ALTRATA

AFP Partner Webinar

Navigating the Six Degrees: From Opportunity to Donation

Presented by

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Speakers

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Agenda

- Altrata
- Relationship Capital
- Relationship Mapping
- Use Cases
- Best Practices
- Relationship Intelligence

Altrata

We've got you covered!

Connecting key leaders at your organization

To prospective donors

- Transformational giving

$30 million + net worth

- Interests, passions and hobbies
- Confirmed inclination to give
- Confirmed liquidity

Hand-curated dossiers

Confirmed data by at least two data sources

Due diligence

$5 million + net worth

- Real time analytics
- Modeling
- AI

Wealth screening

Segmentation score - P2G

Gift capacity score - EGC

$0 - $4.99 million net worth

Altrata

BoardEx

- Helps you leverage their known and unknown connections
- Covers more than 2.1M organizations and 1.6M individuals who lead them, including board members, C-suite executives and senior leaders

BOARDROOM INSIDERS

- Insights into background, business priorities, hobbies and more
- 30,000 plus executive profiles
- In-depth analysis of executive priorities, interests and more across groups of executives and accounts

RELSCI

- A global relationship mapping data provider serving financial, professional services and not-for-profit organizations
- Over 10.5 million profiles of global business leaders and senior management

WEALTHENGINE

- Provides data driven intel on the US's wealthiest individuals
- Over 250M prescored profiles
- Provides proprietary modeling and analytics capabilities
- Over 2,000 clients globally

WEALTH-X

- Intelligent solutions to help you uncover, understand, and engage with the world's wealthiest individuals
- Insights into where, when, and how to effectively engage this highly sought-after population

Relationship Capital

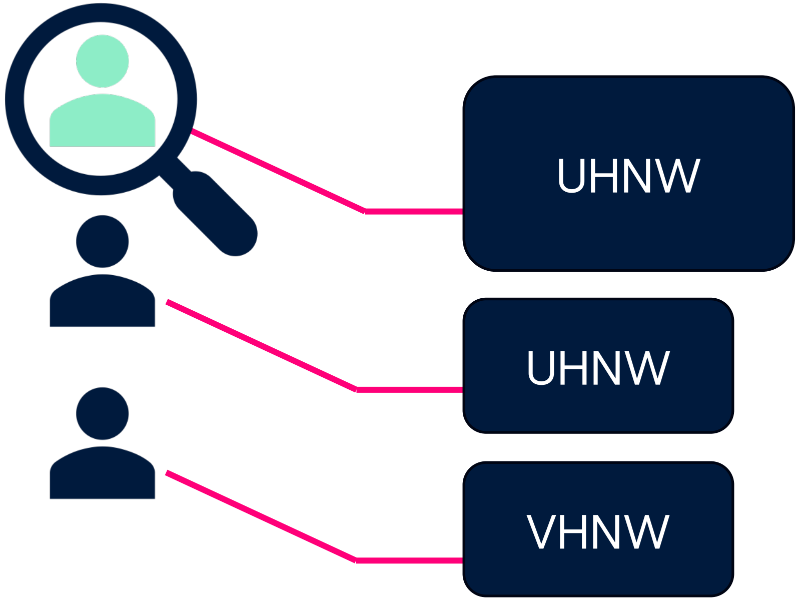
Relationship Capital

- The professional and personal connections and relationships held by your employees, board members, and organization.
- One of the most valuable assets for an organization, but often the most under utilized both tactically and strategically.
- Addresses questions such as:
  - How many relationships do you have access to? To whom?
  - Who has the strongest relationship to a prospect?
  - Who should we invite to this event?
  - What industries or regions do we have the most relationships in?
  - Who is our super connector and are we over or under leveraging them?

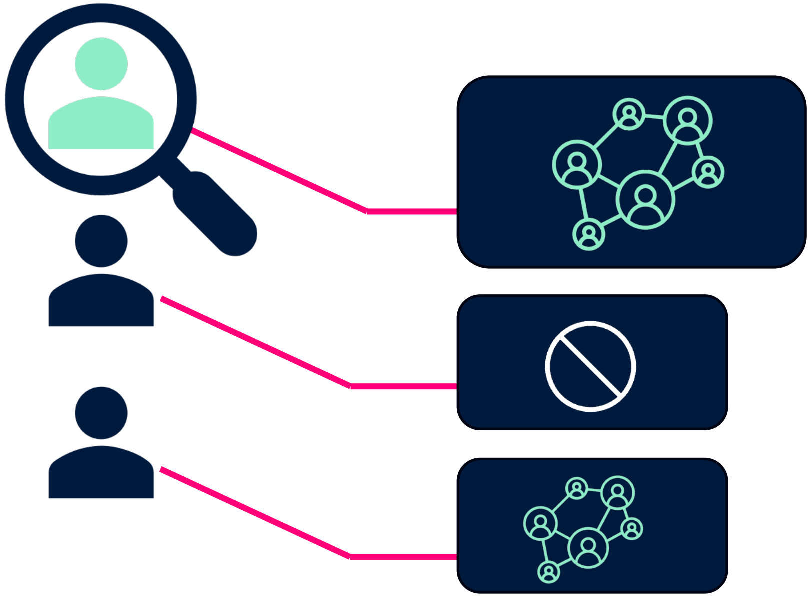
Value of relationships

- Average total relationships of a nonprofit from their current board members: **6,794**
- Average under utilized relationships from your top 20 Donors: **7,520**

Wealth Prioritization



Relationship Prioritization



Why it matters: Giving by the ultra wealthy

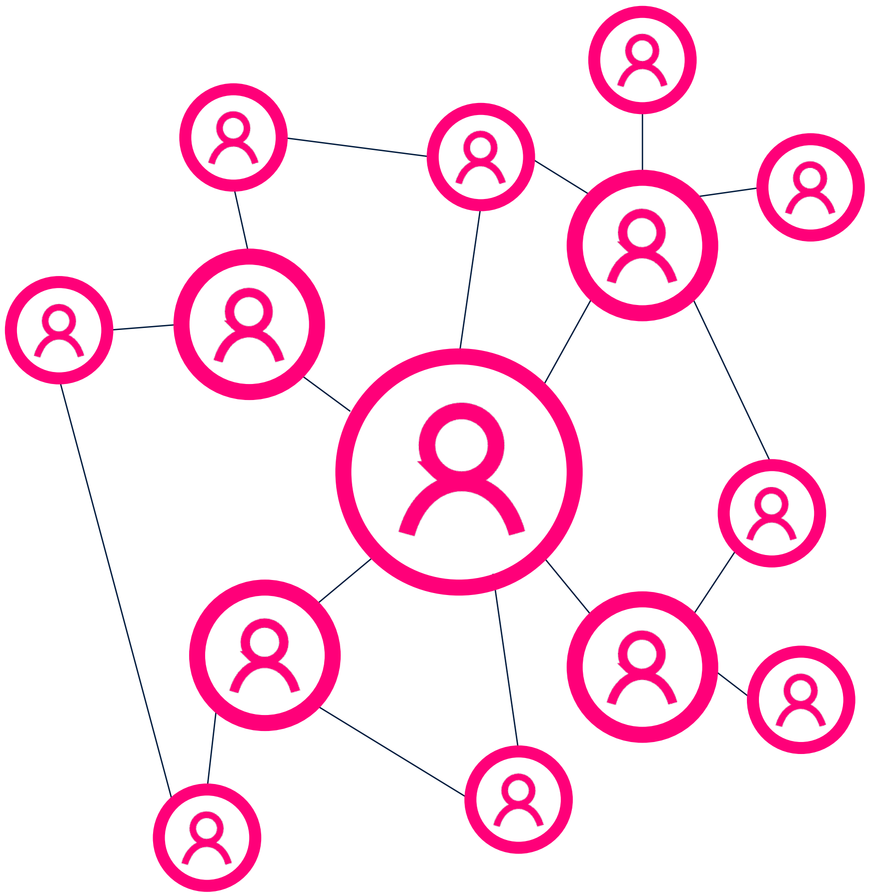
- The ultra wealthy gave a total of **$190bn** to philanthropic causes in 2022, almost 25% more than in 2018.
- The ultra wealthy in North America were the source of almost half of all global UHNW donations, giving a total sum of **$91bn.**
- Almost **one in five** of all UHNW individuals has a private foundation.

Source: Wealth-X, an Altrata company (via our *Ultra High Net Worth Philanthropy 2024* report)

Relationship Mapping

Relationship Mapping

- The act of mapping relationships is a vital step to prioritize who to target and uncover untapped prospects.
- Without a process or strategy in place it becomes exceedingly difficult if not impossible to efficiently leverage your relationship capital.
- CRM Systems can help accomplish this, but usually only partially.
  - Prospects, Donors, Contacts, and more all can have multiple owners & relationship holders both professionally and personally.
- Without relationship mapping remains an “art”, less so a science or process.



Relationship Mapping: How To

- **Identify** and determine your organization’s source(s) of relationships and from who
- **Define** what constitutes a relationship
- **Rate**, not all relationships are equal in strength
- **Frequency**, how often should you update your relationships
- **Process**, what platform and system(s) are you going to use to manage your relationships
- **Use Cases**, determine which workflows and tasks should involve relationship capital
- **Actions**, what are you aiming to influence or impact

Relationship mapping → in action

Case Study: Large Higher Ed Institution

- Public university in the Midwest.

Challenge → Strategy

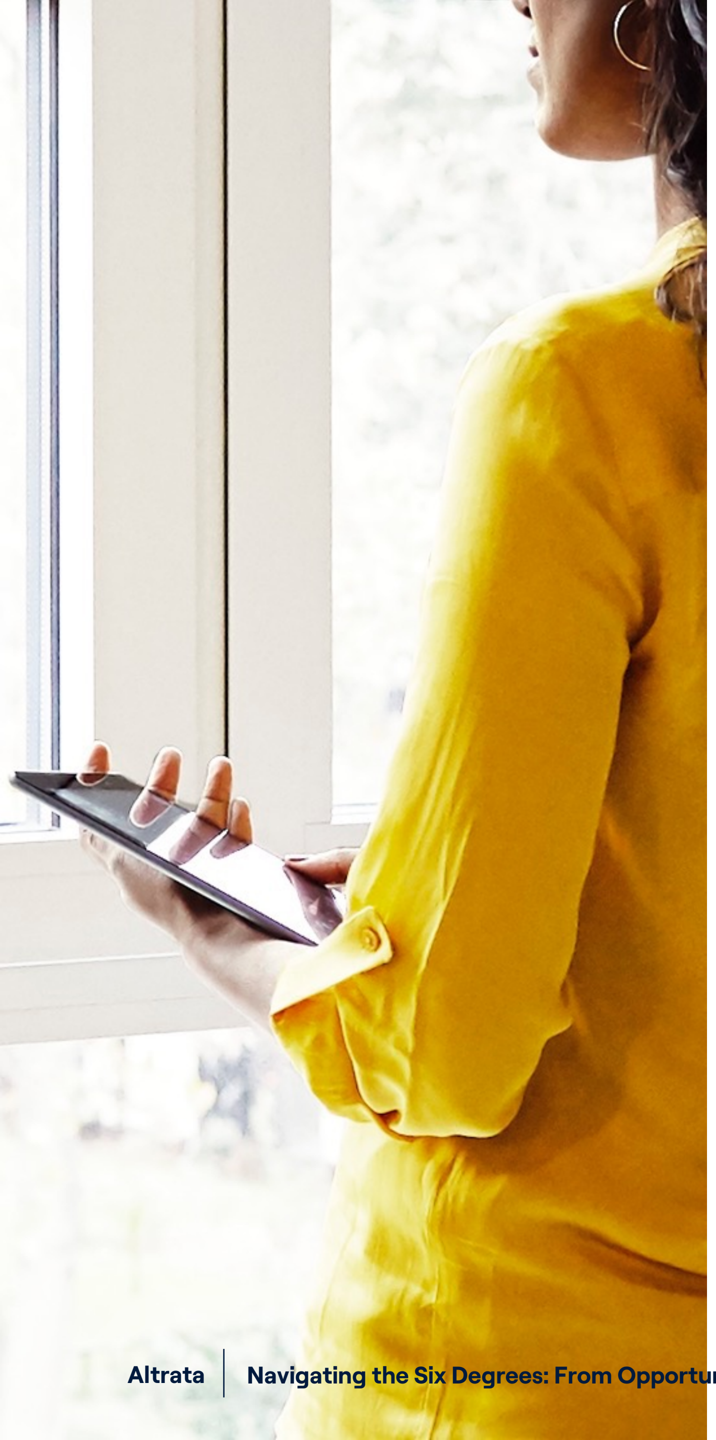
- Strategic initiative from the President to focus on fundraising for Veterans.
- Interested in gathering a list of anyone in Montana that has donated to a Veterans related cause.
- Used **Power Search** to identify 300 quality individuals that donated to Veterans and had a strong connection to the key leaders at the University.
- Used **Path Finder** to connect the key leaders at the University to the individuals on the list and then these relationships were assigned to the Gift Officer so that they could work with the key leaders at the University to provide them with a warm introduction to the individual that had an affinity to donate to veterans.

Case Study: Large Healthcare Organization

- Large healthcare organization in the East Coast.

Challenge → Strategy

- Top priority for the organization was to track potential donors at the $10 million giving.
- Organization utilized New Alerts tool to track key potential donors.
- This was a key component to their Daily workflow as their researcher spent an hour each morning reviewing the news alerts and then assigning the article to the appropriate gift officer.
- This allowed the gift officers to engage with the potential donor when specific life changing events occurred like the selling of shares of a company.
- The organization prioritized engaging with donors at the right time and with the right message to make the most out of every interaction.



Case Study: Nonprofit Organization

- Large national nonprofit organization.

Challenge → Strategy

- Board of Directors is appointed directly by POTUS.
- Many dead-end networking points because their Board is not particularly driven to go out of their way.
- Feels there is a ton of opportunity to identify connections via their other constituents.
- Opportunity to leverage different TYPES of cause, campaign and/or events, to the right audiences.
- Relational mapping can not only **include**.... but to also **exclude**, and filter people out so you can focus on those that will act on your behalf as your **strongest** "warm" introductions.

Case Study: Nonprofit Organization

- Museum in Washington, DC.

Challenge → Strategy

- The museum previously identified potential donors by observing visitors' appearances, like their shoes and watches, which had limited success.
- The museum implemented automated Wealth Screening for all ticket buyers to identify high-net-worth individuals.
- Screened individuals were matched against a Lookalike Model of the museum's top donors to find similar profiles.
- High-potential donors were cross-referenced with the museum's database to find connections to Board Members or Founders.
- Identified potential donors were offered exclusive behind-the-scenes tours to build relationships and encourage donations.
- A data-driven approach, along with personalized engagement, can significantly boost fundraising success.

Best Practices

Best practices

- Tailor your approach to your organization's size by focusing on specific use cases before scaling up.
- Integrate relationship management platforms into specific workflows, making them an essential part of your processes.
- To maximize ROI and efficiency with relationship management platforms, start by pinpointing which relationships to manage.

Relationship Intelligence

Relationship & Contact Intelligence

- **Relationship Intelligence**
  - The insights gained by mapping your relationships
- **Contact Intelligence**
  - Insights and data around you and your organization's interactions with contacts, whether that is frequency of interaction, last date of interaction, number of meetings, etc.

Challenges with contact & relationship intelligence

- Difficulty accessing key decision makers
- Limited visibility into direct and indirect connections
  - How well you're connected with them (relationship strengths)
- Lacking up-to-date contact intelligence on clients and prospects
  - Lack of interaction history

RelSci, an Altrata solution

The RelSci platform provides real-time, people-driven intelligence on millions of influential decision makers and organizations across the public, private, financial and nonprofit sectors.

People/Organization profiles

Access intelligence on millions of people and organizations, including public & private companies.

Generate Prospect Lists

Generate prospect lists of companies and people based on their work experience, education, nonprofit involvement, deal history, memberships, etc.

Radar

Grow your business by leveraging company-wide Business Intelligence and the power of RelSci relationships.

360°Alerts

Receive daily updates on people and companies you know, including news items plus non-news items like stock sales or new investments.

CRM Integrations

RelSci offers off-the-shelf integration with Salesforce CRM. RelSci data and API are also used to power proprietary enterprise applications.

What is Radar?

- Radar is a contact intelligence tool to help grow your business by combining your company-wide business intelligence with the power of RelSci relationships.
- It is a cloud solution that scans your **Exchange interactions** (email, calendar, and contacts) to automatically identify and score relationships to help you make informed decisions.

How does Radar work?

- It continuously scans Exchange metadata (To/CC fields, calendar invites, contacts, etc.).
- It does **NOT** scan the email content.
- It automatically identifies & syncs new relationships and determines estimated relationship strength predictions for contacts that are profiled within RelSci's extensive database.
- Radar has additional front-end enhancements to help users get the most out of RelSci and their relationships.

RELSCI RADAR

ALTRATA

How can Radar help you?

Update and expand your relationship graph automatically

- Radar requires less of a lift from users to manually upload contact files. Radar automatically adds new relationships and estimated relationship strength predictions based on the user's Exchange interactions.
  - This allows for more key access points to targets
  - It adds more contacts to follow in our 360 News Alerts

Gain a deeper understanding of your organization's network and interactions

- Radar's interaction intelligence builds on RelSci's extensive database of profiles, giving users more insight into who their colleagues know, how well, and a timeline of their interactions.

Be better prepared for meetings – in less time

- Radar sends customized email briefs every day to help users better prepare for their upcoming meetings by offering insight into interaction history with the meeting attendees. The briefs are fully customizable, allowing users to match them to their schedules and priorities.

Questions?

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Thank You

Interested in learning more about Altrata? *Click here*

Download the *Ultra High Net Worth Philanthropy 2024 report*

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