Reporting Xpress

10 BEST PRACTICES FOR SMARTER FUNDRAISING

1
MINE THE DONORS YOU ALREADY HAVE
The guide focuses on retention, re-activation and upgrades because existing supporters deliver the highest ROI.

Why it Matters: Cheaper to keep than to acquire; small lifts here drive big revenue gains.

2
COLLECT THE RIGHT BASELINE FIELDS
First gift date, last gift date, 3-5 yrs of gift history, gift amounts.

Why it Matters: Clean inputs make every later analysis (segments, timing, ROI) trustworthy.

3
START WITH RFM PATTERNING
Score every donor on Recency, Frequency & Monetary value to get an instant "engagement snapshot."

Why it Matters: RFM turns intuition into numbers, making it easy to see who's loyal, lapsed, or high-value.

4
USE DATA-DRIVEN BREAKPOINTS
Use natural gaps—like those from Jenks or K-Means—to define "Top/Mid/Bottom" donor tiers more accurately than gut feel.

Why it Matters: Prevents arbitrary thresholds and maximizes targeting precision.

5
STAY IN THE SEGMENTATION "SWEET-SPOT"
5-10 core segments. Too many segments dilute effort and data.

Why it Matters: Quality beats quantity; execution stays realistic.

6
TAILOR MESSAGING
Adjust ask Strategy to each segment (Active, top, warm, cold, new, etc.)

Why it Matters: Personal relevance = bigger gifts, better retention.

7
MATCH SOLICITATION FREQUENCY
Match frequency to each donor's natural rhythm to avoid over- or under-asking.

Why it Matters: Drives higher response and lowers unsubscribe or fatigue.

8
TIME APPEALS STRATEGICALLY
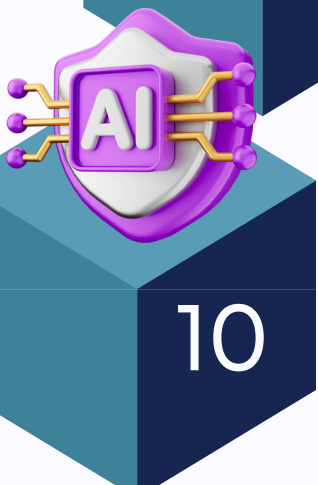Time to donors' personal financial cycles (year-end, tax refund, bonuses, etc.).

Why it Matters: Hitting the moment of greatest capacity/intent lifts gift size and response.

9
TRACK ROI RELENTLESSLY
Response rate, average gift, cost per dollar raised; shift budget to high-return segments.

Why it Matters: Ensures resources flow to what actually works.

10
USE PRIVACY-SAFE AI
Leverage tools like **Xpress Analytics** to quickly segment donors without risking sensitive data

Why it Matters: Gains speed/insight without hiring data scientists or risking donor data.

Learn how Reporting Xpress can help you put these 10 best practices into action, **click here to setup time to discuss.**