# Getting Started with Accessible Intelligence

The Accessible Intelligence marketing platform is an end-to-end solution that allows non-profits to leverage the power of Machine Learning, a discipline of Artificial Intelligence. Our technology is built around common marketing objectives like converting one-time donors to monthly donors, or convincing activist (non-donors) to become donors.
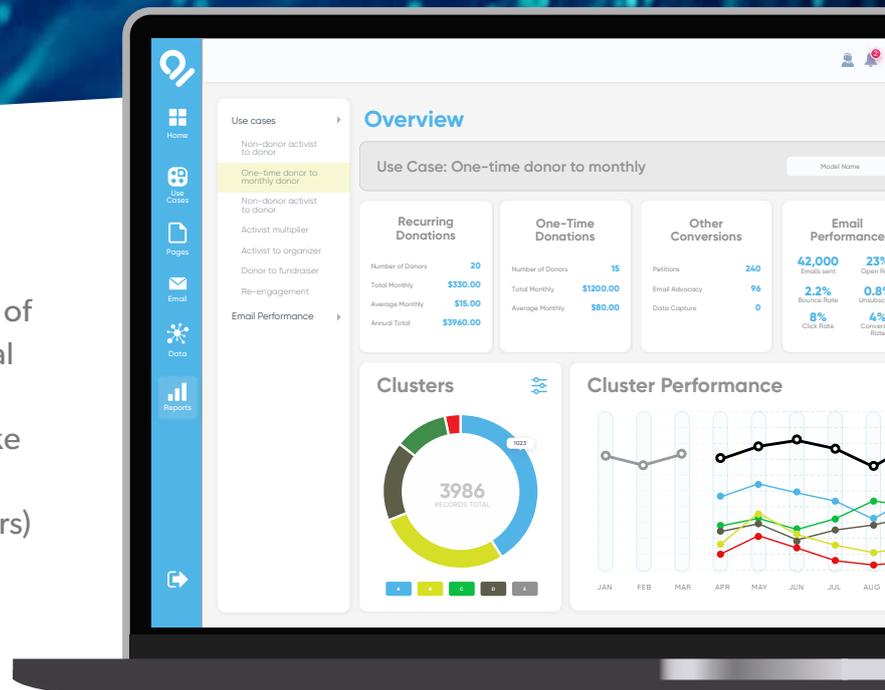
How does it work?

The process can be broken down into a few simple steps:

- working together, data is imported into our data store
- we create a custom database that describes the content of each email you have sent to supporters in the past year
- we test our core models against your data to measure the expected accuracy of our predictions, and then adapt as necessary
- you create the email content, specified by the algorithms, to send to each cluster of supporters for each use case
- we automate the sending of your content and look after the reporting

Each of the steps is described in more detail in this setup guide.

It's All About Data

There are two main sets of data that our algorithms require: the transactional history for your supporters, and a database that describes the content of your marketing emails. It's the connection between these two sets of data that is critical. We need to connect activity with the messaging that triggered the activity.

IMPORTING TRANSACTION DATA
(2-4 WEEKS)
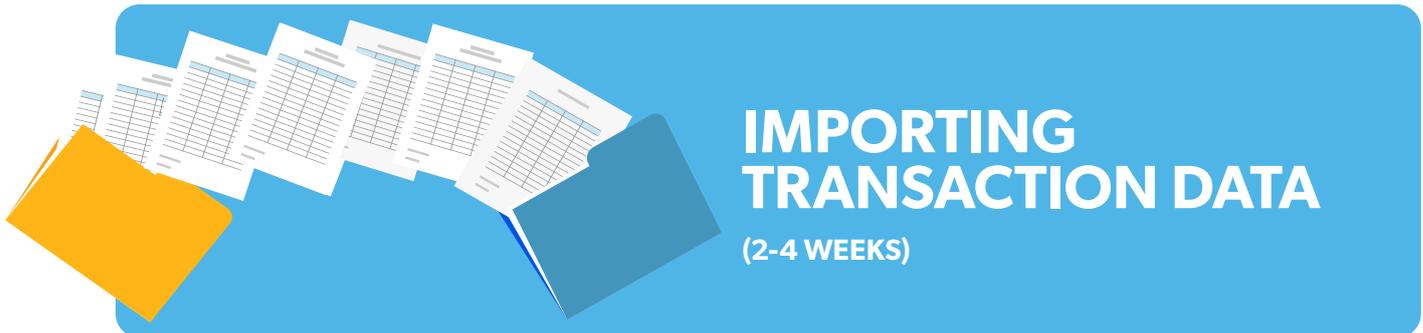
What transaction data do we need? This will vary based on the use case. The essential transactions for fundraising use cases (e.g. 'one time donor to monthly') are of course donations, while use cases that involve advocacy (e.g. 'conversion of activist to donor') require advocacy transactions (petitions, email your representative, call your representative, etc.) We will work with whatever transaction types you can provide, recognizing that the more data that we have the better.

For all use cases we require email engagement (sends, clicks, conversions, and unsubscribes.)

There isn't a need to know anything about the individual supporter, but we do need a unique identifier (like email address) to connect transactions to each supporter. There are a few other requirements like a unique ID for marketing email so that we can connect each email response to a transaction.

Your transaction data can be imported into the data store using a REST service or as a manual file import in the dashboard. Both options include a mapping tool so that you do not need to re-format the data before import.

IMPORTING YOUR MARKETING EMAILS
(CONCURRENT WITH THE DATA IMPORT)

Your marketing emails can be imported as a simple flat file containing a URL for each email, a send date, and a unique ID. That's all we need. As discussed above, the unique ID for each email should connect the email to transaction data (assuming transactions are connected to an email conversion.) We will take the file and manually process the import for you.

Once these emails are in the data store, you now have a ready-made library to help you build out the new email content specified by the algorithms for the marketing automations. We don't want you starting from scratch.


CLASSIFYING YOUR EMAIL CONTENT
(2-4 WEEKS)

With your initial data imports complete, our content classification team will get to work. Following two years of research, Accessible Intelligence has developed a proprietary list of categories and values to describe your email content: emotion, primary ask, theme, reading level, etc. We know what elements of an email are the most influential when it comes to effective clustering of supporters and searching for behavioural patterns.

Our team use a custom dashboard to record the descriptive values for each of your emails. Processes are in place to ensure that we achieve a very high level of consistency across the individuals on our team. The classification values become a database used by the algorithms in clustering and prediction.
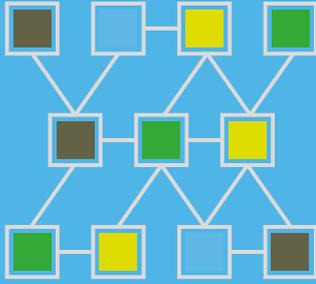
MODEL ADAPTATION
(4 WEEKS, PARTIALLY CONCURRENT WITH THE CONTENT CLASSIFICATION TIMEFRAME)

Each use case rests on two basic models.

- unsupervised algorithms are used to cluster supporters (essentially placing supporters into groups with other similar supporters)
- supervised algorithms look for behavioural patterns in each cluster that allows them to predict the most likely path to achieve the outcome of each use case (number of emails to send, interval, and content)

Based on our analytics, testing, and research, it is not possible to create a single set of models for all use cases. Each use case may be influenced by different components of the database. It is also possible that the core models can be improved based on the content of an individual organization's marketing program, or the profile of their supporters, or both. This is why we test your data in the core models to see if the prediction of outcomes can be optimized.
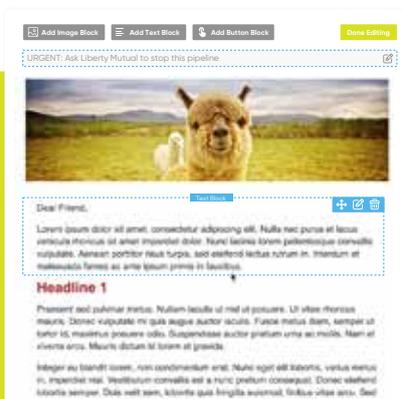
BUILDING EMAIL CONTENT
(4-6 WEEKS)

DATA? READY. MODELS? READY.

The Accessible Intelligence dashboard allows you to click to view the clusters and marketing streams for each use case. For example, you might find that the algorithms have created seven clusters of supporters for the 'one-time donor to monthly' use case. For each of these seven clusters, algorithms have specified a fixed number of emails to send, and they have specified the content to include in each email.

Tools are available to see which content in your library most closely match the requirements (remember that we imported your emails.) These emails can then be used to build out new content for the automations. Once your content is ready, and signed off by our classification team, you are ready to go live.

AUTOMATIONS & REPORTING

Accessible Intelligence works with our sister company, Engaging Networks, to automate sending of your emails for each marketing stream. You do not need to log into Engaging Networks as the Accessible Intelligence dashboard uses REST services to connect to Engaging Networks seamlessly.

We automatically record the email performance data, however, in order to record the conversion data, we need transaction data (post launch) to be imported. The alternative is to build out landing pages using the Engaging Networks platform, in which case transaction data is automatically available for reporting.

This is what makes our solution so compelling. We go from data, to prediction, to implementation.

POST-LAUNCH DATA

Once the service is launched you will continue to acquire new supporters and collect more transaction data for existing supporters. Adding this data (daily, weekly, monthly, etc.) can be done using the import options described at the beginning of this document.

Contact Us

Most of the work described here is completed by our team leaving you to focus on creating the content for the marketing automations. If you are ready, so are we!

Please contact us to get started: joanne@accessibleintelligence.io