

Optimizing Constituent Engagement with Salesforce Einstein Prediction Builder

Client National Kidney Foundation (NKF) | Industry Non-Profit Organization

Overview

The National Kidney Foundation (NKF) sought to enhance its engagement with constituents by leveraging predictive analytics within Salesforce, including donors, volunteers, and professional members. NKF partnered with Equals II

to implement **Salesforce Einstein Prediction Builder**, aiming to harness artificial intelligence (AI) to predict constituent behaviors and optimize interactions.

Project Objectives

The primary objective of the NBA project was to leverage the predictive models and insights generated during the EPB project to create actionable recommendations for Salesforce users. These recommendations aimed to:

<p>Predict Constituent Engagement Determine the level of engagement of various constituents, helping prioritize outreach and improve relationships.</p>	<p>Increase Professional Membership Renewals Forecast the likelihood of professional members renewing their memberships, enabling targeted retention strategies.</p>	<p>Boost Donation Levels Identify donors likely to increase their donations and those with high lifetime value, focusing cultivation efforts on these individuals.</p>
<p>Enhance Donor Retention Predict which donors are at risk of lapsing and implement measures to retain them.</p>	<p>Identify Major Donors Pinpoint potential major donors based on donation history and financial capacity.</p>	<p>Improve Fundraising Efficiency Utilize opportunity scoring to prioritize high-potential fundraising opportunities.</p>



Implementation Strategy

Equals II followed "The Equalizer Way" to implement Salesforce Einstein Prediction Builder:

<p>Discovery Phase Engaged NKF's business unit leaders and subject matter experts (SMEs) in workshops to define the purpose and use cases for leveraging Salesforce AI.</p>	<p>Development and Testing Provided continuous updates during development, with Equals II demonstrating implementation details and testing outcomes to NKF's business SMEs, ensuring alignment and successful delivery.</p>
<p>Deployment and Optimization Implemented predictive models across multiple areas, focusing on donor engagement, professional membership renewals, and significant donor identification. Regular monitoring and adjustments were made to refine predictions and improve accuracy.</p>	

Key Features of the Einstein Prediction Models

<p>1. Constituent Engagement Scoring Predictors Donation history, volunteer activity, event attendance, advocacy efforts, email engagement, and communication preferences. Outcome Prioritized connections with individuals likely to support and contribute, driving long-term engagement.</p>
<p>2. Professional Membership Renewal Probability Predictors Membership status, engagement scoring, donation history. Outcome Identified members at risk of non-renewal, enabling proactive engagement and retention strategies.</p>
<p>3. Donation Increase Prediction Predictors Donation history, constituent engagement score. Outcome Focused cultivation efforts on donors likely to increase their contributions.</p>
<p>4. Donor Retention and Churn Predictors Donation history, communication preferences, email engagement. Outcome Implemented targeted strategies to retain donors at risk of churning.</p>
<p>5. Major Donor Identification Predictors Donation history, financial capacity indicators. Outcome Directed efforts towards donors with the potential to become significant contributors.</p>

Results and Impact

Implementing Einstein Prediction Builder by Equals II has provided NKF with actionable insights transforming how the organization engages with its constituents. The predictive models are enabling NKF to:

<p>Enhance Constituent Relationships NKF can foster deeper connections with key supporters by focusing on high-engagement individuals.</p>	<p>Improve Fundraising Outcomes Targeted strategies based on predictive insights can increase donation levels and improve donor retention.</p>	<p>Optimize Resource Allocation With clear predictions, NKF can allocate resources more effectively, focusing efforts where they will have the most significant impact.</p>
-------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Visual Design Elements

<p>Dashboard Snapshots Include screenshots of predictive model scorecards to visually represent the Einstein models' impact.</p>	<p>Client Testimonials Feature quotes from NKF leadership highlighting the positive changes brought about by the implementation.</p>
<p>Infographics Utilize infographics to illustrate the flow from data input to actionable predictions and their results.</p>	<p>Process Diagrams Depict the step-by-step implementation process, from discovery through deployment.</p>

Conclusion

The collaboration between NKF and Equals II, Inc. on the Einstein Prediction Builder project has significantly advanced NKF's ability to engage with constituents in a personalized, data-driven manner. This project's success highlights AI's transformative potential in the non-profit sector, paving the way for NKF to continue its mission with greater precision and effectiveness.

