# **Strategic Implementation - June 04**

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[@0:00](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=0.0) - **Sim Borodach (Hatch)**

Um, it's so nice to see you again, Sarah. Both Sarahs. Um, is Rabbi Stillerman joining us, Sarah Bandujo, in the end?

[@0:15](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=15.4) - **Sarah Bandujo (yehudi.today)**

Maybe, maybe not. He said he'll try to make it. If he does, he does. If he doesn't. Okay. Let me, let me ask I don't know.

[@0:25](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=25.52) - **Sim Borodach (Hatch)**

Yeah, sure. That would be great. Sarah Adams, are you getting a delay from me or from Sarah B? I'm not, but you're getting a delay?

I'm getting a little, okay, I'm getting a little bit of a delay from both of you guys. No worries.

It's not too bad. Okay, there's no use waiting on him.

[@0:55](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=55.46) - **Sarah Bandujo (yehudi.today)**

If he joins, he joins.

[@0:58](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=58.84) - **Sim Borodach (Hatch)**

So, I, I. Just to level set, I think we're going to consider this the last of these series of meetings in our onboarding series.

And serious credit to you, Sarah, you've shown up, you've got the work done, we've progressed steadily, and now we're here, which is fantastic.

We can definitely continue to meet over time, but I think in the formality of us, you know, deciding that this process is concluded, we'll have ongoing check-in calls, and when the rabbi wants to meet with us, we do, you know, we want him to join in, just so you know.

He's not joining. He is or? He's not. Oh, not joining. Yeah. So, we'll be here to support you, and we want you guys to succeed.

At this point, now that your customers, that's, you know, we brought you in and out, we need you to succeed in order for this to continue, but...

It's going to be a little bit more the space between us to give you guys the support that you need.

So hopefully in this conversation, we can define what symmetric of success looks like between now and maybe a month from now or two months from now.

Key things that you can do that show us that you're engaged with our product, signs that you're learning and you're growing and you're using the tool more.

But that's going to come down to you using it. So and we hope that, you know, at some point we get to meet the rabbi, but we understand he's very busy.

[@2:39](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=159.94) - **Sarah Bandujo (yehudi.today)**

Yeah, he's running an organization, so he's all over his place.

[@2:46](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=166.72) - **Sim Borodach (Hatch)**

Yeah, absolutely. Sarah Adams, is there anything that you want to add?

[@2:52](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=172.64) - **Sarah Adams**

No, it's just I'm really happy to be working with you. And if you need something, you can as well reach out to me on me.

Thank I'm for you. Yeah. And yeah, kudos to you for everything you've done. I don't think it's always that smooth and dedicated.

So good job. Yeah, thank you. It's my job.

[@3:12](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=192.36) - **Sarah Bandujo (yehudi.today)**

I don't know. Thank you. You're welcome.

[@3:14](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=194.48) - **Sarah Adams**

I'm to turn my camera off because I have a bit of a lag now and I'll just do that.

But I am here. Okay. Yeah.

[@3:21](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=201.92) - **Sim Borodach (Hatch)**

To echo what you said, Sarah, this was what you said, Sarah. Customers usually take a lot longer and need way more hand-holding.

So I just want to echo that. That's not how we work. It's not our hand-holding.

[@3:35](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=215.4) - **Sarah Bandujo (yehudi.today)**

It's like not our style. Like we just make things happen. Like it's the way we work.

[@3:43](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=223.62) - **Sim Borodach (Hatch)**

All right. Let's give me a second here to just pull everything, finish pulling everything up. I'm also, as I'm sure you are getting back into the swing of things after the holiday.

Yeah.

[@4:07](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=247.08) - **Sarah Bandujo (yehudi.today)**

Thank you.

[@4:42](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=282.2) - **Sim Borodach (Hatch)**

Thank you. All All right, here we go, we're going to try to do as much as we can in one conversation, which is never too easy, because there's a lot to cover, just bring this over here, all right, you're seeing the hatch window now?

Yeah. Awesome. Okay, so I kind of feel like the best place to start is with what you already know, so we can build on top of your existing knowledge about how the platform works, what's possible, and I'd love to even hear, because I feel like as you've mentioned and now demonstrated, you know, you guys don't need too much handholding.

I remember in our first conversation, I was explaining things that you already knew how to do. Mm-hmm.-hmm. Mm Mm

What's your current understanding about what's possible, what your purpose is using Hatch?

[@6:06](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=366.66) - **Sarah Bandujo (yehudi.today)**

So I'll tell you what we want it for, and then we can just go over that. We want to know donors that we already have that could be giving more that we don't necessarily know.

Like Russell Galbit here at the top, I know he makes the most out of all our donors. That I don't need anyone to tell me.

That I'm aware of. Tavacinic also, these people that are very big givers, that I'm aware of. We're looking for kind of like our sleepers.

People that are already giving maybe like 18, 3600s, but we could be giving up to 18, 25,000s. Like that's really what we're looking for.

People that already know us and are in our donor base, but are not giving at their full capacity. Awesome.

[@6:46](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=406.76) - **Sim Borodach (Hatch)**

So I'm going to let's run with that for a second. The two scores that I guess you're going to want to be comparing to each other are propensity and my org donation.

So. So We're talking about giving, right? Propensity is their overall giving to other organizations, or to all organizations, rather, and my org donations is specifically to your organization.

So when I come to hit that columns button, I'm just going to turn off. Let's just say for a second, to keep it simple, all columns except for these two.

And I'm actually going to change what I sort by on this page as well. It's almost done loading. So I'm going to sort by, it's interesting, we don't actually, I guess we pin him as a 30 out of 100.

So it seems like it's probably going to be amongst the highest from your list. Does that make sense that his largest single gift to you?

That what? That his largest single gift to you is $10,000? Yes. But he's someone, like he has-

[@8:00](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=480.0) - **Sarah Bandujo (yehudi.today)**

Well, that's to give more, but like, yeah, that's what he gives to you, Hudi.

[@8:05](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=485.9) - **Sim Borodach (Hatch)**

So you know what he's giving you and you already know that he's a very wealthy person. Yeah.

[@8:12](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=492.76) - **Sarah Bandujo (yehudi.today)**

Awesome.

[@8:13](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=493.42) - **Sim Borodach (Hatch)**

Okay, so I'm going to switch. I turned it to sort by Hatch score just before we got on the call, but I'm going to change it to sort by highest propensity.

Now, I guess you're, I'm going to assume that since he's a 30, would you say it's reasonable to say that anyone who hovers around that same level of giving you're aware of their wealth or their philanthropy?

Yeah, I would say so.

[@8:37](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=517.72) - **Sarah Bandujo (yehudi.today)**

Okay.

[@8:39](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=519.02) - **Sim Borodach (Hatch)**

So let's say, let's say Adam Aronson, is that someone you know as well? I don't personally.

[@8:46](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=526.02) - **Sarah Bandujo (yehudi.today)**

Rabbi Stillerman might, but him, he's not ringing any bells for me.

**ACTION ITEM: Sort donors by propensity score in Hatch to identify potential "hidden gems" -** [**WATCH**](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=527.9999)

[@8:51](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=531.66) - **Sim Borodach (Hatch)**

Okay, cool. So right off the bat, this view should be pretty helpful. Again, all I did was sort by propensity.

And all these folks who have a high level of philanthropy associated with them, keep in mind that these are unconfirmed and incomplete profiles.

So it could be that this is erroneously associated with this person, Adam Aronson. It could be it's a different Adam Aronson.

We're upfront about that. That product works. It needs to be verified. OK. But this view, to your desire of what we basically call hidden gems, right, prospects that give more to other organizations, there may at some later point be like an emblem next to exactly these folks because they give more to others.

But again, all I did was sort of a highest propensity score. And now you'll see, you know, maybe Morris.

you know Morris? Tafasthenic.

[@9:50](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=590.66) - **Sarah Bandujo (yehudi.today)**

Yeah, Tafasthenic is a major donor to Jewish justice.

[@9:55](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=595.48) - **Sim Borodach (Hatch)**

So some folks you'll see on this list that you know, and we can talk about different. Strategies for how to segment or, you know, only have to go through this one time as opposed to revisit every single time.

But so far, this makes sense and lands. Yeah. Okay. Awesome. Okay. So what else other than hidden gems? That's really what we're using this for.

[@10:23](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=623.76) - **Sarah Bandujo (yehudi.today)**

Okay.

[@10:24](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=624.88) - **Sim Borodach (Hatch)**

Fantastic. me, that's...

[@10:26](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=626.32) - **Sarah Bandujo (yehudi.today)**

Things that we can take from it, but that's our goal is to find, like, the sleepers.

[@10:32](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=632.34) - **Sim Borodach (Hatch)**

Yeah. And I think that can take you, you know, months at least just to go through the process of identifying who those folks are and start to build relationships with them, whatever it is.

Yeah. So, can you remind me what you know about elevated profiles and how those work and what their importance is?

[@10:57](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=657.36) - **Sarah Bandujo (yehudi.today)**

That's, like, we, like, verify the information. Ach ähnert I. Thank Right? Like, you go through and you, like, verify all the information.

Is that what it is?

[@11:06](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=666.52) - **Sim Borodach (Hatch)**

Yeah. Yeah. Exactly. So I'm just going to pop someone open. Let's say this person, Adam Aronson. So, you know, you get clued into him because you see he's got a high propensity.

Okay. So you decide to open his profile. And we'll have to talk a little bit about some of the markers on the profile.

And you'll have to remind me what you know and what you don't know. But you're already here. Now, you can spend as much time as you want on the profile before it's been confirmed and completed.

And you can also hit Elevate Profile whenever you're ready for us to get in there and verify all the information on the profile so that when you come to it, everything is confirmed and completed.

Right. So all these questions, they're all optional. You don't have to answer any of them. Just what you know helps guide us.

Right. So if before you submit Profiles for Elevation, you just run the names by the rabbi or you check your QuickBooks if you have any notes in there, that will help us do a better job.

It's not required, but it is important. Got it. You can see here are basically questions, inaccurate information, approximate age, name of spouse, social profiles, nicknames, and then any additional information, and then you hit send.

So, you know, just for, like, complete clarity's sake, you could go from here, submit the profile for Elevation with two clicks or three clicks and five seconds, essentially.

**ACTION ITEM: Submit 20 donor profiles for Elevation in Hatch (monthly quota) -** [**WATCH**](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=763.9999)

And then you have all these options of additional work that you can do along the way, like peruse the profile yourself, read these questions, bring them to the rabbi, you know, submit them.

Now, one thing you want to keep in mind here is that you have 20 Elevated Profiles monthly. So... You want that right balance of, you know, kind of submitting people freely.

You obviously want to take advantage of all 20 every single month. They don't roll over. Yeah. So you want to take 20, but it's only 20.

So you can purchase more if you start to exceed. And, you know, we hope that that happens. We hope that you're finding this to be very useful and you're able to build relationships faster and smarter with your donors.

And then you naturally want more elevated profiles. But, you first you've got to use the 20 that you have in a smart way.

So we do want you to use them. And we want to them wisely. Got it. Comments, questions, thoughts? No.

Cool. Yeah, it is fairly straightforward. Yeah. So let me ask you, do you want to walk through the donor profile again?

And Talk about things like accuracy or different data points and where they come from. I think accuracy.

[@14:07](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=847.02) - **Sarah Bandujo (yehudi.today)**

How accurate is this? Yeah.

[@14:13](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=853.48) - **Sim Borodach (Hatch)**

So let me open one other profile to compare it to, at least one other one. Okay, that's good. There we go.

Okay. So I'm going to look at these three. And the first thing I want your eye to be drawn to are these green bars or yellow bars or empty bars.

So these bars pertain to any information that, I mean, it's hard to, it's hard to articulate it in a unified way, but you'll see in every section that these bars are present in a card.

So they indicate to you the accuracy of information. In that section, okay? And we'll have to talk about it in a little bit more detail for some specific data points.

Now, on this profile, the fact that there are no bars means we didn't actually match to someone. So not that there isn't enrichment data.

Here you can see that there's a home value. You can also see that the religion is populated. And we'll see a few other data on the profile.

But this didn't get an official match. In contrast to Joanna, who got one, but her match was so-so. And my guess is that her match is so-so.

She matched beyond name and like city-state, but not with a phone number or an email, which would be a stronger match.

David, probably on a phone, probably on one of his emails. You didn't give us any phone numbers for him.

So probably on one of his emails. And so we consider that a really strong match. Basically, as good as a match can be.

Perfect.

[@16:00](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=960.0) - **Sarah Bandujo (yehudi.today)**

There's more to say, but I just want to pause. Do you have any comments or questions?

[@16:03](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=963.22) - **Sim Borodach (Hatch)**

No, but I'm saying, like, there's, like, four phone numbers.

[@16:06](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=966.1) - **Sarah Bandujo (yehudi.today)**

So it's like, if I Googled this guy all the same, it shows, like, that's just a numbers. Like, if I Google someone, I do this for a living, I find someone's phone number, Google it.

Any one of those could be his phone number, but they're just things that got pulled off the internet. They're not necessarily connected to him.

[@16:21](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=981.98) - **Sim Borodach (Hatch)**

No, I mean, these are connected to him, but they're not necessarily a personal phone number. It could be a former work phone number is in there.

It could be one of his kids' phone numbers is in there. So it's, yeah, it's a, the, the, the phone numbers is a little bit tricky in that way, because you don't get so much insight, you know, which one is the best one and how it, you know, how it's connected to him.

Yeah.

[@16:58](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1018.72) - **Sarah Bandujo (yehudi.today)**

Okay, great.

[@17:05](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1025.36) - **Sim Borodach (Hatch)**

So I want to point out a couple other things. Number one, you see these letters O and E, and there's also an H one that's for Hatch.

O is for Organization, that means the data point came from you, and E is Enriched, it means we got the data point in our enrichment, and H is for Hatch, where we manually changed the data.

So during the elevation process, we add or edit information, and so if for any data point where that's the case, it changes to be an H rather than an E or an O.

In this box, for example, you can see that we include here that this address came from you, and it has an O, and there's a value.

Obviously, you didn't provide us the value. And here you have an E address that came from us, and a value that is accompanying that.

So really, any, like every data point here is coming either from you, the organization, or from us, the enrichment provider.

In contrast to like languages, religion, skills, interests, where they are all coming from, we are providing all of those data points.

Yeah. And then similarly with the career section, these are all provided by us, and you have these accuracy markers here indicating how accurate that data is.

And so now when we get a little further into the profile, you're seeing that there's, now before there was green in the earlier sections, and here there's yellow.

And that distinction is because this data comes from a different source, so it has its own accuracy markers. So you might think, oh, he has...

David has, you know, these investments in some publicly traded company, and on some profiles you'll actually see an amount, but the amount was delisted by the SEC.

So the profile can be deleted, and sometimes we do that in the Elevation Project, we lead a stock portfolio because it doesn't correctly belong to the person, and you are also able to do that.

Okay, perfect. Okay. And then by the donations, every single donation has an accuracy marker. There's no aggregate except for a foundation affiliation because, you know, there's one affiliation with a foundation, obviously as a board member or a trustee, but by an individual donation, each one needs to be verified on its own account.

None of them are going to be green out of the gate. You're able to edit them yourself by hitting the pencil and changing the confirmation level.

You're also able to edit them in bulk by hitting, you know, these different dropdowns. You can select all. If you know his name, for example, you can.

Select all of those ones and then save, and then we'll update the confirmation status on all of those here.

And you can also hide donations, so they'll be removed from this view, and then if you want to toggle on to see those, you can hit this button.

Oh, great. And same with political. Tweets are going to populate based on the Twitter handle that's set up here in the snapshot.

And this information you can edit in the down at the bottom, and most of it will populate here on the right side.

Perfect. So, for example, social and online presence. And these are colleagues that he's associated with. You can see the company.

These are not editable. If you do need to edit them or this becomes a problem, let us know. Okay.

We will add that ability. And then news articles has its totally own way of being. Here is an entire list of publications that basically the name David Edelstein is associated with.

And any article is it's just a it's just a potential data point until someone confirms it by hitting this checkmark.

So when we elevate the profile, we go through all of these articles and we confirm the ones that are correctly associated with him.

You are also able to do the same. And as they're confirmed, they pop up to this top section. OK, great.

Now, I think maybe the last two comments are going to pertain to the scores. Scoring reruns. Sorry, one second.

Scoring reruns every time an edit is made to the profile. So any data point that you edit, whether you remove an address or you add the spouse name or you confirm a news article, all these scores are going to read based on the updated data.

Now, obviously, we don't rerun it immediately after. Every data point is changed because you might or our team might be going through a series of changes.

there's a 10 minute buffer window after which the scores are completed, updating. And a final point, and then I'm going to pause and I would love for you to ask some questions or just make some comments.

When you request an elevated profile, we try to do our best to get it back to you within two business days.

So if you requested it today, we would try to get it back to you by Friday. So you can have that quick work cycle.

It will be emailed to you. And if you right now, the rabbi is not a user in your account.

I know that because you only have one user listed here. But if we add the rabbi, then he will also be emailed every time you get that elevation back.

So that could be something you want. Maybe it's something you don't want, right? Because you might get an elevated profile back that isn't who you expected it to be, right?

You thought that David was, you know, some philanthropist. it turns out he is just, you know, a guy. So maybe you don't want to buy.

For the rabbi with those emails, that's up to you. Yeah, perfect.

[@23:05](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1385.02) - **Sarah Bandujo (yehudi.today)**

Yeah, I intentionally did not add him. Like, I'll send him what needs to be sent. Yeah, that makes sense.

[@23:11](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1391.8) - **Sim Borodach (Hatch)**

You can always just follow him in email. Yeah, great.

[@23:15](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1395.32) - **Sarah Bandujo (yehudi.today)**

My biggest question, okay, so for my purpose is what score should I be focusing on the propensity score? Yeah, great question.

[@23:24](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1404.02) - **Sim Borodach (Hatch)**

So you're really going to want the sweet spot between propensity and donations affinity. And you can even throw profile affinity in there, and you can also throw affluence in there.

It's a little bit hard to, say, eliminate all of them. And the reason is we boiled it down to exactly what you're trying to do, right?

Nonprofit fundraisers or prospect researchers can come at it from different standpoints. But at the end of the day, you're trying to assess the top line, which is how much money does this person have and how philanthropic are they?

And then this middle line is how affinity do they have for our organization? Organization, here based on their giving, here based on everything else, like their job, their skills, their interests, what they post about on social media.

And then, of course, this is just their existing relationship to you. How much do they already give to your organization?

So it's up to you what makes sense to you and what makes it most usable. But, you know, something that we didn't show that I would encourage you considering to do is the following.

This is kind of a cool trick that I like to play. So I'm going to change what we see here to actually be the Hatch Giving Score and MyOrg Donations.

And I'm going to let that finish loading. I don't need to hang out there for too long. And I'm actually going to head over to your settings.

**ACTION ITEM: Adjust Hatch Giving Score settings (0% affluence, focus on propensity & donations affinity) -** [**WATCH**](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1484.9999)

And in your settings, in the MyOrganization settings, I'm going to change the Hatch. Are you still hearing me? Yeah.

Okay, I'm going to change the Hatch Giving Score to be, I scrolled all the way to the bottom. Here.

And I'm going to change this to be based on 0% affluence. Okay. Not that affluence isn't important, but let's just say we're only looking at philanthropy for a second.

And I'm going to take all the other scores. I'm just going to look at propensity. So their philanthropy, overall philanthropy, and then their donations affinity.

So how much affinity do they have for your organization based on where else they've given? Okay. And what this allows me, when I hit save, all these scores are going to, the Hatch Giving score is going to recompute immediately.

So it's not actually, it's not crunching crazy numbers. The Hatch Giving score is just saying how much of the other scores do we take into consideration.

So I turned all of them, included all of them except for propensity and donations affinity. Right. And now that I've turned those on and I've sorted by, I'm going to sort by highest Hatch score.

**ACTION ITEM: Review high-scoring donors in adjusted Hatch Giving Score list -** [**WATCH**](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1557.9999)

Any donor who has the highest combo of propensity and donations affinity, meaning they're really philanthropic. And they give to organizations that are like ours is going to pop to the top.

Perfect.

[@26:08](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1568.24) - **Sarah Bandujo (yehudi.today)**

So here we get Stanley Tate, really interesting.

[@26:13](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1573.57) - **Sim Borodach (Hatch)**

And then you have, oh, no, I'm actually realizing it could be useful to also have the propensity score here and the donations affinity score because you can hover, right, and see kind of what information is highlighted about the person.

But, I mean, this is awesome. I don't know why it looks a little funny. Okay, just figured it out.

The column headers were just a little bit off. This is awesome, right? You can see these people are quite philanthropic.

Someone who's got a 90 in their propensity score is like giving a billion dollars away. So these people are really philanthropic.

And you're getting a sense that they like your organization. And then you can see, right, you know this guy, Galbot.

say-dryboot out So have they're And mean, I that they Here's Mark, maybe you know. I'm sure you know Jimmy Saka.

He seems like your biggest donor. Yeah. Then you have all these other people who give to other Jewish causes.

I mean, Mark Stein's a super common name, so that might not be the right Mark Stein. Joseph Friedman's also a super common name.

Yeah. But David Tepper, maybe. Joanna Jacobson, we were looking at. Israel Monk. Israel Monk is less philanthropic, as you could see.

Still quite philanthropic. was $790,000, but he loves organizations with missions. Isn't that awesome? That is cool, actually. Israel has shown a significant support through substantial donations to organizations with missions similar to Yehudi, reflecting strong alignment with their cause.

So let's see what it is. Look at that. He gave to Rabbi Rosenberg and Rabbi Schechter. I think those must be some political.

Entities. No, they're probably Rosh Hashivas.

[@28:04](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1684.78) - **Sarah Bandujo (yehudi.today)**

That would be my guess. Let's see. What is this gift capacity rating? They're all through the Sorala Foundation.

[@28:15](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1695.08) - **Sim Borodach (Hatch)**

Oh, great question. So gift capacity rating is the total, it's an estimate, right? The total estimated that the person can possibly give to all organizations over the next five years.

Oh it's like, if you pay for $480,000.

[@28:33](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1713.58) - **Sarah Bandujo (yehudi.today)**

Like that's his total giving. For the over five years.

[@28:37](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1717.16) - **Sim Borodach (Hatch)**

Yeah. Exactly. That's a total amount he can give based on his, his, all of his markers, his wealth, his philanthropy.

It's like, this is the most that he could possibly give if he gave away his max. Got it. We're talking about your average person who, we're talking about your, your average philanthropic person, not somebody who's giving away all their money.

And then obviously seven. It's not. Yeah. Okay, perfect. Yeah. Yeah. Yeah. So so that's, you know, you can sort of play play around and you can use profile affinity to just look at someone here.

Right. This is Adam Aronson. Adam's Jewish religious background strongly with Yehudi tradition of introducing meaningful Judaism to students and millennials throughout Florida.

And then you can hit CY. Okay, so the fact that he's Jewish got surfaced as a significant fact. He lives in Florida.

That's important. how it ranks it?

[@29:39](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1779.68) - **Sarah Bandujo (yehudi.today)**

Like that he's Jewish, so he must care about the period? Because that's not at all the way Jews work.

Like, is that how it ranks it?

[@29:47](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1787.82) - **Sim Borodach (Hatch)**

Yeah. Well, for, so, so, yeah, for, I mean, for your profile affinity, it seems like that's how. It seems like that's how a lot of folks are going to be serviced.

Basically, I'll tell you this is really the challenge. The challenge is that the Profile Affinity score is capped at 100.

So when you're on, you're not going to see who exceeds 100. But we don't want to exclude the fact that they're Jewish.

But we also don't want that overrepresented. So it's a little bit of a challenge for you to extract using the Profile because you can't really see who's over 100.

But anyone who has a 100 or more above, because she might even have above, right, she has really above 100.

Yeah. She's got closer to 200.

[@30:51](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1851.44) - **Sarah Bandujo (yehudi.today)**

Yeah, like that one's more accurate. But especially if you're looking at...

[@30:54](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1854.7) - **Sim Borodach (Hatch)**

...Jewish. Yeah. there's a lot of Jews that don't like Jewish outreach.

[@30:59](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1859.42) - **Sarah Bandujo (yehudi.today)**

Like... Totally.

[@31:01](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1861.72) - **Sim Borodach (Hatch)**

Totally. Yeah. It's an existing challenge. We haven't exactly figured out how to change the model in a way that doesn't, like, exclude people but captures them to the right extent.

So if you come on, like, a more, you know, as you're using it and you come on, like, a more nuanced articulation of the problem, that could help us.

So please do, you know, think about it. It's like, know the nuance. I don't know how to fix it.

[@31:33](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1893.8) - **Sarah Bandujo (yehudi.today)**

Like, I don't know how you would figure this kind of stuff out in a conversation with a person. With, oh, meaning us talking?

No, like, I would have to call, like, I understand if people like Kira or not because I have a phone call with them and I understand where they stand on it.

Like, it's kind of hard to say.

[@31:53](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1913.54) - **Sim Borodach (Hatch)**

Well, but here, I mean, yeah, but when you look at her facts, it's pretty awesome. And, um... Yeah.

[@32:00](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1920.54) - **Sarah Bandujo (yehudi.today)**

Yeah, like, oh, she worked for Oron Campus. That gives everything I need to know.

[@32:07](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1927.2) - **Sim Borodach (Hatch)**

And that got a score of a 35, which is, like, the second to highest.

[@32:13](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1933.42) - **Sarah Bandujo (yehudi.today)**

And is that, that's, that's bananas.

[@32:15](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1935.94) - **Sim Borodach (Hatch)**

It got that from her, from her email. Yeah. We didn't even get that here, because I think it might have matched to, it's interesting, you gave us that email.

Okay, so the AI figured that out from her email, but, but we, I think we clearly matched to it, I'm assuming this is a different person, because she probably doesn't work at Lutheran Church ELCA.

Yeah. Although, maybe she does. No, maybe I have an idea, maybe she does. Right, so this could possibly be an amazing person to elevate.

But, I she has an unbelievable amount of public donations associated with her. Maybe. Maybe. He may be not. It's Palm Beach, Florida.

That's pretty good. I mean, all we'd need to know is if her husband's name is Austin. You have these other, but this person's in Boston, Massachusetts, or in Maine, so less likely her.

So this is what you'll figure out.

[@33:16](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=1996.52) - **Sarah Bandujo (yehudi.today)**

A lot of snowbirds, that's very common. People live in the north, but they also have a house in Florida.

Oh, very good point.

[@33:24](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2004.44) - **Sim Borodach (Hatch)**

Yeah. So this is where you can, you know, you can decide, like, elevate, not elevate, you know, you burn a credit, even if the elevation doesn't turn out to be good.

It's, you know, since we've done research, it's still burning. Yeah, sorry. So you'll, you'll figure it out. Okay.

[@33:48](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2028.08) - **Sarah Bandujo (yehudi.today)**

Perfect. I think I got it.

[@33:52](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2032.2) - **Sim Borodach (Hatch)**

Okay. I mean, you know, I'm really excited to see what you can do, Sarah. I'd love for just in the next couple minutes for us to, you know, for you.

To be able to state what active use of Hatch looks like, maybe over the next two months, so that we can track, you know, what you're able to accomplish, and then be able to link up in another, you know, six to eight weeks and kind of measure how you're doing.

[@34:17](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2057.3) - **Sarah Bandujo (yehudi.today)**

Yeah, so, you know, it's mainly I'm using it as a research tool to look into our donors and see if I can get more money out of them.

That's really my goal, but this is, I'm really using it as a research tool just to identify who I need to be going after.

And then seeing if we can, also think we want to engage them, we want to invite them to events, like we're playing the long game on these donors, but I'm just using this to identify them.

[@34:43](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2083.2) - **Sim Borodach (Hatch)**

In terms of specifics, like quick searches, elevated profiles, you know, what do you, what do you see yourself doing?

I mean, I could, I'll just pull this up again, so we're looking at the same thing, right? You have these meters here in the top right.

in right. in the You You That highlight your usage. So in terms of onboarding, we've done a good job.

You've got 87% of your bulk enrichment credits are now being used. So then let's talk just talking about quick searches or elevated profiles.

Those are really easy ways for us to measure your engagement with the platform. So how do you see yourself using either of those features?

[@35:22](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2122.4) - **Sarah Bandujo (yehudi.today)**

The elevated profiles, I assume I'll use them. I don't see why not. It's only valuable to me if this is real information.

Because I can also Google someone and guess who they are. it's not legit, it's of no value to me.

So elevated profiles are something I'm definitely going to use. QuickSearch, I don't know.

[@35:44](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2144.4) - **Sim Borodach (Hatch)**

Okay, good. I certainly don't want you to commit to something that does not make sense to you. So good.

So elevated profiles lands. Perfect. Sarah A, is there anything that you want to add? I feel like we're approaching the close of this conversation.

Hey, No, I think it's great.

[@36:05](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2165.48) - **Sarah Adams**

I learned a couple of things as well. Yeah. I'm actually really excited to see how it works out for you, Sarah, using the hidden gem magic and whatnot.

**ACTION ITEM: Use blue app messenger for direct questions to Hatch team -** [**WATCH**](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2181.9999)

So, yeah. We'll see. Have fun with it. Thank you. Okay. So. Oh, right.

[@36:24](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2184.38) - **Sim Borodach (Hatch)**

As questions come up, the, you know, the, we sort of have this email exchange, which is, which is totally fine.

But the blue app messenger is, it's more direct. It's like, it's like DMing, you know, personal messaging, WhatsApp and whatever, rather than getting stuck in like an email pile.

Yeah. So freely use that. Whatever questions come up, I want to hear them. I want you to be unblocked so that you move kind of freely.

Okay. I do work on, I'm, I handle this chat, you know, chatbot and I'm on the West Coast. So.

I often don't get messages till like 11 a.m. your time. And I'm just, you know, that sort of is what it is for the moment until we have someone on the East Coast that's also handling these messages.

But once I'm in, I, you know, this is my, really my job. It's like people coming to my desk and asking questions.

So response time should be real. Perfect. And yeah, otherwise, thank you so much for, you know, for, again, being so awesome in these first couple of meetings.

And we'll, we'll follow up with you in, you know, at least four weeks from now, probably more like six to eight weeks.

So the thing that to us would be, you know, succeeding from your standpoint is submitting those profiles for Elevation.

If we see that, Sarah and I will feel really good in a month from now being like, hey, Sarah B is using, is engaged and.

Okay. Yeah. Thanks for all your help.

[@37:57](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2277.28) - **Sarah Bandujo (yehudi.today)**

I appreciate it.

[@37:58](https://fathom.video/share/sXsH6yJGoPmZ9H9n-AZw3EKCZtM4NDyH?timestamp=2278.32) - **Sarah Adams**

Awesome. Thanks, Sarah. Thanks to see you.