



# AvatarDataPinpoints

(Not Available in Canada)

AvatarDataPinpoints is the most advanced digital technology available to execute database analysis that provides charitable organizations with real-world predictive tools to plan their Estate and Leadership Giving programs.

It assesses every individual on the database using an algorithm developed uniquely for each database, customized to utilize every datapoint available. The process measures the strength of relationship by comparing every individual to the real-world results of asking hundreds of thousands of prospects of charities around North America, for a Leadership or Estate Gift. The best data analysis is built from the ground up. Because Avatar uses a huge dataset of all known factors – donor history, giving patterns, involvement and status factors, Avatar is able to very accurately measure each of your donor's strength of the relationship.

These assessments give every prospect a "score" which can be used to accurately predict the outcome of a variety of fundraising and philanthropy initiatives. Scores are then "banded" and loaded onto powerful dashboards which can be used to create Estate and Leadership Giving planning tools.

## Estate Giving (Planned Giving) Planning Tool

YOUR LOGO HERE

**AvatarDataPinpoints**  
 Estate Giving Planning Tool

Enter Estate Gift Average ⇨

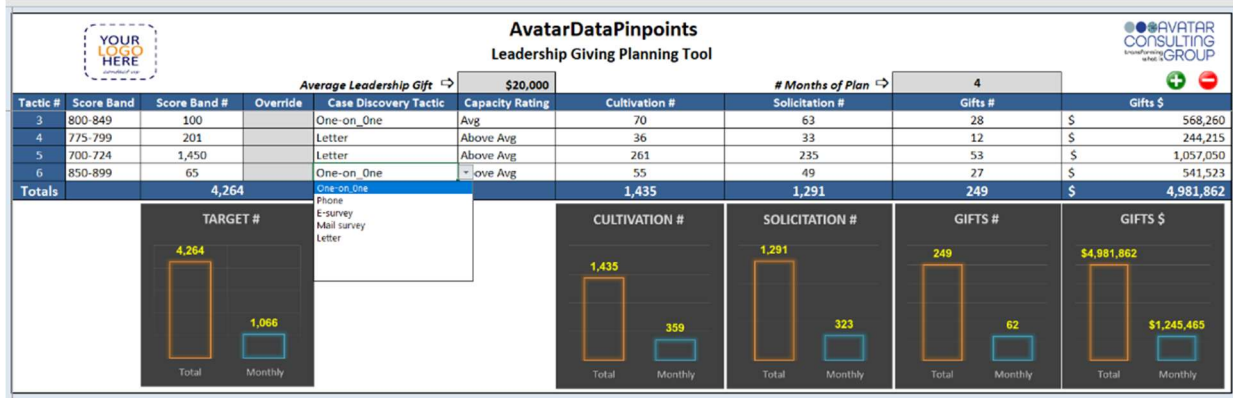
Tactic #	Score Band	Score Band #	Override	Pipeline Tactic	Estate Gift Average	Override	Conversions	Future Revenue	Year
1	640-649	22,452		Letter/seminar/ask by phone		\$2,500	1,212	\$3,031,020	2020
2	750-774	102		One-on-one	\$40,000		25	\$994,500	2021
3	660-669	2,222		Survey program/phone	\$40,000		72	\$2,888,600	2021
4	700-724	5,766		One-on-one		\$5,500	973	\$5,351,569	2022
5	630-639	36,369		E-survey	\$40,000		509	\$20,366,640	2023
6	725-749	1,859		Mail/phone/cultivation	\$40,000		256	\$10,224,500	2025
<b>Totals</b>			<b>68,770</b>				<b>3,047</b>	<b>\$42,856,829</b>	

Mail/phone/cultivation

- Multi-year newsletter cultivation
- Survey program/phone
- E-survey
- Letter/seminar/ask by phone
- Letter only
- Passive ad

This tool allows the fundraising or philanthropy team to choose score bands and automatically the number of individuals in that band will appear; choose one of 8 fundraising tactics and get an accurate forecast of results over time (with proper cultivation, re-solicitation and stewardship) while choosing the desired time frame for implementation. You can create as many variations of the plan, adding or eliminating any row you wish. Because the forecasted results are based on actual "asks" in the field over 18 years, they are very realistic. The organization can use the best tactic for each target donor group (score band) and to grow an Estate Giving program using the correct resources over the correct time frame.

## Leadership Giving Planning Tool



The Leadership Giving Planning Tool allows the fundraising or philanthropy team to plan a program over a period of time, with different target audiences, using different Case discovery methodologies. This is a flexible planning tool giving team members monthly metrics for all of the Leadership Giving steps – Target Choice, Case Discovery, Cultivation, and Solicitation. This will also be very helpful in planning staff resources and expected results.

With both dashboard planning tools, Avatar can modify conversion rates and industry norm benchmarks after time, to allow the organization, to even more accurately predict Estate and Leadership Giving outcomes once actual results are obtained.

All data analysis considerations should be prefaced with the question, "What are you going to do with the results?" Avatar Consulting Group believes in creating the most accurate scoring system available and then importantly, putting tools in your hands to make the scoring of your data the most useful and productive it can be. We believe we have done just that.

If we can be of service to your organization, send us an email,

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