

“Where Do I Start??”

How To Incorporate Data Analysis Into Your Prospect Development Shop

By Tory Pedonti, Associate Director of Prospect Management at Tufts University



All About That Data

- Acquisition
- Analysis
- Output

Data Acquisition

- * Why get it
- * What to look for
- * Where to get it

Why Get Data

- * What questions are you trying to answer?
- * What problems are you trying to solve?

What Data to Look For

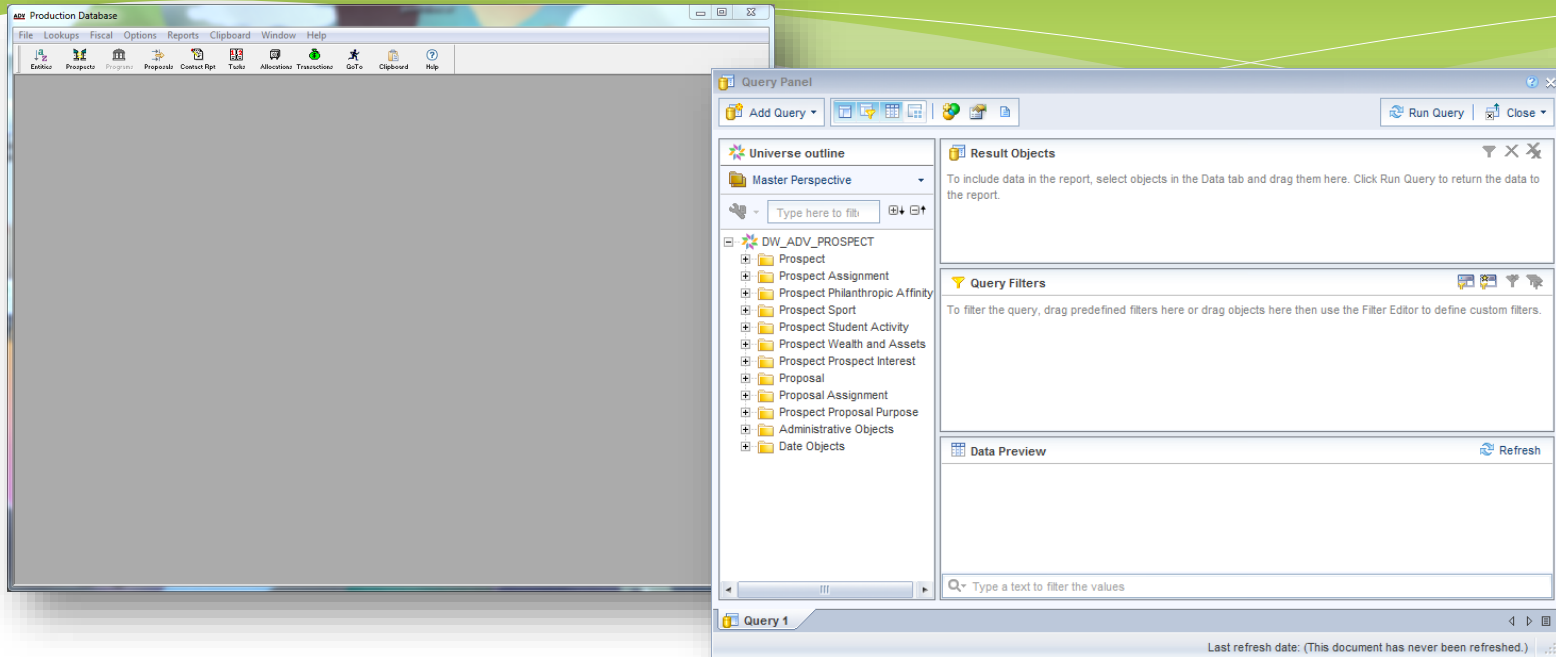
Examples of what we use:

- * Affinity Score
- * Wealth Screenings
- * Giving Records
- * Data Models

Where To Get Data

- * Start with what you know
- * Making the case for more data access
- * Other options

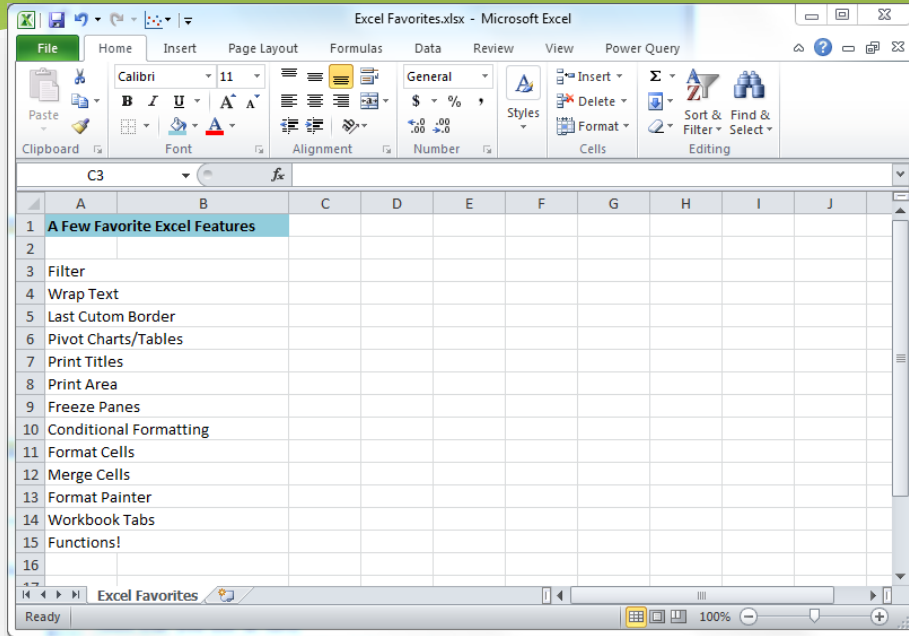
Where To Get Data



Data Analysis

- * Tools
- * Techniques
- * Testing and Validation

Analysis Tools



Analysis Tools

The left screenshot shows an Excel spreadsheet with the following content:

	A	B	C	D	E	F	G
1	A Few Favorite Excel Features						
2							
3	Filter						
4	Wrap Text						
5	Last Custom Border						
6	Pivot Charts/Tables						
7	Print Titles						
8	Print Area						
9	Freeze Panes						
10	Conditional Formatting						
11	Format Cells						
12	Merge Cells						
13	Format Painter						
14	Workbook Tabs						
15	Functions!						
16							

The right screenshot shows an Excel spreadsheet with the following table:

	A	B	C	D	E	F	G	H	I	J	K
1	Function	Output	Reference Cells								
2	=LEN(E2)	3	ABC								
3	=IF(E3<=500, TRUE, FALSE)	TRUE		498							
4	="ABC"&E4	ABC12345	12345								
5	=E4=E5	TRUE	12345								
6	=SUM(E4,E5)	24690									
7	=TRIM(E7)	ABC12345	ABC12345								
8	=CONCATENATE(F8, "", E8)	Tory Pedonti			Tory						
9	=MID(D9, 5, 6)	Spring	123 Spring St								
10	=COUNTBLANK(D2:D10)	2									
11	=COUNTIF(D2:D10, "Tory")	0									
12											
13	VLOOKUP										
14	HLOOKUP										
15	INDEX										
16	MATCH										
17											
18											
19											
20											

Analysis Tools

Google removing blank spaces in excel

All Videos Images Shopping News More Settings Tools

About 107,000 results (0.63 seconds)

Copy the formula to the remaining cells in the helper column. Then copy the data to the data column as you did before using CTRL-C and Paste Options. You can also **remove spaces** using the Find/Replace feature in **Excel**. Click CTRL+F to open the Find dialog box, then click the **Replace** tab. May 28, 2015

	AVERAGE				
1	Jan	Salary	Jan 2012		
2	Feb	Salary	Feb 2012		
3	Mar	Salary	Mar 2012		
4	Apr	Salary	Apr 2012		

www.extendoffice.com

[Remove Extra Spaces from Excel Data | Fred Pryor Seminars Blog](http://www.pryor.com/blog/remove-extra-spaces-from-excel-data/)

About this result • Feedback

People also ask

- How do you remove spaces between numbers in Excel?
- How do you remove blank rows in Excel?
- How do I delete rows in Excel?
- How do I remove a space before text in Excel?

Feedback

[Excel formula: Remove leading and trailing spaces from text | Exceljet](#)

Analysis Techniques

Building a portfolio using a weighted scoring system

Scoring System

	A	B	C	D	E
1	Portfolio Development Scoring Criteria				
2					
3	Most Recent Rating	Score		Affinity	Score
4	\$5M+	4		A,B,C	3
5	\$1M-\$4.99M	3		D,E,F	2
6	\$500K-\$999K	2		G,H,I	1
7	\$100K-\$499K	1		J	0
8	<\$100K	0			
9					
10	School Annual Giving (Additive)*	Score		Optional	YES/NO (1/0)
11	FY17 \$1000+	2		CTS Score (Prospects)	1 or 0
12	FY17 \$500+	1		Consecutive Donor Score	1 or 0
13	FY16 \$1000+	2		20+ Years of Giving Score	1 or 0
14	FY16 \$500+	1		Reunion Year	1 or 0
15	FY15 \$1000+	1			
16					
17	Tufts Total Giving (Annual/Capital)*	Score			
18	\$500,000+	5			
19	\$100,000+	4			
20	\$50,000+	3			
21	\$10,000+	2			
22	\$1000+	1			
23					
24	*Giving range ex. \$10,000+ =\$10,000-\$49,999				

Portfolio Development

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Portfolio Development													
2	Northeast (MA, ME, NH, VT, RI, CT, NY, NJ)													
3	Prospects Only													
4														
5	State	id_numbr	pref_name_sort	Rating Score	Total Giving Score	School Giving Score	Affinity Score	CTS Score	20+ Years of Giving Score	Consecutive Giving Score	Total Score	institutional_suffi	Affin	prospect_rating_desc
6	New York	123456	SHORT, PAMELA	3	4	3	3	0	1	1	15	E78	B	05 \$1M - 4.9M
7	Massachusetts	234556	PEDONTI, TORY	4	5	3	2	1	1	0	16	J62, A87P, A88P	D	04 \$5M - 9.9M
8	New Jersey	123457	STONE, CAROL	1	2	5	3	0	1	1	13	J73, EG75, E12P	C	07 \$100k - 499.9k
9	New Jersey	54321	SMITH, JOHN	1	2	3	3	0	0	1	10	D58, A12P, V19P	C	07 \$100k - 499.9k
10	Massachusetts	3456	SMITH, JONATHAN	0	4	3	3	0	0	1	11	DG58, DG87, DG93	A	
11	Massachusetts	97850	SMITH, JOHN E.	2	2	2	2	0	0	1	9	E94	D	06 \$500k - 999.9k
12	Massachusetts	54232	SHORT, CAROLINE	1	1	1	0	0	0	0	3		J	
13														

Analysis Tips

The image shows a screenshot of a software application window. The main area is a data table with rows numbered 779 through 786. The table is currently empty. Below the table is a ribbon menu with several tabs: 'Data File', 'Table - Constituency', 'Table-Assigned, Unassigned', 'Table-record create date', 'Chart - By State', and 'Chart-by C'. The 'Chart-by C' tab is currently selected. The status bar at the bottom left of the window displays the text 'Ready'.

779				
780				
781				
782				
783				
784				
785				
786				

Analysis Tips

	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO
1	Business St	Most Recent Vis	Most Recent V	Visit by FY	Visit/ No Recorded Visit	# of Visit Co	# of Visit to Tufts	Most Recent Q	Years Rec	Years in Rec	Recognition Lifetin	Affinity Year End Co
2	NY			No Recorded Visit	No Recorded Visit	0	0		1	< 5	\$1,000	G
3	NY			No Recorded Visit	No Recorded Visit	0	0			No Giving		No Affinity Score
4				No Recorded Visit	No Recorded Visit					No Giving		No Affinity Score
5				No Recorded Visit	No Recorded Visit					No Giving		No Affinity Score
6	NJ	4/11/2016		FY16	Visit	0	1		10	5-10	\$150,475	E

Ready

Data File Table - Constituency Table-Assigned, Unassigned Table-record create date Chart - By State Chart-by Q

Ready 100%

Data Output

- * Know Your Audience
 - * Find The Story
 - * Make It Pretty

Know Your Audience

Who are you sharing your work with?

Know Your Audience

	A	B	C	D	E	F	G	H	I	J	K	L
	id_numbr	pref_mail_name	pref_name_sort	gender_code	birth_dt	pref_city	pref_state	no_sollicit_flag	no_af_sollicit_flag	no_telefund_solicit_flag	wealth_screening_rating_desc	wealth_screening_rating_date
1	102011	Mr. John Smith	SMITH, JOHN	M	19570607	Carlsbad	CA	N	N	N	15 Rated Low /	5/28/2014
3	349201	Ms. Carol Stone	STONE, CAROL	F	00000000	San Diego	CA	N	N	N	15 Rated Low /	5/29/2014
4	445721	Ms. Pam Short	SHORT, PAMELA	F	19440501	San Diego	CA	N	N	N	15 Rated Low /	5/29/2014

Know Your Audience

	A	B	C	D	E	F	G	H	I	J	K	L
	id_num	er	pref_mai	gender						no_tele	wealth_scre	wealth_scre
1	102011	Mr. John S								no_of_s	wealth_scre	wealth_scre
2	349201	Ms. Carol								fund_s	rating_	ning_rati
3	445721	Ms. Pam								elic	rating_	ng_date
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												

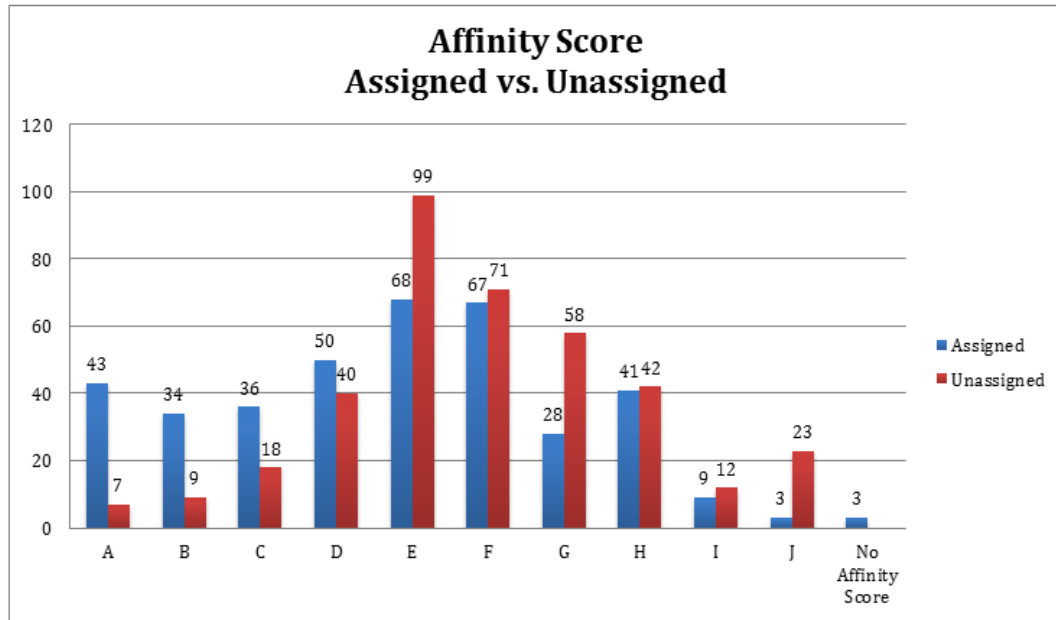
Key:	Column:
Active Prospect	B
Next Year Reunion (3 and 8)	C
15+ Years of Giving	D
High Affinity A-E	M
LYBUNTs	G

ID	Sort Name	Institution al Suffix	Number of Years of Giving	Most Recent Contact Report Date	Most Recent Contact Report Typ	School Last Trans. Recog. Date
456723	SMITH, JOHN	A74	32			3/21/2017
345693	STONE, CAROL	J62	12			2/26/2016
983201	SHORT, PAMELA	E83	16	4/7/2012	Visit w/ Donor	2/6/2017

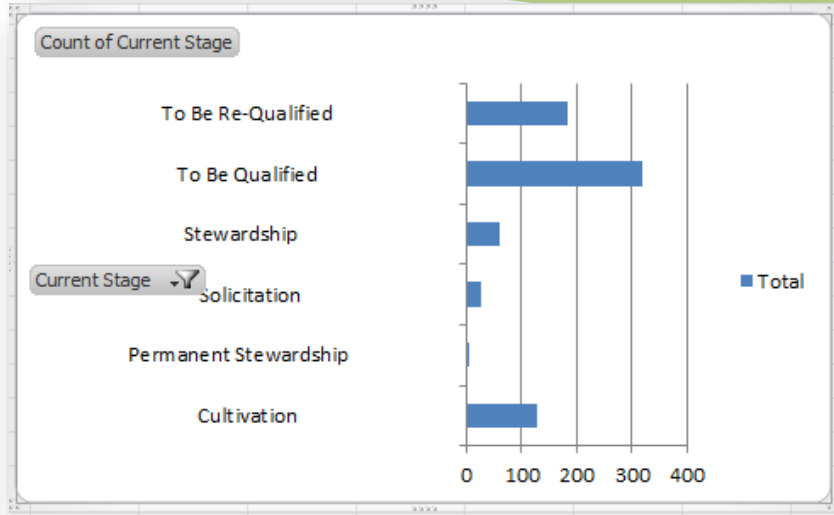
Find The Story

- * What is the story of your data?
- * How can the story produce action items?

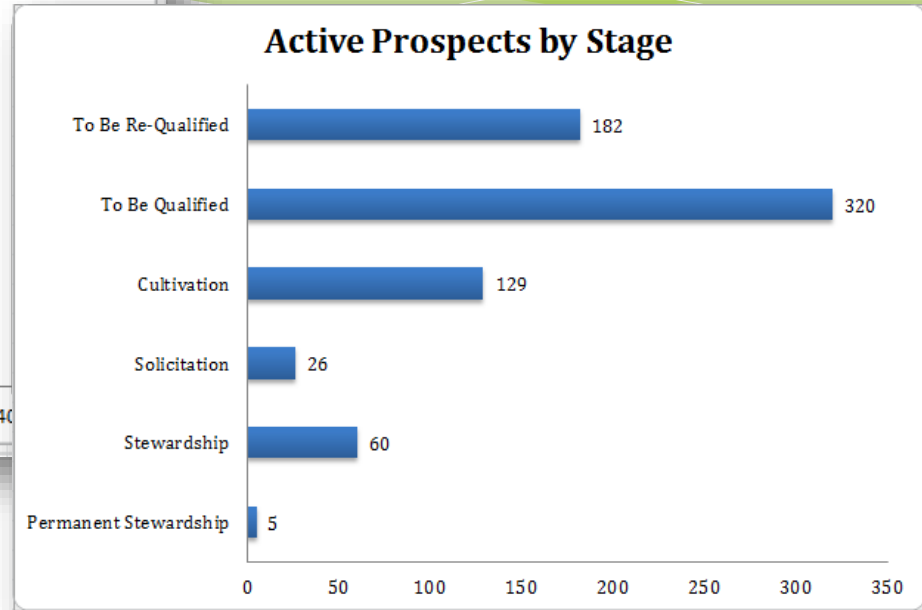
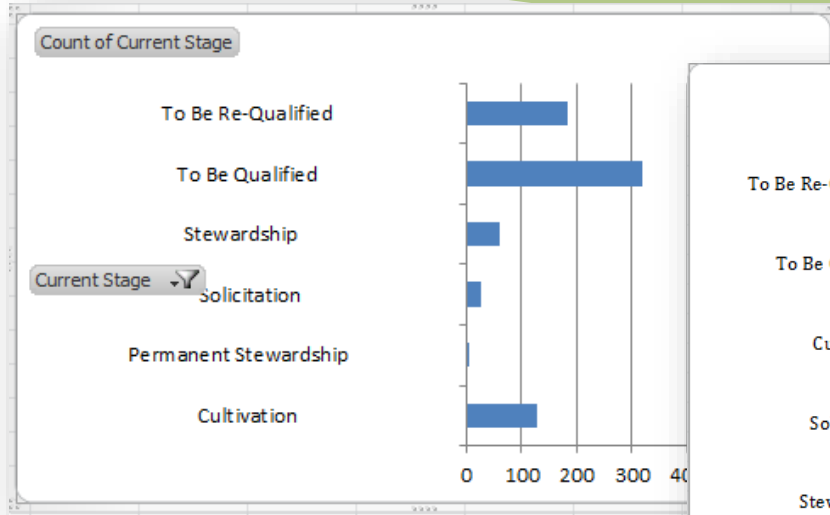
Find The Story



Make It Pretty



Make It Pretty



Conclusion

To start, just:

- * Find the data
- * Analyze it
- * Share it

Questions?