

DATA AND ANALYTICS:

**USING ANALYTICS TO DRIVE
RESULTS WITH METRICS THAT
GROW PROGRAMS
STRATEGICALLY AND
RESPONSIBLY**

Trust me, I'm a doctor...I
know sh*t.

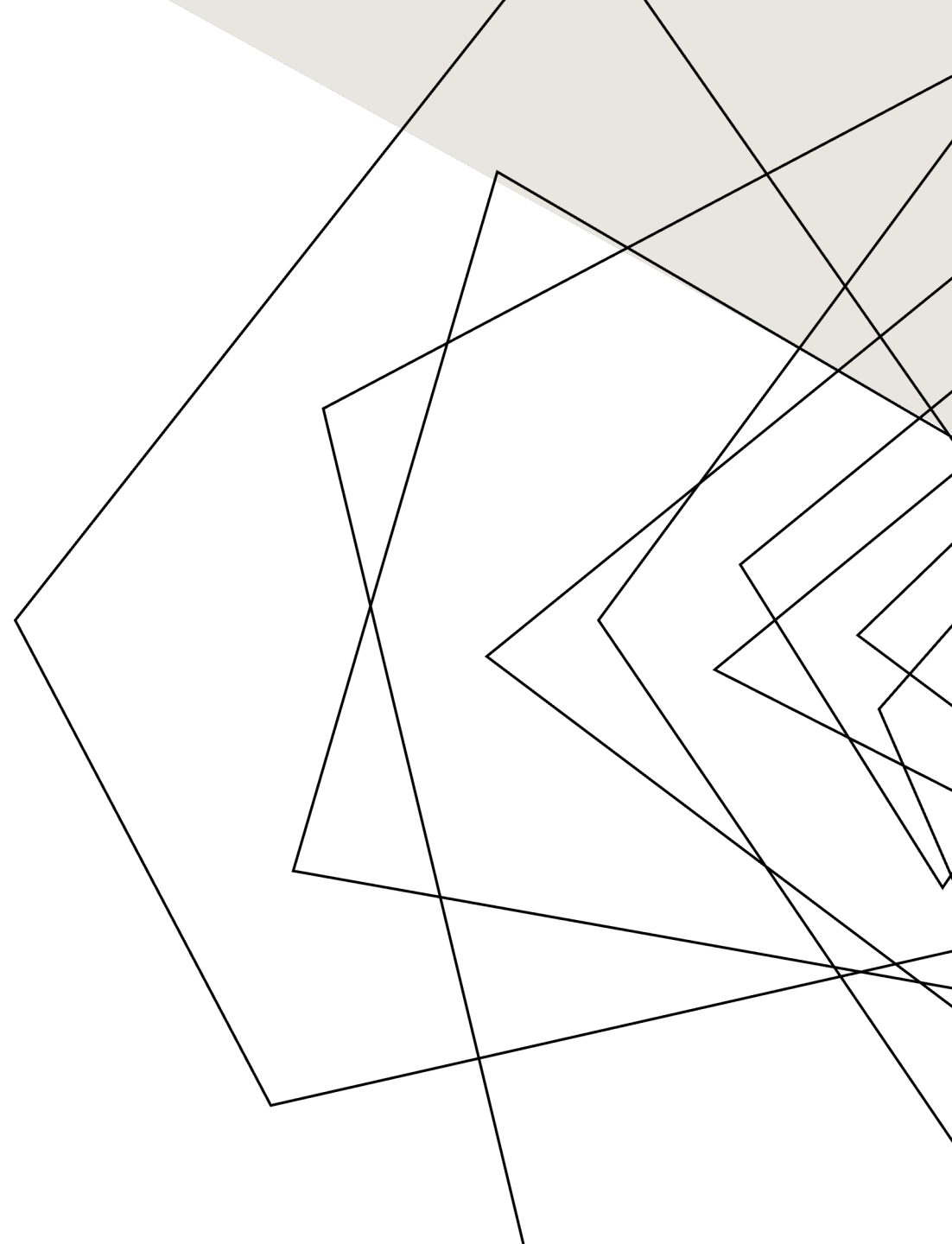


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ABOUT US

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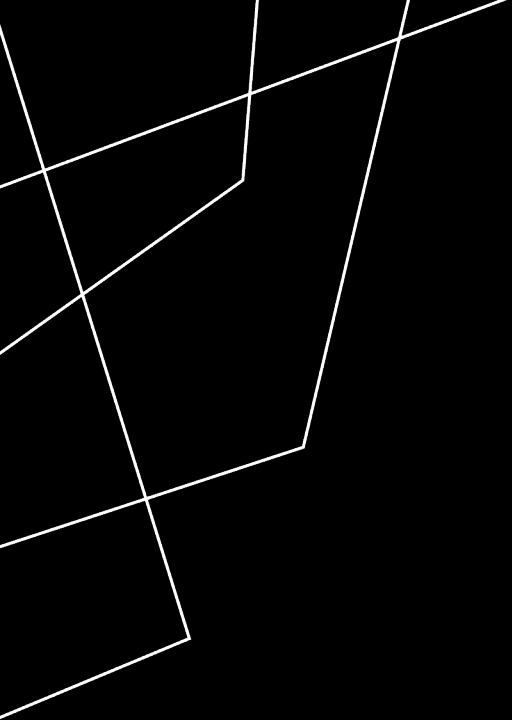
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I'm not always right, but
when I am it's usually
all of the time.



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WHY ARE YOU
HERE?

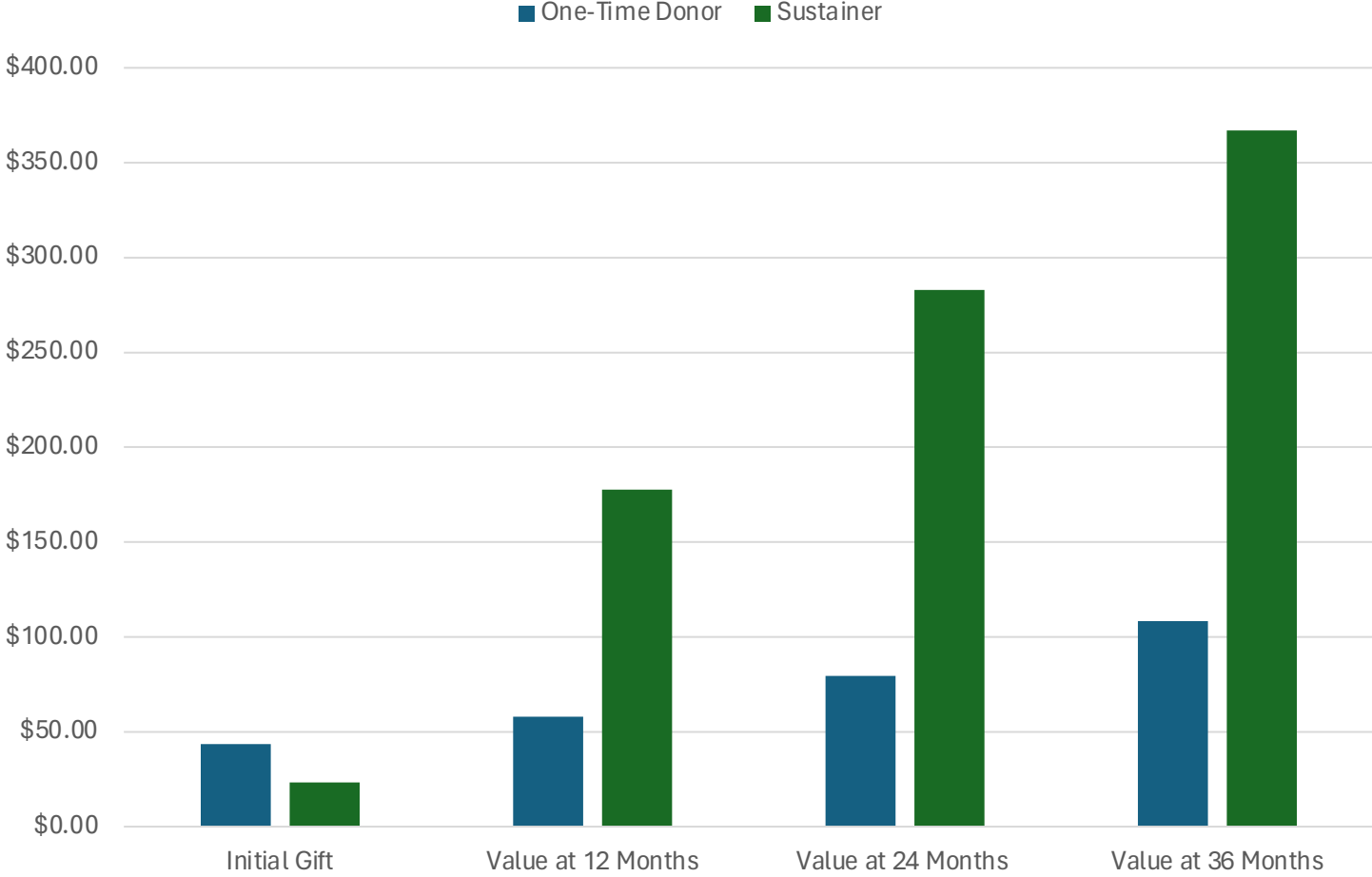
SUSTAINER GROWTH

- Sustainer revenue increased last year while the industry saw one-time revenue going down
- The share of sustainer revenue grew in 2023 – and has grown consistently year over year
- Sustainer revenue on average accounts for roughly a quarter to a third of all individual giving revenue as much as two thirds for certain sectors

WHY ARE SUSTAINERS IMPORTANT?

- Long-term sustainable growth
- Ability to weather environmental impacts better than single gift donors
- Lower cost after the acquisition (less touchpoints)
- Better investment

SHIFTING MINDSETS



SHIFTING MINDSETS AKA ALWAYS BE PITCHING

- in board meetings
- in leadership team meetings
- in all staff meetings
- in budget planning processes
- from benchmarking meetings
- in ALL THE TIMES!



Let's have a planning meeting to plan
for the planning meeting
about our strategic plan.



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STEP ONE

Develop the Investment Plan

DEVELOP THE INVESTMENT PLAN

- Diversified
- Flexible
- Strategic
- Incentivized
- Maximum ROI

DIVERSIFIED

- Is the plan diversified
 - by channel
 - by vendor
 - by payment frequency
 - by payment method

FLEXIBLE

- Is the plan flexible
 - to allow for a shift in spending
 - to pull back if a channel or vendor is under performing
 - to increase investment if a channel or vendor is over performing
 - avoid contracts or spending plans that limit your ability to be agile and pivot when needed

STRATEGIC

- Is the plan strategic?
 - are campaigns scheduled to maximize upcoming events and planned for potential weather issues
 - front loading the start of the fiscal year to maximize sustainer payments
 - testing new channels early in the year to allow for the potential for more investment later in the year (if additional investment becomes available)

INCENTIVIZED

- Are your pitchers, canvassers, door knockers and targets incentivized
 - with proper training and engagement
 - with pay structures and bonuses
 - with different engagement options
 - with branding and benefits
 - with swag or no swag
 - with a fallback offer

MAXIMUM ROI

- Is the plan maximizing ROI?
 - the combined channel mix is forecasted to breakeven within the organization's ROI goal
 - if the forecasted breakeven is under the goal, what channels can be increased, where is the scale
 - if the forecasted breakeven is over the goal, what channels need to be scaled back or eliminated in favor of better performing channels
 - know the industry standards, how do you compare

SAMPLE INVESTMENT PLAN

Product	Channel	#Donors	VPD01Mos	Value Per Donor Forecast						Net Per Donor Forecast							
				VPDMos12	VPDMos18	VPDMos24	VPDMos36	VPDMos48	VPDMos60	NPDMos01	NPDMos06	NPDMos12	NPDMos18	NPDMos24	NPDMos36	NPDMos48	NPDMos60
Sustainers	Street	6,790	\$30.00	\$191.21	\$241.08	\$279.14	\$336.99	\$379.85	\$412.77	(\$250.00)	(\$159.09)	(\$88.79)	(\$38.92)	(\$0.86)	\$56.99	\$99.85	\$132.77
Sustainers	Digital Ads	5,662	\$18.00	\$153.46	\$209.79	\$259.03	\$344.16	\$416.89	\$484.70	(\$82.00)	(\$12.91)	\$53.46	\$109.79	\$159.03	\$244.16	\$316.89	\$384.70
Sustainers	Email	822	\$15.00	\$152.92	\$216.08	\$273.95	\$373.42	\$454.91	\$527.36	\$15.00	\$82.61	\$152.92	\$216.08	\$273.95	\$373.42	\$454.91	\$527.36
Sustainers	Door	9,007	\$32.00	\$235.08	\$312.06	\$377.67	\$487.92	\$576.81	\$650.98	(\$248.00)	(\$140.36)	(\$44.92)	\$32.06	\$97.67	\$207.92	\$296.81	\$370.98
Sustainers	SMS	852	\$15.00	\$153.12	\$218.95	\$269.27	\$353.43	\$427.51	\$484.42	\$15.00	\$82.98	\$153.12	\$218.95	\$269.27	\$353.43	\$427.51	\$484.42
Sustainers	Telemarketing	1,073	\$14.00	\$127.89	\$173.50	\$211.55	\$271.09	\$315.32	\$352.28	(\$181.00)	(\$122.36)	(\$67.11)	(\$21.50)	\$16.55	\$76.09	\$120.32	\$157.28
Sustainers	Web	639	\$30.00	\$170.23	\$218.69	\$260.73	\$330.39	\$391.28	\$445.68	\$30.00	\$107.96	\$170.23	\$218.69	\$260.73	\$330.39	\$391.28	\$445.68
Sustainers	Other	339	\$19.00	\$163.87	\$220.26	\$269.27	\$363.00	\$444.17	\$514.78	\$19.00	\$92.36	\$163.87	\$220.26	\$269.27	\$363.00	\$444.17	\$514.78
Total		25,184	\$26.19	\$192.28	\$254.14	\$305.87	\$391.70	\$461.09	\$519.93	(\$180.23)	(\$91.72)	(\$14.15)	\$47.72	\$99.45	\$185.28	\$254.66	\$313.51

USING DEMOGRAPHIC DATA

Age data specifically can be part of the investment plan. Audience behaviors by age can vary drastically and should be considered during the planning process.

Age analysis can also be leveraged in contract negotiations. For example, a donor who is under 30, might be worth a fraction of a donor who is over 50. Partners will work with you to develop cost structures based on who they are acquiring.

Programs that set an age floor have had success improving ROI.

By all means, continue to bore me with all the things you consider to be important.



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STEP TWO

Tracking the Investment

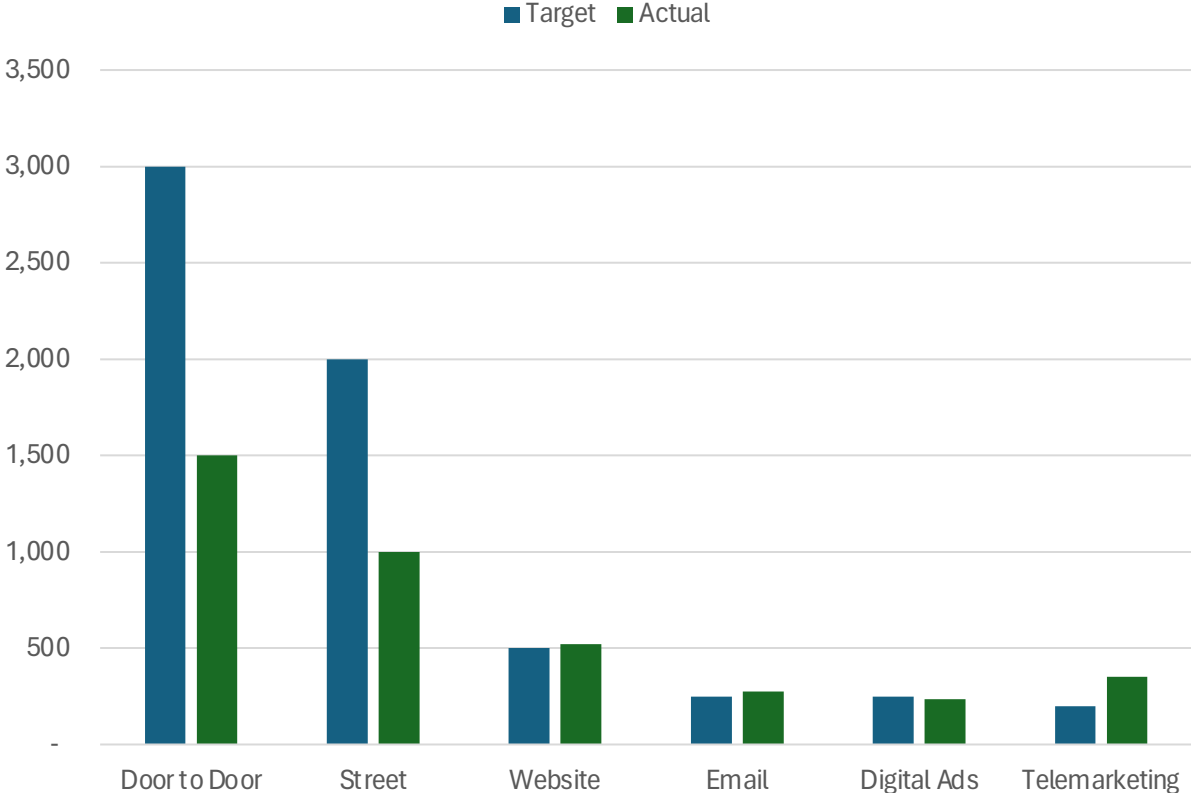
TRACKING THE INVESTMENT

Your job is not over with the initial sign up. Just as important is tracking a sustainer's behavior after the sign up to spot issues that could be impacting revenue and long-term file health.

HITTING INITIAL INVESTMENT TARGETS

- Donor Counts
- Cost Per Donor
- Average Gift
- Payment Method
- Audience Goals (Age)

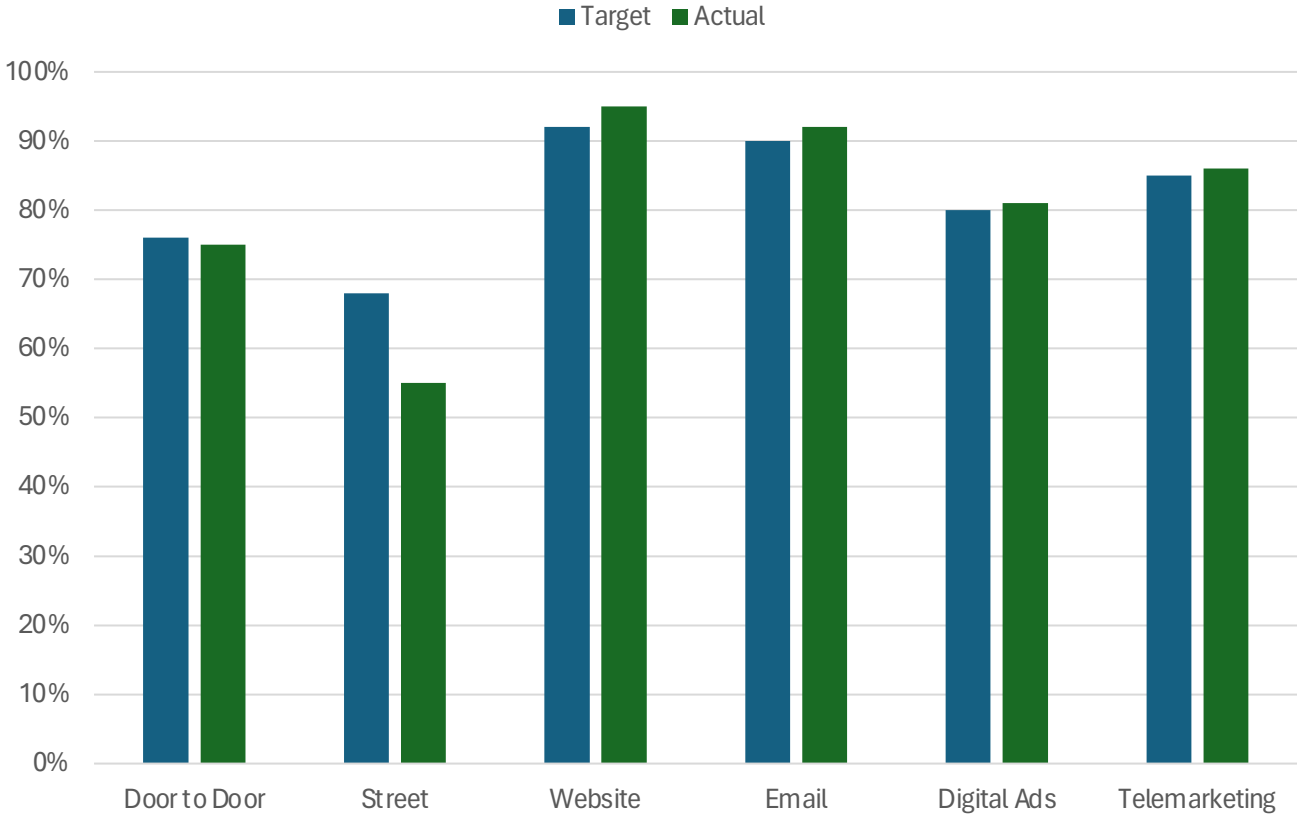
DONOR COUNTS



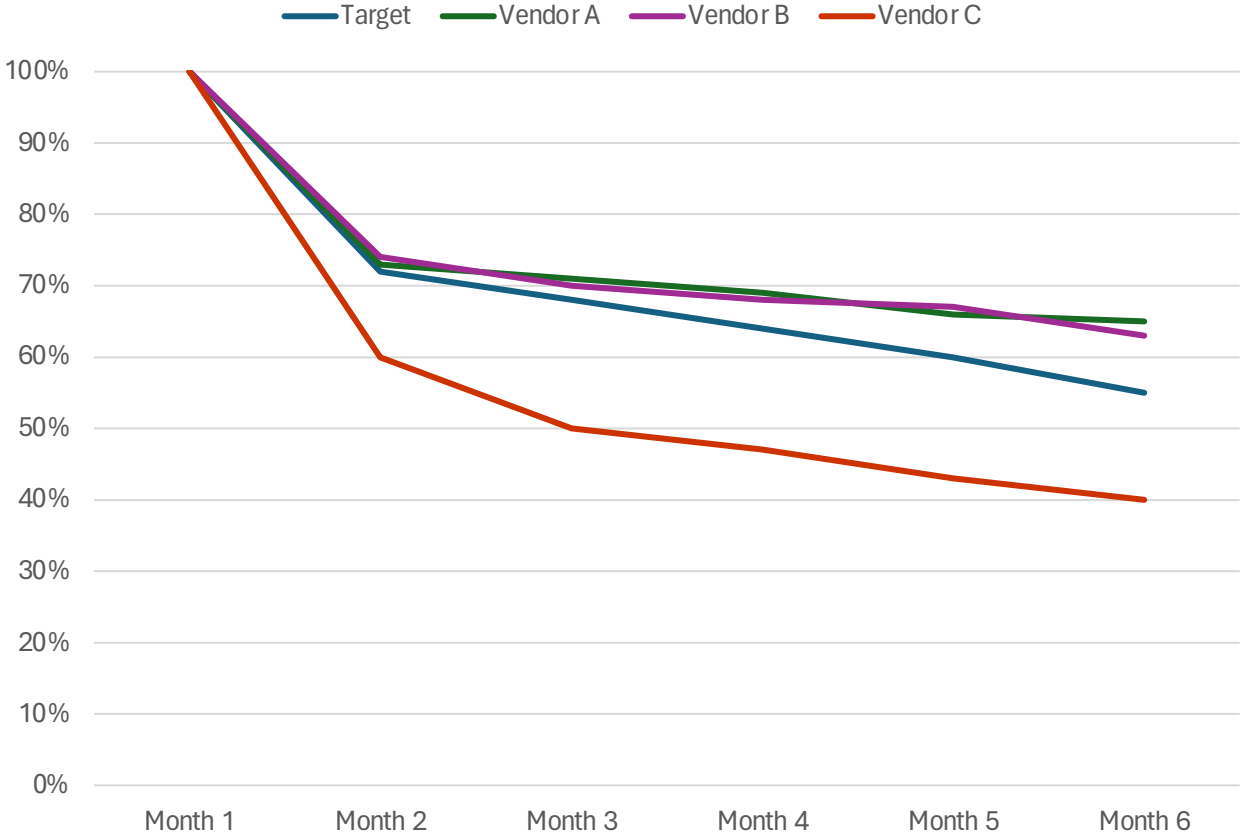
SUBSEQUENT BEHAVIOR TRACKING

- New Sustainer Activation (Retention)
- Existing Sustainer Attrition
- Additional Gifts (Single Gifts)
- Upgrades
- Conversion to EFT
- Reactivation
- Pipeline Development

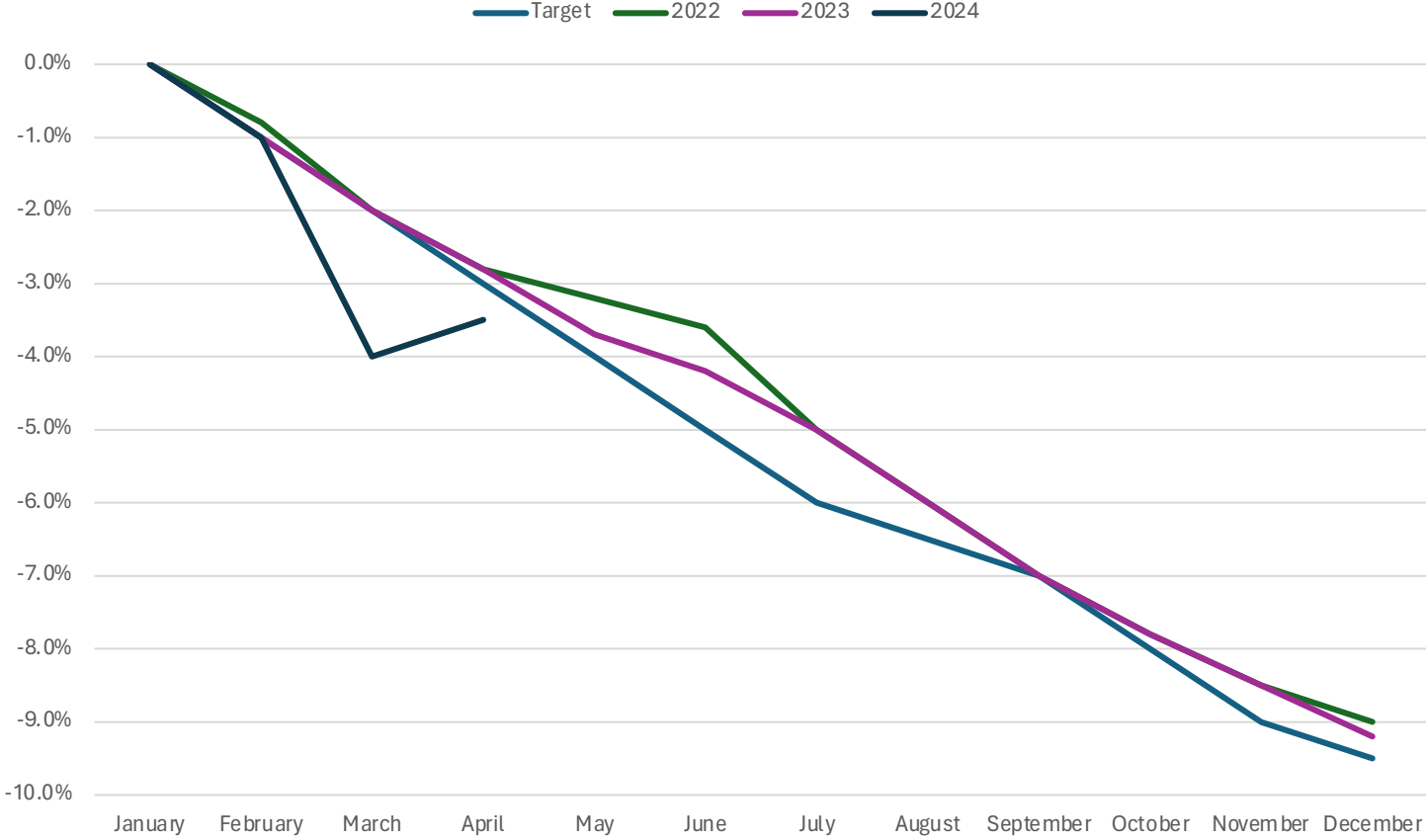
NEW DONOR ACTIVATION BY CHANNEL



NEW DONOR ACTIVATION BY VENDOR



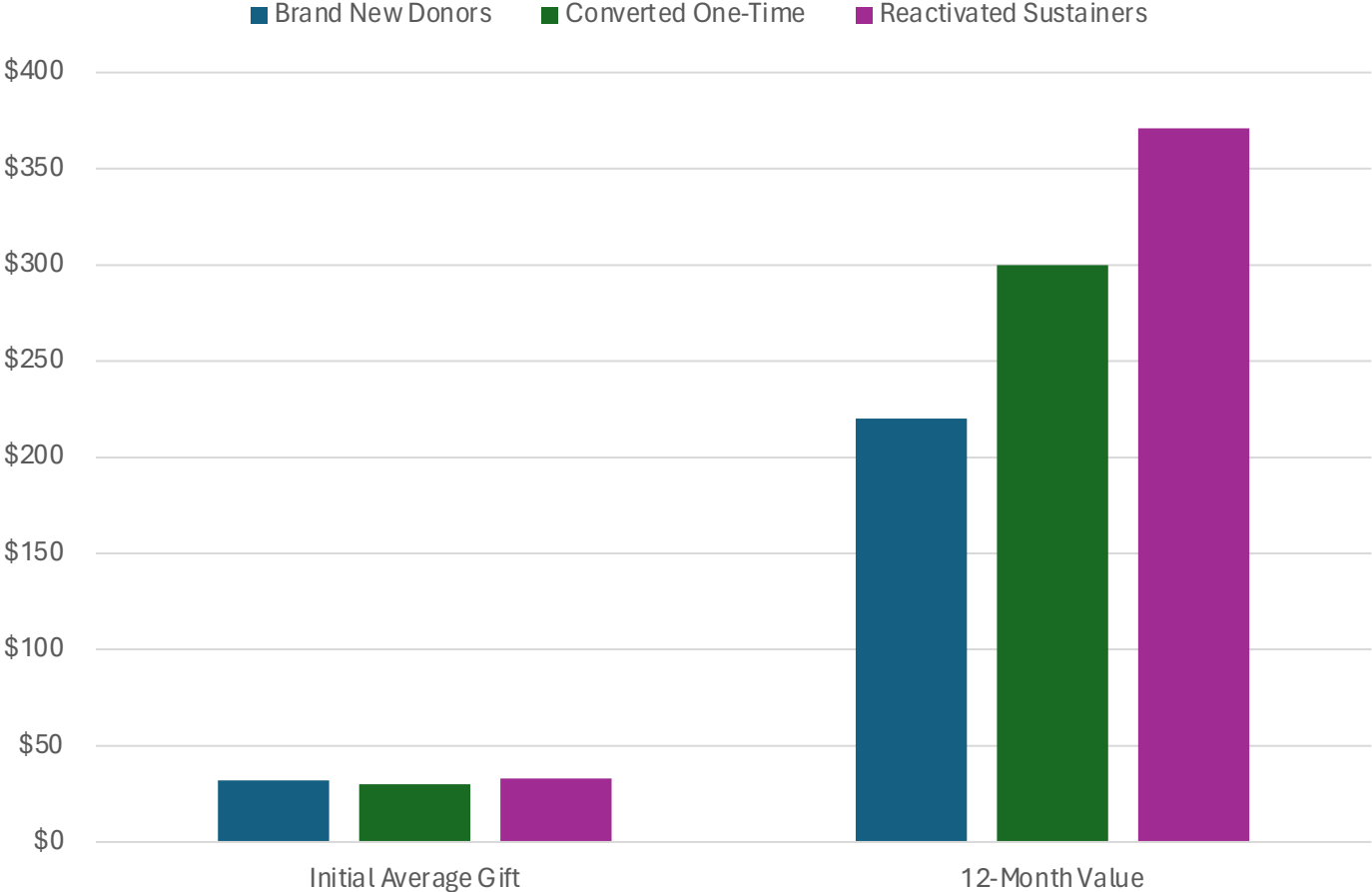
EXISTING SUSTAINER ATTRITION



INCREASING SUSTAINER VALUE

- Additional Gifts (Single Gifts)
- Upgrades – Automatic vs Donor Opt-ed in
- Conversion to EFT

REACTIVATION



PIPELINE DEVELOPMENT

- Midlevel
- Major Gifts
- Planned Gifts



THANK YOU

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