# **Strategic Implementation - July 08**

[**VIEW RECORDING - 60 mins (No highlights)**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz)

[@0:01](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1.34) - **Sim Borodach (Hatch)**

Thanks. Thanks. Thanks. Thanks. Hey, were you talking?

[@0:39](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=39.98) - **Sarah Adams**

I just said hi.

[@0:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=41.48) - **Sim Borodach (Hatch)**

Oh, hey.

[@0:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=42.4) - **Sarah Adams**

Hi.

[@0:46](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=46.0) - **Sim Borodach (Hatch)**

I'm just trying to finish preparing the Messaging for the Volunteers of America webinar. Thanks. Thank I don't know.

[@1:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=60.68) - **Sarah Adams**

I don't know much about that, actually.

[@1:03](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=63.64) - **Sim Borodach (Hatch)**

So VOA, do you know about VOA?

[@1:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=66.36) - **Sarah Adams**

Yes.

[@1:07](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=67.98) - **Sim Borodach (Hatch)**

So we're joining their monthly company-wide meeting to give a 15-minute presentation on AI Scoring & Insights on July 17th.

And then on July 4th, we're going to do a full hour-long webinar. And it's a really big deal because we tried onboarding a couple of their affiliates a year back, and it just was a struggle given the immaturity of the product.

And now this is our opportunity to really lock them in.

[@1:35](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=95.48) - **Sarah Adams**

Wow. Very cool.

[@1:54](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=114.86) - **Sim Borodach (Hatch)**

Here I can share with you the document that we're looking at if you want to take a look.

[@2:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=120.64) - **Sarah Adams**

Sure, yeah, I love that.

[@2:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=129.8) - **Sim Borodach (Hatch)**

I just emailed it over. I know Lillian was going for a red eye from Los Angeles to New York.

She has been really, really busy since she started this new position.

[@2:27](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=147.98) - **Sarah Adams**

When I met with her, like I said, it was like day two or three. And she hit the ground running and now she's traveling.

Yeah, hopefully she's able to join.

[@2:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=161.64) - **Sim Borodach (Hatch)**

Yeah. Yeah, she said she was going to.

[@2:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=164.5) - **Sarah Adams**

She was pretty communicative. Yeah. As a reminder, she has Salesforce, but we're not going to prioritize that quite yet.

Hi.

[@3:01](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=181.04) - **Lillian Rountree (ShalomLearning)**

There's Lillian.

[@3:02](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=182.06) - **Sim Borodach (Hatch)**

Hi. Hi, Lillian. you. Thank you.

[@3:05](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=185.78) - **Sarah Adams**

doing?

[@3:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=186.68) - **Lillian Rountree (ShalomLearning)**

I'm good. Nice to see you in person or, well, on screen rather than just. Good to meet you, Sim.

[@3:14](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=194.66) - **Sim Borodach (Hatch)**

Hey. Good to meet you, too. I'm so glad that you made it. You've had an adventure.

[@3:20](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=200.34) - **Lillian Rountree (ShalomLearning)**

Yeah. I was on a red-eye and anyway, and then I was just like in a learning one of our software demos.

So, it's my tech morning.

[@3:31](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=211.54) - **Sim Borodach (Hatch)**

Oh, okay. What does that mean, one of your software demos?

[@3:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=216.9) - **Lillian Rountree (ShalomLearning)**

So, Shalom Learning provides online learning and classroom curriculum for synagogues across the country. And so, we're preparing to meet with the donor.

And I want to demonstrate the program in addition to kind of going through a PowerPoint of key things. And so, we're using Brisk AI.

Brisk AI. And And so we were just toying with, you can interview somebody from history and we were, Dr.

Martin Luther King was part of it. And so you can ask him a question, why did you do this?

And then we were interviewing Theodor Herzl about the founding of Israel. And so just trying to see what would work from a, like a online demo perspective when you're meeting with a donor who's like super busy and, you know, is it better to like have him go through the AI or is it better for us to demonstrate it to him?

So, very, what?

[@4:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=276.52) - **Sim Borodach (Hatch)**

Unbelievable. that tool seems amazing.

[@4:39](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=279.26) - **Lillian Rountree (ShalomLearning)**

Yeah, it's great. So, and we're just, just piloting it this fall. And it's great because it's, and it's made an extension.

[@4:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=289.54) - **Sim Borodach (Hatch)**

Yeah.

[@4:50](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=290.66) - **Lillian Rountree (ShalomLearning)**

Right. And it just makes it so accessible because you're not into some other platform. It's, it's like, you know, joining where you are.

[@4:58](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=298.48) - **Sim Borodach (Hatch)**

Right.

[@4:59](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=299.4) - **Lillian Rountree (ShalomLearning)**

So I, I was at I ISTE last week, which is the EdTech conference, and met the founder very briefly, and I was like, oh, I just love that somebody had this idea, you know, and...

[@5:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=309.58) - **Sim Borodach (Hatch)**

Totally.

[@5:10](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=310.84) - **Lillian Rountree (ShalomLearning)**

So, anyway, you know, similar to Hatch.ai.

[@5:14](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=314.22) - **Sim Borodach (Hatch)**

Yeah. Well, I'm wondering, what is your, given that you're experienced with software and software demos, like, do you have a preferred approach, whether it's me demoing on my screen, you sharing your screen, clicking through?

[@5:29](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=329.6) - **Lillian Rountree (ShalomLearning)**

Let's start with you.

[@5:31](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=331.68) - **Sim Borodach (Hatch)**

Let's Or neither.

[@5:33](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=333.22) - **Lillian Rountree (ShalomLearning)**

Yeah. No, you demoing. guess the thing, and I can tell you, let me, like, describe the problem.

[@5:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=342.6) - **Sim Borodach (Hatch)**

So, we're a tiny nonprofit. you know, I'm pretty read in from what you've discussed with Sarah.

[@5:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=349.48) - **Lillian Rountree (ShalomLearning)**

Cool. Yeah. So, we're tiny. And so, I'm really the person that's using this, and I kind of have somebody I could, like, push it off to, to do, like...

Maybe File Uploading, but if it's not, but anyway, I'm not even sure it's worth going through that because, so I might be the person doing the file uploading.

I have like a list of literally 40, 40 high net worth individuals that are connected to our founder, you know, email addresses and everything.

So I just need to get that in there. But what, because I haven't done that before, what I keep doing is just needing something immediately and doing a quick search.

Right. And so that's all I've pretty much done so far. So, but I would love to just be, just go through the demo again.

Like, am I doing the quick search correctly and then look at uploading, but really hearing from you and maybe reminding me of what was told to me in the original demo of like, you know, what's the best way to use Hatch.ai?

Like, how am I going to get the most out of it? What's the most efficient? I feel like it's uploading lists, but, you know, let's talk that through.

Um, and let me open up my notes page.

[@6:57](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=417.42) - **Sarah Adams**

I love that. We've got like a crowd here on screen. We've got you too.

[@7:04](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=424.34) - **Sim Borodach (Hatch)**

I pin the videos so then I don't see the AI recorders if you want to use that. Yeah, it's a whole army.

[@7:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=433.38) - **Lillian Rountree (ShalomLearning)**

That's totally fine. Okay, I'm getting my notes.

[@7:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=439.76) - **Sim Borodach (Hatch)**

Do you guys, are we going to discuss that? Should we discuss preliminarily the MailChimp list or should we dive in and discuss that later?

[@7:28](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=448.54) - **Sarah Adams**

Yeah, so Lillian, I explained to Sim that you do have, like you don't have a ton of names. I remember you sharing with me that maybe a hundred contacts in Salesforce plus other lists.

[@7:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=462.66) - **Lillian Rountree (ShalomLearning)**

Yeah, so hundred contacts that we, like in, everything's in Excel, nothing's in Salesforce. Yeah. Oh yeah, no, there are people in Salesforce, but they're from, it spans like 10 years.

[@7:56](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=476.92) - **Sarah Adams**

I see.

[@7:57](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=477.7) - **Lillian Rountree (ShalomLearning)**

Okay. So there's approximately a hundred in Salesforce.

[@8:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=480.0) - **Sarah Adams**

And then you have other lists that aren't in Salesforce, but they're not giant lists, they're a 40 person list, maybe, and then what other lists do you have?

[@8:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=489.4) - **Lillian Rountree (ShalomLearning)**

And then like, just this morning, I got a list of names and email addresses. You know, nothing else. Like some guy thinks that these are people that might be interested in our work, and so he's happy to share names and email addresses, and that's all I have on them.

You know, so that makes it, I think that's a little tricky because then I literally don't know that when you go through this verification process, I can't say like, oh, is it, I mean, all I have is name, email.

I can't say, Bethesda, Maryland vs. New York City vs. anything else. But maybe that's like a more discreet problem when you only have two, you know, and the name and email address, I don't know.

[@8:50](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=530.44) - **Sim Borodach (Hatch)**

The name and email is good enough, and the platform will tell you the quality of the match. So if it's a high quality match, then the...

The other data that's collected is, you know, reliable, and it may be phone numbers, it may be a home address, and if a home address is captured, then a lot more data is captured as well.

[@9:11](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=551.7) - **Lillian Rountree (ShalomLearning)**

And I mean, if it's like, you know, Noah at ABC Company, I mean, that's pretty straightforward, right? Because if you have the full name and the place of employment, I think you're pretty clear that it's the right person also, right?

[@9:29](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=569.14) - **Sim Borodach (Hatch)**

We're not currently, I mean, we're not currently using domain names specifically to, as like extrapolating company name, though, that would be, you know, a good advancement to make, but if the name and the email match, and the person strongly associated with that email, then, you know, there's a good chance the match will be made.

Okay. So how many folks are on that list?

[@9:51](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=591.78) - **Lillian Rountree (ShalomLearning)**

I mean, I've got like a short list of like, eight, and then I've got a list of 40 that we have names, phone numbers and emails, and, and maybe organization names.

So So that's, I think, more just a matter of putting it in your correct format.

[@10:04](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=604.28) - **Sim Borodach (Hatch)**

Yeah, it should be really straightforward because it's a simple data set. I mean, we could do that live on this call.

[@10:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=609.6) - **Lillian Rountree (ShalomLearning)**

It doesn't need to be something that you take care of later. Cool.

[@10:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=613.02) - **Sim Borodach (Hatch)**

Yeah. And then, yeah, and then in terms of the MailChimp list, was that discussed? I mean, I know I've asked, but...

[@10:25](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=625.06) - **Sarah Adams**

We talked about, you shared with me that you had a MailChimp list, but we weren't sure exactly how much data you have.

[@10:31](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=631.58) - **Lillian Rountree (ShalomLearning)**

Is it just emails? Or do you have, like, first and last, it's just emails only? Oh, does it? I would have to look.

[@10:38](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=638.38) - **Sarah Adams**

No, I'm pretty sure it's names and email addresses. Names and emails.

[@10:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=641.56) - **Lillian Rountree (ShalomLearning)**

Okay. Yeah.

[@10:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=642.62) - **Sarah Adams**

I think that's really as far as the discussion went, is let's find out what data you have.

[@10:46](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=646.86) - **Lillian Rountree (ShalomLearning)**

And 6,000, I think, on that list. Okay. But what's interesting about it is when... I mean, there were, like, hundred people unsubscribed after it.

There was a 24% open rate. I mean... And so we know that there are, there's good contact information in there.

And then like the bounce back number wasn't ridiculous. You know, it wasn't like 2,000 bounce back. was, it was like what you would kind of proportionally what you would expect for that size of list.

[@11:16](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=676.8) - **Sim Borodach (Hatch)**

Yeah, I mean...

[@11:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=679.08) - **Lillian Rountree (ShalomLearning)**

Anything else about them, like name, email address, and then there are some tags in MailChimp, like it might have said like partner or...

I don't know. I mean, it's just, it's like a very old list, I think, was handed down from generation to generation.

[@11:35](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=695.88) - **Sim Borodach (Hatch)**

I mean, if you wanted to export a tag, like, you know, I don't know, number of emails opened, or number of times clicked through, those might be helpful when you're filtering in Hatch.

Because you could surface someone who looks like a, I mean, who looks like a great prospect from, let's say, they have capacity and even have some philanthropic history.

The, let's say... They don't have a donations alignment, right? Their affinity doesn't align. So knowing their, like, their Hatch affinity doesn't align, but knowing where they stand in MailChimp will make Hatch that much more usable if you can include some of that data, you know, like open rate or click-through rate.

Okay. The key takeaway for me so far is, you know, whatever it seemed like this great hurdle was going to be, maybe that, you know, is dissipating because first name, last name, and email is exactly what we can service.

[@12:33](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=753.52) - **Lillian Rountree (ShalomLearning)**

Okay.

[@12:34](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=754.74) - **Sim Borodach (Hatch)**

And the more names that you do, I would generally say the better because, you know, it increases the sample size.

Yeah.

[@12:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=768.34) - **Lillian Rountree (ShalomLearning)**

Yeah. I mean, like.

[@12:52](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=772.94) - **Sim Borodach (Hatch)**

And I almost feel like moving forward on this is more important than demoing. I mean, we can and we can and we should demo.

You know, to make sure you're QuickSearch correctly, but this is how you'll really get into, you know, what you're talking about, the benefit of uploading a whole file, you can pop the people to the top who are most relevant in terms of the amount of money they can give and how likely they are to give.

**SCREEN SHARING: Lillian started screen sharing -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=790.409709)

[@13:18](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=798.84) - **Lillian Rountree (ShalomLearning)**

Yeah. I mean, so I'm just like, this is one list that our founders assistant came up with recently of people that, you know, he's in touch with.

And so you've got first name, last name, company for some of them, email addresses for all of them, and some phone numbers.

[@13:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=822.36) - **Sim Borodach (Hatch)**

Great. So this is the list of about 40.

[@13:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=825.14) - **Lillian Rountree (ShalomLearning)**

Yeah. And then, hold on. Yeah. And then this is another list.

[@13:54](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=834.88) - **Sim Borodach (Hatch)**

Great. This is a great list.

[@13:56](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=836.44) - **Sarah Adams**

That's a great list.

[@13:57](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=837.38) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@13:59](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=839.32) - **Sarah Adams**

Okay.

[@14:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=840.0) - **Lillian Rountree (ShalomLearning)**

This is like somebody went into Rocket Reach at some point this year and did this. Yeah. Right. So like, I have this, but I need to just need to get it into your format and...

[@14:15](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=855.02) - **Sim Borodach (Hatch)**

You don't even, I don't even know. I'm not sure there's much change you need to make because it looks pretty formatted already.

[@14:21](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=861.94) - **Lillian Rountree (ShalomLearning)**

Yeah. Yeah. It's pretty clean. I don't even know how long it is. I mean, it's there.

[@14:25](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=865.96) - **Sarah Adams**

Okay. 400. That was... Nice. Okay.

[@14:29](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=869.78) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@14:31](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=871.2) - **Sim Borodach (Hatch)**

Am I getting a lot of overlap between this one and the shorter one we just looked at? There is overlap.

[@14:37](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=877.98) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@14:38](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=878.96) - **Sim Borodach (Hatch)**

Oh. Well, I mean, if the names and the emails are the same, then the overlap will be, the duplicates will be captured.

[@14:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=884.8) - **Lillian Rountree (ShalomLearning)**

Mm-hmm.

[@14:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=885.62) - **Sim Borodach (Hatch)**

But we should upload this one first because it has, like, more details like phone number and address. I think you can upload this one right now.

And there's a couple of small structural changes I'll make, but...

[@14:59](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=899.86) - **Lillian Rountree (ShalomLearning)**

Okay. Download this and upload it. Should we do it now?

[@15:03](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=903.08) - **Sim Borodach (Hatch)**

Yep. Okay. Amazing.

[@15:05](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=905.8) - **Lillian Rountree (ShalomLearning)**

So, where do we go?

[@15:07](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=907.44) - **Sim Borodach (Hatch)**

So first download the file locally from your Google Sheets, and then you are on the right Hatch page.

[@15:18](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=918.5) - **Lillian Rountree (ShalomLearning)**

Microsoft Excel?

[@15:20](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=920.08) - **Sim Borodach (Hatch)**

Yeah, or CSV. And then head back to that Hatch upload page you were on.

[@15:25](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=925.62) - **Lillian Rountree (ShalomLearning)**

Hold on one second, let me just... Rabbit hole, sorry. Okay, so let me just... Okay, just wanted to make sure I had it saved locally.

Okay, so here...

[@15:58](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=958.62) - **Sim Borodach (Hatch)**

Yep.

[@16:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=960.0) - **Lillian Rountree (ShalomLearning)**

Yep, here? Yep. Hold on, Zoom is in the way.

[@16:12](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=972.14) - **Sim Borodach (Hatch)**

Next step.

[@16:29](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=989.4) - **Lillian Rountree (ShalomLearning)**

Okay, so what if, so we're going to do this, what if there is over, like what if I wanted to do that other list as well, and it had overlap?

Is the system just going to realize that and ignore it? Yeah.

[@16:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1002.46) - **Sim Borodach (Hatch)**

Well, it'll, yeah, it will detect duplicates as duplicates and not import them.

[@16:47](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1007.74) - **Lillian Rountree (ShalomLearning)**

Okay.

[@16:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1008.28) - **Sim Borodach (Hatch)**

So, let's say the fourths for our columns are 0%, fifth column is a phone column, that looks good, title column is 0%, so you can ignore that, continuing with 0%.

Company, map company to keywords, so click company and then scroll all the way to the bottom, all the way to the bottom, sorry, no worries, yeah, keywords there at the bottom, right, and then we have more zero percent, last name is good, first name is good, city is good, LinkedIn is good, state is good, registry is good, email is good, almost there, postal code is good, awesome.

[@17:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1068.6) - **Lillian Rountree (ShalomLearning)**

say it's good, you're just seeing that it's green and it has a percentage over here?

[@17:53](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1073.38) - **Sim Borodach (Hatch)**

The green is just highlighting that it's mapped to a column, and that's the name of the patch column that it's mapped to, the percentage indicates that they're

There's some values in that field, so therefore I care about it. And then I can see examples under the name of your field, all the way on the left, it says your data and gives a couple examples, so just noting that it looks as expected.

And you can hit continue to review your data now.

[@18:15](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1095.3) - **Lillian Rountree (ShalomLearning)**

Did we see phone number on here?

[@18:17](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1097.0) - **Sim Borodach (Hatch)**

Yeah, we passed phone at the top.

[@18:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1099.14) - **Lillian Rountree (ShalomLearning)**

Got it. Okay, continue to review.

[@18:21](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1101.44) - **Sim Borodach (Hatch)**

Well, you'll see what basically looks like a spreadsheet here. And on that, you'll see it says review your data.

Please review your data and expected enrichment results and ensure that you've provided all possible critical and important data points before submitting it.

Critical data points are first name and last name, and then one of email, phone, or complete home address. All three is ideal, and if you include all three, that's where those rows are considered optimal enrichment with the green.

If they have one or two of the three, then they're partial. And if they have none of them, there's no enrichment and two are not qualified at all, meaning they're missing like a first or last name.

Okay. And so you can hit import. Prospects, you can see it's only importing 471, because 307 won't be imported, and I'm going to review the file.

can even do it live on the call when I get a free moment. There's a couple of small changes I want to make, but this way we're not exchanging files over email, which is preferred for 30 purposes.

**ACTION ITEM: Check MailChimp list. Confirm data fields (names, emails, tags). Note any additional useful info (open rates, click-throughs). -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1167.9999)

And now we can go on to whatever the next, that we could do that list of 40 of the emails and you can upload them too.

And then I think probably the next thing would be for you to spend some time with that MailChimp, you know, that might be like your hurdle list to go over.

And in the meantime, we could go over how to use Hatch.

[@19:52](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1192.74) - **Lillian Rountree (ShalomLearning)**

Hatch. Okay, so we could download this one. Hatch. Hatch. Hatch. Hatch. Hatch. Hatch. Sorry, Zoom is all over the place.

[@20:03](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1203.74) - **Sim Borodach (Hatch)**

Yeah, you can stop sharing your screen if that's helpful.

[@20:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1206.4) - **Lillian Rountree (ShalomLearning)**

No, it's okay.

[@20:07](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1207.34) - **Sim Borodach (Hatch)**

I'm going to look away for a minute to just make some edits here.

[@20:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1219.34) - **Lillian Rountree (ShalomLearning)**

What just happened? Oh, that is it. Okay. Sorry. All right. So funny, when I saw the instructions for uploading, I was like, it seems like I need to rename fields and put them in another order.

And I was like, I have no time for that. So I just got stalled, probably for a really stupid reason.

[@21:30](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1290.76) - **Sim Borodach (Hatch)**

I mean, yeah, totally. I think with a lot of products, you do have to go through some more manual steps.

it looks like it didn't like this list as much. Okay, let me just come back here for a second.

Okay, why do you say that?

[@21:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1308.86) - **Lillian Rountree (ShalomLearning)**

Because it said zero columns are mapped.

[@21:51](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1311.3) - **Sim Borodach (Hatch)**

Keep scrolling. Keep scrolling. Can you go back to the sheet?

[@21:57](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1317.62) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@21:58](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1318.46) - **Sim Borodach (Hatch)**

Oh, here there. Oh, no, those are all have zero. zero. Yeah, can you go back to the sheet please?

Oh, because row one, delete row one, if you right-click the number one in the top-off corner, then redownload, reupload, that should fix it.

[@22:23](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1343.98) - **Lillian Rountree (ShalomLearning)**

So just go back to cancel?

[@22:27](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1347.4) - **Sim Borodach (Hatch)**

Cancel? Yeah, exactly. Yeah, cancel.

[@22:35](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1355.06) - **Lillian Rountree (ShalomLearning)**

Upload?

[@22:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1356.34) - **Sim Borodach (Hatch)**

Yeah, same exact process.

[@22:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1363.94) - **Lillian Rountree (ShalomLearning)**

Hold on, it's not... How do I just get to...

[@22:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1368.5) - **Sim Borodach (Hatch)**

Folk Enrichment in the center.

[@22:51](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1371.08) - **Lillian Rountree (ShalomLearning)**

Got it. That was good. know just about? Do you know you do? I You Okay, so the row one has to be the titles?

[@23:08](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1388.72) - **Sim Borodach (Hatch)**

Yeah, yeah, because it's interpreting the first row, yeah.

[@23:12](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1392.04) - **Lillian Rountree (ShalomLearning)**

Okay. So, a very simple question, so let's say I wanted to share a profile, with my founder, because he's going to have a meeting.

Is there a way to just download key information, or how would I give him access, because he won't log in and look at stuff?

Is there a way to, like, create a summary, or any way to export, like, donor and prep for a meeting?

[@23:53](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1433.44) - **Sim Borodach (Hatch)**

Yeah, good question. Let's talk about that in a second, once we...

[@24:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1440.44) - **Lillian Rountree (ShalomLearning)**

we... Yeah, okay.

[@24:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1440.78) - **Sim Borodach (Hatch)**

I'm looking at a profile because I need to understand a little bit more about what you want.

[@24:05](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1445.54) - **Lillian Rountree (ShalomLearning)**

Okay. Okay, so we're in this list.

[@24:12](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1452.46) - **Sim Borodach (Hatch)**

Yep, yeah. Now, I'm going to look away for a second just so I can finish cleaning up this file.

But just make sure the comms are mapped. Sarah is here to make sure everything looks good.

[@24:28](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1468.92) - **Lillian Rountree (ShalomLearning)**

Oh, this is good, actually. Oh, this Thank you. Wealth Signals.

[@25:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1536.38) - **Sim Borodach (Hatch)**

Did you go to review the data yet?

[@25:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1540.4) - **Lillian Rountree (ShalomLearning)**

No.

[@25:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1541.36) - **Sim Borodach (Hatch)**

Oh. Is it? I don't know. I was looking away.

[@25:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1544.96) - **Lillian Rountree (ShalomLearning)**

Is it? That's okay. Yeah, it's right here.

[@25:46](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1546.84) - **Sim Borodach (Hatch)**

I was just waiting for you, so. Oh, sorry. No, I mean, go ahead and, yeah, no, you got it.

Go ahead and do it with confidence, yeah.

[@25:55](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1555.64) - **Lillian Rountree (ShalomLearning)**

Okay. So, mean, it looks like, um, everything. It looks like the important things are mapped, like email and first name and last name, and then there's some phone and email.

So just go ahead, continue.

[@26:10](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1570.88) - **Sim Borodach (Hatch)**

Yeah, yeah. I mean, you can only map the, obviously you can only map fields that you have, so.

[@26:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1579.64) - **Lillian Rountree (ShalomLearning)**

So partial enrichment, 53. Yeah.

[@26:30](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1590.3) - **Sim Borodach (Hatch)**

Right.

[@26:30](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1590.86) - **Lillian Rountree (ShalomLearning)**

Oh, yeah. These don't, these don't have last names.

[@26:33](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1593.96) - **Sim Borodach (Hatch)**

Okay.

[@26:35](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1595.98) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@26:39](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1599.76) - **Sim Borodach (Hatch)**

Right. wonder why, let's just scroll back to the top for a second.

[@26:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1604.32) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@26:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1605.56) - **Sim Borodach (Hatch)**

Why?

[@26:47](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1607.08) - **Lillian Rountree (ShalomLearning)**

Yeah, why would this have none?

[@26:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1609.2) - **Sim Borodach (Hatch)**

Yeah, I'm not sure. Well, I mean, you can, why is Can you click partial enrichment, that little button? Yeah.

Yeah. And now click no enrichment. And now deselect partial enrichment. I feel like there's something, maybe that's invalid in the email field.

But again, this is, I can just clean this up a little bit for you. The one thing that I can't clean up is adding in the last names that are missing.

[@27:32](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1652.6) - **Lillian Rountree (ShalomLearning)**

Yeah. I, again, his assistant did it. So I don't.

[@27:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1656.26) - **Sim Borodach (Hatch)**

Okay.

[@27:37](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1657.62) - **Lillian Rountree (ShalomLearning)**

I would, I can send it back to her.

[@27:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1660.58) - **Sim Borodach (Hatch)**

Okay. So what we'll do is take both of the lists that we're uploading. You can, you can import this list and then I'll just clean up what's necessary.

If there's any bug, I'll have that fixed. And we'll put these into two separate lists. You can, you can already hit the lists button on the left side panel.

[@27:58](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1678.92) - **Lillian Rountree (ShalomLearning)**

Right.

[@27:59](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1679.4) - **Sim Borodach (Hatch)**

And you'll have. If two lists here, you'll be able to rename them, call them whatever you want, and that will be your window into a specific list that you uploaded.

You can also access everyone by hitting profiles, the button right above lists, and that's going to contain everyone that you've ever uploaded.

So, so far, you've QuickSearched four people, but this will go up to be in the hundreds after I get these lists in.

[@28:21](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1701.74) - **Lillian Rountree (ShalomLearning)**

Yep.

[@28:22](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1702.98) - **Sim Borodach (Hatch)**

So, we could take a couple minute break just so I could finish getting that first list approved, and hopefully it will start enriching so that you could see, you know, sort of a bulk file enriching in real time.

Okay. It does great. If not, we can just continue with, like, QuickSearch and looking at some other features and talk about that export function as well.

[@28:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1722.3) - **Lillian Rountree (ShalomLearning)**

So, you guys, why you just take a couple minute break here? Yep. Yeah. I'm going to run downstairs and I'll be right back.

[@28:47](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1727.86) - **Sim Borodach (Hatch)**

Yeah.

[@28:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1728.38) - **Sarah Adams**

Okay.

[@28:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1728.6) - **Sim Borodach (Hatch)**

Sounds good.

[@28:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1729.38) - **Sarah Adams**

Thanks. Okay. Thanks. You. Thanks. Thanks. Thanks. Thanks. You

[@32:01](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1921.2) - **Lillian Rountree (ShalomLearning)**

Wealth Signals. Can you let me know when you're ready to come back?

[@32:50](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=1970.6) - **Sim Borodach (Hatch)**

Yeah, I'm here. I just finished making the highlights. And let's see. I'm going through the same process. Now I'm uploading and mapping the columns, and if that goes well I will be able to submit the file.

The only thing is that we, I'm not 100% sure if we have a backup in our enrichment queue, so it may take more time than, you know, it may not be immediate, I guess is what I'm saying.

QuickSearch should always be immediate, but bulk files can sometimes, you know, take a little bit more time, so.

[@33:27](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2007.66) - **Lillian Rountree (ShalomLearning)**

Okay.

[@33:28](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2008.92) - **Sim Borodach (Hatch)**

I would like to, I mean, it would be great to see some results live.

[@33:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2016.76) - **Lillian Rountree (ShalomLearning)**

And so, just in general, is there something I could have done differently, like to prepare the list to upload that would have made it go better, made it work better?

I mean, obviously missing last names is the problem.

[@33:51](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2031.08) - **Sim Borodach (Hatch)**

Um, yeah, I mean, as explained earlier, like there's, there's required, you know, first name, last name, enrichment. Oops. Okay.

Requires first name, last name. And then one of email, phone, or home address. And then improvements to make are to include, you know, two of those or three of those is ideal.

And then we actually have, if you go back to the main upload page, you'll see and click into bulk enrichment.

We have like detailed instructions that you can read through. They're really not complicated. We've tried to keep it really simple.

It's just, we can talk through it now or you could read it yourself. Again, that's, would be from the main upload page and choosing bulk enrichment.

Yeah, that would be upload. Yeah. And choosing bulk enrichment.

[@34:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2080.08) - **Lillian Rountree (ShalomLearning)**

Good. Sorry.

[@34:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2080.98) - **Sarah Adams**

Go here. Okay.

[@34:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2082.22) - **Sim Borodach (Hatch)**

Yeah. Yeah.

[@34:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2082.8) - **Sarah Adams**

there's a sample file too in there that you can look at.

[@34:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2085.82) - **Lillian Rountree (ShalomLearning)**

I think that's where I froze last time.

[@34:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2088.34) - **Sim Borodach (Hatch)**

Yeah.

[@34:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2089.98) - **Lillian Rountree (ShalomLearning)**

It's just a matter of not having enough time. That's all.

[@34:52](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2092.82) - **Sim Borodach (Hatch)**

Well, yeah.

[@34:53](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2093.42) - **Lillian Rountree (ShalomLearning)**

I mean, The thing is like the constituent ID, that's where I got frozen because I, we don't have any IDs.

Yeah.

[@35:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2100.46) - **Sim Borodach (Hatch)**

Yeah. Yeah, so if you go back, if you just click off this page for a second, back to the Hatch page, and scroll up, so it says what's critical is first name, last name, you know, one, enrichment can't happen without those, and then there's important fields, and then where it says click here to view best practices and more detailed instructions, like the sample file is sort of the last thing there on the page, so it's helpful, you know, but I think it's I think some people are used to, like, a system that works that way, and that's why we have the sample file, like, you know, you could kind of copy and paste your data, but it's not necessarily.

[@35:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2140.86) - **Lillian Rountree (ShalomLearning)**

Okay, then, do you understand why some of those people, like, look like they had enough data, but were only partial or fell into the no category?

[@35:53](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2153.88) - **Sim Borodach (Hatch)**

I'm still on the first file, so I don't know, yeah, I don't know yet. yet. I don't know 391.

Okay, so I'm actually seeing just after going through the file, I think about 236 from that first one are going to make it through.

[@36:15](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2175.78) - **Lillian Rountree (ShalomLearning)**

Okay.

[@36:17](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2177.5) - **Sim Borodach (Hatch)**

So I'm going to go ahead and import those. And I'm going to, if you go back to your upload, main upload page, you'll now see that you have an upload processing.

If you hit the upload button. Yeah, and scroll down a bit. So you have that one, it's got 390 prospects in the file and it's processing.

Not all of those prospects are being enriched and you'll see the actual number that are enriching.

[@36:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2203.4) - **Lillian Rountree (ShalomLearning)**

You could hover over processing and you'll see that it's got an indicator of how many imported. Okay.

[@36:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2209.18) - **Sim Borodach (Hatch)**

That takes you is usually quite fast because it's just verifying that they're legitimate imports and then it will change from processing and the indicator will look like it does below.

All right. We'll see the number that have enriched, how many you're expecting to enrich, and then just like you can in the third to last column, Profiles, you can hit View Profiles to just filter to those profiles.

You can go ahead and click one of those, yeah. You see it applies the filter to that upload ID.

[@37:18](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2238.08) - **Lillian Rountree (ShalomLearning)**

Okay.

[@37:19](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2239.3) - **Sim Borodach (Hatch)**

So, I mean, you can also, if you go back, if you just back a page, you could also add to a list.

So that's what I was going to do, and you can already do it here for that upload we just submitted.

You can go ahead and add it to a list and give that list a specific name. You know, I saw it was like, I forget whose name it was, Yuval or something.

Yeah. Or you could go and create a list that way. And we could also just come back to this upload page and always hit, you know, View Profiles from that particular upload.

[@37:50](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2270.84) - **Lillian Rountree (ShalomLearning)**

Yeah. And honestly, I don't even know that the, those, the lists are just like somebody worked on the list at a certain point.

Like for me, it's more important that they're all. All, that I can access them all together, I guess the thing I'd be curious about is the people that don't get uploaded or enriched, like what happens to those people and how can I go back and maybe add missing information or, you know, just spit out, spit back out the ones that didn't get uploaded so I could work on those, if that makes sense.

[@38:25](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2305.7) - **Sim Borodach (Hatch)**

Unfortunately, that's a bit complicated.

[@38:28](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2308.76) - **Lillian Rountree (ShalomLearning)**

Okay.

[@38:31](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2311.34) - **Sim Borodach (Hatch)**

We can't, you can't improve prospects in place. So essentially, if someone didn't get enriched, you would, the best course would be to delete their profile.

[@38:46](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2326.72) - **Lillian Rountree (ShalomLearning)**

Okay.

[@38:47](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2327.42) - **Sim Borodach (Hatch)**

go, to be like, okay, I'm interested in this person, but they didn't get enriched, would actually be to delete their profile and then either quick search them or re-import them in a bulk file.

But with, You know, one of the critical data points.

[@39:02](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2342.1) - **Lillian Rountree (ShalomLearning)**

Okay. Got it.

[@39:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2353.92) - **Sim Borodach (Hatch)**

So, if you head back to the upload page, you can see that the enrichment counter is going up. And let's go take a look at some of those profiles.

And also, just a heads up, guys, I have a hard stop at the... Okay, sweet.

[@39:29](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2369.7) - **Lillian Rountree (ShalomLearning)**

So, I'm sorry. Am I in the right place? Upload.

[@39:34](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2374.46) - **Sim Borodach (Hatch)**

Yeah. And now you could hit view profiles next to the upload. That's, you know, the enrichment counter is incrementing.

Yeah. Okay. So, awesome. I mean, this is amazing. You can already see that the info accuracy is high for so many of these folks.

Yeah. That's that leftmost column. That means that a lot of the other data that you're going to see on the profile has a high level of accuracy associated.

have out the profile. Yes, I have Okay. It's going to be a little bit of a challenge. Like we can go, I'll give you two options.

We can go talk really quickly and we can go rather fast and work through a lot or we can talk a little bit more slowly and targeted and have another call another time?

Probably. do. I do think it's like, well, you know, this, this is where, you know, let me take over.

[@40:27](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2427.9) - **Lillian Rountree (ShalomLearning)**

Yeah. Let me take over. Okay. This is, this has been great.

[@40:30](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2430.34) - **Sim Borodach (Hatch)**

I'm really glad that you, you got to click around.

[@40:32](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2432.9) - **Lillian Rountree (ShalomLearning)**

You want me to stop sharing?

[@40:34](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2434.36) - **Sim Borodach (Hatch)**

Yeah. I'm going to take over the share.

[@40:37](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2437.64) - **Lillian Rountree (ShalomLearning)**

Okay.

**SCREEN SHARING: Sim started screen sharing -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2443.666206)

[@40:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2444.46) - **Sim Borodach (Hatch)**

Okay. Excuse me a second to plug in. I like your hat, by the way. Oh, thank you. Yeah. So my wife is a, um, engagement coordinator for the Jewish grad organization in Southern California.

Okay. Have you heard? I don't think they're directly affiliated with Hillel. Maybe they are, but they definitely work closely with the Hillels on campuses, those Jewish on-campus organizations.

[@41:15](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2475.18) - **Lillian Rountree (ShalomLearning)**

So she's the engagement coordinator for the universities in Southern California, and one of her students makes these hats, so she got me a hat from him.

So great.

[@41:25](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2485.7) - **Sim Borodach (Hatch)**

Yeah. That's awesome. Sarah, did I tell you about the meaning of this hat?

[@41:33](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2493.6) - **Sarah Adams**

Yeah, doesn't it mean, hey?

[@41:35](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2495.5) - **Sim Borodach (Hatch)**

Yeah.

[@41:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2496.62) - **Sarah Adams**

Yeah. Okay. I'm learning, Lillian. All the same thing.

[@41:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2500.36) - **Lillian Rountree (ShalomLearning)**

Yeah, I'm learning too.

[@41:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2505.56) - **Sim Borodach (Hatch)**

Okay. Okay, so you're seeing my screen, right?

[@41:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2508.14) - **Sarah Adams**

Yeah.

[@41:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2509.08) - **Sim Borodach (Hatch)**

Awesome. So I'm going to go and apply that same filter for the up by upload ID. You have your whole filter panel on the right side here.

You're, you don't need to get in. You could pretty much function in the entire platform without drilling into these filters because of the layer of AI insights, but you could filter by donor level, public donations, you know, set a threshold, you could filter by zip code, you could filter by skills or interests, et cetera, et cetera.

So I'm going down to the bottom, to the prospect management section, when you upload that MailChimp list, you're going to use profile tags, you know, let's say you'll make a code like open rate, so you'll call it like OR colon, and then put a number, something like that.

So you'll use tags here, they're empty right now because those are user defined, so we don't auto-generate any tags.

We'll come back to Elevated Profiles, is that familiar?

[@42:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2568.92) - **Lillian Rountree (ShalomLearning)**

No.

[@42:49](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2569.98) - **Sim Borodach (Hatch)**

Okay, we'll come back there. And then the one that I used is UploadID. So that's, you could see sort of from the upload panel, this is just a different view.

And I'm going to go. Select that one with the 236 Prospects that we imported. So this counter is going up because there's still, I filtered by Public Donations, I didn't deselect that one, so only folks who have Public Donations are appearing here, just happens to be the one that I applied.

So let's leave it for a minute, and you can see that that column is already selected in view here, the Public Donations column, and that's going to give you an indication of total amounts that this person is associated with Barry Schwartz is a super common name, so I can guarantee you that these are not all him, unless he is the Barry Schwartz.

And when I hover, I could see the number, you know, the number of actual donations that he is associated with.

You also have in view here are the social profiles connected to the person and the home value. Now, on the donor profile, you'll see these accuracy markers.

They're always red, yellow, and green associated with either individual data points or For an entire card of information, which could be alma mater, current companies, phones, and emails, those are going to be your guides for whether a data point has been confirmed and verified, or it may be in some semi-confirmed or unconfirmed state.

Okay. I can tell you from this view that donations are treated individually, and you'll see that on the donor profile.

[@44:23](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2663.64) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@44:24](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2664.46) - **Sim Borodach (Hatch)**

It's very hard to say that entire swath of donations are associated with a person. It's kind of treated in a one-by-one basis, with the exception being an affiliation with a foundation, right?

Because a foundation might award many grants, and that's a one-to-one. The donor is either connected to that foundation or they're not, and if they are connected to that foundation, then we associate them with all the grants given by that foundation.

Okay. for political gifts or individual giving, it's going to be one-by-one. All of those three categories are lumped here in public donations.

Now, I can change which columns I see on the screen here by selecting... And some other ones that will be of tremendous interest to you are going to be the scores.

So I'm going select the Hatch Giving Score, Affluent Score, Propensity, and Donations Affinity. Now, this is how we suppose will probably be the easiest way to pop folks to the top, right?

You want to use your time as effectively as possible. So a really easy way to approach this would be, okay, you're going to sort by highest affluent score.

Just pop the people to the top who are the richest, right? And the affluent score is your catch-all of their net worth.

Any wealth indicators associated with this person are captured in their affluent score. And 87 is remarkably high. Wow. Do you know Brad Keywell?

[@45:42](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2742.66) - **Lillian Rountree (ShalomLearning)**

No.

[@45:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2743.58) - **Sim Borodach (Hatch)**

Okay, that's a really unique name. I don't know if there are multiple Brad Keywells. And it says he has a stock portfolio valued at over $428 million.

Now look at this. So without even going into the profile, this is how much insight you get on a person.

[@45:58](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2758.44) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@45:59](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2759.24) - **Sim Borodach (Hatch)**

You know that Brad is- Among the richest people in your donor database. And when I hover over his affluence score here, you can see that you could see the AI explanation and this level, this explanation accompanies every single score with the Hatch Giving score, which is just an awaited sum of the different scores.

[@46:23](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2783.0) - **Lillian Rountree (ShalomLearning)**

Okay.

[@46:24](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2784.0) - **Sim Borodach (Hatch)**

I'm to talk about that again in a minute, but there are five subscores. Yeah. guys went over this during the demo.

Do you think you can rattle them off the top of your head, Lillian? And obviously this is, there's no consequence to this pop quiz.

Okay. There is affluence, propensity, two affinity scores, and your RFM, MyOrg Donations score.

[@46:48](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2808.26) - **Lillian Rountree (ShalomLearning)**

Okay, affluence is perhaps, RFM or MyOrg Donations.

[@46:54](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2814.2) - **Sim Borodach (Hatch)**

This color coding, by the way, that you see, I'm going to open up Brad's profile just so you can see it even more clearly.

It looks like, Thank Well, I guess that's the thing. No one's really going to have any MyOrg donations because you don't have donation history.

And we do capture if it's publicly advertised that someone gave to ShalomLearning and we capture that, this value will populate.

And the color here is pink. I just realized, Sarah, that this is probably important to emphasize to users. There's maybe a loose meaning behind why each color was chosen for each score.

But this will always be dark blue, whether it's one or whether it's 100, this will always be light blue.

And again, I'm not exactly sure what the meaning is to these colors, if there is any.

[@47:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2861.38) - **Lillian Rountree (ShalomLearning)**

They just needed four colors.

[@47:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2863.96) - **Sim Borodach (Hatch)**

Yeah, five, in fact, because the MyOrg donations is pink. So you can see that same color coordination is reflected here.

So now in terms of Brad, we can see his philanthropy, right? That's his propensity score. Propensity is our word for philanthropy.

result. you. Thank His donations affinity, do we want, we should probably go over the affinity scores in a little bit of detail.

[@48:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2886.12) - **Lillian Rountree (ShalomLearning)**

Okay.

[@48:07](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2887.0) - **Sim Borodach (Hatch)**

And then I don't have in view here anyone's, you I'm not turning on my org donations because it's likely to be zero, although we could do a quick test and see if I sort by my org donations and see if anybody has a value.

Nobody does, because we're now sorting at the highest at the top. So it seems like that com will not be particularly useful to you for a little while.

So now, amazing, when I sorted by highest affluent score, Brad popped out to me. This should be, hopefully, the first sign of ROI for you.

You know, we don't know anything about Brad yet, but we want to go learn a little bit more about him.

So I opened his profile in another tab, which is a great practice, so you don't need to refresh pages.

You could do that by hitting command click on your laptop or control click if you were on a Windows.

to of or you could write Right-click on something, right, and select, like this, you could right-click and select Open Link in a New Town.

[@49:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2946.64) - **Lillian Rountree (ShalomLearning)**

Open Link in a Town, okay.

[@49:08](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2948.16) - **Sim Borodach (Hatch)**

That's just good practice.

[@49:10](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2950.02) - **Lillian Rountree (ShalomLearning)**

Yep.

[@49:10](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2950.92) - **Sim Borodach (Hatch)**

So now his profile opens up. It actually opens up here at the top, but I'm going to jump right to the Insights section because that's where our AI is gathering all the details in one place and in a really nice, neat, packaged way.

So we see that sentence again on his stock portfolio. I can see his philanthropy. He seems to be quite philanthropic.

And then we're going to drill into the Affinity scores right now, and that's going to be the assessment of how connected he is to Shalom Learning Institute, just based on the information that you've told us in the upload and what we've gathered from him across the web.

And I'm going to say one thing about the accuracy of this data, but Lillian, looks like you have a comment to make.

[@49:54](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2994.86) - **Lillian Rountree (ShalomLearning)**

Yep, I'm good.

[@49:55](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=2995.5) - **Sim Borodach (Hatch)**

was just taking notes. So let's just talk. Before we dive into the Affinity, I want to say a word on App.

Every profile that comes into, that we did in that bulk enrichment, right, it's all computers talking to each other.

And while the computers are good at talking to each other, we believe after four years of deep R&D into this prospect research function, right, taking a donor or a prospective donor and trying to learn about them, the human element is critical.

It's not really optional. At some point, someone needs to think about what makes sense here. We're not at the phase yet where we say, well, the AI just figured it out.

It's not an unreasonable approach, but there's an error margin that will show up in different places and, you know, we don't really have a clear sense of what the consequences of that are.

So having human eyes go through the entire donor profile, really through all of these other sections, which we may not even get a time to look at today, but I'm sure you did look at for those profiles that you quick searched.

[@51:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3060.2) - **Lillian Rountree (ShalomLearning)**

look at.-

[@51:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3060.0) - **Sim Borodach (Hatch)**

You can go through and both complete the profile and also confirm all of the data that's there, such that when you're looking at this Insights section, everything is completely accurate and everything is complete, right?

It's highly accurate and complete. So on Brad's profile and on everyone else we just uploaded, it is considered unconfirmed and incomplete.

And that elevated profile term, okay, it's going to come up a lot. That's how you get a confirmed and complete profile where a human prospect researcher on our side collects all the missing data points that the computers did not gather and also verifies all of the data on the profile.

[@51:45](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3105.12) - **Lillian Rountree (ShalomLearning)**

Okay.

[@51:46](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3106.18) - **Sim Borodach (Hatch)**

So basically, when you come across someone like Brad, who I think even after we dive into his affinity in a second, we're going to see he's a pretty good prospect.

You're going to want to select for Brad to be elevated. That's a really simple about anyone. We're from five-second to two-minute process, literally be five seconds.

[@52:03](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3123.86) - **Lillian Rountree (ShalomLearning)**

Okay.

[@52:05](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3125.08) - **Sim Borodach (Hatch)**

And I believe you have...

[@52:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3126.02) - **Sarah Adams**

To request it, yeah. And then it takes a couple days before it's completely confirmed and completed to come back.

[@52:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3133.3) - **Sim Borodach (Hatch)**

Our target time is a two-day business turnaround time. We're happy to field those urgent requests to the best of our ability.

We don't guarantee that we can. I would say the two-day business time is a guarantee, unless there's someone that we're facing challenges, elevating them, and we need to communicate to you.

But we will communicate to you, hey, we're struggling to figure out who this person is. Can you provide us more information?

Something like that. We will communicate.

[@52:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3161.52) - **Lillian Rountree (ShalomLearning)**

And how many elevated do we get per month?

[@52:44](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3164.4) - **Sim Borodach (Hatch)**

Great question. So here's another area that... We're going to come back to the affinity. Yeah. I don't want to get too distracted here, but you'll see here your elevated profile usage.

And so far, you used one out of 10 this month. Okay. Here are your quick searches, which you're already pretty familiar with.

Yeah. 4 out of 20 used, and that quote is going to reset also every single month, and then now you've used 236 out of 2,500 bulk enrichments.

By the way, QuickSearches do not count against your bulk enrichment. So you have 20 every month, that's 240 over the year, those will not count against your 2,500.

[@53:20](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3200.76) - **Lillian Rountree (ShalomLearning)**

And is it reset every month? Like, do I want to use the remaining ones by the end of the month, before the end of the month?

[@53:27](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3207.78) - **Sim Borodach (Hatch)**

Yeah, it happens to be that you subscribe toward the end of the month, so your quota reset is on the 26th of the month.

But if someone subscribed on the 15th, it would reset on the 15th of every month. It's the subscription date reset.

So you should be charged every month on the 26th, and you can expect that your quotas will reset every month on the 26th.

For QuickSearches and Elevated Profiles.

[@53:50](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3230.9) - **Sarah Adams**

Right, and the Elevated Profiles don't carry over, so you will need to use them, and we highly recommend that you do.

I think you will. I think you... So... So... So... So... So... ... You... You...

[@54:00](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3240.0) - **Lillian Rountree (ShalomLearning)**

So the elevated profiles don't carry over, but the quick searches do, or they neither do? Neither do. Got it.

Okay.

[@54:08](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3248.18) - **Sim Borodach (Hatch)**

Yeah.

[@54:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3249.22) - **Lillian Rountree (ShalomLearning)**

Okay. Okay. So we could elevate him, for example.

[@54:17](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3257.08) - **Sim Borodach (Hatch)**

Yeah. Yeah, we'll come to that in one second. So here's his affinity, right? Yeah. we can see he seems to be super wealthy.

He seems to be incredibly philanthropic. Does he have affinity for Shalom Learning?

[@54:33](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3273.98) - **Lillian Rountree (ShalomLearning)**

Like that's sort of... Yeah.

[@54:36](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3276.42) - **Sim Borodach (Hatch)**

And it seems like he does. Yeah, he does.

[@54:38](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3278.94) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@54:40](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3280.22) - **Sim Borodach (Hatch)**

And in both cases, you could hit CY to explore more details. In the case of Profile Affinity, you'll view individual facts and the score associated.

This is not an accuracy score. This is how significant is that fact in relation to your organization. Obviously, his score exceeds 100.

We cap Profile Affinity at 100 right now, but we still include... These Facts, which you see when you pop it open, and then for Donations Affinity, you'll see a list of all the public, the organizations that he's given to publicly, including Shalom Institute, if we have, and this is pretty awesome what you're about to see.

Let just give it another second. So the ones that are furthest to the top are the ones that have the strongest combination of recency, frequency, amount, and the comparison.

That the comparison is indicative of a strong alignment. Meaning, even if he gave a million dollars to an organization this year, if that organization has no similarity, like zero, it's going to be at the bottom.

Yeah.

[@55:54](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3354.26) - **Lillian Rountree (ShalomLearning)**

Okay. Yeah, this looks good.

[@55:56](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3356.8) - **Sim Borodach (Hatch)**

So every profile has all of these scores, and you can click. So those CY, those explanations, the only thing they're generating on the spot are the explanations on the right.

The rest of this has all been crunched. We just only make the, make the explanation.

[@56:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3373.1) - **Lillian Rountree (ShalomLearning)**

Yeah.

[@56:13](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3373.66) - **Sim Borodach (Hatch)**

Yep. And then to request him for elevation, I'm just going to jump, we were in insights, I'm jumping back up to the snapshot.

This is the very top of the profile. And here you could see that you've used one out of your 10 again, with the little blue indicator, highlighting how many, you know, how many you've used or what, what.

Percentage. I'm going to select Elevate, and the window that pops up here on the right side highlights all optional questions.

It doesn't sound like you know anything about him, so you can actually scroll all the way to the bottom and hit send.

[@56:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3403.66) - **Lillian Rountree (ShalomLearning)**

Okay.

[@56:43](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3403.88) - **Sim Borodach (Hatch)**

For someone you do have information that wasn't captured in the upload, or you do maybe call your colleague to say, hey, you I remember you mentioned this person one time before I request them to Elevate.

Because we won't know. And if we don't come back to you in the process, basically, if we're not struggling with the profile.

We're not going to come back to you to say, hey, this is your opportunity to tell us if you know anything else.

[@57:04](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3424.74) - **Lillian Rountree (ShalomLearning)**

Okay.

[@57:05](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3425.4) - **Sim Borodach (Hatch)**

You want me to push him through?

[@57:06](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3426.84) - **Lillian Rountree (ShalomLearning)**

Yeah, please.

[@57:09](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3429.14) - **Sim Borodach (Hatch)**

And that little button at the bottom that said include in Future 5 Alive, did you see that?

[@57:14](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3434.04) - **Lillian Rountree (ShalomLearning)**

No, but that's okay.

[@57:15](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3435.78) - **Sim Borodach (Hatch)**

Yeah, it's going away shortly anyway, so it's not an important thing for you to deal with. So you'll get back, emailed back his profile, as Sarah mentioned, you know, within two business days.

So you could expect by Thursday, end of day, to have his elevated profile, and it will, you know, be confirmed and complete, or as confirmed as complete as it possibly can be.

**ACTION ITEM: Explore Hatch platform. Use features demoed (QuickSearch, bulk upload, filters). Note questions for follow-up. -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3454.9999)

[@57:41](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3461.26) - **Lillian Rountree (ShalomLearning)**

Okay, amazing. And I know that you have to go in two minutes, and so do I. So I will play around with this, and I will let you know what other follow-up questions I have, and then maybe we could do like another, you know, session next week after I really explore it a bit.

**ACTION ITEM: Use 10 elevated profile requests before 26th. Prioritize high-value prospects (high affluence/propensity scores). -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3472.9999)

[@57:56](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3476.08) - **Sim Borodach (Hatch)**

Absolutely. Absolutely. And just so you know, our- Your subscription renews on the 27th. A leading indicator that you're succeeding with the platform and that shows us that you're logging in, that you're doing some evaluation is using those 10 elevations by the reset date, right?

And it shows us that you understand they don't carry over. So putting those requests through. Okay. And by the way, at least the way it's designed now that we may need to tweak this is the meter goes up as you get the profiles back.

Because I think part of it, if you request them all on the last day of the month, like technically you got them in, but it puts us in a bind because we need a couple days to work on them.

So if you try to get them in sooner rather than later, you're only working with 10. I mean, we have customers who have many, many more than that.

So, you know, shouldn't take you too much to get through them. And, but yeah, that, that's kind of the leading indicator, right?

To us that you're having. You're good time, you're finding people that are interesting, you're elevating them, and then we'll talk more about what do you, you know, what are the most actionable data points on the profile, because we didn't really get to the target ask amounts today, but, you it's pretty intuitive for you.

**ACTION ITEM: Upload/process Lillian's 2nd list (40 contacts). Send quick note when complete. -** [**WATCH**](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3547.9999)

[@59:14](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3554.76) - **Lillian Rountree (ShalomLearning)**

Amazing. This is great. We got people in there and I can look through them and get it.

[@59:18](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3558.68) - **Sim Borodach (Hatch)**

And I will get that other list in that you sent and I'll send you just a quick note. There's, by the way, there's a, the blue button in the bottom right corner.

That's how you really chat with me in real time. Email is fine.

[@59:32](https://fathom.video/share/nws-b_JhSuWFyro8yFzmUy7MHdeB3QWz?timestamp=3572.24) - **Lillian Rountree (ShalomLearning)**

Yep. I got it. Okay. All right. Hopefully you'll see me soon. Thanks, Sam. Thank you both. Bye. welcome. Thanks, Lillian.

Bye.