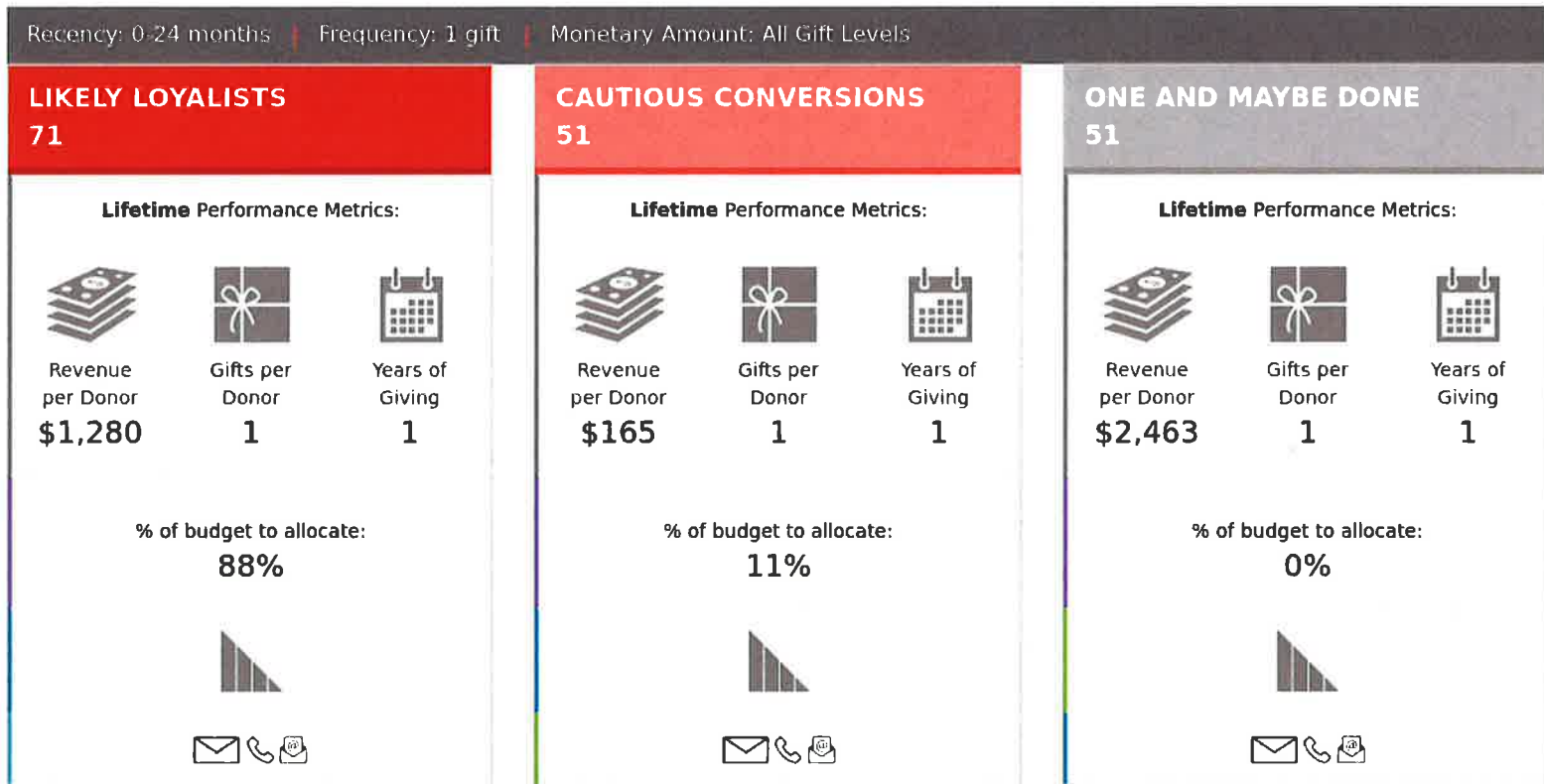


RETENTION ACTION PLAN: SINGLE GIFT DONOR CLUSTERS










Single gift donors who met the following criteria have been clustered into easy to implement segments built to increase second gift conversion and new donor retention.












REACTIVATION ACTION PLAN: LAPSED DONOR CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to optimize lapsed donor reactivation.

Recency: 25-60 months | Frequency: 2+ gifts | Monetary Amount: All Gift Levels

RELIABLE DONORS				97	
Lifetime Performance Metrics:					
	Revenue per Donor \$4,596		Gifts per Donor 4		Years of Giving 3
RENEWABLE DONORS				72	
Lifetime Performance Metrics:					
	Revenue per Donor \$345		Gifts per Donor 4		Years of Giving 3
RISKY DONORS				72	
Lifetime Performance Metrics:					
	Revenue per Donor \$407		Gifts per Donor 9		Years of Giving 3

EXPENSE BUDGET	FREQUENCY OF CONTACT	CHANNELS
 % of budget to allocate: 97%	 Contact as frequently as budget allows.	 High perceived channels and packaging.
 % of budget to allocate: 2%	 Contact as frequently as budget allows.	 Lower value channels and packaging.
 % of budget to allocate: 1%	 Be cautious. Possible 'Super Dupe' with acquisition.	 Minimize risk. Low package costs and channels.

RETENTION ACTION PLAN: EXISTING DONOR CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to optimize net revenue and increase retention

Recency: 0-24 months | Frequency: 2+ gifts | Monetary Amount: < \$500 HPC

COMMITTED DONORS 60

Lifetime Performance Metrics:



Revenue per Donor
\$1,231



Gifts per Donor
15



Years of Giving
5

CASUAL DONORS 45

Lifetime Performance Metrics:



Revenue per Donor
\$641



Gifts per Donor
15



Years of Giving
5

EPISODIC DONORS 45

Lifetime Performance Metrics:



Revenue per Donor
\$302



Gifts per Donor
22



Years of Giving
4

EXPENSE BUDGET

FREQUENCY OF CONTACT

CHANNELS



% of budget to allocate:
63%



Contact as frequently as budget allows.



High perceived channels and packaging.



% of budget to allocate:
23%



Reduce contact frequency by 15 - 20%



Lower cost packaging and channels.



% of budget to allocate:
14%



Reduce contact frequency by 50% or more.



Minimize risk. Low package costs and channels.

MONTHLY GIVING ACTION PLAN: SUSTAINER DONOR CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to optimize monthly donor (sustainer) conversion.

Recency: 0-24 months | Frequency: 2+ gifts | Monetary Amount: < \$480

READY TO GO STEADY 60

Lifetime Performance Metrics:



Revenue per Donor
\$1,337



Gifts per Donor
36



Years of Giving
6

These donors are most likely to become monthly givers. Target these donors at least annually and put the top tiers on the phone.

POTENTIAL PLEDGERS 45

Lifetime Performance Metrics:



Revenue per Donor
\$590



Gifts per Donor
6



Years of Giving
6

These donors are potential targets and can be included in the sustainer invitations if budgets allow. These donors do not warrant the expense of telemarketing.

UNLIKELY SUSTAINERS 45

Lifetime Performance Metrics:



Revenue per Donor
\$212



Gifts per Donor
2



















Years of Giving
3

These donors are less likely to become sustainers. They are still valuable donors and extremely loyal. If you are implementing an aggressive growth strategy for monthly donors this group can be pulled in.













UPGRADE ACTION PLAN: REGULAR AND MID-LEVEL UPGRADE CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to increase donor value and mid-level upgrades.

	Recency: 0-24 months Frequency: 2+ gifts Monetary Amount: < \$500 HPC		
	IMMEDIATE UPGRADES 26	SPECIAL DEVELOPMENT 32	WORTH THE WORK 2
	Lifetime Performance Metrics:		
	 Revenue per Donor \$1,899	 Gifts per Donor 24	 Years of Giving 5
	 Revenue per Donor \$1,159	 Gifts per Donor 22	 Years of Giving 6
	 Revenue per Donor \$1,027	 Gifts per Donor 90	 Years of Giving 8
EXPENSE BUDGET	% of budget to allocate: 46%	% of budget to allocate: 28%	% of budget to allocate: 25%
HPC	\$250 - \$500	\$100 - \$250	< \$100
CHANNELS	  	 	 

UPGRADE ACTION PLAN: MAJOR DONOR UPGRADE CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to increase donor value and major donor upgrades.

	Recency: 0-24 months Frequency: 2+ gifts Monetary Amount: \$500 - \$5,000		
	PRIME TIME PLUS 32	MAJOR GIFT IN WAITING 22	MID-LEVEL MAINTENANCE 21
	Lifetime Performance Metrics:		
	 Revenue per Donor \$10,603	 Gifts per Donor 35	 Years of Giving 6
	 Revenue per Donor \$2,617	 Gifts per Donor 5	 Years of Giving 4
	 Revenue per Donor \$1,219	 Gifts per Donor 5	 Years of Giving 4
EXPENSE BUDGET	% of budget to allocate: 73%	% of budget to allocate: 18%	% of budget to allocate: 8%
CHANNELS			
ACTION	Profile donors. Ready for MGO portfolios.	Not ready for portfolios. Engagement and retention are priorities.	Not ready for a major donor ask. Keep engaged through mid-level program.

PLANNED GIVING ACTION PLAN: LEGACY DONOR CLUSTERS

Donors who met the following criteria have been clustered into easy to implement segments built to optimize planned giving response.

Recency: 0-36 months | Frequency: 2+ gifts | Monetary Amount: All gift levels

WILLING AND ABLE

158

Lifetime Performance Metrics:



Revenue per Donor
\$18,680



Gifts per Donor
14



Years of Giving
5

These donors are most likely to include your organization in their will. Append age and cull through existing data to market targeted planned giving offers to these donors.

POTENTIAL PLANNED GIVERS

117

Lifetime Performance Metrics:



Revenue per Donor
\$775



Gifts per Donor
4



Years of Giving
3

These donors are potential legacy donors. Send informational materials to these donors to stay in front of them.

PAST THEIR PRIME

117

Lifetime Performance Metrics:



Revenue per Donor
\$2,627



Gifts per Donor
18



Years of Giving
4

These donors are least likely to respond and can be used as "fill quantity" for less expensive direct marketing campaigns.