

Dashboard Controls

☐ Show Ghosts Only ?

Global Filters

Assigned RM

Alice x

Ben x

Charlie x

x

v

Industry

AI x

Software x

Technology x

x

v

Geography

Australia x

Canada x

France x

Germany x

United Kingdom x

x

v

Relationship Stage

Active x

Early x

Exploring x

Late x

Mid x

x

v

Donor Insights Dashboard

Comprehensive view of donor engagement, lifetime value, and portfolio health.

Data loaded: 60 / 60 rows | Last Refreshed: 2026-02-12 03:50

Pipeline Velocity (Last 2...)

\$2,948,000

At-Risk Capital ?

\$21,630,000

Dormancy Rate (>6mo N...)

95.0%

Total Donors

60

Total Lifeti...

\$29...

Avg Lifeti...

\$64...

High Risk ...

24

Avg Engag...

2.24

Efficiency Matrix Ghost Table Deep Dives

Efficiency Matrix: Effort vs. Revenue

Color By:

Assigned_RM



Bubble Size:

Recent_Annualized_Giving



Efficiency Matrix

