WINDFALL + DonorDock

WEBINAR SERIES:

Segment & Prioritize Your Database like a Pro

Speaker Introductions



Kathleen Atkins
VP of Marketing
kathleen@windfall.com



Matt Kitzman
Account Executive
mkitzman@windfall.com

For more information visit www.windfall.com

WINDFALL

Windfall Overview

Based in San Francisco, Windfall Data, Inc. is on a mission to help data-driven nonprofit organizations more effectively engage with constituents & donors through the accurate data and best-in-class propensity modeling.

20M+
Affluent households

100M+
US households

1,500+
Customers

$100T+
Wealth in database

Today's Agenda

1. Quick Windfall Overview
2. Why Data-Driven Segmentation is Important
3. Use Cases & Data for Key Segments
4. Q&A

Windfall Overview


Our vision is to change the way that organizations understand and engage donors.

Windfall Empowers Nonprofits with Accurate Data



IDENTIFY

Find your highest valued donors and prospects to prioritize your overall development workflow.



UNDERSTAND

Segment your existing donors and prospects to help convert “hidden gems.”

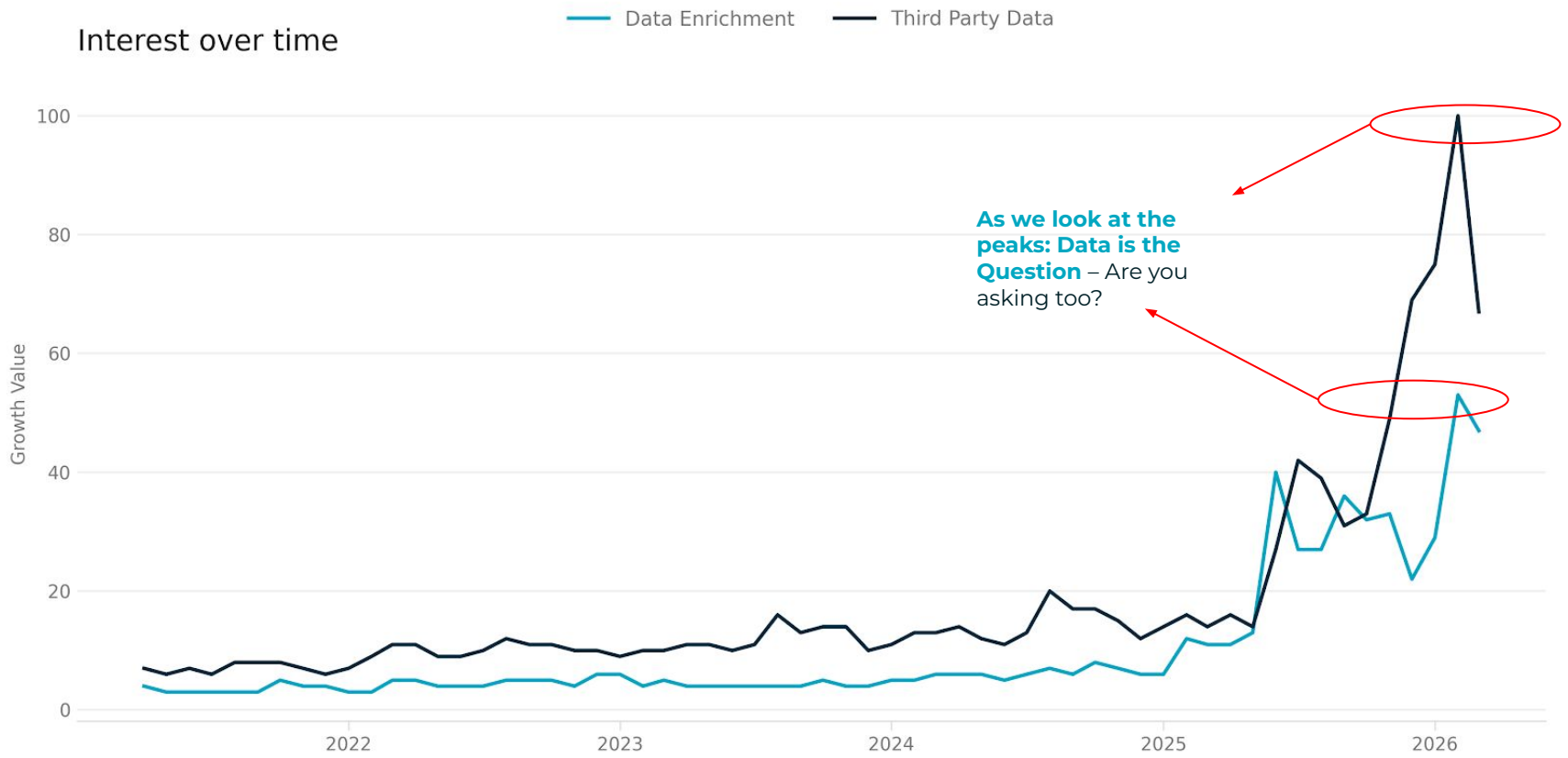


ENGAGE

Either based on levels of wealth or Windfall’s triggers, figure out your engagement strategy.

Why Data-Driven Segmentation is Important

Data & Enrichment Requests Over Time



Most Organizations are **NOT** Data-Driven

A sea of donor and prospect data in **disparate systems**



Then, organizations still make decisions or **based on gut/anecdotes**

Even if/when the data is unified, **they miss key insights**

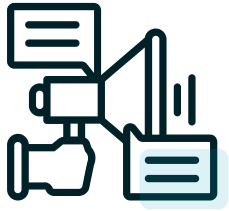
It’s Harder to Reach The Right Individuals



CONSTITUENT INSIGHTS ARE SHIFTING QUICKLY



NONPROFITS ARE WORKING WITH LIMITED RESOURCES



IT’S HARD TO BREAK THROUGH THE NOISE

First Party Information Only Tells a Fraction of the Story



Gut Feel Can Lead to Missed Opportunity

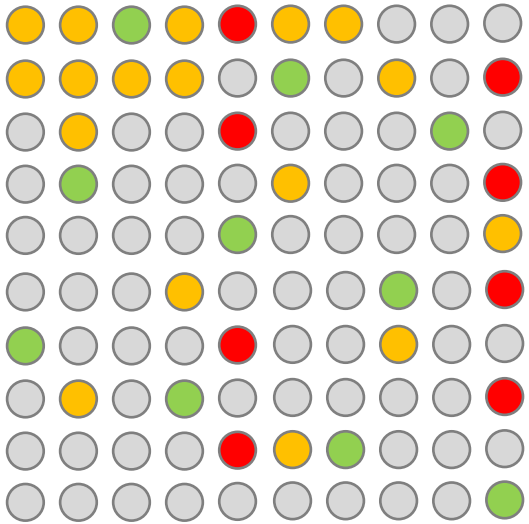
	Linda J.	*Simon H.*	*Jack D.*	*Chelsea P.*	*Harry M.*
Donor Source	Major Gift	Event	Leadership Annual Gift	Email	Direct Mail
Past Giving	$10,000	$100	$7,500	$50	$50
Net Worth	?	?	?	?	?
Money in Motion	?	?	?	?	?
Multi-Property Owner	?	?	?	?	?
Trust Association	?	?	?	?	?
Liquidity Trigger	?	?	?	?	?
Priority?	**YES**	**NO**	**YES**	**NO**	**NO**

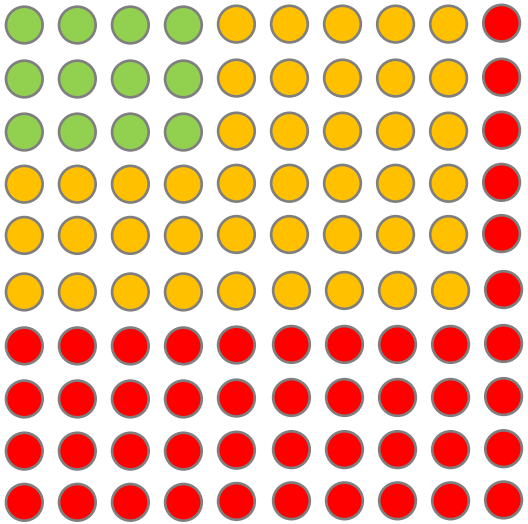
How do we know that we aren't missing out on ideal candidates purely based on 1st party information?

Prioritizing the Right Constituents Saves Your Team Time

Having an understanding of qualification within your database enables your frontline fundraisers to be most efficient with their time!

Without 3rd party information, do you really know the best place to aim your team?





Gaining a deeper understanding of your constituents allows your team to be most efficient!

Choosing the Right Partner for People Insights Makes the Difference

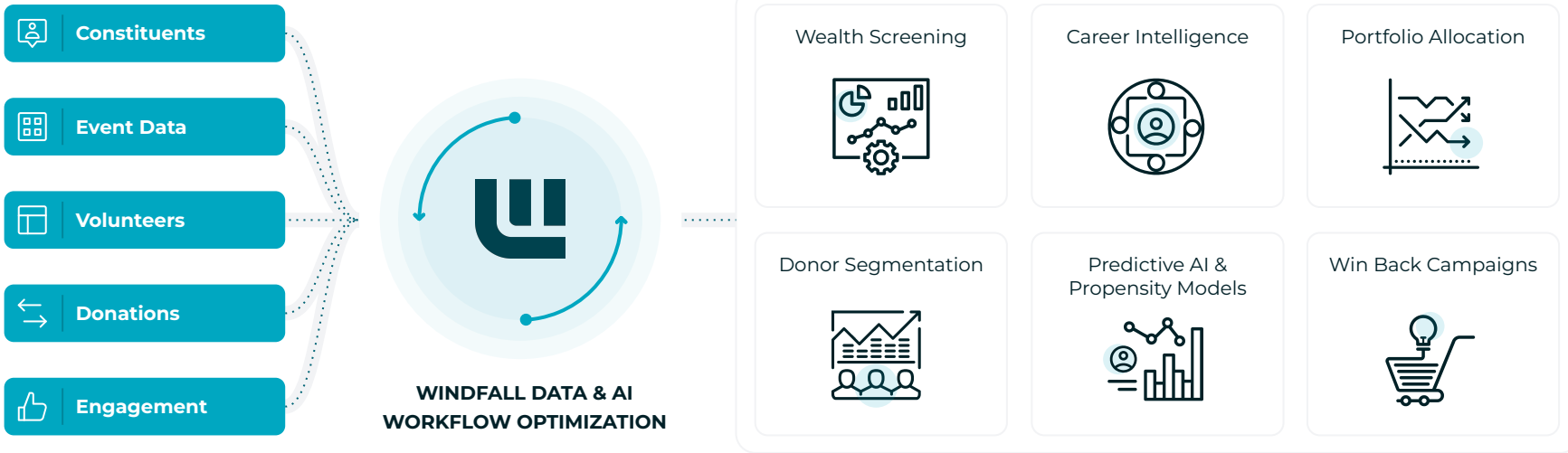


Utilizing Enriched Wealth Data for Segmentation

Use Cases &
Data for Key Segments

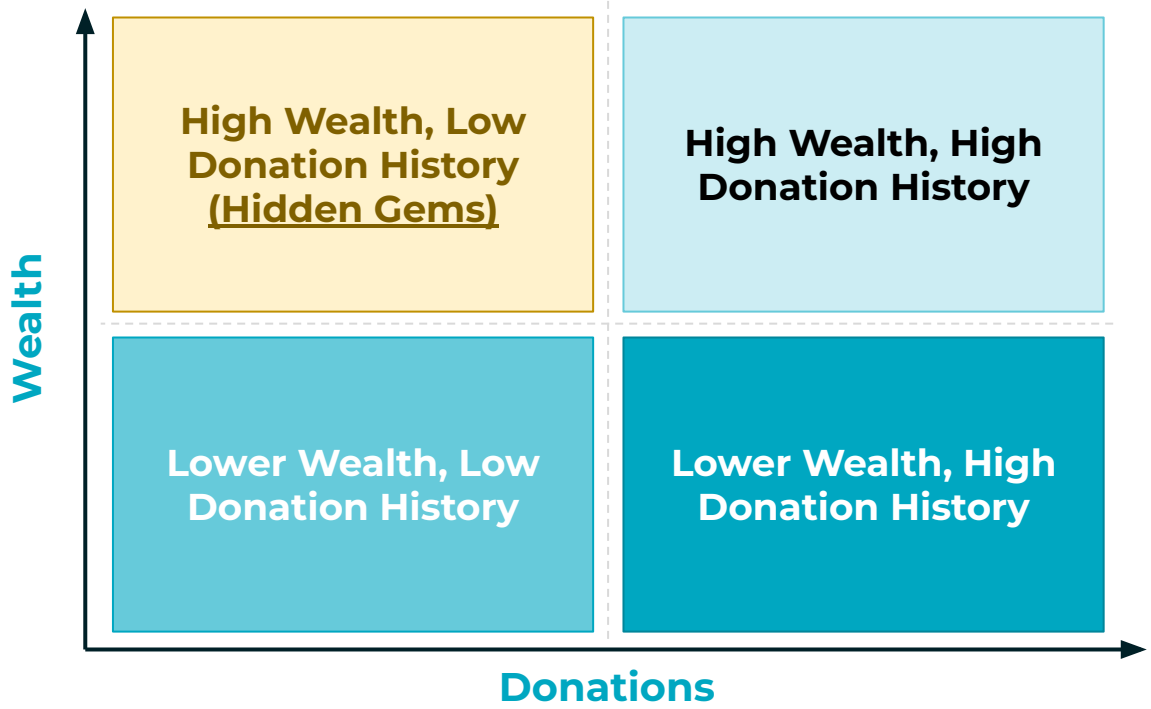
Windfall Data-Driven Workflow for Nonprofit Organizations

Windfall automates your data and AI efforts by setting up automations for better data-driven fundraising decisions.



Comparing Wealth and Donation History to Unlock Hidden Gems

Layer Windfall's wealth estimates over donation amount and history to identify your most promising constituents



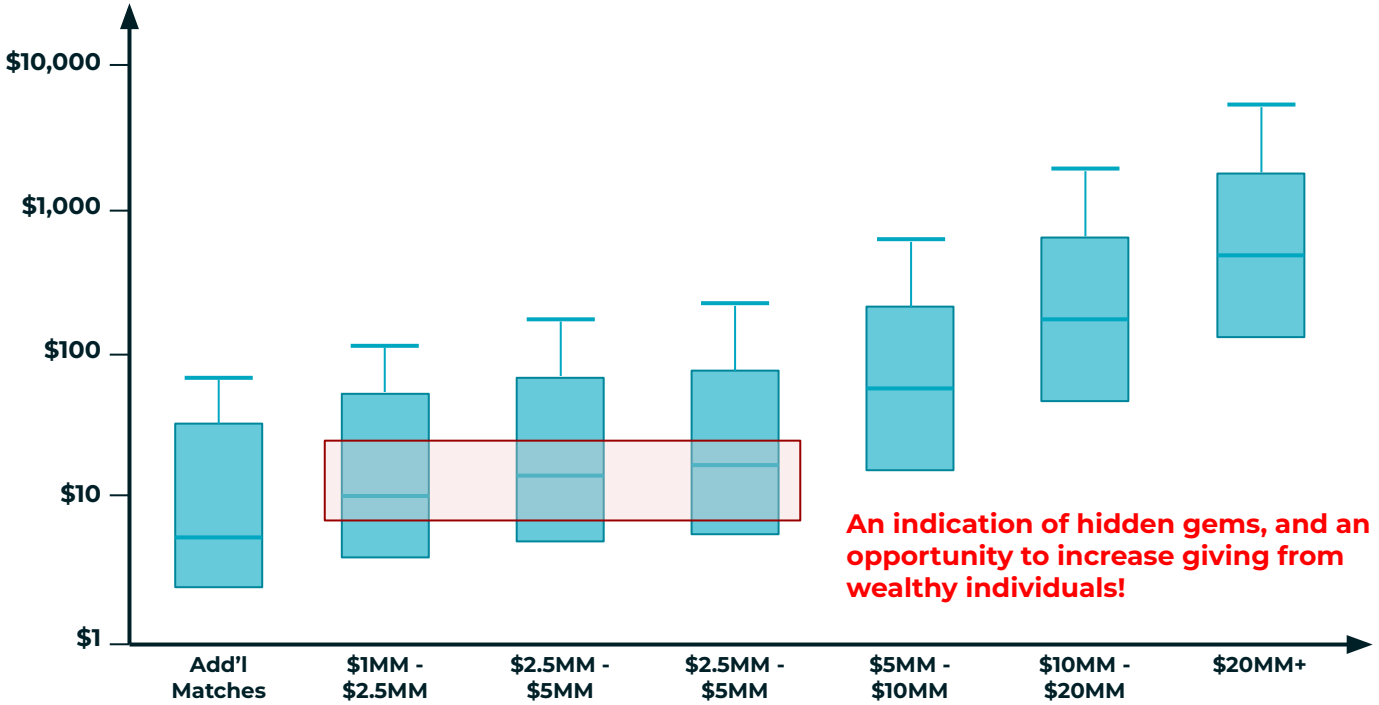
Uncovering Hidden Gems Helps Remove Selection Bias

	Linda J.	*Simon H.*	*Jack D.*	*Chelsea P.*	*Harry M.*
Donor Source	Major Gift	Event	Leadership Annual Gift	Email	Direct Mail
Past Giving	**$10,000**	**$100**	**$7,500**	**$50**	**$50**
Net Worth	**?**	**?**	**?**	**?**	**?**
Money in Motion	**?**	**?**	**?**	**?**	**?**
Multi-Property Owner	**?**	**?**	**?**	**?**	**?**
Trust Association	**?**	**?**	**?**	**?**	**?**
Liquidity Trigger	**?**	**?**	**?**	**?**	**?**
Priority?	**YES**	**YES**	**YES**	**YES**	**YES**

With Windfall's wealth screening, you're able to remove gut-feel to identify and isolate hidden gems!

Visualizing the Donation / Wealth Helps Tell the Story

Your aggregated donation statistics should increase with wealth - no separation indicates pockets of opportunity!



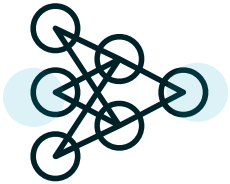
Identifying & Removing Duplicates

Identifying & Removing Duplicates

The Windfall ID returned with your enriched data can be used to identify potential duplicates within your database!

CRM ID	Created Date	First	Last	Email	Windfall ID
123	3/3/22	John	Smith	jsmith@gmail.com	acf91c6ef58eb7a7c...
456	2/13/21	Jane	Smith	janes@gmail.com	acf91c6ef58eb7a7c...
789	11/18/20	Steve	Doe	doe-s@yahoo.com	68769ee7de804d...
987	4/29/23	Julie	Davison	dj@business.com	
543	8/17/22	Clark	Kent	sman@gmail.com	
271	3/29/21	Tracy	Morgan	tracy@yahoo.com	81b12cc2db133425...
912	2/10/24	John	Smith	jsmith@office.com	acf91c6ef58eb7a7c...

Outlining the Benefits for Identifying Duplicate Records



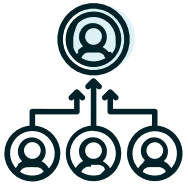
TYING DIFFERENT PII TO ONE RECORD

Unify disparate pieces of PII for individuals that may be spread across duplicates, for a cleaner CRM and ease of outreach



LINK DONATIONS ACCURATELY

Donations may be spread across multiple duplicate records. Ensure that you are unifying that for accurate analysis



REDUCING REDUNDANT RECORDS

A clean CRM with fewer, more complete records is easier to manage. Ensure your team isn't losing efficiency based on duplicates

Using Other Data Points for Segmentation

Leveraging Triggers for Individual Giving



Annual Giving

Increase participation of your overall constituent base

- ✔ Previous Giving <$1,000
- ✔ Philanthropic (NTEE Code)
- ✔ Net Worth <$1MM
- ✔ Net Worth >$1MM and $0 Giving History
- ✖ Donations $1,000+
- ✖ Portfolio Assignment



Major Gifts

Grow your Major Gift pipeline and build officer portfolios

- ✔ Previous Giving
- ✔ Net Worth $10MM+
- ✔ Liquidity Insights (SEC Money in Motion, Top Political Donor, etc.)
- ✖ Previous Gift >$10,000 in Last 6mo
- ✖ No Engagement



Planned Giving

Identify donors with assets to support your org through estate planning

- ✔ 10+ Gifts (Any Size)
- ✔ Nonprofit Board Member
- ✔ Trust Association
- ✔ Volunteerism
- ✖ Confirmed Planned Gifts
- ✖ Zero Giving History

Leveraging Triggers for Additional Use Cases



Event Lists

Identify the right people to invite or seat together at your next event

- ✔ Philanthropic Cause
- ✔ Small Business Owner
- ✔ Local to Event Location

- ✖ Donations $1,000+
- ✖ Net Worth >$1MM and $0 Giving History



Targeted Ask Amounts

Increase base ask amounts by net worth ranges

- ✔ Net Worth
- ✔ Previous Giving History
- ✔ Recent Liquidity

- ✖ No Donation History
- ✖ Last Donation within 6mo



Outreach and Many Others!

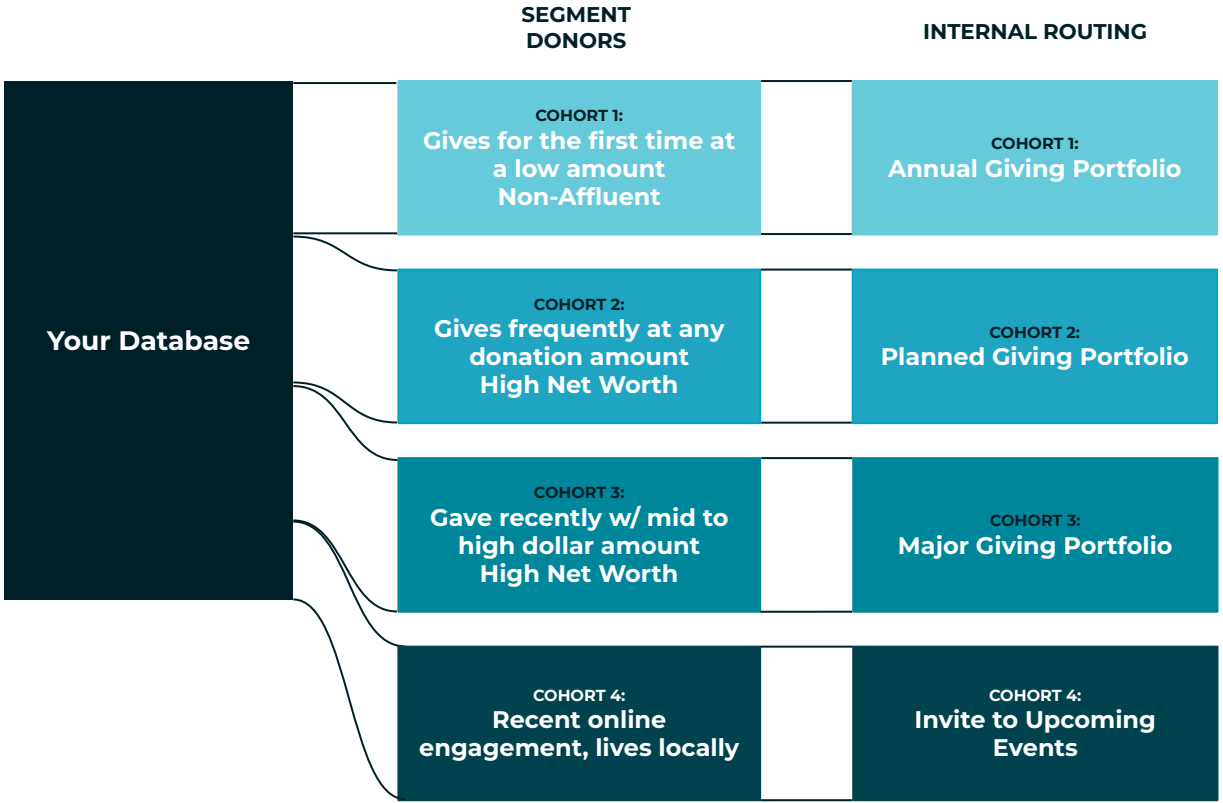
Steward donors who have lapsed, direct mail lists, meeting invite, etc.

- ✔ Recent Engagement
- ✔ Net Worth: Any Value
- ✔ Recent Household Events (Move, Promotion, etc.)

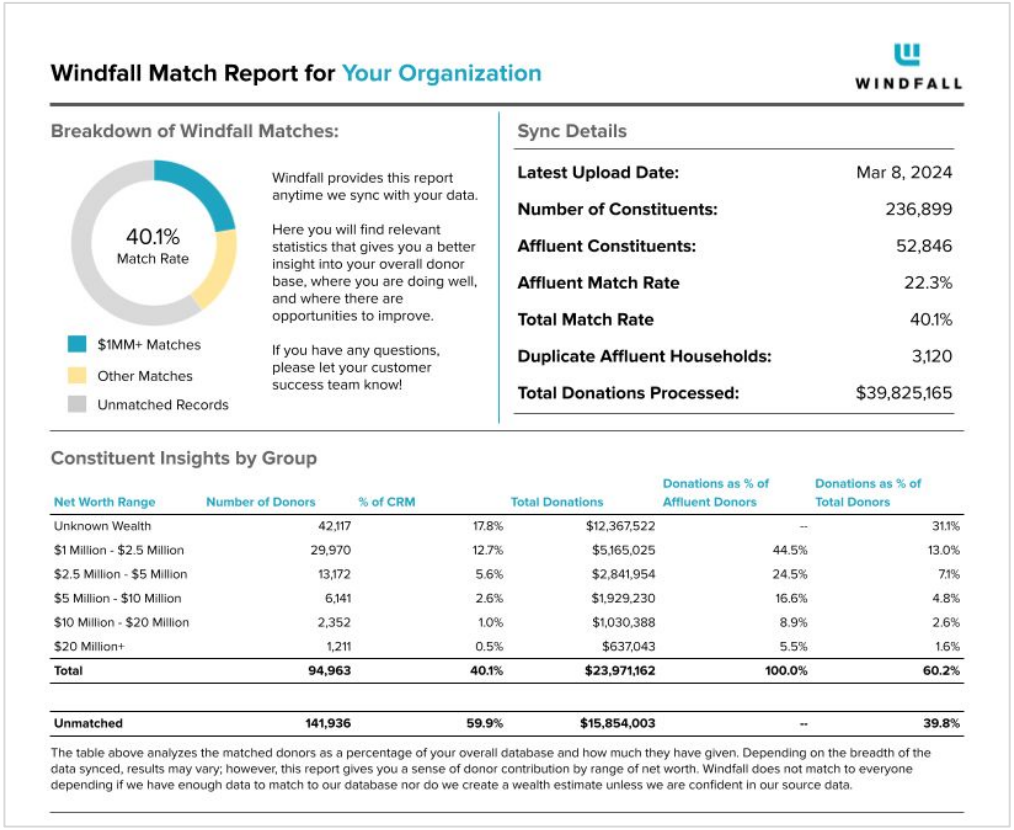
- ✖ Anonymous Donor
- ✖ Deceased or Death in Family

Routing Constituents to the Appropriate Portfolios!

- Create different segments helps your organization route constituents to the right teams
- We've seen our customers leverage our information to route new / existing records based on specific campaign goals for the organization
- Segmentation can be used in conjunction with historical giving or 1P data attributes



Get a **Free** Wealth Analytics Report



Windfall Match Report for Your Organization

WINDFALL

Breakdown of Windfall Matches:

$1MM+ Matches
Other Matches
Unmatched Records

Windfall provides this report anytime we sync with your data.

Here you will find relevant statistics that gives you a better insight into your overall donor base, where you are doing well, and where there are opportunities to improve.

If you have any questions, please let your customer success team know!

Sync Details

Latest Upload Date:	Mar 8, 2024
Number of Constituents:	236,899
Affluent Constituents:	52,846
Affluent Match Rate	22.3%
Total Match Rate	40.1%
Duplicate Affluent Households:	3,120
Total Donations Processed:	$39,825,165

Constituent Insights by Group

Net Worth Range	Number of Donors	% of CRM	Total Donations	Donations as % of Affluent Donors	Donations as % of Total Donors
Unknown Wealth	42,117	17.8%	$12,367,522	--	31.1%
$1 Million - $2.5 Million	29,970	12.7%	$5,165,025	44.5%	13.0%
$2.5 Million - $5 Million	13,172	5.6%	$2,841,954	24.5%	7.1%
$5 Million - $10 Million	6,141	2.6%	$1,929,230	16.6%	4.8%
$10 Million - $20 Million	2,352	1.0%	$1,030,388	8.9%	2.6%
$20 Million+	1,211	0.5%	$637,043	5.5%	1.6%
Total	**94,963**	**40.1%**	**$23,971,162**	**100.0%**	**60.2%**
Unmatched	**141,936**	**59.9%**	**$15,854,003**	**--**	**39.8%**

The table above analyzes the matched donors as a percentage of your overall database and how much they have given. Depending on the breadth of the data synced, results may vary; however, this report gives you a sense of donor contribution by range of net worth. Windfall does not match to everyone depending if we have enough data to match to our database nor do we create a wealth estimate unless we are confident in our source data.

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GET YOUR
FREE WEALTH ANALYTICS REPORT
AT ANALYTICS.WINDFALL.COM

Q&A
Thank You!

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Windfall Data, Inc.
595 Pacific Avenue, Floor 4 | San Francisco, CA | 94133
www.windfall.com | questions@windfall.com