

Dashboard Controls

Show Ghosts Only ?

Global Filters

Assigned RM

Alice x Ben x



Charlie x



Industry

AI x Software x



Technology x



Geography

Australia x



Canada x

France x

Germany x



Relationship Stage

Active x Early x



Exploring x Late x

Mid x

Donor Insights Dashboard

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

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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

