Donor Segmentation Cheat Sheet

Start with your Recency Frequency Monetary Value report from your donor base . This may look like the below:

Example of Donor value breakdown for client

Value	single donors 0-12 mos	multiple 0-12 mos	single donors 13-24 mos	multiple 13-24 mos	single donors 25-36 mos	multiple 25-36 mos	single donors 37+	multiple 37+	Totals
$0.01-$9.9	47	184	18	43	35	93	3,216	2,123	5,759
$10-$24.99	139	372	86	151	98	250	3,921	4,084	9,101
$25-$49.99	118	514	55	216	58	278	1,337	3,180	5,756
$50-$99.99	88	587	56	180	36	206	672	2,126	3,951
lower end	*392*	*1,657*	*215*	*590*	*227*	*827*	*9,146*	*11,513*	*24,567*
$100-$249.99	118	905	61	267	34	221	509	1,990	4,105
$250-$499.99	12	169	2	55	4	40	52	419	753
$500-$999.99	19	126	5	25	4	23	25	240	467
mid level	*149*	*1,200*	*68*	*347*	*42*	*284*	*586*	*2,649*	*5,325*
$1,000+	4	131	1	25	3	25	35	196	420
Grand totals	**545**	**2,988**	**284**	**962**	**272**	**1,136**	**9,767**	**14,358**	**30,312**

You may have to create special groups or run specific queries to get to specific information but this is the typical starting point for organization your segments.
You decide how many codes you'd like to create for tracking. Typically, number of names is the driver as well.
For example, most organizations group the $0.01 to $24.99 groups together, then $25-$99.99, then $100-$249.99, then $250-$999.99, $1,000+

If you do not have something an RFM chart, select your **mailable** donors and make sure you include the following fields:

donor ID (constituent id)
title
first name
last name
suffix
Company/Organization
Address 1
Address2
City
State
Zip
email address
phone
Last gift date
last gift amount
Last gift source

Take this data, put it in an excel file and sort the whole file by last gift date and then by last gift amount (start high to low) and most recent to older.

then, you can create the breaks for last 12 months, 24 months, etc.

Make sure you put tracking code (mail code, solicitation code, package code (in Reaiser's Edge) so you can track results by group

If questions, contact Erica Waasdorp, erica@adirectsolution.com, (508) 776 1224 or check with your donro base support folks.

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