

Unearthing More Gifts in Will with AI and smarter data strategies

AMNESTY
INTERNATIONAL



dataro

Meet your panelists



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Agenda

PART ONE:

- a. Key challenges in legacy fundraising
- b. The role of data and AI in identifying your best legacy prospects

1. PART TWO:

- a. Building legacy programs & campaigns with AI models at Amnesty
- b. Lessons & best practice tips

PART ONE:

Why AI is needed in legacy giving



Key challenges for legacy fundraising

AND WHY AI IS NEEDED



More competition

- Concentrated wealth, between fewer donors
- Requires tailored experiences



No time / resources

- Good relationships take time
- Cost of wasted time is high



Too much data

- High volume
- Too many sources
- Unclear signals



The cost of living crisis – a strategic opportunity

- The cost of living crisis is squeezing household budgets & generosity
- Less discretionary income doesn't mean donors care less 💔

BUT...

- Legacy programs are uniquely positioned to benefit from the crisis
 - Gifts in Will is giving on the donors terms / in their own time
 - a values-driven way to contribute now without financial impact
- Smart organisations are doubling down on legacy giving opportunity

AND AI CAN HELP YOUR FOCUS EFFORTS ON RIGHT DONORS



But isn't AI still new and untested?



Recommendation systems
(Netflix)



Predictive analytics
(propensity models)



Gaming



Chatbots

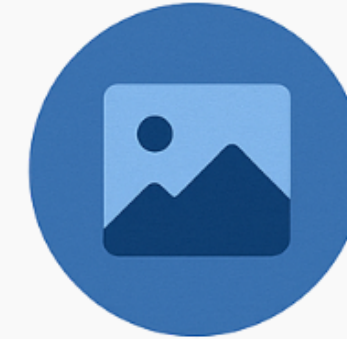


Image generation



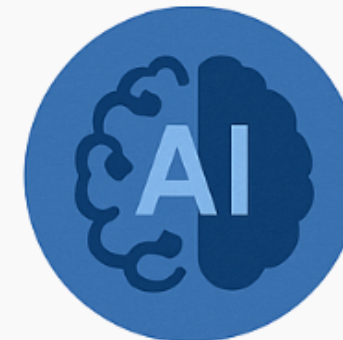
Copy writing



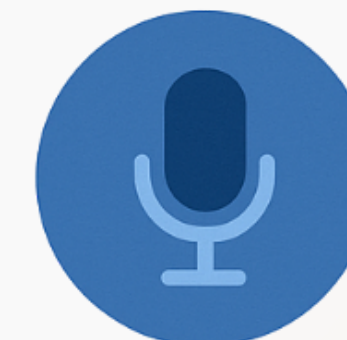
Chatbots



Healthcare diagnostics

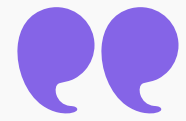


AI Agents

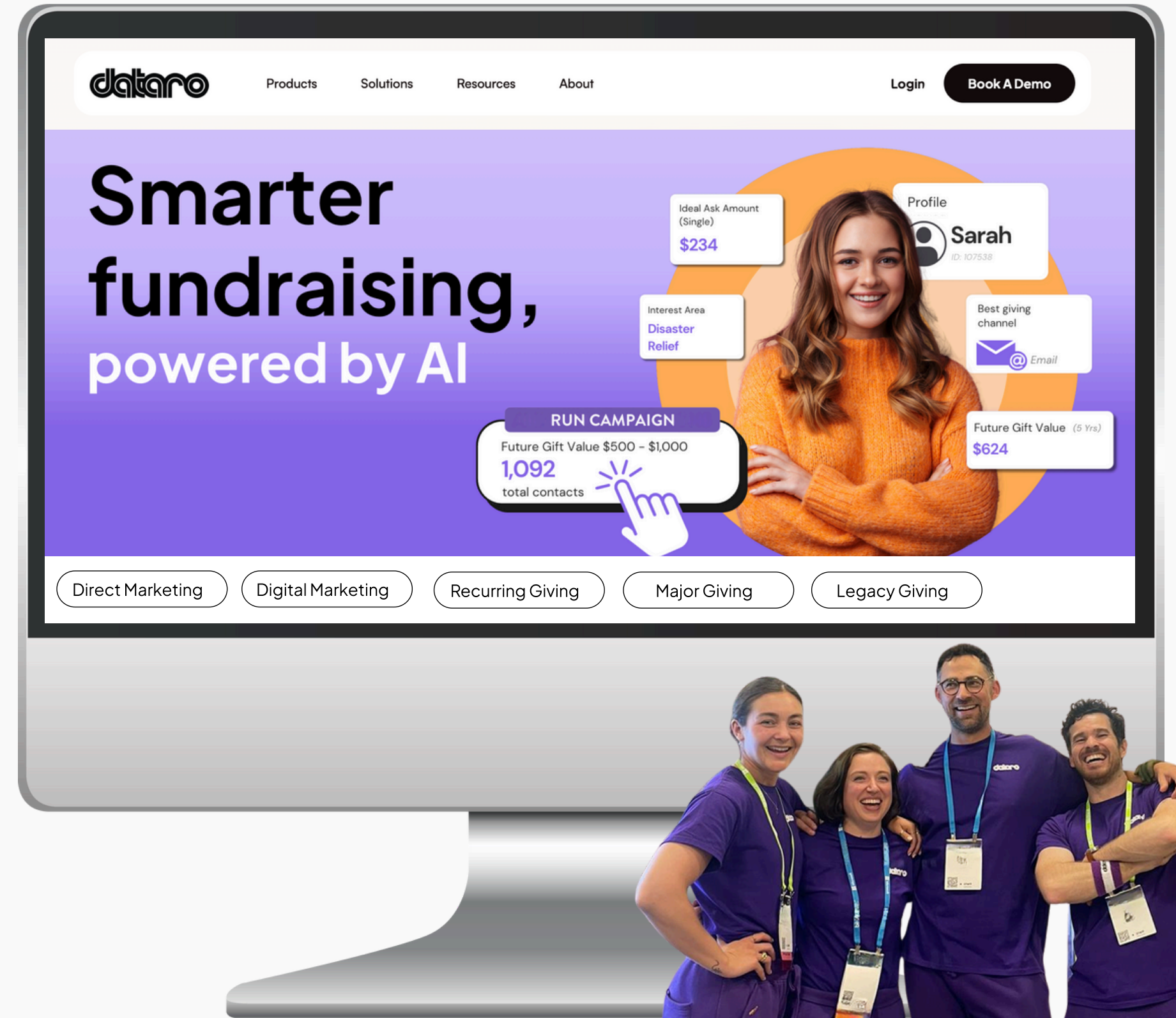


Virtual Assistants





We help fundraisers leverage AI to grow their fundraising & fuel more impact



Trusted by 300+ nonprofits in 20+ countries



So how does AI help build better legacy pipelines?



+



+



Right audience

Right message

At the right time

*The best legacy brand and campaign won't succeed,
if you aren't talking to the right supporters*



Who are our best gift in Will prospects?



AI HELPS YOU ANSWER THIS QUESTION



Traditional segmentation approach



Groups donors together based on limited giving & demographic data

Given more than \$\$\$ historically?

Recurring giver?

Gender / Age



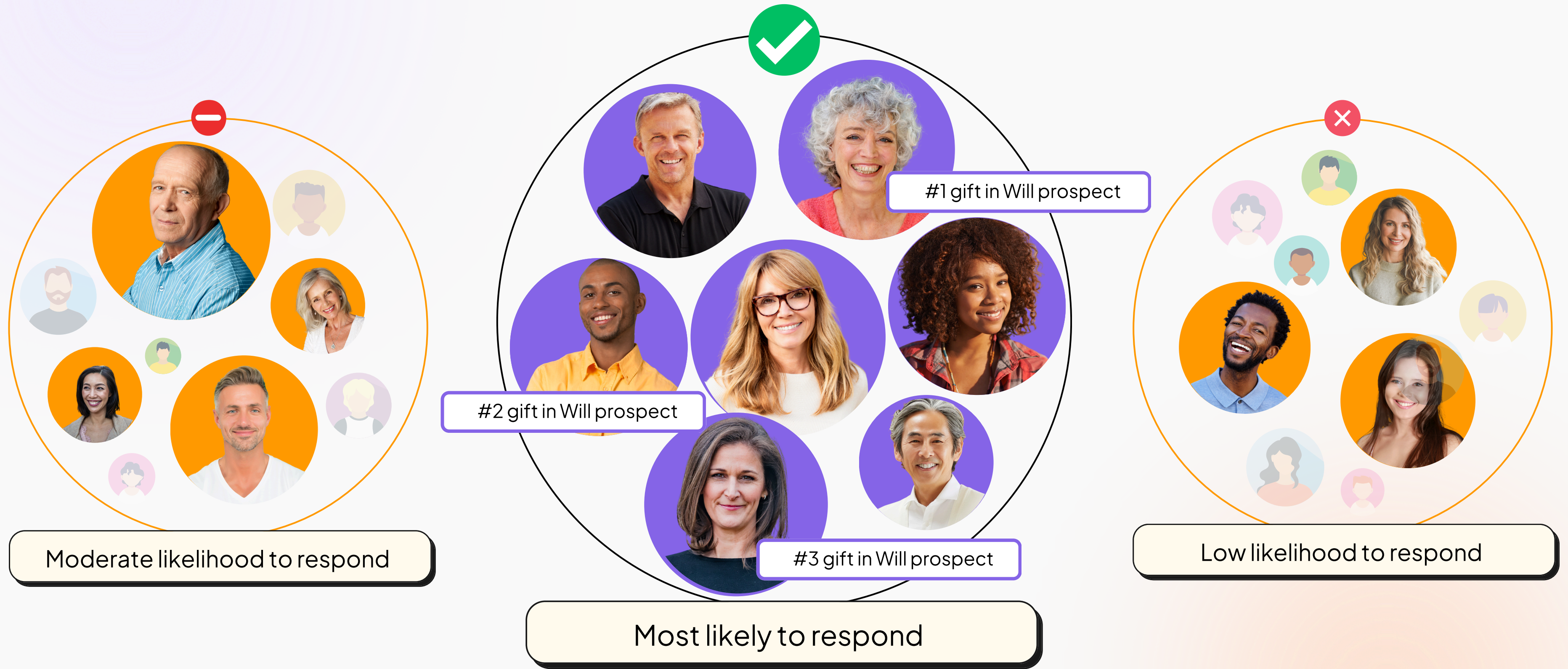
AI-powered audiences



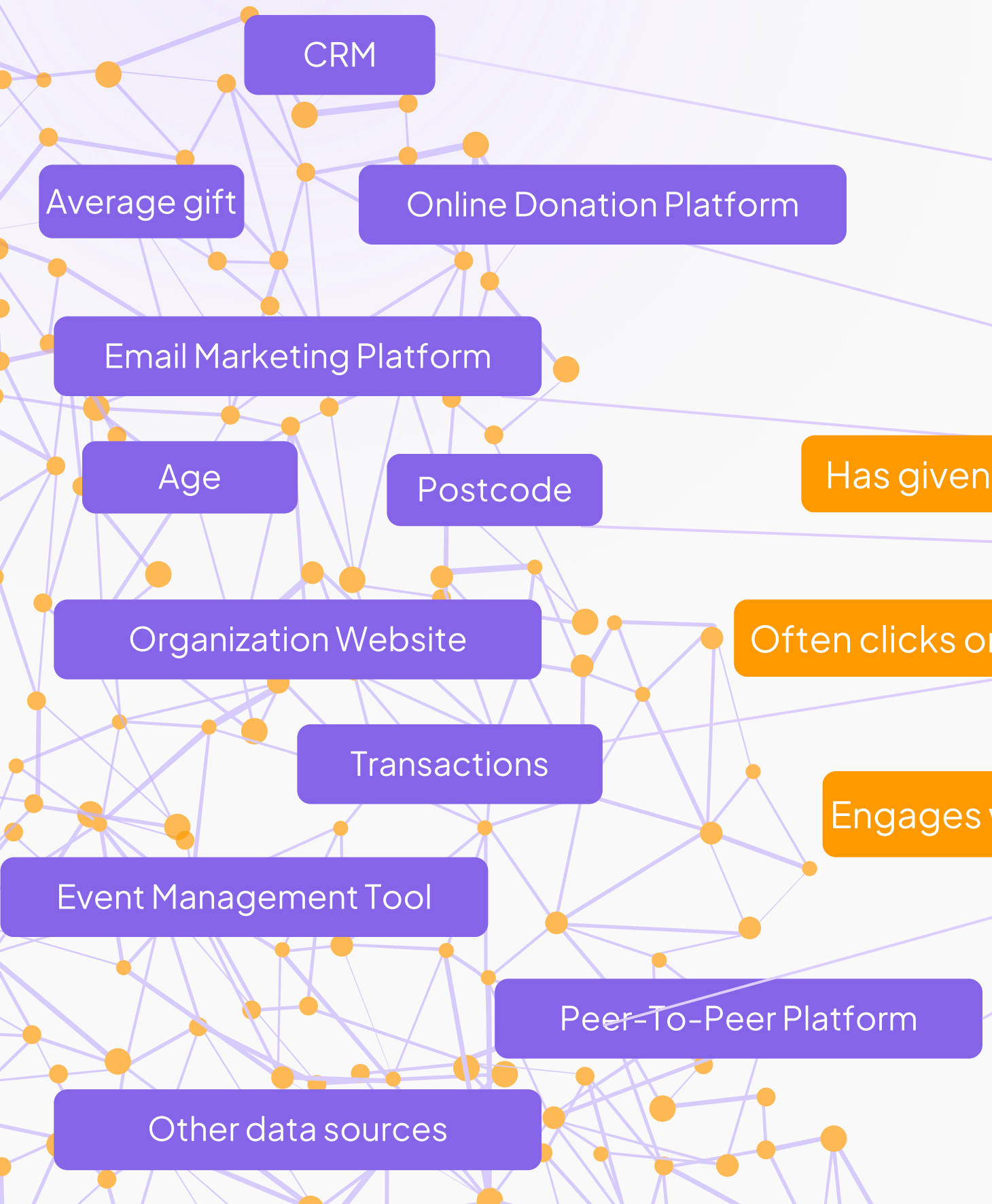
- Prefers email
- Interested in deforestation



AI-powered audiences



Predictive modelling with AI uses everything



AI evaluates every donor's history to find the patterns that matter

Has given multiple single gifts

Often clicks on email newsletter links

Engages with appeals focused on deforestation

Last gift / gift count / gift value / all transaction history / all commitments / all communications / all actions taken / age / gender / location / payment method / acquisition channel / relationships / education / memberships / website visits



Fundraisers only use the tip of the ice berg

WHAT FUNDRAISERS SEE

Recency
Frequency
Value
LTV
Age / gender



WHAT AI SEES

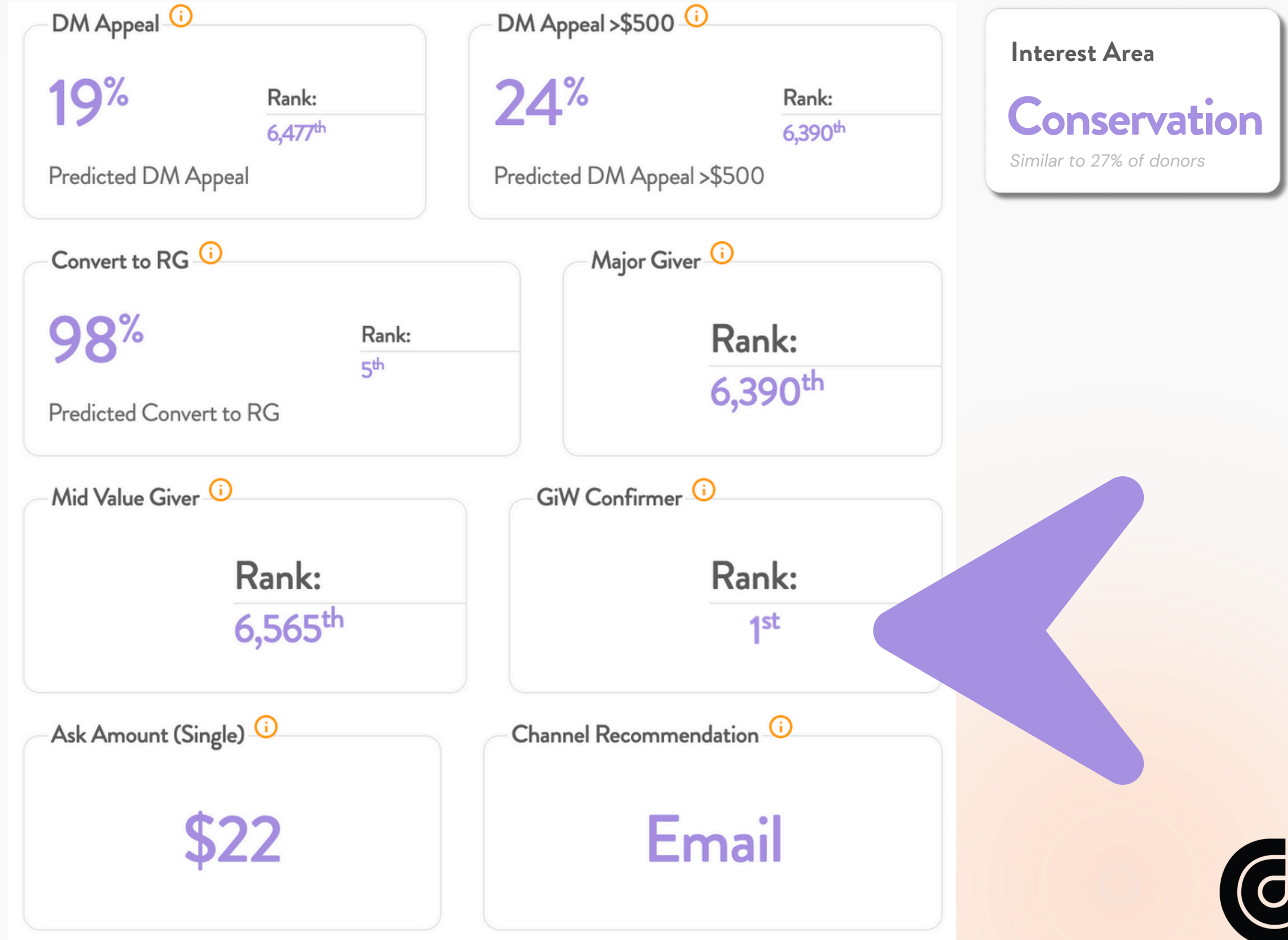
All transaction history
All commitments
All communications received
Open rates / clicks
Interest areas
All actions taken
Age & Gender
Location
Payment methods
Acquisition channels

...and so much more

Dataro's AI models has found 146 individual predictive features that influence legacy giving



Know your donors better with a 360 degree view



Every donor, analysed and ranked

9,010 donors found

Donors listed by Gift in Will Ranking

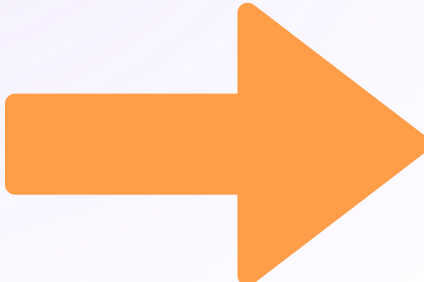
Filters

Columns

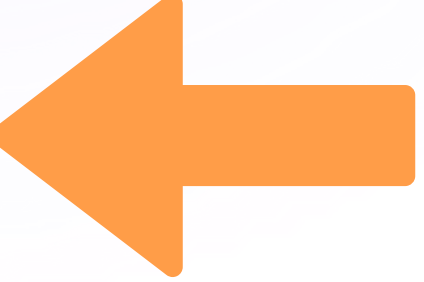
Export

Contact ID	First Name	Gender	Age	Favourite campaign type	Favourite channel	Favourite payment method	Gift-in-will rank	Channel Recommendation	Expected ROI
2864	Silvana	Female	68	Appeal	Mail	Cash	1 st	Mail	-
11718	Leonie	Female	66	Appeal	Mail	Credit Card	2 nd	Phone	-
23730	Teresa	Female	66	Appeal	Mail	Cheque	3 rd	Phone	-
29458	David	Male	85	Appeal	Mail	Cash	4 th	Phone	-
8450	Margaret	Female	74	Appeal	Mail	Cash	5 th	Mail	-
16701	Don	Male	91	Appeal	Mail	Cheque	6 th	Mail	-
6336	Ros	Female	71	Appeal	Mail	Credit Card	7 th	Email	-
5694	Irene	Female	87	Appeal	Mail	Cheque	8 th	Email	-
2391	JA	Female	89	Appeal	Mail	Cheque	9 th	Mail	-
15223	Max	Male	71	Appeal	Mail	Credit Card	10 th	Mail	-

Predictive AI: Machine Learning (ML)



Input = Historical data
(your donor CRM data)



Output = Future predictions
(% likelihood of giving or rank)

The image shows a woman with long brown hair wearing an orange sweater, standing in front of a large orange circle. Several data visualization boxes are overlaid on the scene:

- Ideal Ask Amount (Single):** \$234
- Interest Area:** Disaster Relief
- Best giving channel:** Email (indicated by an envelope icon)
- Future Gift Value:** \$624
- Profile:** Sarah, ID: 107538
- RUN CAMPAIGN:** Future Gift Value \$500 - \$1,000, 1,092 total contacts (with a hand icon pointing to the number)

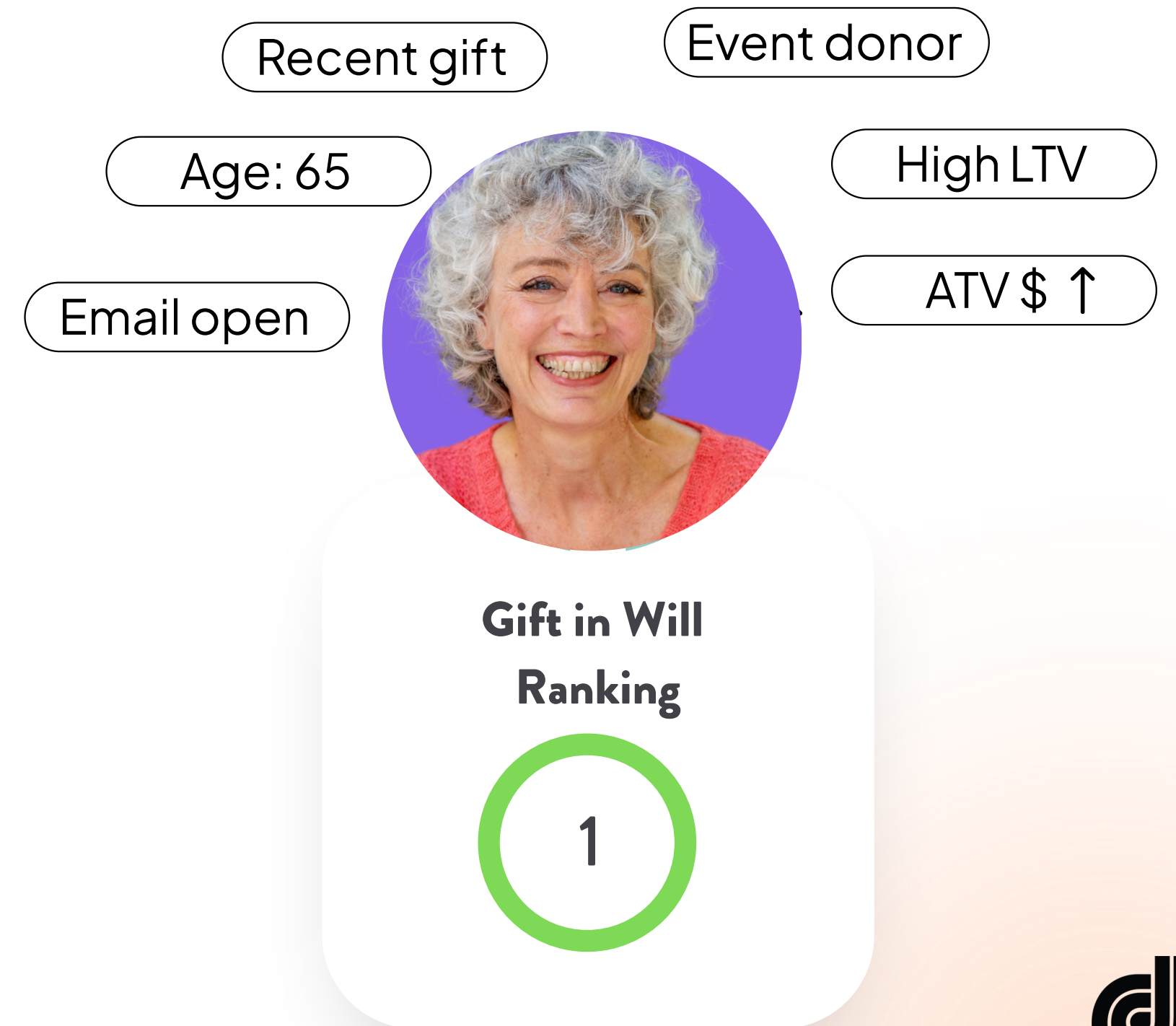
Think of ML as **pattern analysis** - uses all of your available CRM data



How Dataro builds gift in Will AI models

The Challenge:

- **Limited data** - bequests account for less than 0.05% of all gifts



Our Answer:

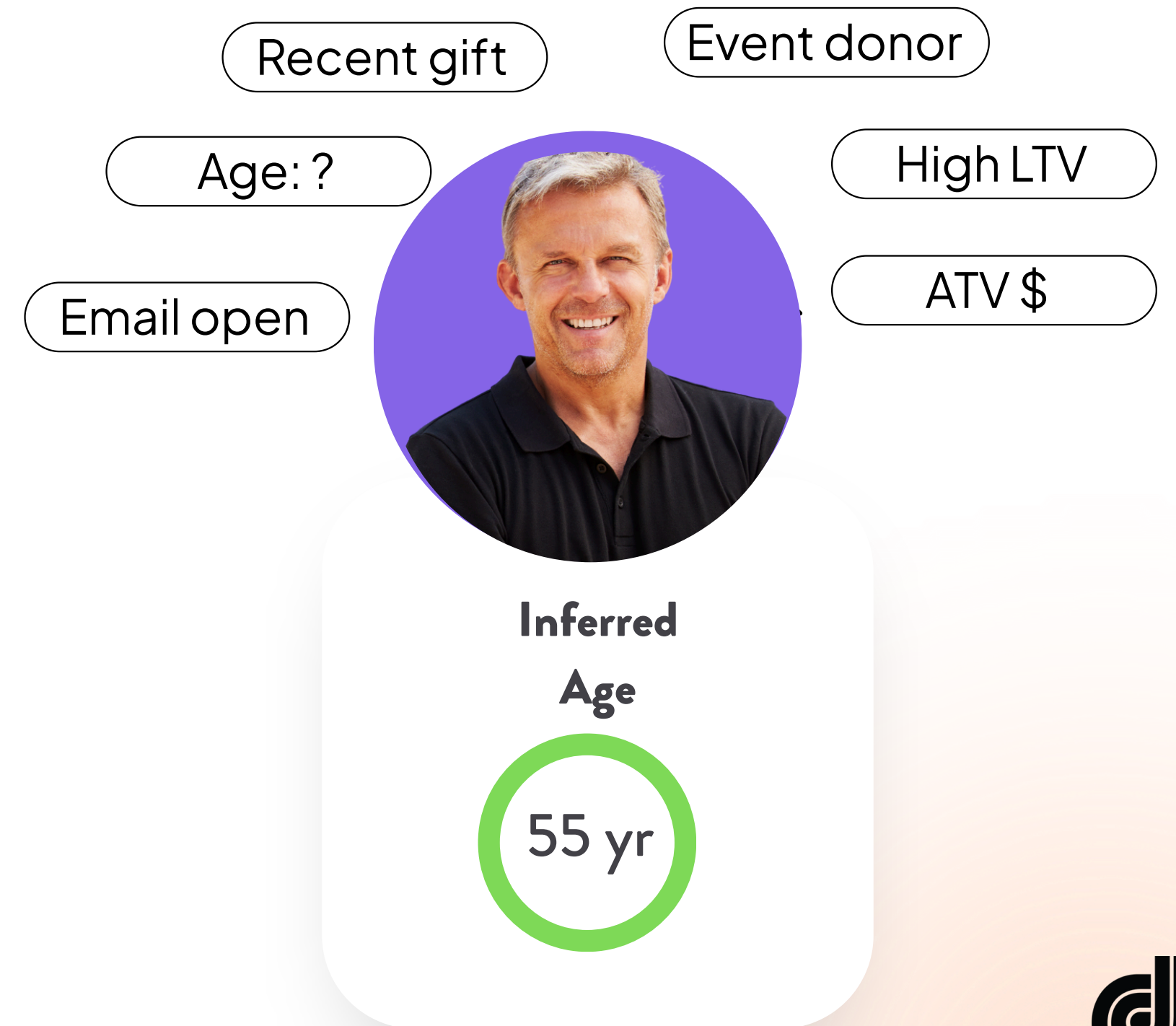
- **“Foundation” model** - using anonymised data from over 300 organisations
- No PII in model training
- 146 different features



Bonus data – filling the gaps

The Challenge:

- Patchy D.O.B - The typical charity has <30%



Our Answer:

- Leveraging the 'Data Pool' to triangulate an estimated D.O.B. to within a range of ~5 years.



Key considerations using AI in legacy giving

- AI and predictive modelling is NOT a silver bullet
- Don't over-automate - common & fundraising nouse still matters
- The black box concept
- Helps point you in the right direction of best audiences



PART TWO:

Putting the AI theory into Action – Amnesty

