Research Profiles
A "Disruptive" Approach

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SESSION #3A: Wednesday, October 12, 2016
3:15 – 4:30 pm

"Disruptive"

Disrupt	*Disruptive*
to interrupt (an event, activity or process) by causing a disturbance or problem	causing trouble and therefore stopping something from continuing as usual (*influence*) ~ changing the traditional way that an industry operates, especially in a new and effective way (*technology*)

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session agenda

- a brief history
- "waves" of progress
- impact
- complications & challenges
- perspective
- q&a

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audience

How many of us do profiles regularly?

How many profiles in a month? 15 or less? More than 15?

Manually? Automated?

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a brief history

in the beginning…

profiles were entirely manual

multitude of profile styles: Basic, Basic+, In-depth

timeframe to complete a basic profile: 2-4 hours
timeframe to complete an in-depth profile: 3-6 hours
significant portion of the time was spent formatting document

3, then 4 (2010), F/T researchers

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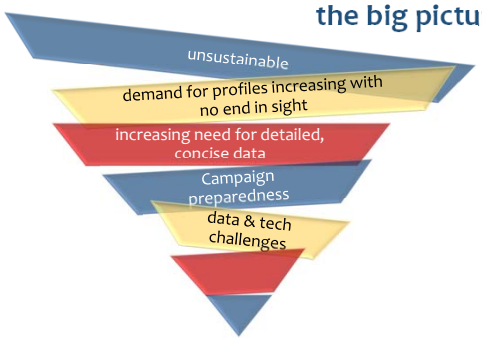
the big picture



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The 1st Wave: Quick fixes

The Assessment Profile Report

An automated, 2 page profile containing information from Advance ("just the facts")
Run by end user directly
Still in use by our fundraisers

The Wealth Assessment

Development of a 1 page document containing Wealth Indicators and Capacity Assessment
A change in how we were delivering profiles to meet fundraiser needs; the document was essentially a "snapshot" of portions of the In-depth profile, tailored specifically for pre-solicitation
Phased out since introduction of SRP

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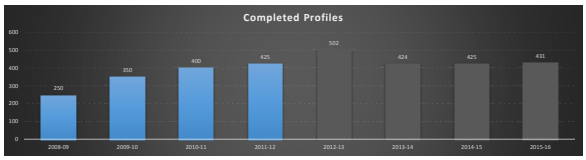
the quest begins…



Quiet 2006/07-2011-12 | Public Launch Fall 2012 | Closing Celebration Fall 2016

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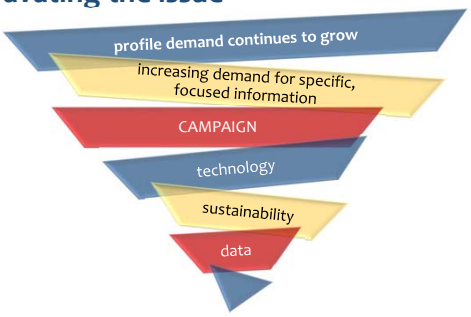
aggravating the issue



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The 2nd Wave: harnessing the data

development & experimentation

worked with Advancement Technology Services (ATS) to determine scope of **need vs ability** of database

pushing the limits of the database and the reporting software – **how far could we go?**

our "canned" Profile Reports were born…

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unsettling the status quo

technology is our ally in disrupting the status quo…

developed a **partially system generated document** that would be pre-formatted with headers and sections - ready to fill-in-the-blanks once exported to Word

Advance generated data included: **Bio, Degree, Addresses, Gift, Activity, Prospect**

"Fill-in-the-blank" sections: **Career, Philanthropy, Wealth indicators, Notes, and Assessment (for the In-depth version)**

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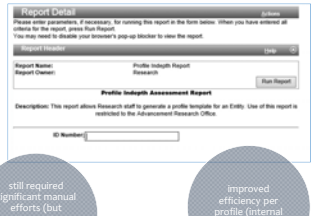
the results



semi-automated process

still required significant manual efforts (but drastically reduced from previous process)

improved efficiency per profile (internal and external)

interesting data challenges

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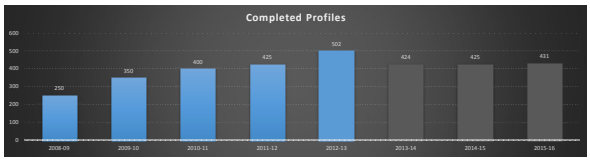
pressure still building…



Quiet 2006/07-2011-12 → Public Launch Fall 2012 → Closing Celebration Fall 2016

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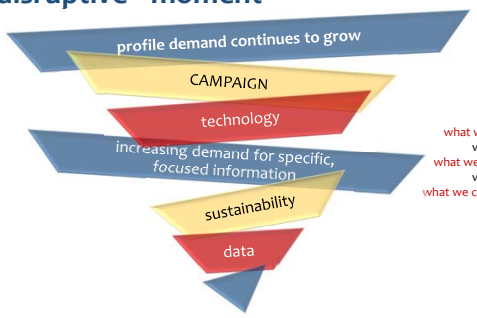
the disruptive "moment"



what we had
vs
what we needed
vs
what we could get…

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getting to the 3rd Wave

Profile process was improved, but it could still be better & demand not slowing we needed…

greater automation – formatting & content

data review (to determine what we had on the database vs what we needed to have)

to determine top priorities – our own + discussions with fundraisers and ATS

We needed something more… we needed something we had not yet seen…

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The 3rd Wave: The SRP

The Profile Reports = a good **foundation**
BUT…

We wanted a fully automated profile – "**click, save, send, done**"
Bio, Address, Education, Giving, Activity, Career, etc.

Limitations determined by database, reporting software, and "customer" needs

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the standard research profile

- Fall 2013 Development began
- Data: created SRP Bio "Note Type" for ADV
- Employment form revitalization
- Stylized Formatting
- Ability to add notes tailored to specific fundraiser needs
- "SRP Note" document created to ease process
- Minimal tweaking required

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the SRP report

The SRP Profile Report on ADV – this is where we tailor the profile for specific needs of our "client"

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an SRP

Spring 2014

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the results

- database-driven document with the ability to add Notes to the report prior to "run"
- condensed 3+ profiles styles into 1
- exportable to Word or PDF
- reduced "Types" of Employment on ADV from 54 to 4; cleanup of data; more consistent application
- consistent profiles
- daily use - ~85-90% of our MG profiles are now created with the SRP Report

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The 4th Wave: the 1-year evaluation

assessment

- observations: our notes/ideas, requests from "customers"
- assessment resulted a "Wish List" of 13* Recommendations for improving efficiency, performance and content
- data reviews

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the assessment

examples* of the Recommendations from the SRP 1-year evaluation:

employment & directorship Information
marital "status"
giving
DNC entities
gift pledge information
named fund indicator
awards & honours

**not all Recommendations are included, and not all improvements were part of the Recommendations document*

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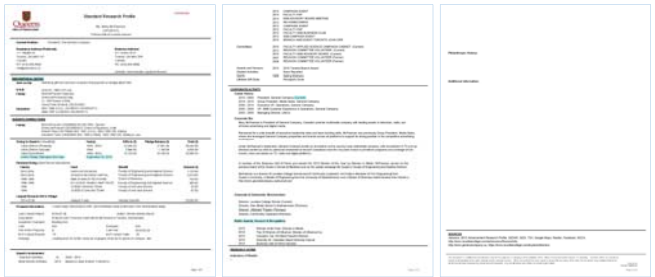
SRP 2.0

January 2016: Launched SRP 2.0



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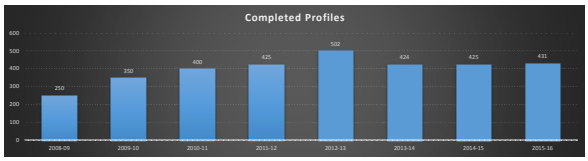
consistency…



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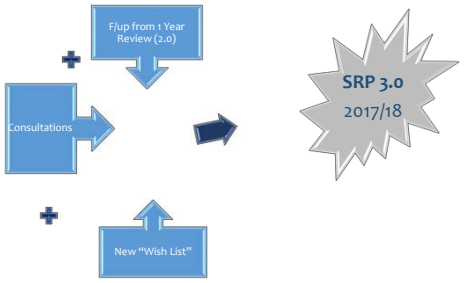
The 5th Wave: SRP 3.0



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impact

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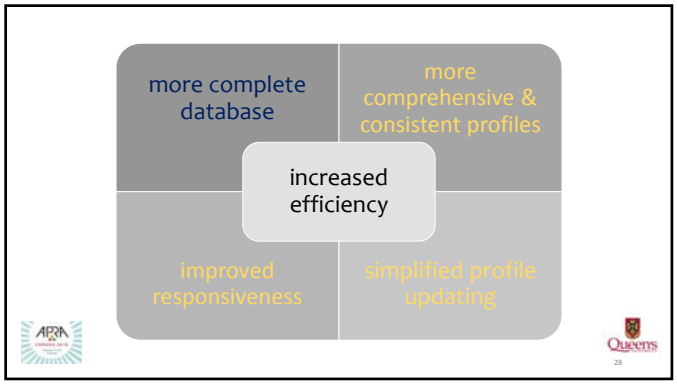
more complete database
more comprehensive & consistent profiles
increased efficiency
improved responsiveness
simplified profile updating
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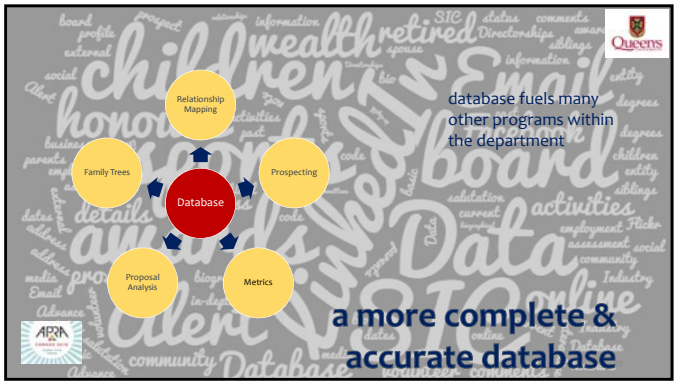
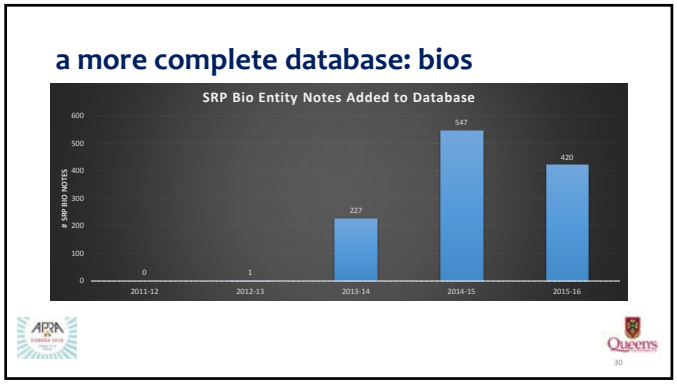
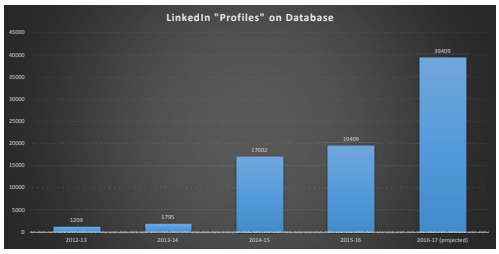

Relationship Mapping
Family Trees
Prospecting
Database
Proposal Analysis
Metrics
database fuels many other programs within the department
a more complete & accurate database


a more complete database: bios
SRP Bio Entity Notes Added to Database
SRP BIO NOTES
600
500
400
300
200
100
0
0
1
227
547
420
2011-12
2012-13
2013-14
2014-15
2015-16
30

a more complete database: LinkedIn



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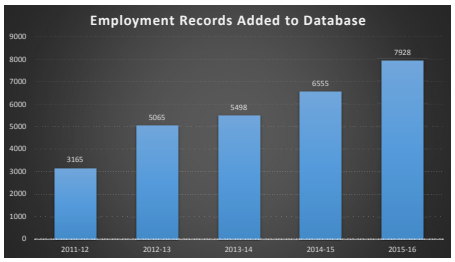
a more complete database: career history



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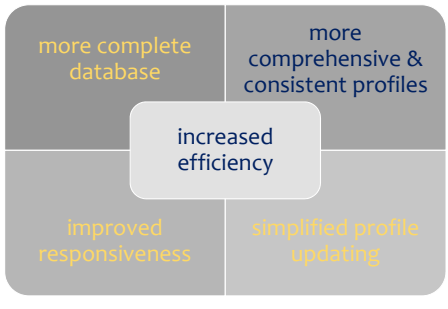

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more comprehensive & more efficient

the SRP contains more information than previous versions, but in a tighter, more concise and consistent presentation

added Alerts
more family connections
clarifications to, & expansion of, giving summary
Awards & Honours section

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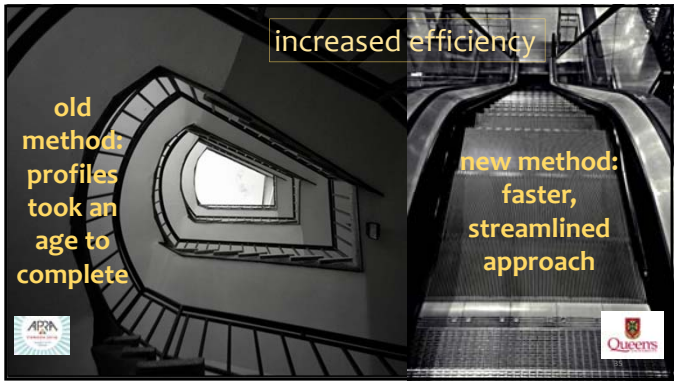
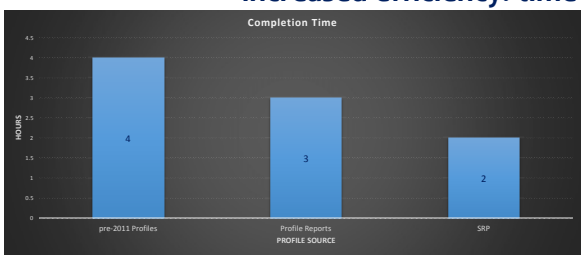


increased efficiency: time



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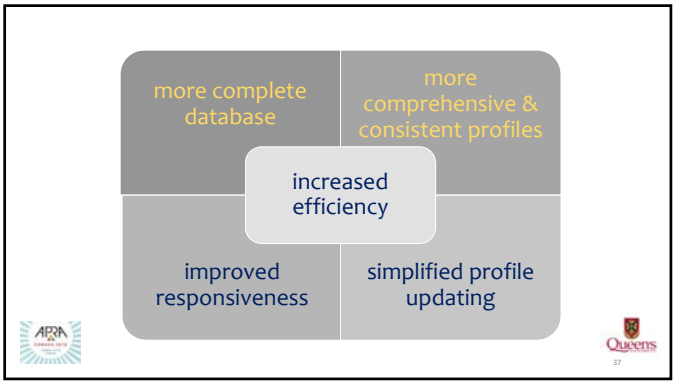


improved responsiveness

primary & supplementary information (e.g. donor summary) is now built into the report

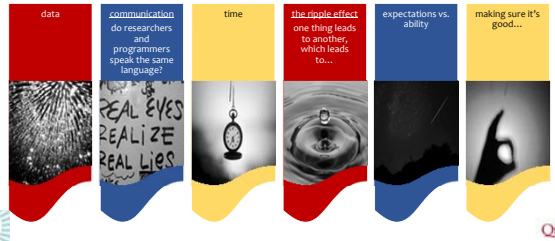
additional efficiencies

confidentiality & security
industry coding
more concise data entry rules/options – e.g. employment types

complications & challenges

a few issues along the way

disruption is not without some pain…



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Testing.

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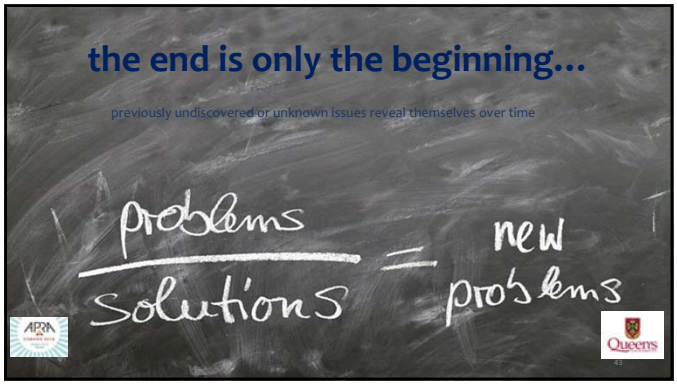

impact of disruption

ATS
- challenged our programmers to help us create something entirely new & different

Fundraisers
- disrupted without disrupting

Ourselves
- challenged ourselves to find a new way of doing our business, without causing a disruption in services provided

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advantages of disruption

"If there's a need for something to be disrupted and it's important to the future of the world then sure, we can disrupt it," *elon musk*

How did we improve the "customer's" world?

responsiveness
consistency
clarity of information/data
tailored or focused information/data as required
adapting to their needs

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what does the future hold for the SRP?