

# UC Davis Portfolio Analysis – Streamlined, Transparent and Personalized

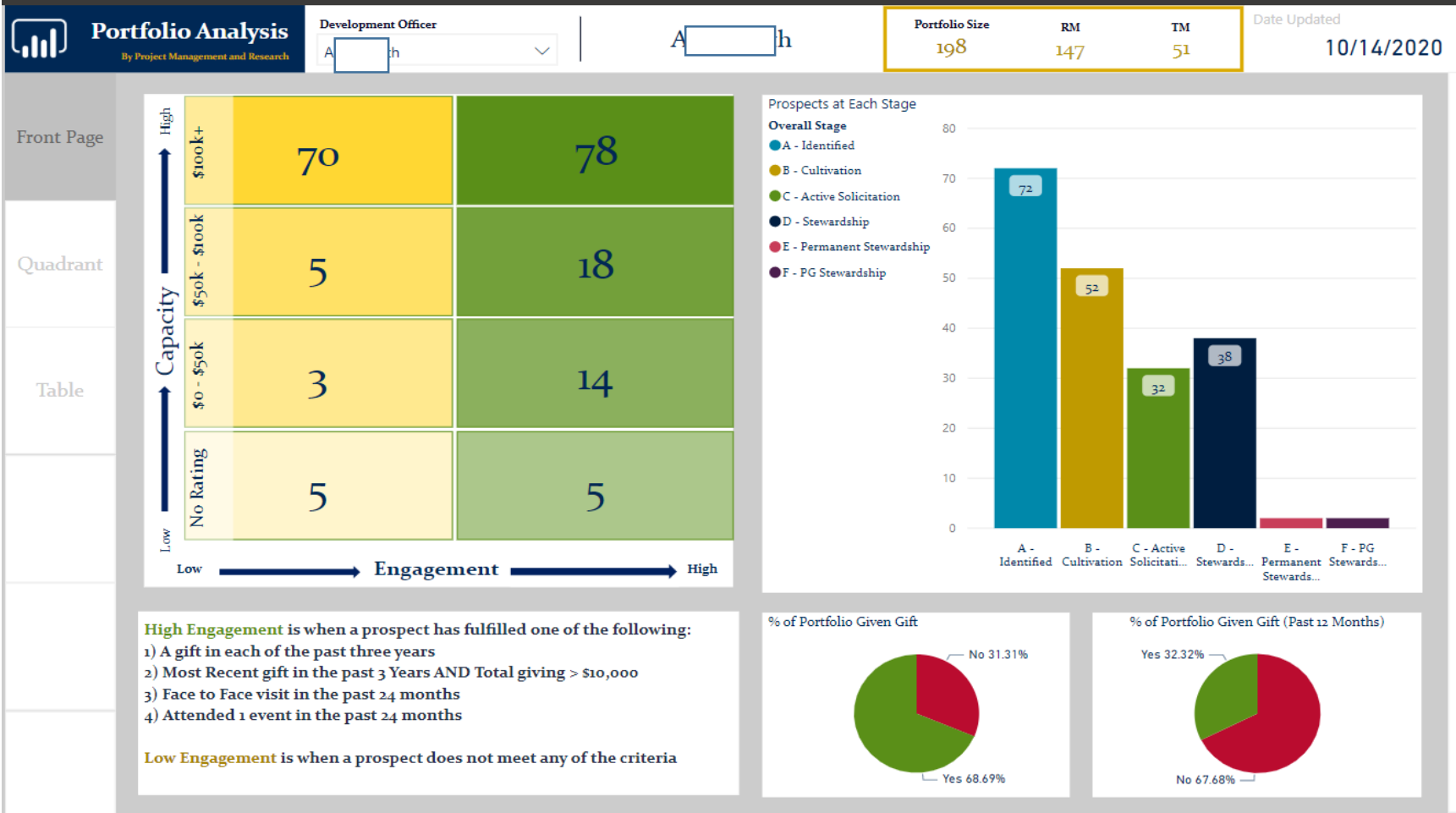
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# Cover Page

Researcher is able to choose development officer  
and have a big picture view of portfolio health



Engagement score  
criteria – allows for  
ease of organization  
and provides the  
researcher with a  
detailed yet still  
overall look at a  
development officer’s  
portfolio health

# Filtering

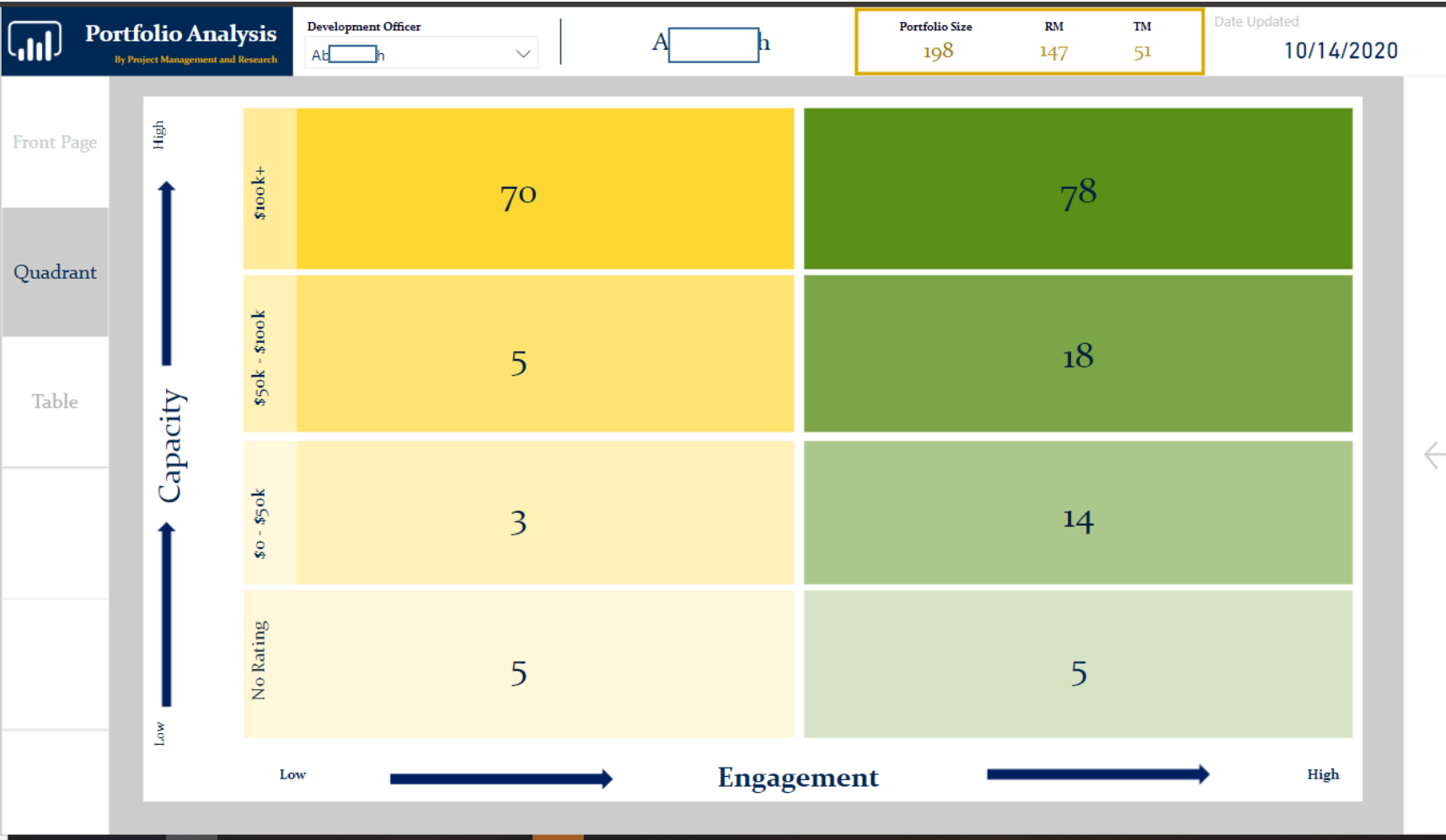


Clicking the right side of the PowerBI report allows for the user to filter for specific segments of a development officer's portfolio.

Visualizations and data update automatically based on these filters – allowing for a fast and easy way to observe trends and tendencies

# Quadrant

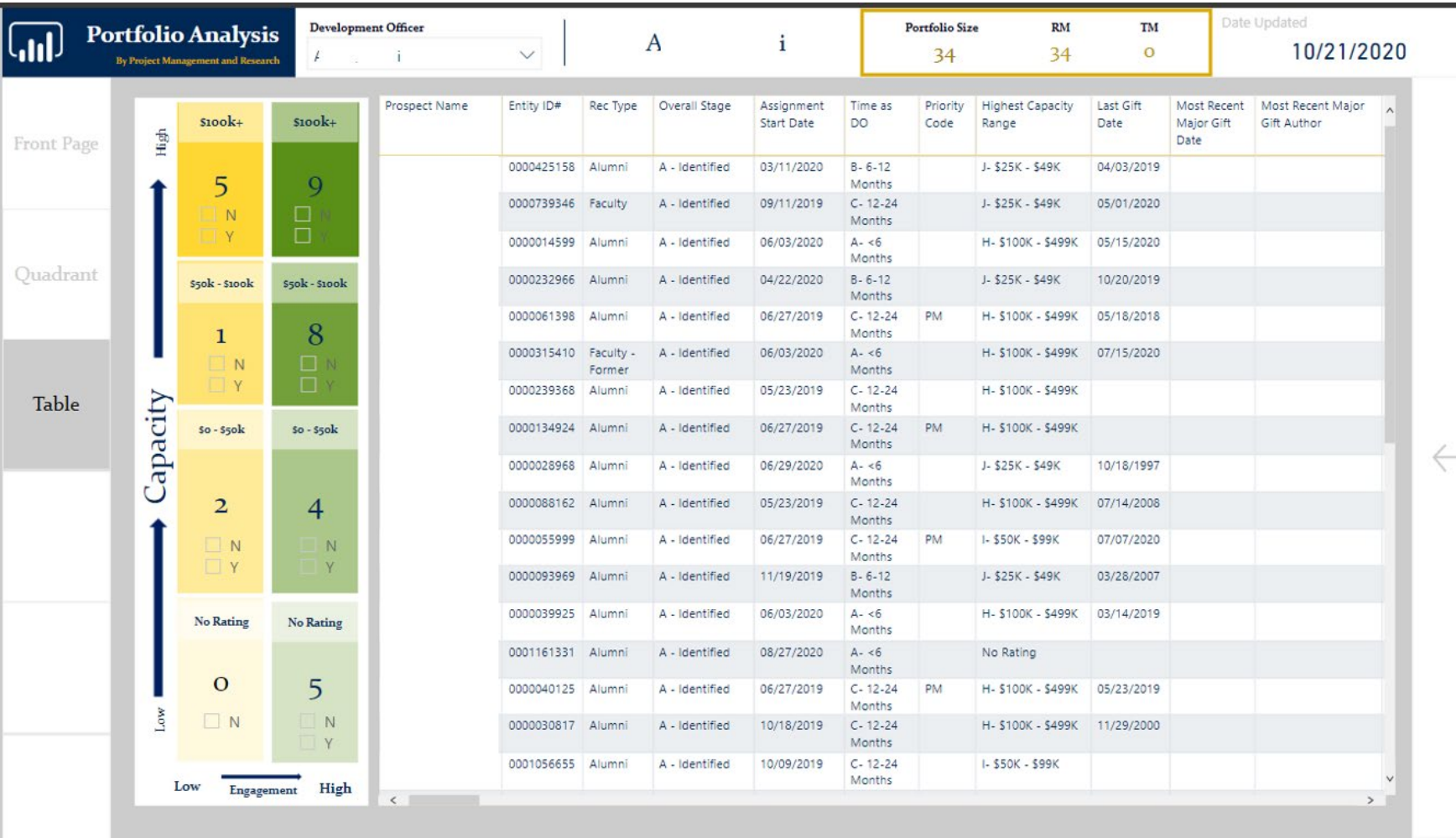
This concise visualization allows for researchers to print and take notes on each segment while meeting with the development officer.



Lowering the amount of visualizations and data on a screen gives the researcher the ability to focus on the key segments.

For instance, focusing on the 3 prospects who are rated low engagement and have a capacity between \$0-\$50k. A researcher can discuss the reasons that these not-as-strong prospects are included in the development officer's portfolio.

# Quadrant + In Depth Report

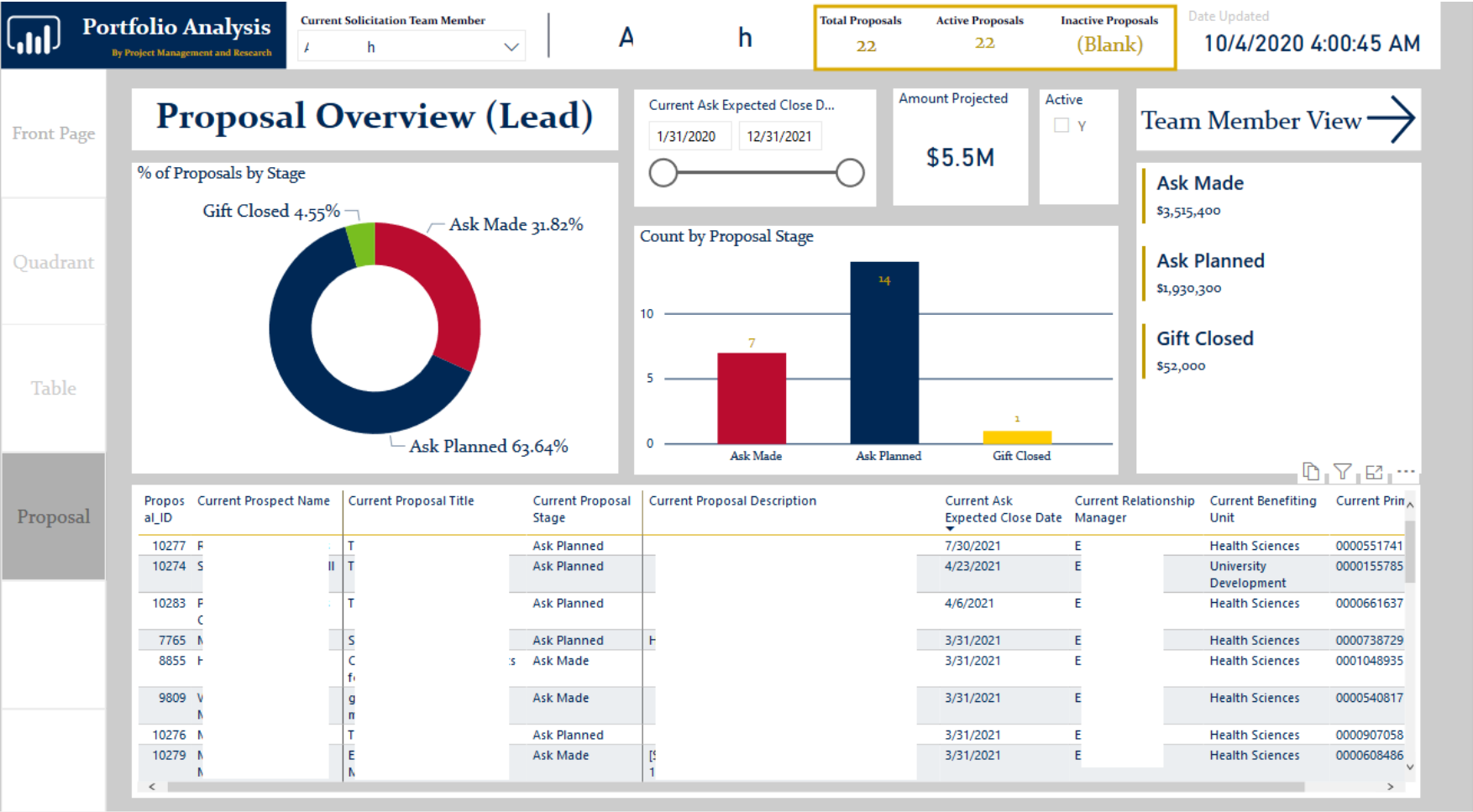


Researchers can use this page to filter for specific segments to see the individual prospects associated with each segment

This allows for an efficient way to export important and relevant data for pertinent prospects.

Researchers can also export the entire portfolio of a development officer into an excel file

# Proposals - Solicitation Lead



Researchers can see a quick view of a development officer's active and inactive proposals

This page shows all proposals of the filtered development officer and their current proposals where they are solicitation lead



# Proposals – Team Member

