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PRODUCT REVIEW

ADVIZOR Visual Discovery

University of Florida Foundation Uses Data Discovery and Analysis to Segment and Target Prospects

REVIEWER: Audrey Geoffroy, Associate Director of Data Analysis at University of Florida Foundation.

BACKGROUND: University of Florida Foundation serves as the fundraising arm of the University of Florida.

PLATFORMS: ADVIZOR Analyst on Windows PCs; ADVIZOR Server AE over the Web to IE from Windows Server.

PROBLEM SOLVED: Charged with raising and managing private gifts to meet the needs of a public university, the UF Foundation implements its mission with the help of an Oracle-based fundraising database. ADVIZOR visual discovery allows users to access and analyze patterns and trends that would otherwise be hidden in the complexity of this large data set. The product pulls data from the main database and other internal sources and transforms it to interactive charts that allow end users to analyze business processes, from staff performance and portfolio balance to annual fund segmentation and prospect identification. Prior to implementation, managers, researchers and

fundraising staff needed to order reports from overburdened reporting specialists, which often meant waiting several days or weeks for data from custom queries which may or may not have answered their questions. Now these users can now drill down and figure out who, what, how, when and why immediately, changing questions and approaches on the fly as they discover answers to their business problems.

PRODUCT FUNCTIONALITY: At the Foundation, we maintain three major projects, which are updated nightly and published to the server for the use of our 15 end users. The first project is organized to answer questions about segmentation, appeals, giving, and participation and helps our Annual Fund staff to focus on best approaches for email, phone and mail-based marketing efforts. This project saves time and money internally by reducing the lag surrounding data requests from the reporting team; it has also allowed for better planning for targeted messaging that generates higher yields from fewer attempts. The Prospect Research Department uses a second project to find prospective donors with both wealth capacity and philanthropic interest in current university programs.

Since implementation, the researchers have increased their proactive identification of good prospects to pass along to fundraising staff and have improved productivity within the department. Finally, the portfolio management project helps managers to quickly evaluate staff performance and to review the balance of fundraisers' portfolios as they build relationships that transform prospective donors into committed donors. The software helps officers to have meaningful conversations about realistic expectations at both the individual and unit level for success in furthering the Foundation's fundraising mission.

STRENGTHS: ADVIZOR's biggest strengths lie in its in-memory data management capability and the interactive nature of its data visualizations. The former allows one to take the details of a very large data set pulled from multiple sources into a meeting on nothing more than a laptop, while the latter allows one to slice and dice the data using a fairly intuitive interface. Visual displays make analysis not only easier to interpret but also allow for effective sharing of insights since charts and lists can be exported to other applications, such as PowerPoint or Excel.

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WEAKNESSES: While ADVIZOR can do some reporting, it is not a reporting tool. End users can't designate fields for export and must rely on a project author to make any additions or changes to the design. Also, ADVIZOR does not sit on top of live data and, therefore, can't function as an up-to-the-minute dashboard of key metrics.

SELECTION CRITERIA: This solution was selected based on a combination of the software functionality and the speed with which it could be implemented. Most importantly, compared

to similar products already in the fundraising space, ADVIZOR allows us to visualize and interpret our data without needing to house our data on a vendor's server, as we prefer maintaining data security within our own network.

DELIVERABLES: ADVIZOR visualizes data either in its client version or in a browser. Charts and lists that result from analysis can be exported. ADVIZOR does have an additional version of the software that can create predictive models, but this product has not been implemented at UF.

VENDOR SUPPORT: The vendor did an outstanding job in supporting us before and post-implementation. They listened to our needs, authored the initial projects (since modified), and have provided sufficient training for both project authors and end users. They are very responsive to questions, helpful in providing new ideas, and encourage relationships with other product users.

DOCUMENTATION: The documentation and help is embedded in the software application.