

# How to Analyze Your Fundraising Data for Success With DS Analytics



**DonorSnap**  
Donor Management Made Easy



# Agenda

- What is DonorSnap Analytics
- Benefits of AI for Strategic Planning
- 3 Areas
  - Donor Retention
  - Campaign Performance
  - Goal Setting



# What is DonorSnap Analytics?

- Add-On to DonorSnap Subscription
- AI-powered tool that writes SQL queries for you
- Two main features:
  - AI Reports (chat-based report building)
  - Dashboards (visual analytics widgets)
- DonorSnap Analytics Training Webinar

# Why Use Analytics for Strategic Planning?

- **Speed:** Get answers in seconds vs. building complex reports
- **Creativity:** Ask "what if" questions you never had time to explore before
- **Depth:** Dig deeper without technical barriers
- **Strategic Focus:** Less time on reports = more time for decisions

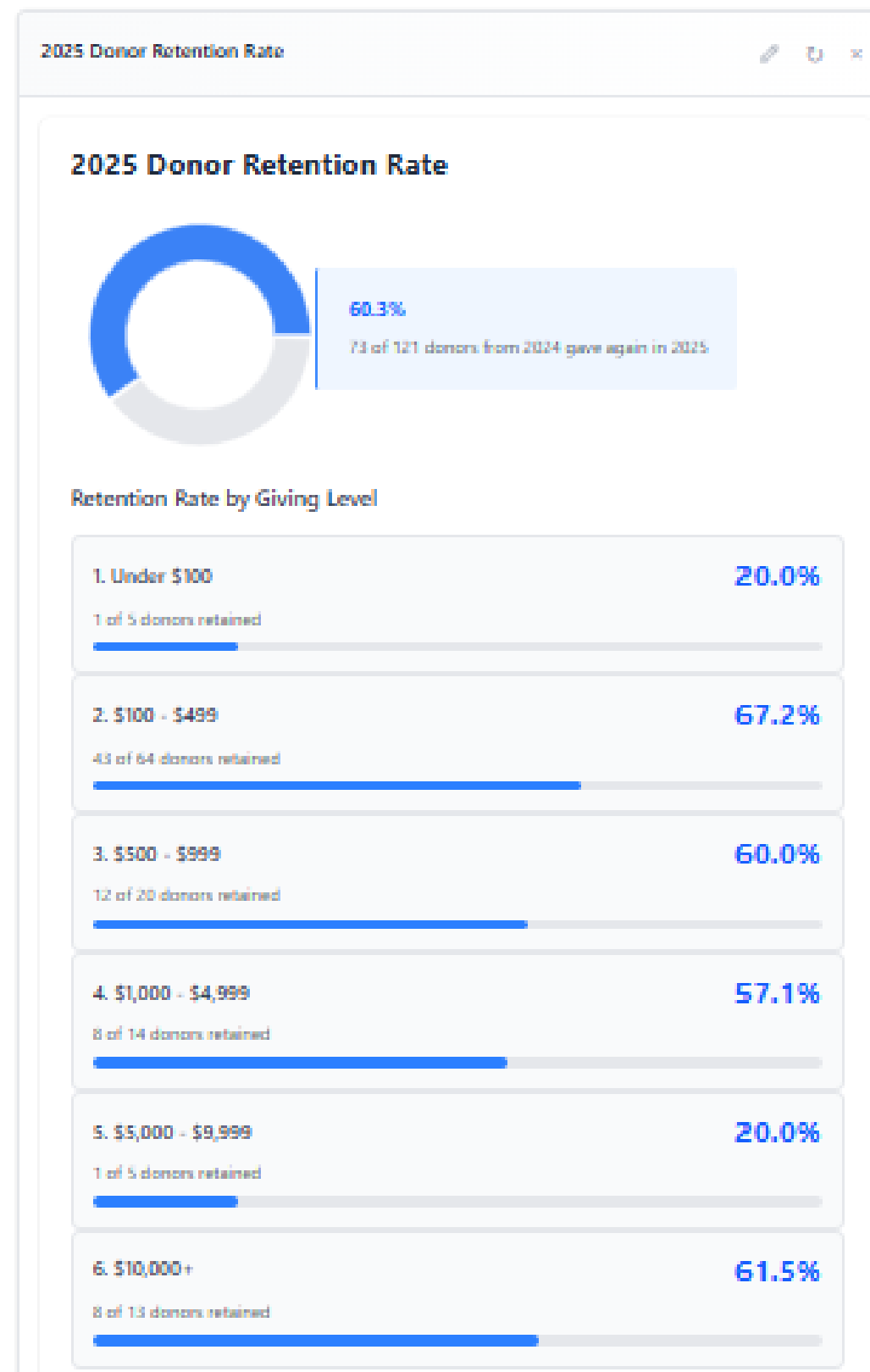


# Strategic Area #1 - Donor Retention

- **Why it matters:** Keeping donors is more cost-effective than acquiring new ones
- **Key questions to answer:**
  - What's our overall retention rate?
  - Which giving levels need more attention?
  - Which major donors lapsed?



# Donor Retention Widgets



- **2025 Donor Retention Rate by Giving Level:**
  - **Ask:** Show total donor retention rate of all donors in 2025 and break it down by giving levels. Also put a radial progress chart at the top.
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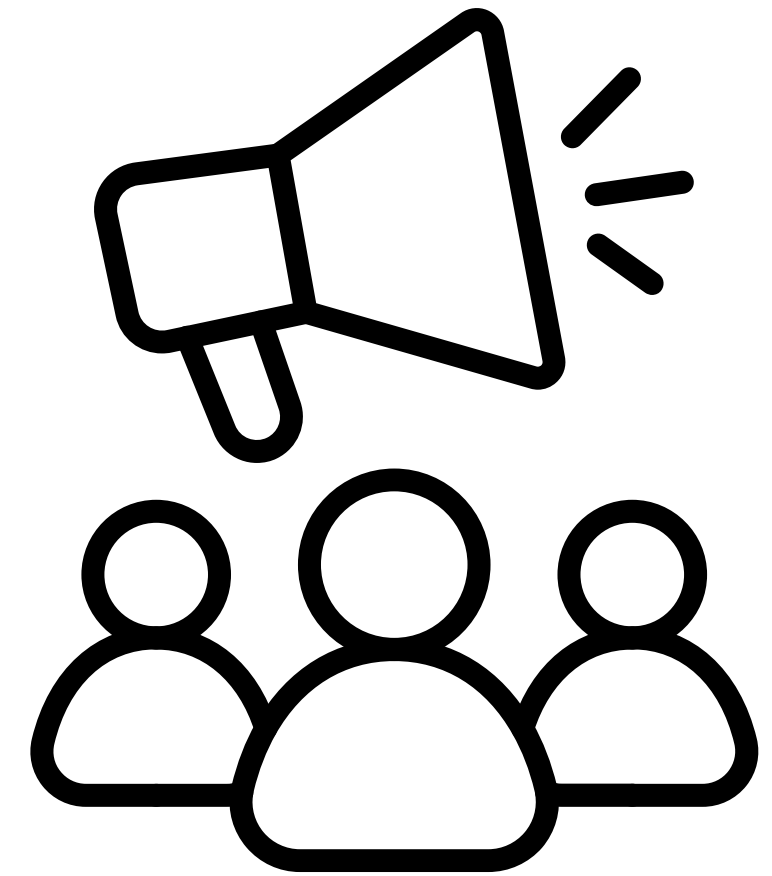
# Donor Retention Dashboard Widgets Cont.

- **Major Donor Monthly Progress:**
  - Give me a list of donors who gave over 5,000 in 2025 by month that they gave, along with their contact information and if they have given again in 2026. Also show their gift amount in 2026.
- **Donor RetentionOverall Progress**
  - **Ask:** Show donor retention rate for 2026. Show donors who gave in 2025 who have given again in 2026, can you also show me if I am an track with this same time last year?



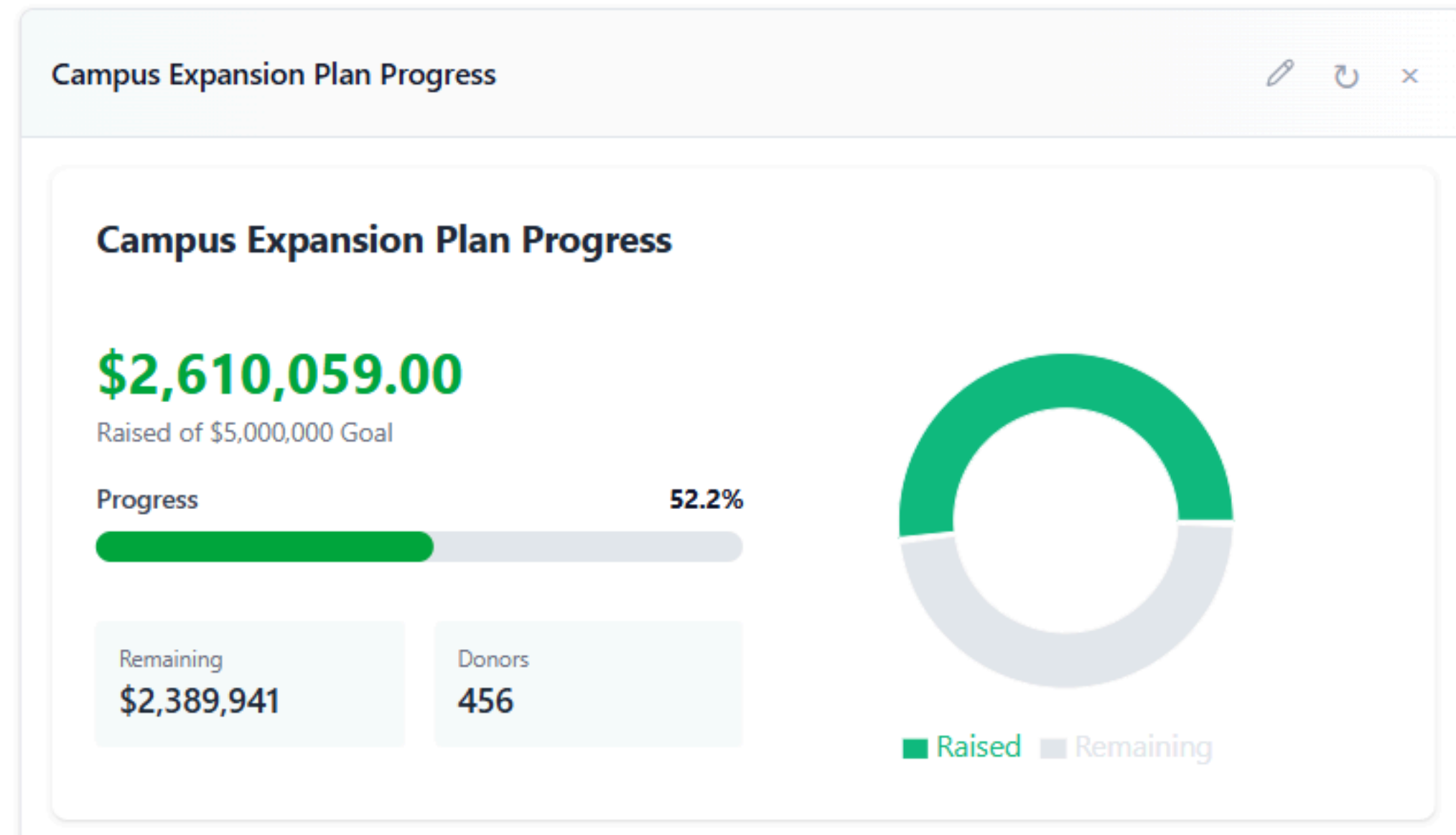
# Strategic Area #2 - Campaign Performance

- **Why it matters:** Understand what's working to plan the year ahead
- **Key questions to answer:**
  - How is the capital campaign performing?
  - Build a prospect list from current donors for capital campaign





# Campaign Performance Widget



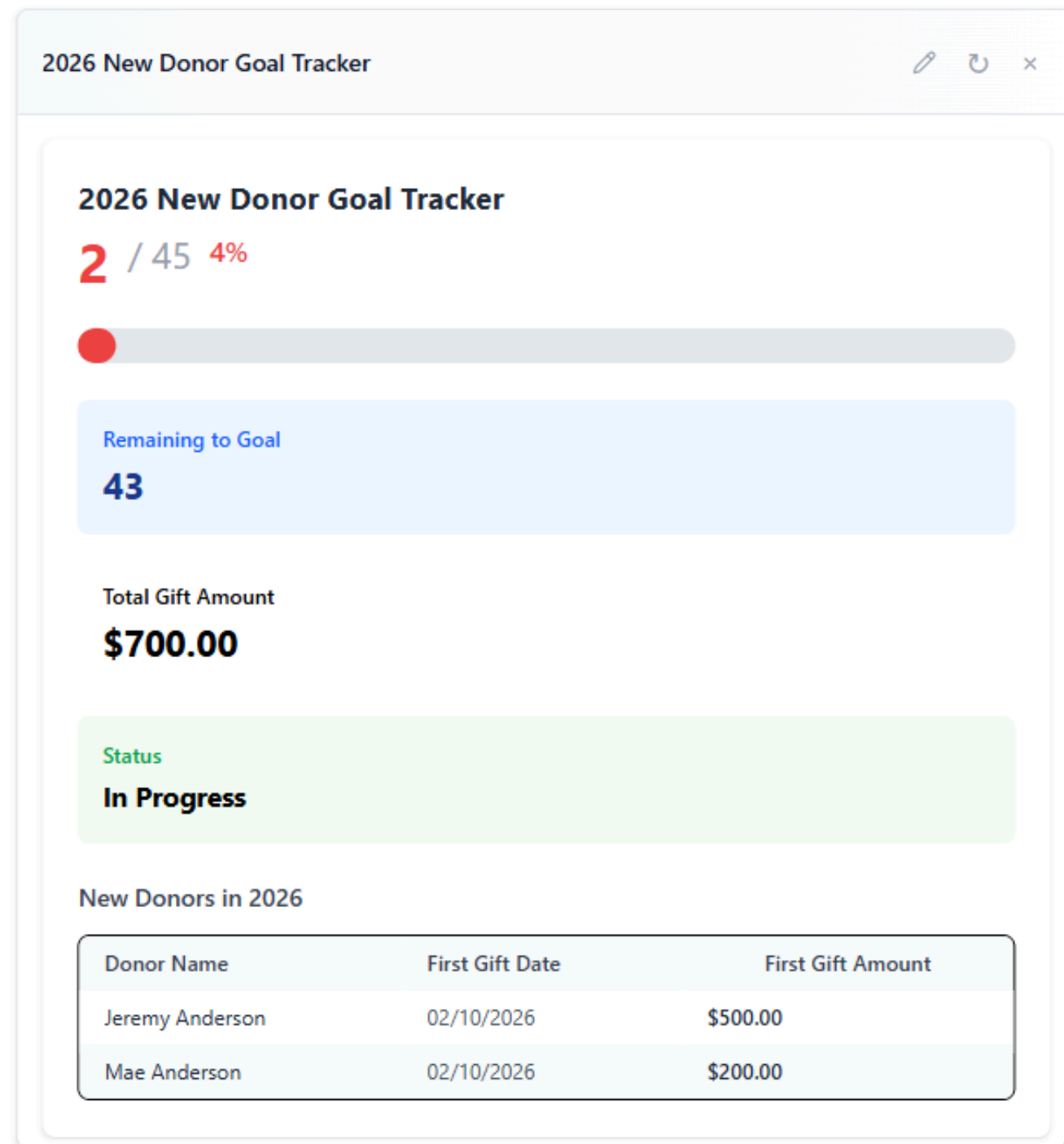
Ask: "can you show me my (campaign name) progress with a (goal amount) goal"

# Strategic Area #3 - Goal Setting

- **Why it matters:** Set realistic, data-informed goals
- **Key questions to answer:**
  - How many new donors should we aim for in 2026?
  - What percentage of donors can we expect to move up a giving level?



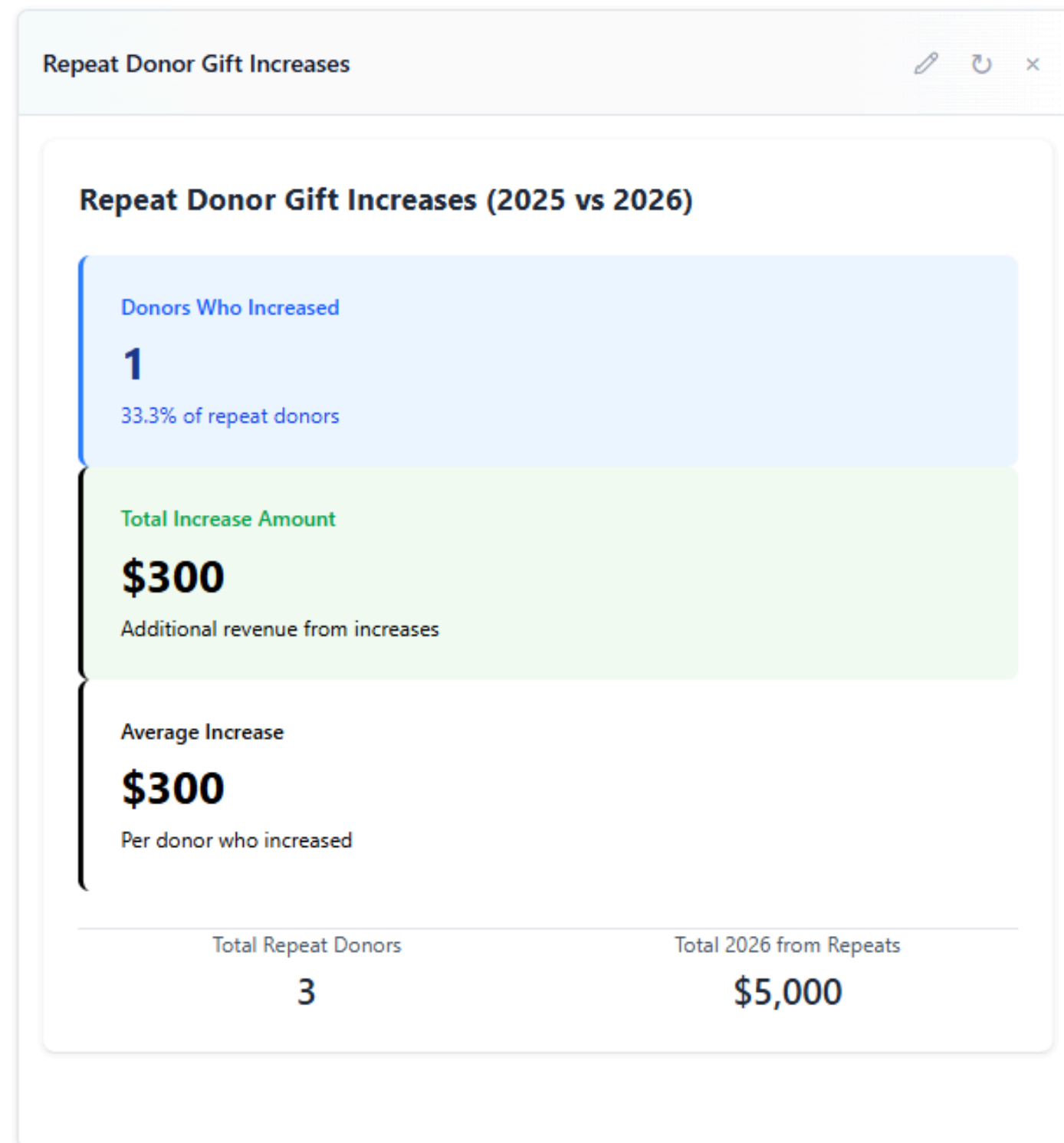
# Goal Setting Widgets



- **New Donor Goal Tracking:**
  - **Ask:** I have a goal of 45 new donors for 2026. Show all donors who made their first gift in 2026 and help me track the goal of 45. Also show the total gift amount from new donors in 2026.



# Goal Setting Widgets



- **Gift increase amount tracking:**
  - **Ask:** Can you track if repeat donors increased their gift amount from 2025, show the percentage and also the donation total increase.



# Tips for Success

- **Start with high-level questions** you need answered
- **Iterate:** If the first result isn't perfect, refine your prompt
- **Save your reports** for easy access later
- **Build dashboards** for metrics you check regularly
- **Combine insights:** Use multiple prompts to build a complete picture

**Ready to get started?**

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