

A photograph of the UC Berkeley tower at sunset. The sun is low on the horizon, creating a warm orange and yellow glow. The tower is silhouetted against the bright sky. In the background, there are mountains and a cityscape with various buildings and trees.

UCB Examples

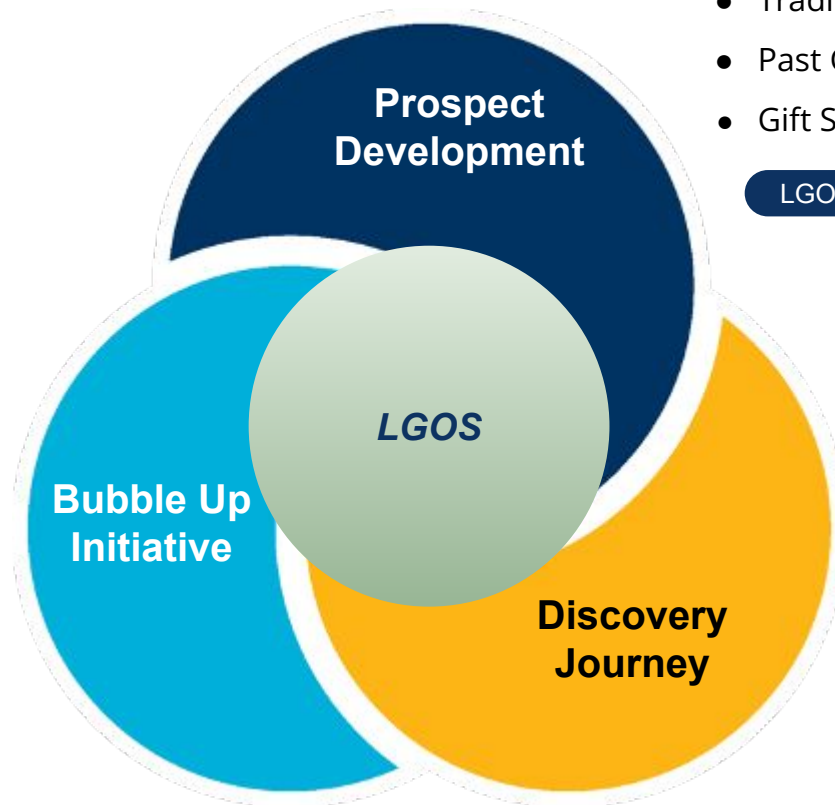
DRAFT

UC Berkeley

Lead Generation Streams

- Traditional Model
- Past Giving
- Gift Scores & Predictive Modeling

LGO Model since 2019



- Efficient Stewardship
- Timely
- Increased Bandwidth for Gift Officers

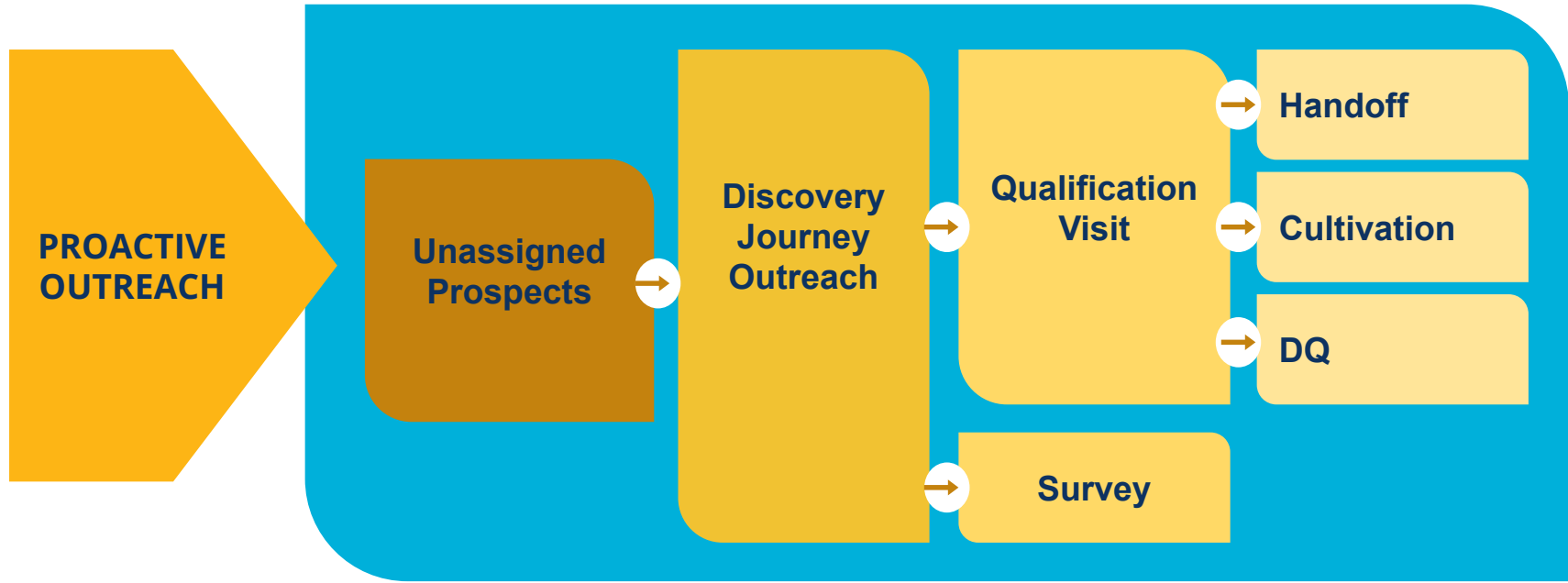
Launched in 2023

- Scalable Qualification
- No Real Estate Data
- Increased Bandwidth for Gift Officers

Launched in 2020

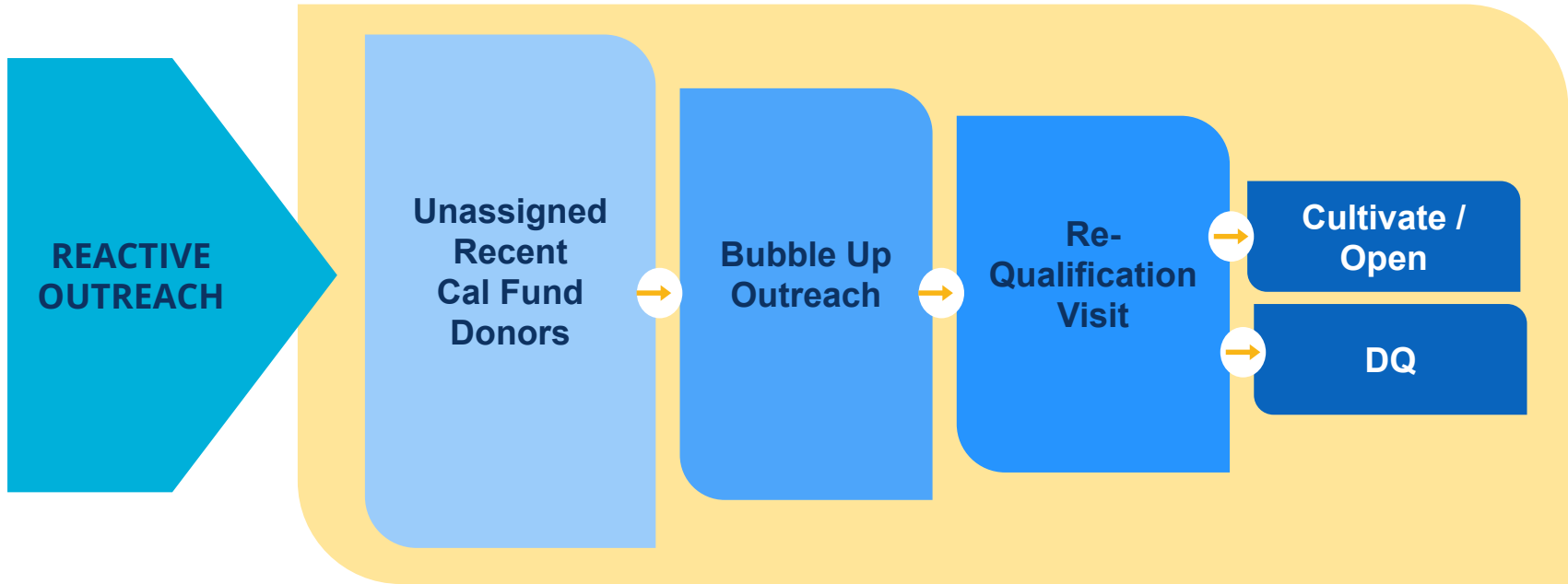
Discovery Journey = Proactive

Goal of the program= Discover prospects to build the donor pipeline for gift officers



Bubble Up = Reactive

Goal of the Program= Timely response to donor behavior to move prospects up the pipeline



Touchpoints - Emails

BerkeleyHaas

Hi Alessandra,

As a Berkeley Haas alum and donor, you are an important part of our community. We would love to know more about you and what inspires your philanthropy today.


As we kick off the new year, I'd like to invite you to have a conversation with a **member of my team** to share:

- Your experience as a student and alum of Berkeley Haas
- What motivates you to give back
- How you would like to be engaged with the school going forward


Please feel free to schedule a virtual meeting with my team by [clicking here](#). Ariel will also be in touch over the next few weeks.

Warmly,

Howie Avery
Assistant Dean for Development and Alumni Relations



Marketing Cloud



And I'm following up on the message that Howie Avery sent

[Connect over Zoom](#)

Dear Alessandra,

We are grateful for your support of Berkeley Haas as an alum and donor. We recognize a lot may have changed since graduation, and we'd love to learn more about what interests you and inspires your philanthropy today.

Are you available to meet with me in the upcoming week? Please [click here](#) or on the button above to set up a chat with me at a time and day that works best for you. If you are not interested at this time, you can still [connect with us by filling out this brief survey](#).

Thank you again for supporting Berkeley Haas. Go Bears!

Ariel Azcunaga
Berkeley Haas Discovery Officer

ThankView

Touchpoint- Survey

Qualtrics Survey

Section 1: Your Priorities and Philanthropic Preferences

Supporters like you often recognize the need to help Berkeley Haas transform lives. Would you consider furthering our work in any of the following ways?

	I already have	I am likely	I am somewhat likely	I am not likely
Make a donation online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mail a check	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating through a family foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donating through a donor advised fund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talk to a gift officer face-to-face or over the phone about making a significant impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving appreciated assets (like personal or business stocks or bonds, land or real estate, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 2: More About You

Marital/Domestic Partnership (optional)

Married

Widowed

Divorced

Single

Domestic Partnership


Which of these best describes your family? (optional)

No children

One child

Two or more children

Scheduling a Qualification Meeting



UC Berkeley Haas

Haas Chat

🕒 30 min

Thank you for supporting Berkeley Haas and setting up a time to meet! Please select a time for a 30-minute Zoom meeting. Once you finish signing up for a time, a calendar invitation along with the Zoom link will be sent to your email.

If you do not see any available time slots or need any assistance with scheduling, please email Ariel Azcunaga at ariel.azcunaga@berkeley.edu, and she will work with you to schedule a time.

Many thanks, and Go Bears!

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Select a Date & Time

powered by **Calendly**

< February 2024 >

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

Time zone

🌐 Pacific Time - US & Canada (1:09pm) ▾

Discovery Program Productivity

