

A photograph of three women in an office environment. The woman in the center, wearing glasses and a white shirt, is smiling and looking at a document. The woman on the left, with blonde hair and a pink top, is also looking at the document. The woman on the right, with dark hair and a blue top, is holding a coffee cup and looking towards the center. A teal banner with the text "YOUR MISSION MATTERS" is overlaid on the image.

YOUR MISSION MATTERS

Why boodleAI?

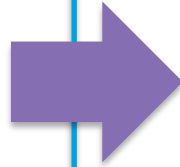
Nonprofits want



to acquire,
retain, and
grow donors



new and
increased
fundraising



Our Solution

boodleAI helps
nonprofits find the
**best donors in any
prospect list** using
predictive analytics
and AI.

what boodleAI provides



CUSTOM GUIDONS

Bespoke predictive models created from your donor data enriched with billions of third party data points using AI.

Examples

- Predict likely donors
- Predict high value donors
- Predict recurring donors

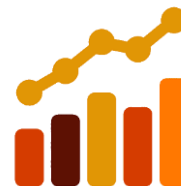


INSTANT GUIDONS

Generic predictive models created from third party data using data science.

Examples

- Wealth Score
- Giving Capacity
- Affinity for Causes
- Preference for Direct Mail



PROSPECT LIST INSIGHTS

Descriptive analytics about your prospect lists enriched with third party data.

Examples

- Geography
- Generation
- Veteran Status
- Giving Propensity

How boodleAI works

1

WHAT CUSTOMERS DO UPLOAD THEIR DATA

Customers select 250+ records from their existing databases, drawn from the audience they want to target (a training dataset) and a list of internal or external records they want to prioritize or segment (a target dataset).

They then upload the first name, last name, and email address OR physical address OR phone number of each record.

	A	B	C	D
1	first	last	email	
2	Jessica	Medina	woe@fast.at	
3	Edith	Dawson	woe@nammik.ny	
4	Joan	Wagner	df@afawentid.cw	
5	Ellen	Swanson	joh@fscay	
6	Hallee	Bradley	sun@frum.gl	
7	Philip	Leonard	warren@pht.at	
8	Elizabeth	Graham	po@frankon.jp	
9	Ray	Harrison	woe@shane.cw	
10	Bernice	Rockledge	haz@frankand.org	
11	Joan	Pratt	rak@k@flm.ki	
12	Phyllis	Tucker	um@f@ge	
13	Jack	Pence	rup@f@us	
14	Hebert	Hall	ch@ag@ce@f@ll.ge	
15	Jerome	Peters	pen@f@th.do	
16	Derek	Crawford	kap@w@tag.mh	
17	Adeline	Rode	ced@f@th.us	
18	Nathaniel	French	mit@th.de	
19	Cheryl	Hudson	zad@f@me.at	
20	Alex	Ottiga	jet@f@k.ng	
21	Roxie	Jones	ob@v@ce@f@med.it	
22	Joel	McKeville	cos@f@me.us	
23	Sam	Bass	at@f@gr@th@w@p.iff	
24	Jerry	Diaz	me@f@f@f@f@f@f.ng	
25	Dan	Page	vo@ar@f@w@ne.ki	
26	David	Swanson	h@k@f@f@f@f@f@f.us	

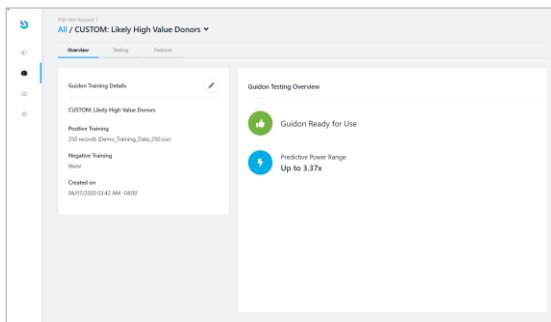
	A	B	C	D
1	first	last	email	
2	Olga	Carter	mico@f@f@f@f@f@f.ki	
3	Jerome	Pence	ter@w@f@f@f@f@f@f.cw	
4	Sally	Garcia	h@f@f@f@f@f@f@f@f.us	
5	Bernice	Sanders	h@w@w@f@f@f@f@f@f.mio	
6	Edward	Miller	pen@f@f@f@f@f@f.ki	
7	Jerome	Barber	jak@f@f@f@f@f@f@f@f.m	
8	Sally	Newman	jak@f@f@f@f@f@f@f@f.m	
9	Lula	Morton	mig@f@f@f@f@f@f@f@f.bw	
10	Iva	Cobb	ce@f@f@f@f@f@f@f@f	
11	Carther	Sims	me@f@f@f@f@f@f@f@f	
12	Elisavice	Turner	af@f@f@f@f@f@f@f@f.mio	
13	Olga	Rockingtop	zad@f@f@f@f@f@f@f@f	
14	Beatrice	Griffith	h@w@f@f@f@f@f@f@f@f.bw	
15	Wendy	Fowler	ag@f@f@f@f@f@f@f@f.ng	
16	Nora	Michael	je@f@f@f@f@f@f@f@f.us	
17	Thomas	Figuerola	h@w@w@f@f@f@f@f@f@f@f.ki	
18	Clyde	Sanders	h@w@f@f@f@f@f@f@f@f@f@f.us	
19	Ursell	Cox	com@f@f@f@f@f@f@f@f@f@f.ki	
20	Gerard	Stephens	m@w@f@f@f@f@f@f@f@f@f@f.us	
21	Stake	Munoz	me@f@f@f@f@f@f@f@f@f@f.us	
22	Gabriel	Armstrong	co@f@f@f@f@f@f@f@f@f@f.us	
23	Philip	Boyd	df@f@f@f@f@f@f@f@f@f@f.mh	
24	Marguerite	Shelton	zad@f@f@f@f@f@f@f@f@f@f.us	
25	Iva	Franko	zad@f@f@f@f@f@f@f@f@f@f.bw	
26	Roxie	Lewis	h@f@f@f@f@f@f@f@f@f@f.bw	

2

WHAT boodleAI DOES BUILD, TEST, APPLY GUIDON

boodleAI matches each record to databases of 220M adult Americans, which contain over 500 data points about each person, then builds a predictive model (a **guidon**) from the training dataset.

boodleAI tests the guidon to verify its predictive power, then uses the guidon to score, prioritize, and segment the target dataset.

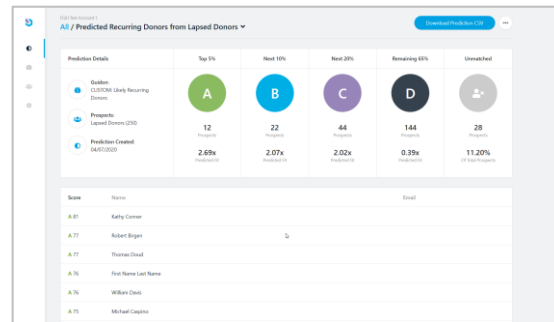


3

WHAT CUSTOMERS RECEIVE ACTIONABLE INSIGHTS

The scored, prioritized, and segmented dataset is delivered to the customer via online SaaS platform, managed service, or API.

The result: significant lifts in conversion, engagement, and retention rates.



the boodleAI difference:

donor affinity screening to predict who is the best fit ... using name and email address

boodleAI builds predictive models using the nonprofit's own data and machine learning algorithms. Most other look-alike models are created manually or using generic nonprofit trend data.

boodleAI helps busy nonprofit staff save time. Our turnkey platform only requires nonprofits to upload two datasets. boodleAI does the rest.

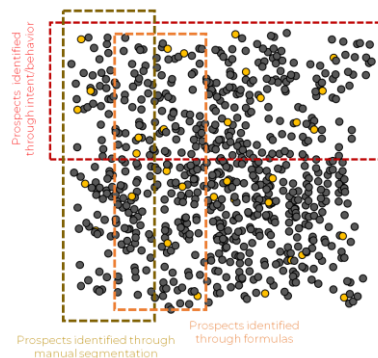
boodleAI can match identities using just name + email or name + mailing address. Most other prospect prioritization or lead scoring tools don't offer identity resolution. Or if they do, they require a physical mailing address.

We will never sell or share your data and will delete it upon request. We offer as much or more privacy and security safeguards as other nonprofit SaaS platforms.

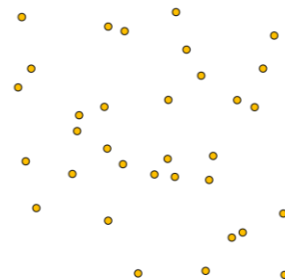
boodleAI uses over 500 third party data fields to build predictive models. Many other nonprofit tools focus on one dimension: capacity. Our AI engine looks at over 500 data fields (including capacity) to predict donor affinity.

We offer a 100% money back guarantee. If you are unhappy with boodleAI for any reason at any time, we will refund your entire annual license fee.

without boodleAI:
development staff spend time and money on prospects that are not a fit (black dots)



with boodleAI:
development staff focus their time and money on leads that are a fit (gold dots)



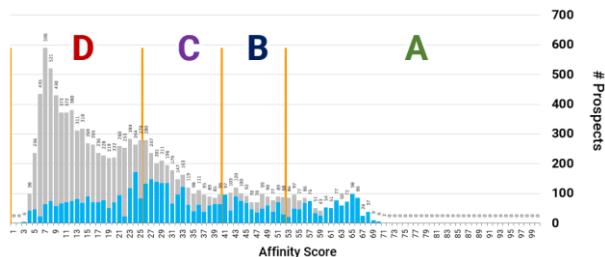
what boodleAI can do

PREDICTIVE LEAD SCORING

Using a single guidon, boodleAI can score any list of current prospects or donors for fit.

Examples

Predict likely customers
Predict high value customers
Predict recurring customers



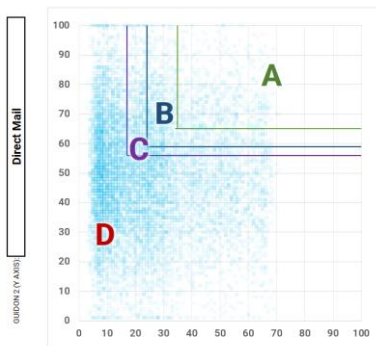
First	Last	Email	Lead Fit Score
Maria	Johnson	bonsirpiz@rag.bq	77
Walter	Beck	ovgevo@sinmau.us	77
Duane	Howell	de@niup.bi	76
Mark	Lowe	te@fofo.cy	76
Michael	Willis	nup@wojfe.pl	75
Leonard	Miles	at@natso.ao	75
Cecilia	McCoy	utmet@fufje.co.uk	74
Cornelia	Todd	bobeb@vo.lk	74
Theodore	Williamson	zh@bousd	73
Nelle	Terry	roanaeg@quhne.ve	72

PREDICTIVE LEAD MAPPING

boodleAI can score any list of current prospects or donors for fit against two guidons simultaneously.

Examples

Predict likely customers AND leads likely to respond to direct mail
Predict high value customers AND leads likely to attend an event
Predict recurring customers AND high value customers



GUIDON 1 (X AXIS) Convert from Trial to Paid

First	Last	Email	Lead Fit Score	Direct Mail Fit
Michael	Willis	nup@wojfe.pl	87	55
Leonard	Miles	at@natso.ao	86	42
Cecilia	McCoy	utmet@fufje.co.uk	85	64
Cornelia	Todd	bobeb@vo.lk	84	42
Theodore	Williamson	zh@bousd	82	43

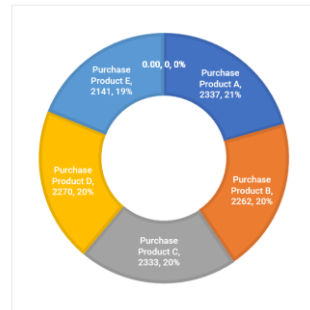
PREDICTIVE LEAD SEGMENTATION

boodleAI can sort any list of current prospects or donors against multiple guidons.

Examples

Predict best salesperson to assign
Predict best outreach (email, direct mail, or phone)
Predict best time to approach prospect

1	Purchase Product A
Share	20.6% # Prospects 2337
2	Purchase Product B
Share	19.9% # Prospects 2262
3	Purchase Product C
Share	20.6% # Prospects 2334
4	Purchase Product D
Share	20.0% # Prospects 2270
5	Purchase Product E
Share	18.9% # Prospects 2141



Prospects Best Fit for A

Leonard Miles (86)
Cornelia Todd (45)
Theodore Williamson (89)
Vincent Lawson (78)
Theresa Estrada (73)
Katharine Coleman (91)

Prospects Best Fit for B

Cecilia McCoy (64)
Earl Holloway (38)
Cody Kelly (39)
Elizabeth Quinn (90)

Prospects Best Fit for C

Michael Willis (78)
Eunice Wilkins (89)
Lucille Hubbard (90)
Alvin Casey (93)
Ryan Graves (92)

who uses boodleAI

In the 9 months since product launch:

60

Paying Customers
(54 nonprofit, 2 political, 4 commercial)

\$110K

Smallest nonprofit customer (annual fundraising)

\$4.2M

Average customer size (annual fundraising)

\$300M

Largest nonprofit customer (annual fundraising)

\$105,000

Largest annual license sold to date

boodleAI results

boodleAI has helped customers achieve:

\$20,000

Largest single boodleAI "found" donation

+56%

Increase in major gift size

+35%

Increase in email open and click rates

+160%

Increase in average donation size

+81%

Increase in donation rate

what people say about boodleAI

Individuals:

"boodleAI does a really good job of simplifying predictive outcomes."

- Dan Streetman, CEO, TIBCO

"It really focuses our marketing. We spend way too much money on marketing that isn't effective anymore. From what I expect to generate from boodleAI, it'll return \$10 for every \$1 invested." -David Smydo, CEO, Sokolin

As Mentioned in

NonProfitPRO

THE NONPROFIT TIMES
The Leading Business Publication For Nonprofit Management

WASHINGTON BUSINESS JOURNAL



Media:

- Named an "AI Tool Your Nonprofit Must Explore" in [NonProfit Pro](#).
- In a [survey of 212 nonprofit leaders](#) about AI implementation, boodleAI ranked as highly as AI products from publicly traded companies Microsoft and Blackbaud

Awards & Recognition

	# Custom Guidons	# Records	Pricing for Annual License	Pricing for +10K records
Starter	3	50,000	\$4,950	\$1,000
Growth	8	100,000	\$9,900	\$750
Professional	25	300,000	\$24,750	\$500
Enterprise	Unlimited	Varies	Varies	-

100% Money Back Satisfaction Guarantee

Access to Customer Support Team