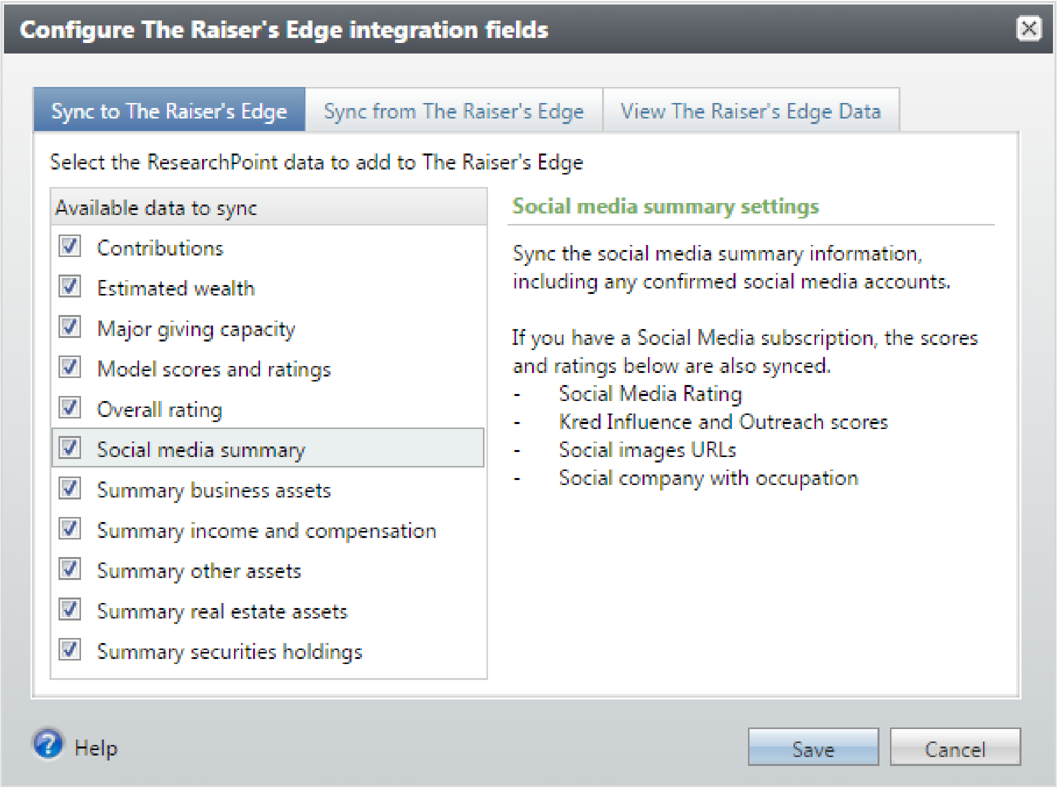
Release Notes: April 2015 (4.2)

Before you begin to use Target Analytics ***ResearchPoint***, take a moment to review the following notes. It is important to share this information with all Target Analytics ***ResearchPoint*** users in your organization.

Sync Social to RE

If you are a ResearchPoint standalone customer who integrates with the Raiser's Edge, we added the ability for you to sync social media information from ResearchPoint to the Raiser's Edge.



If you select to sync, social media accounts you manually add and confirm in ResearchPoint are added to the linked Raiser's Edge constituent record. If you subscribe to Target Analytics Social Media Finder, additional social media information can sync as well.

- Confirmed social media accounts returned from a WealthPoint screening
- Social media rating
- Influence and outreach ratings
- URLs for the social media images

  Tip: Up to one social media image is returned per email address on a screening.

- Company and occupation from the social media biography

For more information about Social Media Finder, see the release notes from the February 2015 (4.1).

Social Media Information on Raiser's Edge Constituent Record

When you sync from ResearchPoint to the Raiser's Edge, the social media information from the Social Summary tab of the wealth and ratings record appears in the following places on the constituent record:

- Confirmed social media account URLs appear on the Bio 1 tab, **Links** grid.
- Social media, influence, and outreach ratings appear on the Prospect tab, in the **Ratings** section.

  Tip: The Prospect tab appears if you have the optional module *Prospect Research Management*. If you do not have this module, the ratings appear on the Ratings tab.

- URLs for social media images appear on the Attributes tab as a "Profile Photo - WP" attribute. The URL for the image appears in the **Description** column.
- Company and occupation from the social media biography appear on the Attributes tab as a "Company - WP" attribute. The company name appears in the **Description** column and the occupation appears in the **Comments** column.

Because the social media information is added to the constituent record, once synced, you can query based on the new data.

Note: In a constituent query, links can be found under the **Phones**, **Specific Phones** node.

Blackbaud Web Services

We recommend you check the Web Services page in the Raiser's Edge on a regular basis to see if an update appears for Blackbaud Web Services. These updates may contain improvements that will help your integration between ResearchPoint and the Raiser's Edge.

Performance Improvements for Group WealthPoint Screenings

To improve the performance when users screen a group of constituents through *WealthPoint*, Target Analytics made the following updates.

Going forward, we are focusing on returning the key relationships from GuideStar on a group screening:

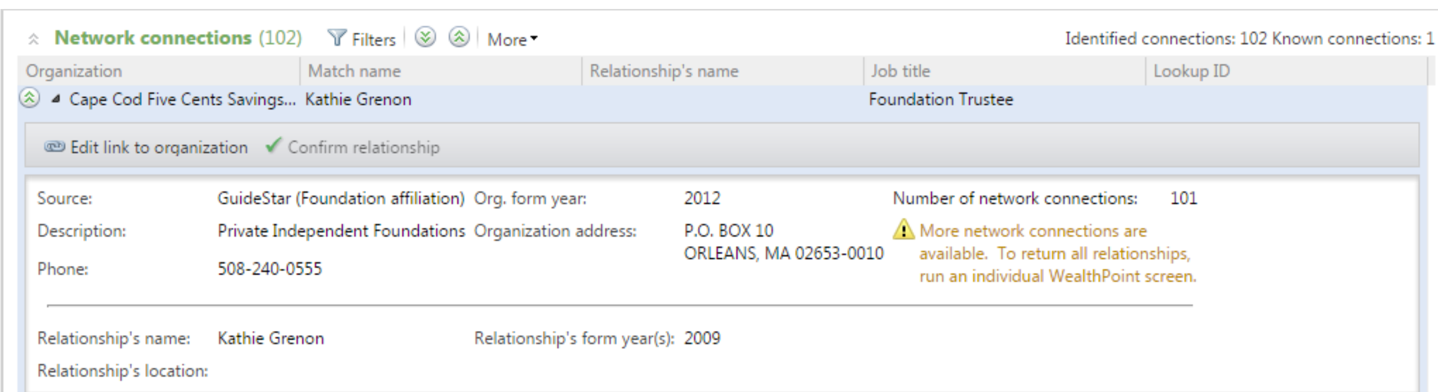
- Known relationships (both people have been screened through *WealthPoint* and have a connection through a nonprofit found in GuideStar), regardless of form year

  and

- A representative sample of the other relationships from the most recent years

For some nonprofit connections, we've seen the total number of relationships returned could be up to 20,000. For you to sort through 20,000 relationships and get the most pertinent information is unrealistic. Therefore, we have simplified the process. These initial results will then help you determine if it is worth the effort to review the additional relationships. And, we want to ensure that you have the choice when to return thousands of relationships for a constituent. If you want to see all the relationships, individual WealthPoint screenings will continue to return all relationships.

With this release, we added an indicator in ***ResearchPoint*** for records that have more network connections available from GuideStar. This indicator appears after a group WealthPoint screening and can help you decide if you want to run an individual *WealthPoint* screening to return all nonprofit connections.



With these changes we can improve your *WealthPoint* group screenings without sacrificing the ability to see all relationships for a constituent. We hope these performance updates will improve your experience group screening constituents in *WealthPoint*.

Target Analytics Data Updates

In March, we updated NOZA, FEC, and Experian. Experian data is now updated through the 4th quarter of 2014.

- **NOZA**: The world's largest database of public charitable donations. This information is stored on the constituent's wealth and ratings record, Giving tab, under Philanthropic gifts. For each donation, a gift range, organization donated to, organization category, gift year, and name on the gift returns. You can use the web address or source material to help you confirm the data belongs to your prospect.
- **FEC**: Federal Elections Commission data, from the Internal Revenue Service, contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns. Information includes the amount of the contribution, the recipient, and the date. This information is stored on constituent's wealth and ratings record, Giving tab, under the Political donations section.
- **Experian**: Experian data provides detailed consumer information to identify wealth indicators such as household income and home value, as well as the number of children, discretionary spending estimate and vehicle value. This data is accessed on the constituent's wealth and ratings record, Biographical Information tab, in the Biographical data section. The Experian data includes up to 5 household members and provides prospect demographics. If you click the Household Mosaic link, an Experian webpage opens in a new window to their Mosaic USA Interactive Guide. The guide provides a demographic profile of your constituent.
- **Core Logic**: Tracks the constituent's real estate holdings including real estate valuation estimates. Identifies properties owned for a deed, parcel, and mortgage. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Real estate section.
- **Dun & Bradstreet**: The world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies. Provides you with data about the constituent's employment. This information is stored on the constituent's wealth and ratings record, Assets tab, under Businesses section.

Target Analytics Community

An update from your Community Manager, Crystal Bruce –

Have you checked out the Target Analytics Online Community? Accessing your community is as easy as clicking the help icon in ResearchPoint. You can **Ask the community** from inside the program! One click and you are interacting with fellow prospect researchers, fundraisers, and development officers.

Want to know the best way to do something? Post a question and watch as your peers and our experts weigh in with their best practices. You can even submit an idea for the ResearchPoint Development Team. When strangers start acting like friends is when communities become invigorating. Help us invigorate ours by becoming a member today!

Release Notes: February 2015 (4.1)

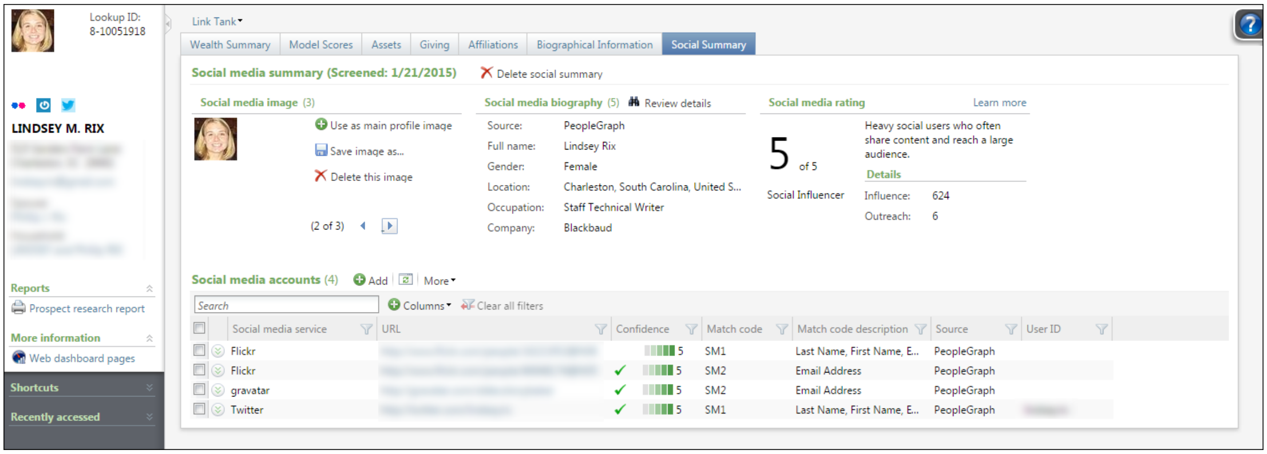
Before you begin to use Target Analytics ***ResearchPoint***, take a moment to review the following notes. It is important to share this information with all Target Analytics ***ResearchPoint*** users in your organization.

New Social Media Finder Service for WealthPoint

To help you find and track social media accounts for your prospects, we added a new data service to *WealthPoint* screenings. In our Social Media Finder service, *PeopleGraph*, a Dun & Bradstreet company, uses email address information from your constituent records to find social media data.

The social media data that returns on a wealth screening is stored on a new Social Summary tab. On the Social Summary tab, you can track the social media accounts for your prospects and if you have the Social Media Finder subscription, social media accounts, profile images, demographics, and ratings appear here after a *WealthPoint* screening.

Note: Previously, the social media accounts were stored on the Biographical Information tab. We moved the accounts to live with the rest of the social media data that returns from *PeopleGraph*.



Tip: If you are interested in the Social Media Finder add-on subscription, contact your Blackbaud Account Representative or email us at solutions@blackbaud.com.

About Social Media Finder

Unlike other data sources in *WealthPoint*, when you perform a *WealthPoint* screening for social media information, you are not returning results from a Target Analytics database. Instead, we're using *PeopleGraph*'s API to search and return results directly from them. Therefore, when *PeopleGraph* updates its database, it will be immediately available to you the next time you perform a *WealthPoint* screening. While *PeopleGraph* may update the social media services in their database, they currently have over 90 social sources in its search including *Facebook*, *Twitter*, *LinkedIn*, *Flickr*, *Etsy*, *Google+*, *Instagram*, *Pinterest*, *tripadvisor*, *WordPress*, *Vimeo*, *YouTube*, and more.

Note: *PeopleGraph* may add social media sources at any time. If we hear of new services added, we will inform you. Potentially, they may have to adjust or remove some of their social media services due to privacy changes and API restrictions, For example, as a social media service increases in popularity, so does the value of their data as a revenue source. Some services will choose to maintain a very open API, like *Twitter*. However, others can decide to restrict access to data in their API at any time. Keep note of these two possibilities when you screen prospects.

However, just as with wealth data, if prospects do not want their social media information shared, most services enable users to voluntarily implement strict privacy settings. And, users are allowed to change their privacy settings at any time so your results may change based on user preferences.

How Social Media Finder Works

Social Media Finder returns data on a *WealthPoint* screening only. With or without the Social Media Finder subscription, all records will have a Social Summary tab on the wealth and ratings record. A Social Media Finder subscription is not required to add and maintain social media accounts manually. However, with Social Media Finder, social data that returns from a *WealthPoint* screening lives on the Social Summary tab with the manually entered social media accounts.

During a *WealthPoint* screening, up to 5 email addresses are sent to *PeopleGraph*. Priority is given to the primary email address on record. The primary email address and the next 4 most recently added email addresses are sent to *PeopleGraph* for their social media search.

If you integrate with ***The Raiser's Edge***, the email addresses on ***The Raiser's Edge*** constituent record are given priority over the email addresses on the prospect record in ***ResearchPoint***. Because ***The Raiser's Edge*** constituent record is the contact record of choice, we send any email addresses in ***The Raiser's Edge*** to *PeopleGraph* first. Therefore, if you have five email addresses on the constituent record and none match the two email addresses on the prospect record in ***ResearchPoint***, we send the email addresses from ***The Raiser's Edge*** to *PeopleGraph* and not the email addresses in ***ResearchPoint***. ***Raiser's Edge*** email addresses marked as inactive are not sent to *PeopleGraph* and will not return social media data.

Tip: We recommend you verify email addresses before you screen and consider re-screening when you receive a new email address. For example, it can be common for people to have multiple email accounts for different purposes. It is possible that little or no social media accounts may return for your prospect because you may not have the personal email address he or she used as the contact email on the social media service account.

Ultimately, the success of the individual or group wealth screen for social media information depends on the record or records you send to *PeopleGraph*. Consider that older constituents may not have the number of accounts that younger constituents have. Have you been able to verify both personal and professional emails for your constituent? And, do your prospects want to be found on social media?

Those who do return large amounts of data hold even more value over other prospects because they likely have invested much time in developing their online network, influence, and outreach. You should consider developing a relationship with those who return high ratings and large numbers of accounts because they may be great candidates for furthering the message of your organization.

Social Media Images

When *PeopleGraph* searches for your prospect, they return up to one social media image per email address. However, because it's an image, *PeopleGraph* can't determine which profile image from a social media account most looks like your prospect. For example, is the picture that returns for a social media account a headshot, group photo, beloved pet, grandchild, or a field of flowers? Instead, *PeopleGraph* picks the best image based on a formula they developed. The formula to decide which image to return for each email address is based on which account they determine most important. Therefore, the social media images that return may not be what you consider most important in the prospect research world.

We recommend you review the images and delete those that are not applicable. However, just like other data from *WealthPoint*, it can return on your next wealth screening. If there is an image that captures the prospect well, you can easily use the image as your main profile image or save to your computer. When you scroll through the images that return, click **Use as main profile image** to quickly update the constituent's main profile image. The old constituent image deletes and is replaced by the new one from your *WealthPoint* screening.

Social Media Biography

Based on the data *PeopleGraph* finds, we provide a Social Media Summary for your prospect. To review the information, from the Social Summary tab of a wealth and ratings record, click **Review details**.

The information for the social media biography summary fields are based upon the social media accounts returned by *PeopleGraph*. If the location, occupation, company, name, or gender fields are inaccurate or incomplete, you can update the information. For example, *PeopleGraph* may populate the gender field with "Unknown" based on the social media data it finds, however you likely know and can update that information.

To show you how *PeopleGraph* found the location, occupation, and company, we provide a details section with the information found for each email address sent to *PeopleGraph*.

Social Media Ratings

The influence and outreach scores are provided by *PeopleGraph* and are based on *Twitter* accounts. If a prospect does not return a *Twitter* account, they will not have ratings. *PeopleGraph* also relies upon the service Kred.com to determine how trusted *Twitter* accounts are, how often the account's content is shared, and how large is the account's network.

The Social Media rating is based on a Target Analytics algorithm. Among other factors, the algorithm does consider the influence rating, outreach rating, and number of social media accounts returned.

For more information about the meaning of the social media, influence, and outreach ratings, review the rating descriptions below.

Social media rating:

5 – Social Influencer: Individuals who are very heavy social users, and often share content. They have large followings, which gives them major influence when they interact with others. They are normally very involved on *Twitter* and *Facebook*, with multiple posts per day. Most importantly, their content is frequently re-shared by others. Individuals and companies will target influencers directly because of their large networks. They hope the influencers can help spread their message.

4 – Content Cultivator: Heavy social users who are very active, but do not carry the network size or have the impact of a true influencer. While they have less impact than the influencer, they can be very helpful to nonprofits because they habitually share content. These individuals are great to connect with because they increase the chances of your message reaching a large audience.

3 – Socially Connected: Individuals in this segment have a presence on all three major networks, *Facebook*, *LinkedIn*, and *Twitter*. Also, they often use other platforms (ex. *Pinterest* and *Instagram*) but interact with a smaller social circle than influencers or cultivators. They are less likely to share content, or shift people's point of view with their opinions. They use social often, but more for entertainment and family interactions.

2 – Multi-Networker: Individuals who are socially-savvy enough to have a presence on several platforms, but are largely passive users. They log into *Facebook* several times a week to change their status, and sometimes have *LinkedIn* or *Twitter* accounts. However, social media is a small part of their lives. Because they aren't as engaged, they are not as exposed to content they may relate to and as a result, share with others infrequently.

1 – Social Starter: Individuals who typically have only one social media account. They also aren't heavy users and have very little influence. Most often they use only *Facebook*, and on average are older than the mainstream social media user. They are only engaged on the network because their peers or family members are, and they log in occasionally to see "what's going on."

0 – Unconnected: We were unable to find social media accounts linked to the prospect's email address.

Influence rating:

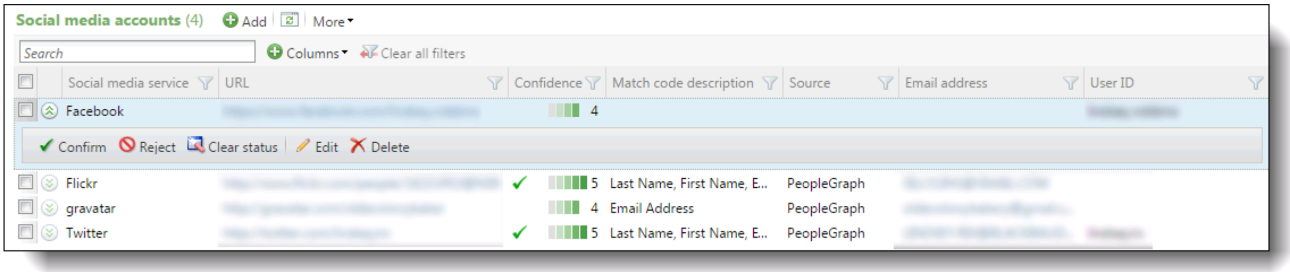
The influence rating is based on how likely others are to retweet or share that individual's social media posts with their networks. The higher the influence rating the better. Those whose content gets shared regularly help shape other people's opinions. Anything above 700 is considered excellent.

Outreach rating:

The outreach rating ranks how likely a user is to comment on or share content on *Facebook* and retweet others' social media posts within his or her network on *Twitter*. A good score means the person is a "sharer," and someone that may help spread your message. A score of seven or higher is considered excellent.

Social Media Accounts

The social media accounts are a combination of manually entered accounts and the ones that return from *PeopleGraph*.



When you periodically screen prospects with *WealthPoint*, new information can return, especially if you were able to send a new email address. However, before you screen, you can choose to **Delete social summary**. All data that *PeopleGraph* returns, including social media images, social media biography, social media ratings, and social media accounts, will delete. Then, when you perform a wealth screening, it is possible to return less or different accounts than the last time you screened. There are three main reasons this can occur:

1. Did the email addresses change since the last time you wealth screened the prospect? Were any email addresses marked as inactive in ***Raiser's Edge***? Those emails are not sent to *PeopleGraph*.
2. The prospect could have changed his or her privacy settings for the social media service.
3. The social media service could have changed its privacy settings and terms for its API, and therefore restricted *PeopleGraph*'s ability to locate records based on email address.

Helpful Tips for Social Media Accounts

- Only manually added and confirmed social media accounts appear as icons below the profile picture on the wealth and ratings record.
- The links in the list are clickable. For example, click a social media service link in the **URL** column to open the social media account in a new browser tab.

  Tip: *Facebook* and other account links work better if you log in to the social media service first. We recommend you log in to *Facebook* before you click social media icons or URLs on a wealth and ratings record.

- When you delete a social media account that returned from a wealth screening, it operates the same as other wealth data that returns. It removes the information temporarily, but it can return on the next WealthPoint screening.
- To confirm the social media account is your prospect's, use the URL and match code description to determine if the data from *PeopleGraph* is accurate.
- ***Raiser's Edge*** email addresses marked as inactive are not sent to *PeopleGraph* and will not return

social media data.

- To remove the confirmed or rejected status from a social media account, click the double arrows for the record's row in the list and click **Clear status**.
- Even when you subscribe to Social Media Finder, you may need to add an account manually from time to time. For example, if you do not know the email address for a prospect but a basic Google search of the person based on name and geography returns an account, you will want to track this on the wealth and ratings record.
- For social media accounts that return from a *WealthPoint* screening, we automatically add new social media services (including the icon) for you to the Social Media Services page in *Prospects*, **Configuration**.

Social Media Data Recommendations

While social media is a quickly evolving yet newer field of data, there is much to be done with the data that does return. Use these ideas for how to leverage social media information to the benefit of your organization.

1. Use social media accounts to verify information about your prospect including occupation, employer, interests, and affiliations.
2. Use social media to identify your most important content cultivators and influencers. Not only can you search for prospects who have the capacity to donate to your organization but you can identify people who can use their great influence on social media to promote your cause. For example, have you heard that your organization is planning an important event? You may want to consider researching and providing your event coordinators a list of those with great social media influence so they can invite them to the event. Well connected individuals can help promote the event and increase awareness.
3. Use social media to confirm relationships and connections. Can you identify someone at your organization (donor, employee, trustee) that already has an established relationship with the new prospect? Social media can help you determine if there's someone who can give your fundraisers the edge with a personal introduction.
4. Which social media services should you invest your time developing a strong message and network for your organization? Base your decision on the most popular social media accounts that return for your constituents. If most of your constituents are on *Twitter*, *LinkedIn*, or *Facebook*, develop your accounts there and then perhaps consider whether you can finally close your *Myspace* or *Google+* account.
5. Provide fundraisers the key social media accounts that can help them to get to know and connect with prospects.
6. Create a constituent query and filter records by social media service. For example, you can create a filtered list of just prospects with a *Twitter* account and provide it to the person in your organization who's in charge of updating and growing your organization's social media accounts. A list of constituents who care about your organization and a link to their related account can grow your network and influence much more quickly than organic, word of mouth growth.

Note: Target Analytics and our data providers are contractually bound to comply with all local, national, and international legal requirements related to the collection, transfer, and storage of social media information and other constituent data. As an analytics provider of a publically traded company, maintaining compliance with the law is our top priority - we will not offer any solution that we believe puts our clients or shareholders at risk.