm reviewing my notes. I don't think I had anything else at this moment, but, I obviously I got some work ahead of me.

**ACTION ITEM: Request elevated profiles for 15 interesting donors before month-end -** [**WATCH**](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2349.9999)

[@39:12](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2352.58) - **Sim Borodach (Hatch)**

Yeah.

[@39:13](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2353.52) - **Stephen Crary (FamilyLife Network)**

Well, listen, I really think you're, you know, as I said, I think you're onto something with the simplified approach.

[@39:20](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2360.22) - **Sim Borodach (Hatch)**

And again, you can start requesting those elevated profiles. You're already halfway through your first month. So those elevated profiles don't roll over.

The quick searches don't either.

[@39:31](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2371.5) - **Stephen Crary (FamilyLife Network)**

It's just 40 is a fair amount.

[@39:34](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2374.14) - **Sim Borodach (Hatch)**

So I would say start requesting elevated profiles for someone that looks interesting and, you know, think through why did I request this person?

How do the results look different? Are they as I expected them to be? And I'd say give yourself anywhere from one to three months to feel comfortable.

Okay. Really comfortable where you're like, oh, okay, I really get how to use Hatch. think that's, again, one, one on the short and three on the, if you're,

If it's like Q4 of 2025 and you're like, I'm really not getting it, we need to revisit how we're educating you or, you know, this might not be the right fit for you guys.

**ACTION ITEM: Email Stephen when target ask amount algorithm is updated -** [**WATCH**](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2402.9999)

[@40:11](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2411.58) - **Stephen Crary (FamilyLife Network)**

Sure, sure. And will you, Sim, will you let me know when they do update the algorithm for the target ask amounts?

Will you shoot an email or send out a mass marketing communication? Just so I know that it's been refreshed and it's a different one now.

[@40:28](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2428.98) - **Sim Borodach (Hatch)**

Yes, sir.

[@40:30](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2430.4) - **Stephen Crary (FamilyLife Network)**

Okay, perfect. That's great. Well, hey, man, thank you. Thank you for your time today, Sim. I appreciate it, man.

You're great. Yeah, I'll be praying for you guys out in LA, man.

[@40:40](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2440.78) - **Sim Borodach (Hatch)**

Seriously. Thanks, brother. I appreciate that.

[@40:43](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2443.84) - **Stephen Crary (FamilyLife Network)**

Yeah, man.

[@40:44](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2444.54) - **Sim Borodach (Hatch)**

For all of us, you know, this is a, it's a sober, not sobering, it's a calming conversation, honestly, that we had.

[@40:52](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2452.1) - **Stephen Crary (FamilyLife Network)**

Okay, good.

[@40:54](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2454.8) - **Sim Borodach (Hatch)**

People are, people are. Most people I interact with, you know, in my day-to-day are not level-headed, and even if we have different opinions, they're just, it's like, can we be level-headed, can we just have a frank conversation, yeah, transparency is the key, yeah, but I think that's partly to do, if I could be so bold, is I feel like the blame sits on social media because I feel like we have a whole generation of people being mentored by Facebook, and I don't think that's the answer, right?

[@41:29](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2489.46) - **Stephen Crary (FamilyLife Network)**

You don't get mentored by Instagram, or Facebook, or Twitter, like, that's, those aren't the people that should be mentoring you.

Like, you need, you need people speaking into your life that actually care, right?

[@41:39](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2499.36) - **Sim Borodach (Hatch)**

Not just sit behind a virtual wall, send you paid advertisements to get you to steer your thinking.

[@41:45](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2505.04) - **Stephen Crary (FamilyLife Network)**

Like, you need people that actually speak into your life that can, you know, like, fathers, and dads, and mentors, and people that care, you know?

So, yeah, I think that's part of our problem with a generation.

[@41:57](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2517.1) - **Sim Borodach (Hatch)**

Hmm. Cool. Thanks for sharing.

[@41:59](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2519.92) - **Stephen Crary (FamilyLife Network)**

Yeah, man. Yeah, man. Hey, man. Be good, brother.

[@42:02](https://fathom.video/share/cczxQGXLMDaxtxfhUtPRqfBRBvkMzit1?timestamp=2522.42) - **Sim Borodach (Hatch)**

All right. You too, Stephen. Really look forward to being in touch again soon. All right, man. Take care, man.

Thanks. Bye.