# **Strategic Implementation - July 01**

[**VIEW RECORDING - 48 mins (No highlights)**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz)

[@0:07](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=7.46) - **Sim Borodach (Hatch)**

Hey, Edward! How are you, my friend? How are Edward, do you read me? Oh, I couldn't unmute it until I...

[@0:37](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=37.62) - **Edward Escarsega (JANM)**

sorry. How's it going?

[@0:39](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=39.74) - **Sim Borodach (Hatch)**

Do not even worry about it at all.

[@0:43](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=43.06) - **Edward Escarsega (JANM)**

You must be a ventriloquist. Oh, no, never mind. Sorry, it's a photograph. How are you doing?

[@0:52](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=52.24) - **Sim Borodach (Hatch)**

But I am a showman.

[@0:53](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=53.7) - **Edward Escarsega (JANM)**

I am a showman. You are. I can tell. I've seen your FAQ videos and... And, um, it's like you're trying to get it right, each time.

[@1:06](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=66.4) - **Sim Borodach (Hatch)**

I don't know what you mean by that.

[@1:08](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=68.5) - **Edward Escarsega (JANM)**

No? Because, so like, it was like, uh, you were doing, it was like, I, I would, at first I, I was following along, you know how you're kind of doing something else on the side, right?

And like, I'm listening, and then, but then I'm like, wait a minute. Well, you, you, it's like a video, and I told, um, uh, Sam, right?

[@1:30](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=90.48) - **Sim Borodach (Hatch)**

No, uh, it's Joe, Sam, yeah, Sam.

[@1:34](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=94.42) - **Edward Escarsega (JANM)**

Yeah, that, that, uh, that, uh, the, I was trying to look for these guides, and it's, I, I noticed you, I recognize you, but you're, it's like you're doing two or three, four takes, and it's all together.

And so, you, you, you're like repeating the same script, but you're like, no, let me do it again. Amen.

. I got to find, you got to link, can you link to where you're seeing this? Okay, yeah.

[@2:07](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=127.94) - **Sim Borodach (Hatch)**

Also, I'm going to turn my video on in one second. I just got to take a quick minute and then I'll be right back if that's okay.

[@2:15](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=135.38) - **Edward Escarsega (JANM)**

Okay, I will too then.

[@2:17](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=137.26) - **Sim Borodach (Hatch)**

Okay. Perfect, yeah. Quick bio break. Thank you. You All right, Edward, I'm just trying to situate myself somewhere that's not entirely in the sun.

Too many hours indoors on a computer will make any man go crazy.

[@4:28](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=268.18) - **Edward Escarsega (JANM)**

Yeah, I can imagine. And you're in New York?

[@4:48](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=288.3) - **Sim Borodach (Hatch)**

I'm actually in Los Angeles.

[@4:50](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=290.12) - **Edward Escarsega (JANM)**

Oh, you are? Oh, okay. How about you? are you located? I'm also inside. Sometimes I feel like moving. We'll

I'm everything, but then I'm so situated here, like the hassle, but I should set something up in the patio.

It would be much better. I find myself working more and more at home, but I don't think your Wi-Fi is there.

Okay, you got it. Yeah.

[@5:24](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=324.74) - **Sim Borodach (Hatch)**

Sorry about that. just switched to a different network. Do you mean me okay?

[@5:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=331.16) - **Edward Escarsega (JANM)**

Yeah.

[@5:33](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=333.5) - **Sim Borodach (Hatch)**

Awesome. All right. Edward, it's so nice to be here with you.

[@5:38](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=338.94) - **Edward Escarsega (JANM)**

Yeah, same.

[@5:40](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=340.0) - **Sim Borodach (Hatch)**

I'm glad that you... I mean, thank you. I hope we're going to have a good time together.

[@5:45](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=345.88) - **Edward Escarsega (JANM)**

Yeah, think I'm really... I'm hoping that this is... Well, it was exactly what I was thinking about.

[@5:54](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=354.82) - **Sim Borodach (Hatch)**

Yeah, tell me.

[@5:55](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=355.76) - **Edward Escarsega (JANM)**

It's on the prospect research and giving me... I just hate doing the whole formatting and doing it manually, and I'm like, why is it 2025 and I'm doing this?

So this, I'm hoping it won't.

[@6:13](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=373.22) - **Sim Borodach (Hatch)**

Tell me a little bit more about what your process has been like and what you like about Hatch and what you're excited about it, and then let's dive right in.

[@6:21](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=381.06) - **Edward Escarsega (JANM)**

Yeah, well, so I, you know, one thing that I'm concerned about is like, when it's really a process, that is, you know, qualified really already, to some extent.

So we have a wealth screening tool. We use all true Blackbaud product, so I forget what they call it, but the wealth screening tool that they use.

And so we'll get a rating system. It's not always great, but they're, they're just numbers, you know, they're just a basic score.

And it's related. It could be all different kinds of things, but you don't really know why they're rated like that, but I like that here, there's at least the potential of getting a profile that is more robust, and if they're not financially a prospect, you know, they could be through some other means, through, you know, just affinity, or just, you know, something else.

So, I like those, it's like four different types. But the process now is, you know, for some, I've been using, like, ChatGPT, or Perplexity, or whatever.

I've tried different ones, but always kind of making sure that I'm pulling out, not putting in, right? And so, I get a little nervous about that, though, because then...

And, you know, so I'll put, I'll take it out, but then if I don't put something in, then it's not, it's not, there's a lot of manual adjusting, and then it doesn't come up with any photographs, and no, so I have to go and find that.

[@8:18](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=498.28) - **Sim Borodach (Hatch)**

Yeah, yeah, yeah.

[@8:19](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=499.02) - **Edward Escarsega (JANM)**

And then I have to look into, a little deeper to the, the addresses that come up, because sometimes they're connected to businesses.

[@8:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=511.46) - **Sim Borodach (Hatch)**

Yeah.

[@8:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=511.78) - **Edward Escarsega (JANM)**

And they're not really connected to them.

[@8:35](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=515.14) - **Sim Borodach (Hatch)**

Right.

[@8:35](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=515.7) - **Edward Escarsega (JANM)**

Yeah, so it's parsing apart everything, and I feel like this, at least potentially, because I haven't only done it like on four profiles, but I, I thought, you know, there's a better shot with this than anything else that's out there, I think.

mean, even though there are a couple others that I think could do it, but I, I just felt like, I don't know.

Just the look of it, the ease of it, the simplicity, I like the design, so yeah.

[@9:10](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=550.18) - **Sim Borodach (Hatch)**

Who are you comparing us to? I'm just so curious because I don't necessarily like to deep job, especially with customers who I don't know, but I'm just getting all the thoughtfulness and like, you know, like you want to, you really, you, you, you, you basically bought, you know, after like one meeting.

And to me, that's like, even though you're a smaller deal for us, you see what we're doing and you see into it.

[@9:39](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=579.56) - **Edward Escarsega (JANM)**

So I'm curious to learn a little bit more. Yeah, I mean, I went through a list and just, you know, I also used AI and I had it do research on it and then compared exactly what it was just a, I can get you the list.

I have to look in the notes.

[@9:59](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=599.36) - **Sim Borodach (Hatch)**

in the notes to find it. Oh, yeah. Did you have a summary table, a comparison table or something?

[@10:04](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=604.72) - **Edward Escarsega (JANM)**

Yeah, I think you came up with a comparison, a summary table, yeah.

[@10:08](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=608.6) - **Sim Borodach (Hatch)**

Oh, yeah.

[@10:09](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=609.22) - **Edward Escarsega (JANM)**

But I, you know, what I usually do is I'll look in, like, Gemini used to hate Gemini, now it's suddenly woken up.

I think it's got a little more consciousness. So it's, now it's usable. God, like maybe a month ago it wasn't.

Now it is. So I'm, I'll use that, too, to, to figure out, you know, so it's usually Chachi BD and Gemini now.

[@10:40](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=640.22) - **Sim Borodach (Hatch)**

Oh, Edward, are you here in Los Angeles?

[@10:42](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=642.78) - **Edward Escarsega (JANM)**

Yeah, I am.

[@10:43](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=643.6) - **Sim Borodach (Hatch)**

Yeah.

[@10:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=644.02) - **Edward Escarsega (JANM)**

I'm in downtown. Are you by the museum? Yeah. Yeah. Well, right now I am in Alhambra.

[@10:51](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=651.2) - **Sim Borodach (Hatch)**

Okay.

[@10:51](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=651.8) - **Edward Escarsega (JANM)**

But I'm, I'm going to, it's like 20 minutes away. Where are you at?

[@10:56](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=656.48) - **Sim Borodach (Hatch)**

I'm over by Culver City.

[@10:58](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=658.72) - **Edward Escarsega (JANM)**

Oh, okay.

[@11:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=660.08) - **Sim Borodach (Hatch)**

I got it. I gotta come over, though. I'd love to check out the museum.

[@11:02](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=662.88) - **Edward Escarsega (JANM)**

Oh, please do.

[@11:04](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=664.4) - **Sim Borodach (Hatch)**

That'd be awesome.

[@11:05](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=665.36) - **Edward Escarsega (JANM)**

Yeah, please do. I go in. Usually I like working from here because there's construction. We're renovating the museum.

[@11:14](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=674.54) - **Sim Borodach (Hatch)**

oh, oh.

[@11:14](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=674.9) - **Edward Escarsega (JANM)**

Is it closed?

[@11:15](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=675.8) - **Sim Borodach (Hatch)**

Is it temporary?

[@11:16](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=676.38) - **Edward Escarsega (JANM)**

It's closed to the public, but yeah, I can share the space with you and stuff.

[@11:22](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=682.22) - **Sim Borodach (Hatch)**

Oh, that would be so rad.

[@11:23](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=683.68) - **Edward Escarsega (JANM)**

There's lots of other things to see because we own the whole, like the whole plaza there. So it's, it's not just the museum.

It's across the street's historic building, which is part of the collection. And then there's a democracy center, which is, that's open.

It's a theater and workshop space. So that's where we're running most of our programs. Otherwise, we've got an art center, an exhibition there.

But. Yeah. Yeah, it's still, like, plenty to learn.

[@12:05](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=725.18) - **Sim Borodach (Hatch)**

Unbelievable. can't wait.

[@12:06](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=726.98) - **Edward Escarsega (JANM)**

Yeah.

[@12:07](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=727.18) - **Sim Borodach (Hatch)**

can't wait. Sounds awesome.

[@12:08](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=728.74) - **Edward Escarsega (JANM)**

And there's a little thing in my signature that's, like, a calendar, like, kind of like what you have. So you're there every day?

You said some days that you go, but a lot. Some, I go, I'm right down the street, so I'll go anytime.

Like, I'm, yeah, so I don't really keep a strict schedule.

[@12:27](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=747.56) - **Sim Borodach (Hatch)**

Yeah.

[@12:28](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=748.24) - **Edward Escarsega (JANM)**

Okay, I'll let you know.

[@12:30](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=750.0) - **Sim Borodach (Hatch)**

It works for me then.

[@12:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=751.72) - **Edward Escarsega (JANM)**

Yeah.

[@12:32](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=752.48) - **Sim Borodach (Hatch)**

That's, that's cool.

[@12:33](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=753.76) - **Edward Escarsega (JANM)**

Yeah, for sure.

[@12:34](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=754.92) - **Sim Borodach (Hatch)**

on.

[@12:36](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=756.76) - **Edward Escarsega (JANM)**

Yeah, so I, I, the, the other, other platforms were probably some of them more too expensive, or for, for, like, it didn't just focus on, on the, the prospects.

And so this is, like, an excellent, exactly what I needed. Yeah. You know, it's focusing, because my job is just major giving, so either corporate or, that was another thing, it doesn't, does it do corporate?

Or not, it doesn't, no, yeah, so it just focuses on individuals, which in the end, that's, even if you're, even if it's a corporation, you still need the individual, you know, so I, it's just, something that, um, I realized, oh, this is exactly, I don't need anything more, and I don't need anything less, so, and I think, I think if, if more people knew about it, you'd probably have a really good, um, response, I think, yeah, yeah, man, awesome, awesome, I'm just so glad to hear it, um, and I hope that we can meet your, like, so,

[@14:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=840.0) - **Sim Borodach (Hatch)**

Sounds like, you know, you have some expectations, but you're coming with a fair degree of openness, and as your, like, you know, customer success operative, I really appreciate that way of being because we can sort of, you know, move together to give you a successful experience, and yeah, let's get started.

[@14:19](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=859.72) - **Edward Escarsega (JANM)**

Okay.

[@14:21](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=861.74) - **Sim Borodach (Hatch)**

So do you have, so are you an RENXT or a different CRM?

[@14:27](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=867.56) - **Edward Escarsega (JANM)**

It's all true.

[@14:29](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=869.04) - **Sim Borodach (Hatch)**

Oh, that's the name of the CRM, okay.

[@14:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=871.42) - **Edward Escarsega (JANM)**

Yeah.

[@14:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=871.82) - **Sim Borodach (Hatch)**

Sure.

[@14:32](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=872.42) - **Edward Escarsega (JANM)**

It's a BlackBot product. It's, like, they're after Razor's Edge.

[@14:37](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=877.54) - **Sim Borodach (Hatch)**

Okay.

[@14:38](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=878.8) - **Edward Escarsega (JANM)**

They made this, which is, I think, their only proprietary thing. Like, everything else I think they've just bought, you know?

[@14:48](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=888.44) - **Sim Borodach (Hatch)**

Oh, I didn't know that. I didn't know they bought anything else. Wow.

[@14:51](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=891.86) - **Edward Escarsega (JANM)**

Yeah, they took over, they took over a lot of, like, I don't think RE is even theirs.

[@14:59](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=899.28) - **Sim Borodach (Hatch)**

Wow, I know. You really know your stuff also, I guess.

[@15:02](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=902.42) - **Edward Escarsega (JANM)**

Have you been in the game for a while? 20 years. When I first started at a small museum, they didn't have a database, so I built it out of FileMaker, and it was a relational, I'm like, oh, relational?

[@15:24](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=924.32) - **Sim Borodach (Hatch)**

Okay, relational.

[@15:25](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=925.62) - **Edward Escarsega (JANM)**

Okay, so then I started, okay, so then everything they buy at the store should be in here, and then that person, we should have everything together, right?

If they buy it in the store, if they make a donation, or if they're a member, or if they come to an event, or we send them a mailing, the mailing should be in here, the collections should be in here, you know, everything should be connected.

So that, that's how I, I was like, oh, it's essential. Is it then when, once we started doing that, we're like, oh, you know, people were communicating.

Hating with people, it was amazing. It was only a year old, the museum.

[@16:06](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=966.18) - **Sim Borodach (Hatch)**

Uh-huh, uh-huh. So yeah, so feel free to sprinkle in the little bits of wisdom you got going on. I'll appreciate that greatly over time.

So since you're not, I guess I was asking the CRM question, we don't with Altru, so we're going to to do a manual export from Altru up to Hatch.

So let me just, let me itemize a couple things that we could review. Maybe we'll get to all of them today.

**ACTION ITEM: Review Hatch CSV upload instructions at hatch.ai/csv-upload-instructions -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=996.9999)

Um, yeah, cue you. Okay. So one of them is that export from your CRM, and we have specific instructions, which I'm going to pop up on my screen, just where you can find those instructions.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1003.380059)

And you're going to find them by, if you select upload here on the left, you are a few folks, right?

[@16:55](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1015.44) - **Edward Escarsega (JANM)**

Oh, looks like you even tried to import a file.

[@16:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1017.82) - **Sim Borodach (Hatch)**

Yeah.

[@16:58](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1018.88) - **Edward Escarsega (JANM)**

At some point. The very first time. Yeah, and then I think I didn't have all of the fields at all, or they didn't, some of them didn't match, but then it was just sitting, I thought I did match them, and then it just never worked, so that's something I talked to Sam about as well.

[@17:17](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1037.16) - **Sim Borodach (Hatch)**

Yeah, I mean, the, I'm not sure, but I'd say just give it another shot after we talk, and, you know, whatever issues you have, this is going to be your rule of thumb, you know, just use the style.

on here on the bottom of the alert, and I'll reply, especially because you're also in West Coast time, I'll reply in your real time.

Okay. But anyway, so yeah, for these instructions, you know, we require, you have to have a first name, last name, and then one of either email, phone, or full home address in order for us to run an enrichment.

We can't run an enrichment without these fields.

[@17:54](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1074.4) - **Edward Escarsega (JANM)**

So, if you have, sorry, if you only have email, or if you only have a phone number, Just one, because I thought it was all, you just have to at least have one.

[@18:06](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1086.46) - **Sim Borodach (Hatch)**

Yeah, yeah, yeah, that'll give you like a partial enrichment, and optimal enrichment is when you have all three.

[@18:12](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1092.02) - **Edward Escarsega (JANM)**

All three, okay. Yeah. Okay.

[@18:14](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1094.64) - **Sim Borodach (Hatch)**

Yeah. So, then these are some other important fields, but the real place you're going to want to just give yourself a few minutes is by hitting that link right here.

[@18:25](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1105.54) - **Edward Escarsega (JANM)**

Yeah.

[@18:27](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1107.02) - **Sim Borodach (Hatch)**

Yeah. It's probably not the best use of our time together to like read these over. You know, it's not long.

These are like seven plus details. Some of them are obvious and like we write out so that it's been said, you know, for the record.

And then if you just scroll, you'll see like what possible fields you can use. And I'll call out a couple right now for you.

But again, would, you know, when we wrap this up, go over this again and any outstanding questions you have.

I've just just messaged me through the intercom chat and I'll reply, you know, in your real time.

[@19:05](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1145.94) - **Edward Escarsega (JANM)**

Oh, so there is a spouse name and that's important as well. So you put in a full name, a full spouse name?

[@19:16](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1156.6) - **Sim Borodach (Hatch)**

Yeah, exactly. Full or you could put first name if the spouse shares a name with the primary donor.

[@19:22](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1162.32) - **Edward Escarsega (JANM)**

Okay. Okay.

[@19:25](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1165.34) - **Sim Borodach (Hatch)**

Yeah. And then, you you got all these phone fields for, you know, different options, emails, the home address fields, work, work related information, social media accounts.

And I'll just call out here, LinkedIn, if you, if you do have LinkedIn's on people or, you know, you feel called to like, you know, add some to your, to your export.

That's a really great way to match folks because LinkedIn's a super unique identifier and, you know, it's not usually too hard to the spot, you know, it's the right person you're looking for, if you know them, obviously, if you don't know them, you know, that's part.

Part of where Hatch's magic comes in is you just have someone's name and email and we'll collect all of this additional information.

So it's not necessary, but it's a very useful data point. And then contact person, these are the last section.

That's just going to be if you've got, you know, donors with a secretary or an assistant. It could be the spouse too, just to be fully transparent.

**ACTION ITEM: Review and approve Edward's bulk upload file when submitted -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1224.9999)

This data is not really used for enrichment. It's mostly like a UI thing. So if you want to just be on a Hatch page, you got it.

So that's pretty much it again. If you go over this, it should take you a few minutes. And then for this bulk enrichment, I review the file and approve it before it's performed.

So let me just give you a little quick demo of how this looks.

[@20:50](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1250.36) - **Edward Escarsega (JANM)**

Okay. So I'll use the sample file, right, to upload?

[@20:53](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1253.96) - **Sim Borodach (Hatch)**

You can. Yeah, you can use a sample file and like copy and paste. Or you could just make sure that your file is like proper.

We mapped up to, you know, our specifications, whatever, whatever you prefer, we don't have much of a preference, just give me one second.

All right. Okay, here we go. So I'm just going to mock, like import a file here. So I just, I put it in a test file, hit next, and then this step actually does like an AI column mapping.

So, you know, if the columns in your file are different, that's fine. You're going to want to cross check them at this step, just, you know, to make sure that everything's teed up properly.

Okay, but you could see that, well, I guess they're named one-to-one here, but left column here, these are, these are the fields in the file we uploaded.

Here we have the hatch fields that they're mapped to.

[@21:54](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1314.76) - **Edward Escarsega (JANM)**

Yeah.

[@21:55](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1315.04) - **Sim Borodach (Hatch)**

And then you have the importance of the fields, which is, you know, back from the instructions. Great. Thank you.

You should see examples for the values in the field, populate here, just kind of like a little helpful hint.

And then you'll get the fill percentage. So, you know, ideally your name, you know, your first name, last name should be 100%, because if you're missing a first name or last name, that contact won't enrich.

But it's, you know, just to get a sense of things. And then once you've mapped the columns properly, you'll go hit review the data in the last step.

And here you'll actually see your rows, you know, populated and you'll see real data that you're uploading. I mean, this is just kind of an evaluation step.

There's nothing to actually do here other than to make evaluation. And you can see these statuses. Optimal enrichment is going to mean you've got the email, phone and home address.

Partial means you've got one of the three. No enrichment means you've got none of them. And then not qualified means you're missing like a first name, last name.

[@22:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1377.96) - **Edward Escarsega (JANM)**

Okay, so no enrichment means Okay, I'm missing one, like, I don't have any of the, so what, how, how, I don't know, how would it look?

Like, no enrichment would mean that it has, like, maybe a last name only, or something?

[@23:16](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1396.38) - **Sim Borodach (Hatch)**

Or probably first name, last name, because I think not qualified is for missing first or last.

[@23:22](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1402.18) - **Edward Escarsega (JANM)**

Okay. Oh, okay, yeah, yeah. Alright, so if they're red, I should probably just take them out then. Yeah. Because that counts towards the, like, quota thing, right?

[@23:32](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1412.28) - **Sim Borodach (Hatch)**

I think, yeah, yeah, it's gonna count towards the quota, yeah. And then, and then not qualified means it could have a phone, email, an address, hundreds of those, but it's missing what's, like, a core, first name, last name is usually.

Now there's also the user ID field, which you're gonna want to include, because that's how you'll map the, so then you'll hit import, and then I'll get a notification, I can even do this.

Right, and then here, you're gonna see it's in review. And then if you go to your, Okay. Upload panel, you'll see here it says in review, and I'm going to review it and approve it.

Should be same day. If we need to have a little back and forth about it, we will. And, you know, in general, you can submit as many uploads as you want.

There's no restriction around that. And we try to do, you know, a turnaround time same day. just can take a little bit longer for various reasons.

[@24:23](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1463.46) - **Edward Escarsega (JANM)**

And so there's this, or in order to enter in, it's this, a batch, or the just quick search?

[@24:33](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1473.86) - **Sim Borodach (Hatch)**

Exactly. Yeah. Yeah. Yeah. Yeah.

[@24:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1484.66) - **Edward Escarsega (JANM)**

Yeah. I think like that video, I'm pretty sure there are videos. What is it? The FAQ, maybe, that they're- yes.

[@24:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1497.62) - **Sim Borodach (Hatch)**

You can pull it out.

[@24:58](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1498.98) - **Edward Escarsega (JANM)**

What's that?

[@25:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1500.12) - **Sim Borodach (Hatch)**

Yes. See if you can pull it up. I definitely want to know about it.

[@25:02](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1502.48) - **Edward Escarsega (JANM)**

Today, I am thrilled to demo... No, it's not him. It's you. Hold on. Let me see. But yeah, I thought I'd let him know where I had found it, but basically there was a FAQ area, right?

think it's under my name. No. Where is it? Where is the FAQ? Or like, help? Is it typing in?

Let me see. How did you find that? No. No. Okay. It's just a... Strange.

[@26:01](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1561.72) - **Sim Borodach (Hatch)**

You know what? Don't sweat it. If you come across it, just let me know.

[@26:05](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1565.94) - **Edward Escarsega (JANM)**

Yeah, yeah. It's weird. found it, like, right away. Yeah. Maybe somebody took care of it. I don't know.

[@26:16](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1576.62) - **Sim Borodach (Hatch)**

Yeah, could be. So do you have any more? The last kind of upload feature to review is the donations upload.

[@26:24](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1584.7) - **Edward Escarsega (JANM)**

Do you have any question, anything else to cover about QuickSearch or bulk enrichment? Just a quick search.

[@26:30](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1590.54) - **Sim Borodach (Hatch)**

Could you go to it really quick? yeah, of course.

[@26:41](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1601.34) - **Edward Escarsega (JANM)**

So it's so simple that the enhancement, so it's going through, you said 250 million profiles, right? And I put in first name, last name.

Keywords can be anything. screen. Related to them seems like, if I, like if it's like a food company that does fish products, so if I just put fish, that would make sense, okay, and then the fields that I put here that are sort of, that come up automatically, has middle name, phone number, email, city, state, zip, street address, date of birth, LinkedIn, those are like the, the, the, the best additional information.

[@27:37](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1657.1) - **Sim Borodach (Hatch)**

Bingo, yeah.

[@27:38](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1658.26) - **Edward Escarsega (JANM)**

Okay. And, and then adding those will just make it more likely that it'll be an exact match. But once it comes up with your person, you put in somebody, right, and then you, here's the, here's the point where you see, and there's, there's my doppelganger.

I actually met that guy about 20 years ago. I found him on Facebook, and we were talking, and he turned out to be such an .

He started threatening me. He was super aggressive. Our politics didn't match. He was a totally aggressive right winger. So I was like, whoa!

So every time I see him, I remember that. Oh my gosh. Yeah. And then he was like, how come you're not talking to me anymore?

I'm like, what, you threatened to kill me?

[@28:42](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1722.72) - **Sim Borodach (Hatch)**

He's like, that's just how I talk with them.

[@28:45](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1725.44) - **Edward Escarsega (JANM)**

Yeah, that's how I see the world. Come on. So then I see, it's obviously like the top guy and the bottom guy, I think they're the same dude.

But that's me in the middle. So then that's where you see... Say, okay, this is the person, and then what we get here is the details of what we just saw, right?

You selected the person, now you're seeing more details to what? Like just double confirm that this is the person, right?

[@29:21](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1761.66) - **Sim Borodach (Hatch)**

Yeah, yeah.

[@29:22](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1762.96) - **Edward Escarsega (JANM)**

Okay. And then when you're importing, then you get what's from the database. And then on top of that, you can ask for the, what is it called?

[@29:40](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1780.96) - **Sim Borodach (Hatch)**

Elevated approach.

[@29:42](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1782.24) - **Edward Escarsega (JANM)**

Elevated, that's right. So if I do that, what is happening? What are you doing?

[@29:50](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1790.94) - **Sim Borodach (Hatch)**

Well, our team of data analysts comes through the entire web and gathers any missing information, and And they comb through the entire profile to confirm every piece of information that's here.

So we could talk more about the details of the profile and how to assess accuracy of specific data points.

Obviously, if you pick the person through QuickSearch, it's assuming that you picked the right person. We're going to assume that you're picking the right person, unless you tell us when you're filling out the Elevated Profile Questionnaire, which is really quick and all these questions are optional.

Okay, they're optional. You could just go right to the bottom and select send. But all these questions are here where you might think to write, I guessed at the QuickSearch, I think the person is, you know, insert details here.

And then we'll go off what you tell us. And if we have a lot of trouble resolving the person or we have additional questions, we'll send you a message through this intercom channel, and you'll see.

[@31:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1860.0) - **Edward Escarsega (JANM)**

That a ticket will be open like this, right?

[@31:03](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1863.38) - **Sim Borodach (Hatch)**

Or it's going to say Elevated Profile, and then it would say Michael Okamura, and then until we resolve it, that's going to stay as an open ticket, which is kind of neat because we, you know, we otherwise just work through it and it will get sent back to you in two business days, right?

So today's Tuesday. If you put Michael through today, you'd get him back by Thursday at the latest end of day.

But it's kind of neat because it's almost like you have an assistant working for you since where challenges come up.

You know, we don't just say, well, we can't elevate that person or we don't say, well, you know, to hell with you.

We're just not even going to tell you what's happening. We'll send him, just kidding. You we'll just send you this little message through the chat and and then you can have some back and forth, right, and kind of decide how you want to proceed.

Now, if we are able to work on the profile, Even you might get it back, you know, just full transparency, you might get it back and, and the results may be, oh, well, this turns out, you know, it seemed like this person had a very large stock portfolio, but it turned out to not be the right person.

So that might be disappointing on the one hand, but on the other hand, you want to know that before you invest your time, cultivate a relationship with them or, you embarrassing yourself, asking for some significant gift.

So, it's kind of a necessary part of the process, as it seems like you're well aware.

[@32:30](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1950.0) - **Edward Escarsega (JANM)**

Yeah. Okay. Yeah.

[@32:32](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1952.78) - **Sim Borodach (Hatch)**

Now, our hope is that, you know, you really enjoy these elevated profiles and that you, you know, you, you use them.

And to me, there are two, two outcomes that I want to see basically in your first month. So, you know, I, I'd give it till the 25th of, uh, 25th of, uh, of July, when your monthly quotas.

Yeah.

[@32:56](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1976.52) - **Edward Escarsega (JANM)**

I'm talking a lot. Let me pass back to you. No, no, no, no, no.

[@33:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=1980.46) - **Sim Borodach (Hatch)**

I'm Okay, okay. So like, so you paid for an annual plan, right? So your subscription is going to renew next year.

But every month, your monthly quotas reset. So the monthly quotas refer to the quick searches, which you get 20 monthly, and the elevated profiles, which you get 10 monthly.

So on the 25th of every month, that's going to go, you'll see the meter go up as you use it, and then go down as you as that monthly renewal date is hit.

**ACTION ITEM: Upload donor file to Hatch by July 25th; ensure first name, last name, and at least one of email/phone/full address -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2002.9999)

So what I was going to say is, to me, you know, if we're trying to measure like what is a successful first month for you look like, it would be number one, you know, getting a file in with your data by the 25th.

**ACTION ITEM: Use 10 elevated profile requests before July 25th quota reset -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2014.9999)

And number two, would be requesting, you know, a bunch of elevated profiles. So that basically you use your quota.

Because those don't roll over month to month.

[@33:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2037.12) - **Edward Escarsega (JANM)**

Yeah, okay.

[@33:59](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2039.79) - **Sim Borodach (Hatch)**

And in terms of The quick searches, you know, if you go haywire on the quick searches, I'm happy, because I like when customers use that feature a lot, but, you know, 20 maybe is just more than you're trying to research outside your existing donor database, I don't know, you know, if you're doing a lot of prospecting, it's great, and like, go crazy, because you can create a quick search, and then, if you're like, nah, it a dud, or I'm not interested, you could just delete it, right?

It will still be a used quick search, but it won't, like, clog your database.

[@34:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2071.08) - **Edward Escarsega (JANM)**

Okay, and so, why, I'm just curious, because you could do the list, you could upload the thing as a list, the name as a list, not do a quick search, what's the...

[@34:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2084.08) - **Sim Borodach (Hatch)**

The main benefit is, you know, our terminology is human in the loop, right, where you're involved in this selection process, when it's a little bit less obvious who the right person is.

But Boken Richmond is great, too.

[@34:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2097.82) - **Edward Escarsega (JANM)**

see.

[@34:58](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2098.16) - **Sim Borodach (Hatch)**

Yeah. Boken Richmond is great, too.

[@35:00](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2100.0) - **Edward Escarsega (JANM)**

Okay. And so because you don't go and get it. So then what happens when in the bulk enrichment, if you're not choosing one by one, which one is the better profile, or which one is the correct one?

What do I end up with, with the bulk upload? Is it just the best guess? And then it might not be?

And then where do I go from there?

[@35:25](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2125.22) - **Sim Borodach (Hatch)**

A hundred percent. A hundred percent. It is the best guess. So the algorithm is as robust as it could be, taking into account all permutations of the name, and then whatever additional data you provide, email, phone number, city, state, full address.

But this info accuracy is sort of, you're going to be your, one of your leading guides to know, like, how accurate was the enrichment, was the match?

And there's other indicators, but that's going to be your, one of your leading indicators here.

[@35:56](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2156.64) - **Edward Escarsega (JANM)**

So, but what happens once it's in the bulk. Like, do I, like, is there's no, like, for example, adjusting it, because then that becomes, it's somebody else.

So then I'd have to delete that and then, or what's the suggestion, what's the recommendation?

[@36:17](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2177.9) - **Sim Borodach (Hatch)**

So if you could take that route, you could delete the profile and then re-import them. And by the way, you could re-import your whole file every day and it will only re-import new people in that file.

Right? We detect duplicates.

[@36:33](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2193.56) - **Edward Escarsega (JANM)**

Okay. Okay. Good.

[@36:36](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2196.18) - **Sim Borodach (Hatch)**

Yeah. Yeah. Yeah. So, so if you find that we got the wrong match and then you say, well, you know what, I saw it's the wrong match.

I'm going to go to LinkedIn and find the right person on LinkedIn, drop that LinkedIn URL into the, your spreadsheet and re-upload the spreadsheet will re-enrich that person and it will, you know, hopefully map to the right person.

And you could also come and quick search that person or you could elevate them, you know, which is, I think as you.

You're going to guess not necessarily the best use of your elevations, but, you know, where it comes up a little bit more frequently is you'll see someone who's, let's say, got a lot of public donations associated with them, or, you know, their scores, let's say their propensity score is rather high, so you just say, listen, the data, I want the team to elevate this person anyways, to corroborate, you know, their public donation records and the philanthropy associated with them, so whatever, they'll find the right person in that process anyways, and that's what we do.

In the elevation process, we confirm and complete, we update the entire donor profile, so it's as good as it could possibly be.

[@37:41](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2261.0) - **Edward Escarsega (JANM)**

that, yeah, so that's the, that's the gold standard then for the, for the profiles is just to do that elevated individual.

Yeah, so, uh, I'm noticing now that there's a misspelling on Hal Bastion, it should be A-N, so what do I do in that case?

Case, and does it change the, yeah, it should be I-A-N.

[@38:04](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2284.94) - **Sim Borodach (Hatch)**

Well, so you QuickSearched how?

[@38:07](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2287.26) - **Edward Escarsega (JANM)**

I don't, I probably, probably.

[@38:10](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2290.54) - **Sim Borodach (Hatch)**

I can check.

[@38:11](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2291.58) - **Edward Escarsega (JANM)**

I must have, because, yeah, the file import didn't work.

[@38:18](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2298.48) - **Sim Borodach (Hatch)**

Let me take a look here. Yeah, he was QuickSearched back last Tuesday, and it looks like it was entered with I-O-N, so.

[@38:28](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2308.24) - **Edward Escarsega (JANM)**

Yeah, I just, I don't know why. So, what happens at that point?

[@38:36](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2316.9) - **Sim Borodach (Hatch)**

I can't edit the- Yeah, you can edit a lot of the details, just hit the pencil.

[@38:41](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2321.52) - **Edward Escarsega (JANM)**

This toolbar is going to be pretty handy for you. Okay.

[@38:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2324.8) - **Sim Borodach (Hatch)**

Just going left from right, you can open the toolbox on the left side, I'll show you that in a sec.

Okay. Click to write a letter with Sir Hatch, you can add notes, add to lists, edit the profile, print the profile, add tags.

some 2 this Alright. And then share a profile link and trash it. So let's say we wanted to go hit edit, you'll see the side panel pop open here.

And then we're going to go to personal information, change that to an A, scroll down to the bottom and hit save.

[@39:14](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2354.08) - **Edward Escarsega (JANM)**

Oh, okay.

[@39:15](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2355.4) - **Sim Borodach (Hatch)**

Yeah. And just as this is like an important technical thing, anytime you or our team edits information on the profile, you'll see that these scores are going to, you're going to get a yellow indicator.

I'll show you just so that you can actually see how that works. I'm going to hit save. And now in the AI scoring and insights, you're getting that calculating scores indicator.

Since we go and recalculate scores when the profile is edited, there's a 10 minute buffer in the event that you're in like an editing session.

[@39:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2384.9) - **Edward Escarsega (JANM)**

You weren't just editing one thing or confirming one public donation.

[@39:49](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2389.22) - **Sim Borodach (Hatch)**

He doesn't have any on his profile. Maybe it's because of that A versus O issue. I'm not sure. But any data you edit, it's going to recalculate the scores, but there's that 10 minute buffer from the last.

So if you keep editing it's going to keep resetting that 10 minutes and then after the 10 minutes the scores will finish calculating and you'll just give the profile a refresh about 10 minutes because for profiles that have a lot of data the scoring might take longer than a couple seconds it could take up to a minute even two minutes if it's got a lot of information because it takes some pretty heavy calculations but again for this profile it should run after the 10 minute window pretty quickly because it's not got a ton.

So you'll just hit that refresh and you should see that this disappeared and the scores may or may not change because it depends on what data was changed on the profile.

If that data affected scores, they'll change. If not, they'll look exactly the same.

[@40:44](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2444.06) - **Edward Escarsega (JANM)**

Do you think an A could change something?

[@40:47](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2447.48) - **Sim Borodach (Hatch)**

I don't think so. Not the way it's designed presently. Yeah, but we'll get there. We'll get there pretty, you know, hopefully pretty soon where a small change like that will, you know.

A lot of what we're doing manually right now it's over. Over time, we'll automate it. It's just the automation process and utilizing AI in a smart way where it's scalable and you've accounted for, we've accounted for like error margins, you know, we're, we're, we're still, we're still a startup.

So when we get funded with, you know, a hundred million dollars, I'll call you.

[@41:19](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2479.52) - **Edward Escarsega (JANM)**

Who made this?

[@41:21](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2481.98) - **Sim Borodach (Hatch)**

So this was a, I mean, this was, you know, a team effort. We made it, you know, we made it with our, with our, with our, our sweat and tears and strained eyes and strained fingers.

[@41:34](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2494.64) - **Edward Escarsega (JANM)**

many of you?

[@41:36](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2496.88) - **Sim Borodach (Hatch)**

We're, I mean, we're, know, we have a, we have a full-time team. have contractors who help us. And, uh, so there's, there's up to 20 of us working on the project on a given day.

[@41:47](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2507.56) - **Edward Escarsega (JANM)**

But a core, like five or four or five or?

[@41:50](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2510.88) - **Sim Borodach (Hatch)**

It's a little bit hard to describe the, like the core team. It's probably more accurate to say it's like 10, you know, and then we have investors and advisors.

And we have. have. We have key stakeholders, customers that have been with us for multiple years. four years old?

Yeah, four years old. Yeah, just over four years old.

[@42:08](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2528.62) - **Edward Escarsega (JANM)**

That's great.

[@42:10](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2530.84) - **Sim Borodach (Hatch)**

We've worked, you know, we've met a lot with nonprofits. Our CEO was part of a crowdfunding platform, one of the first like peer to peer fundraising, you know, join my crowdfunding campaign to raise $100 million overnight.

[@42:24](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2544.48) - **Edward Escarsega (JANM)**

So he co-founded one of those.

[@42:27](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2547.42) - **Sim Borodach (Hatch)**

And, you know, he's got a lot of that experience. And then our other technical lead has got a lot of experience designing and building products like these.

And he's a wicked smart fellow. So just, he designed, he created this whole scoring system. And then I actually programmed a lot of this particular part of the system that you're seeing.

The rest was programmed and, and built by our other engineers.

[@42:54](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2574.56) - **Edward Escarsega (JANM)**

So I'm hoping that because I just on the few profiles that I saw, like, some of The fields didn't really populate.

[@43:02](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2582.24) - **Sim Borodach (Hatch)**

Okay.

[@43:02](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2582.74) - **Edward Escarsega (JANM)**

I'm wondering if that's because it's manually done at some point, and it's part of the thing that it's learning, that you're learning to automate.

[@43:16](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2596.8) - **Sim Borodach (Hatch)**

Um, we're not, yeah, we're not there. It's not, it's not doing that in the background yet. Not yet. Not yet.

Yeah.

[@43:28](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2608.94) - **Edward Escarsega (JANM)**

Okay. Yeah. I think, uh, I, I think it'll be, I'm hoping it'll be super useful, um, in terms of cutting my research time down.

So I'm rooting for you guys as much as I am for myself.

[@43:47](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2627.36) - **Sim Borodach (Hatch)**

So I hope, you know, I hope I can give you feedback too. Yeah. Oh yeah. I mean that, so my job is to, my job is to make sure that you have a successful experience.

And, uh, you know, it sounds like maybe we could find. Success is like hours saved.

[@44:03](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2643.4) - **Edward Escarsega (JANM)**

Oh, yeah.

[@44:05](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2645.1) - **Sim Borodach (Hatch)**

That would be great.

[@44:06](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2646.98) - **Edward Escarsega (JANM)**

Insight, information, and then being able to like, I'm not sharing this with anybody else right now because I paid for it.

So I'm not sharing it like with my team. Like, yeah, I'm not saying, hey, here's a pro, you can use this because that wouldn't, you know, it wouldn't make sense.

[@44:28](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2668.62) - **Sim Borodach (Hatch)**

So Yeah, yeah. Onboard them, get their strategic buy-in, like at the right.

[@44:33](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2673.8) - **Edward Escarsega (JANM)**

Exactly. Yeah. So, but I, but I really want to use it first for a while.

[@44:40](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2680.72) - **Sim Borodach (Hatch)**

Yeah.

[@44:41](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2681.88) - **Edward Escarsega (JANM)**

Okay.

[@44:42](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2682.7) - **Sim Borodach (Hatch)**

The other, the other, the other like key thing you could just think about is, you know, your, the, all these scores are driving you toward these metrics here in this gray box.

[@44:55](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2695.52) - **Edward Escarsega (JANM)**

Yeah.

[@44:57](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2697.32) - **Sim Borodach (Hatch)**

So, you know, the gift capacity rating is sort of like a. Yeah. Thank general sense of how much this person could possibly give at their maximum over the next five years.

Like if you had to put dollar value to them, this is it. And that these specific numbers, you know, customers are benchmarking these, like, what were we going to ask?

[@45:15](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2715.68) - **Edward Escarsega (JANM)**

What, you know, how did Hatch help us right-size the ask to give land?

[@45:20](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2720.44) - **Sim Borodach (Hatch)**

And that's another place where if you could say, oh, we were going to ask this person for, you know, 500 bucks, but they're pretty engaged and it seems like they can get 3K, and then you right-size that ask, you know, that's another possible success metric for you.

[@45:36](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2736.14) - **Edward Escarsega (JANM)**

Yeah, so the, yeah, and this, this is probably pretty accurate because this isn't a major giving person. This is just somebody who has influence, and who is like a, they call him the mayor of downtown.

[@45:53](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2753.08) - **Sim Borodach (Hatch)**

Whoa! Whoa!

[@45:54](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2754.36) - **Edward Escarsega (JANM)**

So he's the reason why downtown is, has been rediversified. Since the 90s, it used to be like just very unlivable, but he brought in like shopping markets, you know, like food markets and stuff like that so people could actually have a place to shop if they lived there.

**ACTION ITEM: Compare Hatch gift capacity ratings with existing wealth screening tool results; report findings to Sim -** [**WATCH**](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2780.9999)

So he was responsible for all that. So I know he's not, and that's about around what I'm thinking so, but I'm going to also compare it to our wealth screening.

[@46:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2791.1) - **Sim Borodach (Hatch)**

Oh yeah.

[@46:31](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2791.6) - **Edward Escarsega (JANM)**

See what, what the differences are and see which is working better for me.

[@46:38](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2798.08) - **Sim Borodach (Hatch)**

Oh yeah. Yeah.

[@46:39](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2799.8) - **Edward Escarsega (JANM)**

And I'll let you know.

[@46:40](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2800.88) - **Sim Borodach (Hatch)**

Yeah. Oh, I, I, I hope you do.

[@46:45](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2805.3) - **Edward Escarsega (JANM)**

Yeah. Okay. I got to run, but if we could, if I could, you know, if I, for some reason, it's so simple, it's so straightforward that I don't think there'll be a need for, like, I have deeper.

Questions other than like, oh, this doesn't seem to be working or this doesn't, you know what I mean? So I'll let you know in the best ways through that chat.

[@47:10](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2830.34) - **Sim Borodach (Hatch)**

You got it. You got it.

[@47:12](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2832.02) - **Edward Escarsega (JANM)**

Okay.

[@47:12](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2832.84) - **Sim Borodach (Hatch)**

If you're ever not hearing from back from me or, you know, there's a more billing question or something you want to talk about with Sam, your contract renewal or upgrading your subscription.

I mean, you don't have to go through email, but you can always email him and, you know. He's your account executive, so he's here to not necessarily support you in the day-to-day, but just, you know, make sure your account's going ahead productively.

[@47:41](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2861.56) - **Edward Escarsega (JANM)**

Perfect. Thank you, Sim.

[@47:43](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2863.26) - **Sim Borodach (Hatch)**

Really appreciate All right, Edward. Look forward to seeing you downtown.

[@47:45](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2865.96) - **Edward Escarsega (JANM)**

Yes.

[@47:46](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2866.42) - **Sim Borodach (Hatch)**

Let me know. We'll do.

[@47:48](https://fathom.video/share/7xtxC1NWyY_wtYK97PKKT2d9LYRUDYxz?timestamp=2868.04) - **Edward Escarsega (JANM)**

care. Bye.