Squark|AI

Better fundraising starts with better predictions.

Major Gift & Upgrade Propensity

Outcomes we typically see*

+5%	Improved	Days
Annual Net Return	Officer Productivity	Time to Value

What this use case delivers

• Score capacity, affinity, and timing to focus officer time.
• Generate officer-ready call sheets and next steps.
• Target events and visits to moments with higher win-rates.
• Surface mid-level and major upgrade candidates.

AI signals powering it

• Capacity indicators blend wealth and historical giving signals.
• Engagement propensity highlights prospects likely to respond now.
• Timing forecast plans outreach windows by quarter.
• Prospect prioritization ranks lists to streamline focus.

How it works

• Signals from wealth, engagement, and prior actions combine with timing models to prioritize portfolios.
• Outputs prioritized lists with recommended next actions for each prospect.

Implementation (days, not months)

• Connect historical donor, campaign/appeal, cost, and channel data.
• AutoML trains models with validation; you get donor-level scores and drivers in plain language.
• AI agents push segments and next-best actions into your CRM, ESP, print, and ad tools.
• Launch fast with no-code setup and human-in-the-loop approvals where needed.

* Directional examples; actual results depend on list, offer, channel mix, and scale.

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Major Gift & Upgrade Propensity (cont.)

Data & integrations

- Donor master & gift history with unique IDs and dates.
- Campaign/appeal tables, list sources, package and premium costs.
- Channel touches (mail, email, SMS, web), and optional enrichment (co-ops, demographics).
- SFTP/API/cloud-DWH access; read-only connections to activation tools.

Governance

- Human-in-the-loop approvals for high-impact actions and content.
- Least-privilege data access, expirations, and audit logs for decisions and prompts.
- Bias monitoring and calibration checks; versioned models with rollback.

Measurement

- Track net revenue, CPDR, response rate, average gift, reactivation/upgrade rates, and time-to-first gift.
- Use randomized holdouts and pre-registered test plans; report lift with confidence intervals.
- Explainability: show top drivers and calibration so teams can answer the 'why'.

Next steps

- Score one portfolio; test outreach sequences and track stage movement.
- Roll to all portfolios with shared playbooks and accountability.