RaiseTell

Using the Top Donor Profile Dashboard

A one-page profile of any top donor - giving history, scores and charts - ready before your next conversation

Dashboard 175 · QX175

Who has a profile

Top segment last full FY
Total annual giving put them in your Top segment last full fiscal year

Top segment this FY
Already in the Top segment in the current fiscal year

Top 100 last full FY
Ranked among your top 100 donors by giving last full fiscal year

Has an assigned fundraiser
Any donor or prospect, at any giving level, with an assigned fundraiser

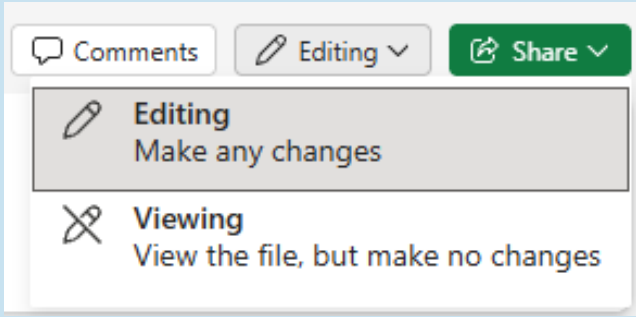
Overview tab

Your 10 largest donors last full fiscal year, with a chart, and a note on who has a profile. All the detail is on the Donor Profile tab.

Step 1: switch the workbook to Editing

Why it matters

- The profile is driven by dropdowns on the Donor Profile tab. In Viewing mode they don't open.
- Use the mode selector at the top right of the Excel ribbon and choose Editing.
- Or download the file and open it in desktop Excel.



Choose Editing - "Make any changes". Selecting a donor doesn't change your data; it only changes which donor the profile shows.

Step 2: View, then Fundraiser, then Donor

Donor Profile tab, cells B4-B8

View	**All** ▼	B4
Fundraiser 1	**All** ▼	B5
Fundraiser 2	**All** ▼	B6
Fundraiser 3	**All** ▼	B7
Donor	**<- pick a donor** ▼	B8

1 View picks the group: All, Top segment last full FY, New Top segment donors last full FY, Top 100 last full FY, Top segment this FY, or Donors with an assigned fundraiser.

2 Fundraiser 1-3 narrow it to up to three fundraisers. A donor is listed if ANY chosen name appears in their Assigned Fundraiser, so shared donors are included. Leave all three on All for everyone.

3 Donor lists only donors who match the View and fundraisers. Pick one and the whole profile fills in.

Tips for getting the right donor



Pick single names

The fundraiser list also shows shared assignments (two names together). Choose the single name to get all of that fundraiser's donors, shared ones included.



Re-pick the donor

After changing the View or a fundraiser, choose the Donor again - the previous name stays in B8 until you do.



Check the Constituent ID

If two donors share a name, the profile shows the first one. Confirm the Constituent ID at the top before you rely on it.



Work a portfolio

Set Fundraiser 1 to a gift officer and step through their Donor list one by one to review every covered donor.

The profile: who they are, where they stand

Identity & standing

Name, classification, constituency, assigned fundraiser, deceased flag, donor since, segment last FY and this FY, rank, whether new last FY, share of last year's revenue and year-over-year change.

Why: Tells you who owns the relationship and how important this donor is right now.

Lifetime giving

Gross and net lifetime giving, pledge write-offs and lifetime number of gifts.

Why: Shows the depth of the relationship; write-offs flag pledge fulfilment risk.

Pacing

Giving this fiscal year to date vs the same point last year, in dollars and percent.

Why: Ahead or behind tells you how urgent the conversation is.

Scores

Giving amount and giving frequency trend codes through the last full FY (most recent year first).

Why: The direction of giving and how often they give, at a glance.

The profile: history, loyalty and timing

Giving by fiscal year

Total giving for the last three fiscal years and the median gift over three years, with the 3-Year Giving Trajectory chart.

Why: Shows the trend and gives a realistic base for sizing the next ask.

Gift counts & tenure

Gifts in each of the last three years, total and active giving years, current and longest consecutive-year streaks.

Why: Loyalty and streaks set the tone of stewardship - a long streak is worth protecting.

Timing & pledges

Most common and second most common giving month, most recent gift date and amount, pledge payments this and last FY, last pledge payment.

Why: Ask in the months they usually give, and don't ask on top of an open pledge.

When They Give chart

Lifetime gifts by calendar month, from January to December.

Why: Shows their giving rhythm visually, next to the most common month.

Before every top-donor conversation

When to use it

- Before a cultivation call, solicitation or stewardship touch: pull the profile and prepare
- In portfolio planning: each gift officer works through their own donors with the fundraiser filter
- Use the View and fundraiser filters to make sure every covered top donor is actively managed

Measures of success (pilot)

Better prepared
how ready your team is for top-donor conversations

Retention
improved retention of the covered donors

Better asks
whether the profile surfaces context that leads to better asks