

Don't Excel, Pivot!: Data-Driven Wealth Analysis from Annual Fund to Major Gift

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Overview

- Background
- Assessment
- Tools we built
- Outcome

Background



"This really is an innovative approach, but I'm afraid we can't consider it. It's never been done before."

Key Issues

- Size of portfolios
- Understanding of wealth
- Time management
- Change in leadership
- Organizing principles

Size of Portfolios



Understanding of Wealth



Understanding of Wealth

Meghan,

I just confirmed a visit next month with John Harvard in D.C. He has a \$25K rating, but it is only preliminary and it's back from 2006. He has a government job and I don't think there is family money, so perhaps that's accurate, but I am wondering if you can double-check. I'm planning to solicit him for a five year pledge during our meeting, so your rating could help me determine the appropriate ask amount.

Thanks!

Understanding of Wealth

Meghan,

I am wondering if someone from your team can quickly investigate Ms. Mary Harvard. She makes small annual gifts but has never been rated. It appears that she might have been a social worker, so perhaps there isn't capacity there, but based on her annual gifts, I thought it was worth checking. She's in her 50th reunion this year, so I'd love your insight in the next month or so in order to determine the best ask amount.

Many thanks!

Time Management



Change in Leadership



Organizing Principles



Diagnosing The Problem



1. Getting to their top 200 prospect list.
2. Determining ask amounts.

Working With Data

Top Prospect List Sort Criteria		
Gift of Security		
Gift on behalf of giving (family foundation)		
PE, VC, HF Industry		
Rating of \$500K+		
BBA Assets of \$1M+		
6 Year FAS Giving of \$50K+		
Largest gift ever of \$50K+		
Prestigious Job Title		

Working With Data

RES Flag for Top Prospect	Strength Score	\$500K+ Rating	Securiti	On Behalf of Giving	6 Year FAS Giving of \$50K+	Largest gift ever of \$50K+	BBA Assets of \$1M+	PE, VC, HF Industr	Prestigio us Job Title Fla
Rating of \$500K+; Gift of Securities; Employment HF, PE or VC; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title	9	2	2		1	1	1	1	1
Rating of \$500K+; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title; On Behalf Of Giving	7	2		1	1	1	1		1
Rating of \$500K+; Gift of Securities; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; Prestigious Job Title; On Behalf Of Giving	8	2	2	1	1	1			1
Rating of \$500K+; Gift of Securities; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title	8	2	2		1	1	1		1
Rating of \$500K+; Gift of Securities; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title	8	2	2		1	1	1		1
Rating of \$500K+; Employment HF, PE or VC; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title	7	2			1	1	1	1	1
Rating of \$500K+; Gift of Securities; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; BBA Assets of \$1M+; Prestigious Job Title	8	2	2		1	1	1		1
Rating of \$500K+; Gift of Securities; Employment HF, PE or VC; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; Prestigious Job Title	8	2	2		1	1		1	1
Rating of \$500K+; Gift of Securities; Employment HF, PE or VC; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; Prestigious Job Title	8	2	2		1	1		1	1

Solutions

Current Top Prospect	Research Strength Score	Research Suggested Top Prospect Note	Prospect List to Add to Advance (Y or N)	Top Prospect Note to Add to Advan	High Income Earner Research Flag
Y	+	Rating of \$500K+; Gift of Securities; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; Prestigious Job Title; On Behalf Of Giving			
Y		Rating of \$500K+; Employment HF, PE or VC; BBA Assets of \$1M+; Prestigious Job Title; On Behalf Of Giving			
Y		Rating of \$500K+; Gift of Securities; Employment HF, PE or VC; 6 Year FAS Giving of \$50K+; Largest gift ever of \$50K+; Prestigious Job Title			

Relief



Data Driven Asks

The screenshot shows an Excel spreadsheet with a search dialog box open. The spreadsheet has columns A, B, and C. Column A contains company names, and column B contains values. The search dialog box is titled "Search" and has a search bar with a magnifying glass icon. Below the search bar is a list of items with checkboxes: (All), 1981, 1982, 1983, 1984, and 1985. The "1985" checkbox is checked. Below the list is a checkbox labeled "Select Multiple Items" which is also checked. At the bottom of the dialog box are "OK" and "Cancel" buttons.

COL Class Year	(All)	C
Row Labels		
20th Century Fox		
\$1,000		
2-1-8 Moto-Akasaka		
\$1,500		
24eight, LLC		
\$1,000		
40/86 Advisors		
\$1,000		
4D Global Energy Advisors		
\$2,000		1
52 Eighty LLC		1
\$100,000		1
A B D Securities		1
\$5,000		1
Ab Initio Software Corporation		2

Data Driven Asks

\$7,500	1
\$10,000	1
\$25,000	1
\$500,000	1
[Redacted]	1
\$25,000	1
[Redacted]	1
\$256,000	1
[Redacted]	1
\$600,000	1
[Redacted]	1
\$370,580	1
[Redacted]	1
\$1,000	1
(blank)	1
\$25,000	1
Good Samaritan Free Clinic	1
[Redacted]	1
\$1,000	1
Goodwin Procter LLP	1
Attorney	1
\$2,750	1
Google, Inc.	5
[Redacted]	1
\$25,000	1
[Redacted]	1
\$25,000	1
[Redacted]	1
\$50,000	1
(blank)	2
\$1,000	1

Pivot Table Lrg ... + : <

Pivot Tables

Questions and Audience Participation