

Chapter 5: Analysis Features

“Know well the condition of your flocks, and pay attention to your herds; for riches are not forever, nor does a crown endure to all generations. When the grass disappears, the new growth is seen, and the herbs of the mountains are gathered in, the lambs will be for your clothing, and the goats will bring the price of a field, and there will be goats’ milk enough for your food, for the food of your household, and sustenance for your maidens.”

PROVERBS 27:23-27

Effective analysis helps ensure that your “flocks” – the sources of your financial support – are in good condition.

TntMPD offers a number of nifty analysis features to help you make the most of your MPD data. These analysis tools are found in the Analysis View and in the **Tools** menu.

This chapter covers:

1. The Analysis View.
2. **Tools | Late Donor Report** – to help you be aware of donors who are behind on their pledges.
3. **Tools | Contribution Report** – to give you a table-based view of your contributions for one or more months.
4. **Tools | Appeal Tracking** – to help you create appeals and track the results.
5. **Tools | Birthdays and Anniversaries** – to take your relationship building to a very high level.
6. **Tools | All Pictures** – where you can store small photos of your contacts.

Analysis View

The Analysis View offers a wealth of fascinating information about your contacts and their giving. The more information you have about your contacts—both in quantity and quality—the better you’ll be served by the Analysis View.

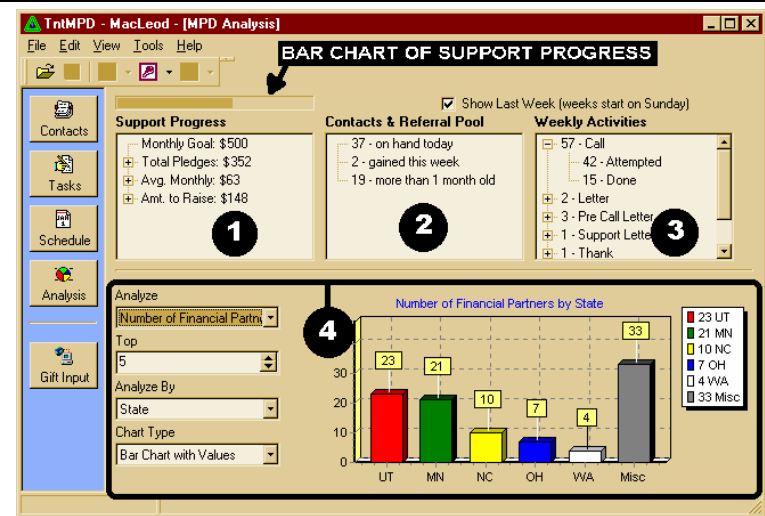
1. Support Progress.

- **Monthly Goal** is defined in your **Tools | Options**.
- **Total Pledges** is the monthly sum of all pledges for contacts whose MPD Phase is “PARTNER-Financial”.
- **Avg. Monthly** is TntMPD’s computed current monthly average for Financial and Special PARTNERS. *This is not simply “All gifts divided by 12”.* See next page.
- **Amt. to Raise** = Monthly Goal minus Total Pledges.

All three of these have a plus button (+) that will show you more detail.

2. Contacts & Referral Pool tells you how many contacts you have whose MPD Phase is below the Decision Line. (See the **Life Cycle of a Contact** inside the front cover.)

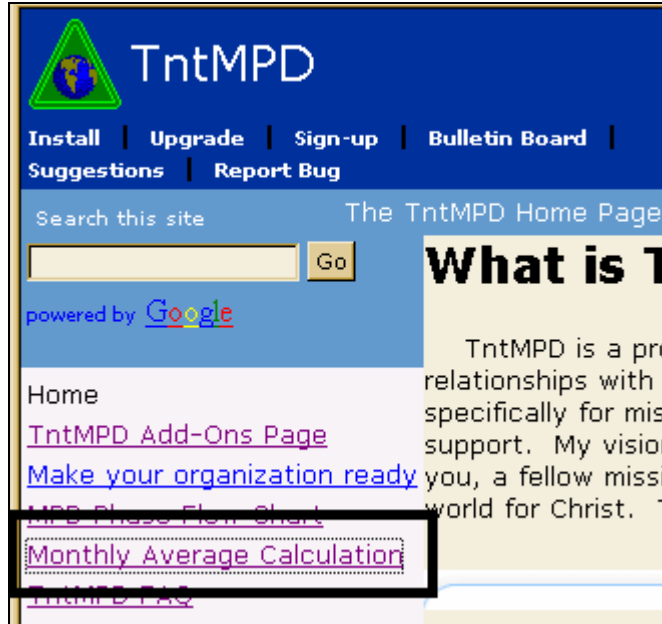
3. Weekly Activities summarizes all items in the History Tab for all your contacts for this week or last week. (You define your week’s start day in **Tools | Options**.)



4. Analyze your support in the lower section. The very cool graphical views of your support offer 3D views of gifts, pledges, contacts and more: 10 different reports you can view 14 different ways. The best way to learn about the graphical views is to just start clicking and see what you learn.

Seeing these charts helped me make wiser decisions in regard to which states I directed future development activity. Until I started using TntMPD, I did not realize how significant one particular state was both in the number of contacts and amount of annual giving, and have more actively sought new contacts in that state.

HOW TntMPD COMPUTES MONTHLY GIVING



Note: This text is copied verbatim from the TntMPD web site. Go to the web site and select the above link to see this text as well as several tables of examples of donors who give consistently—but not monthly—and how that impacts the *Monthly Average Calculation*.

Contacts in TntMPD have an AveMonthlyGift field that can be used to determine past giving performance and can also be used to estimate future expectations. This field is not necessarily a simple average. If you want a simple average, you can just divide the TwelveMonthTotal field by 12.

Special Partners

When a contact does not have a financial pledge, they are treated as a special partner and the AveMonthlyGift field does represent the simple average. This is the TwelveMonthTotal field divided by 12.

Financial Partners

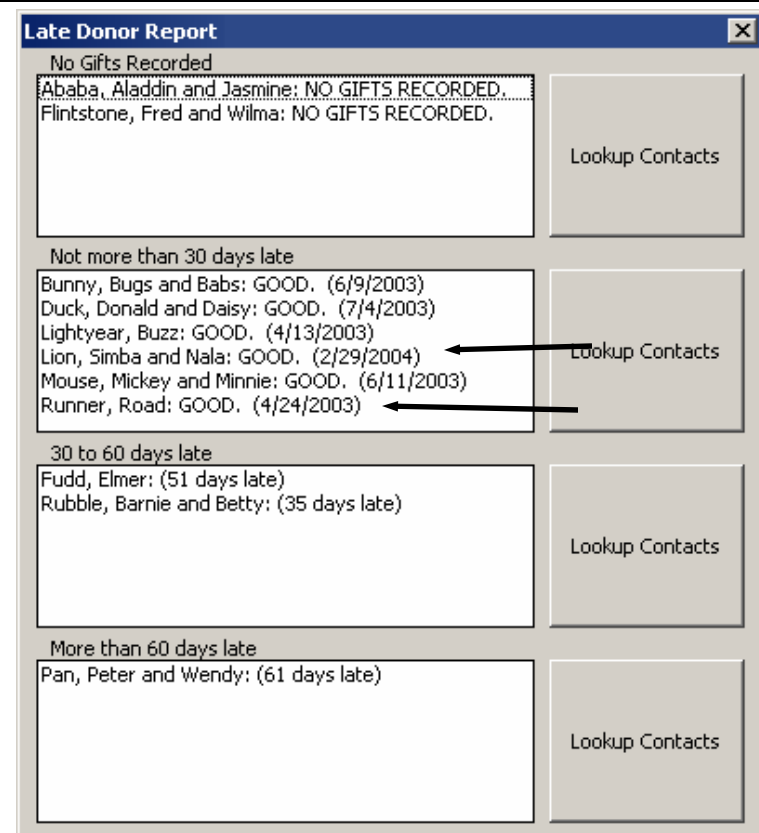
When a contact has a financial pledge, their MonthlyPledge ($\text{PledgeAmount} / \text{PledgeFrequency}$) is taken into consideration. First of all, the average is based upon $(12 + \text{PledgeFrequency})$ months. This means that a monthly giver has the average based on $(12 + 1)$ 13 months. A quarterly giver is based on $(12 + 3)$ 15 months, and an annual $(12 + 12)$ 24 months. If no gifts have been received within this time frame, the average is zero. If there are no gifts before this range, the number of months is shortened to just include the first gift.

Once this range is established, the first month with gifts prior to the range and the last month with gifts within the range are treated uniquely. The first month with gifts prior to the range is spread out evenly to fill in all months without gifts up until right before the first month with gifts within the range. This is done because the donor probably intended for that gift to cover those months. The last month with gifts is spread out into the future based upon the MonthlyPledge. This is done because the donor probably intends for the gifts that month to count for future months if it is larger than the MonthlyPledge.

Tools | Late Donor Report

While TntMPD can create auto tasks for donors who DO give (either resuming their pledge or giving an amount different from their pledge), it will *not* flag you when a donor is behind on their pledge. You have to run the **Tools | Late Donor Report** yourself.

- Select **Tools | Late Donor Report**.
- TntMPD spends a moment analyzing all of your contacts and compares them to (a) their pledge and (b) their most frequent gift.
- **No Gifts Recorded** are contacts who have a pledge recorded but have yet to give their first gift.
- **Not more than 30 days late** are all contacts whose most recent gift has fallen within their pledge frequency. TntMPD also lists the date their next gift is due. An annual donor could be as much as 365 days away. (Notice Simba & Nala Lion's next gift is due eight months after Road Runner's next gift.)
- **30 to 60 days late** and **More than 60 days late** alerts you to donors for whom you should take action. You can press **Lookup Contacts** to look them up as a Group, then schedule a task to call or write to them.



Tools | Contribution Report

This report is a table of your gifts and offers a number of different options for types of gifts shown and time period displayed.

- The default display is 13 months.
- Select which gifts to include in the report.
- You can Export this report. Before you Export, you can also add fields not shown on the report.

Notice that John & Pocahontas Smith—\$45 monthly donors—missed in February but doubled in March. They actually sent two gifts, but they were posted on the web on March 1 and March 31.

The

Extra Fields... button allows you to select non-displayed fields to include in your export.

Tip from the Developer:

The ways I use the report is to check on my total “personal gifts” to see how close to the annual limit I am. I also check on all my non-web gifts to see if there are any gifts I manually entered that haven’t been processed by CCCI. I’ve had a few times where after a month, it became obvious that the gift I mailed in was credited to the wrong account, and I’ve been able to correct this. “Non-web gifts” includes any gift not actually found on the web yet.

Tools | Appeal Tracking

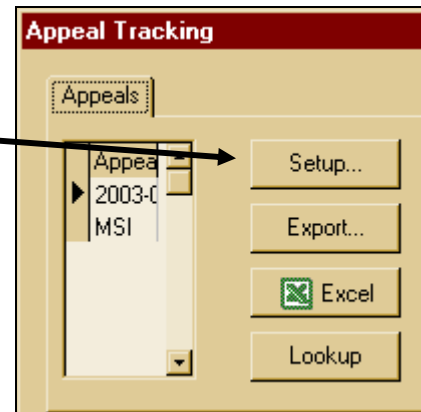
SETTING UP NEW APPEALS

The report itself is called **Tools | Appeal Tracking**. This section also covers

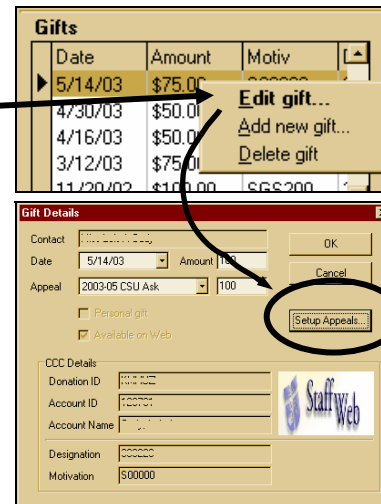
1. Setting up new appeals
2. Assigning activity to an appeal, such as the sending out of an appeal to 41 contacts.
3. Assigning gifts received to an appeal.
4. Viewing the results of the appeal.

Appeals can be set up from several different places.

- From the **Tools | Appeals Tracking** dialog box.



- In the **Gift Details** box. Double click on a contact's gift (or right click and select **Edit Gift...**).



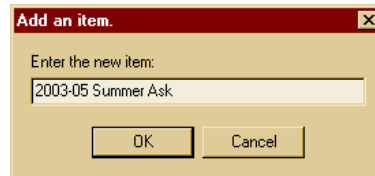
- (Not shown.) In the **Log History** box when logging history for an individual contact or a group.

Creating an Appeal.

Press **Add** to create an Appeal.



Type in the name of your appeal.
Click **OK**.



Tip: I personally recommend using a date code (YYYY-MM) prior to the actual appeal name, so that as you have more and more appeals, you will be able to easily find them. This will be particularly helpful if you send an appeal at the same time each year.



ASSIGNING ACTIVITY TO AN APPEAL

*Note: Use the “Appeal” on a history event only when sending out the appeals. For example, if you make a call to follow-up on an appeal, do **not** select the appeal when logging the event. If you do, TntMPD will register an additional appeal to that contact.*

- You can assign an appeal to an individual contact by logging a history item on the History tab.
- Choose the **Type** (typically a “Support Letter”). Write a **Description**, then select the Appeal from the drop-down list.
- Click **OK**.

The screenshot shows the 'Log History' dialog box. The 'Type' is set to 'Support Letter'. The 'For' field is empty. The 'Result' is 'Done', 'When' is '5/22/03' at '12:47:26 AM'. The 'Description' is 'Sent Summer Appeal'. The 'Notes' field is empty. The 'Appeal' dropdown menu is open, showing options: '<none>', '<none>', and '2003-05 Summer Ask'. Buttons for 'Setup Appeals...', 'Cancel', and 'OK' are visible at the bottom.

- You can also assign an appeal to an entire group. Select **Group | Log History**.
- Same as above, except that when you click **OK**, this item will apply a history event to each one of the contacts in the group.
- Press **OK**.

The screenshot shows the 'Contacts' menu. The 'Log History...' option is highlighted, with the keyboard shortcut 'Ctrl+L' shown next to it. Other options include 'Group', 'Lookup', 'Tools', 'Help', 'Schedule New Task...', 'Send Group to Outlook...', 'Field Change...', and 'Delete Group'.

Remember: A Group History item cannot be undone, so be certain you want to log this event for the whole group before you click **OK!** See *Groups* in Chapter 3 for how to undo an error like this.

The screenshot shows the 'Log History' dialog box. The 'Type' is 'Support Letter'. The 'For' field is 'all 323 contacts in current group'. The 'Result' is 'Done', 'When' is '5/22/03' at '12:53:08 AM'. The 'Description' is 'Sent Summer Appeal'. The 'Notes' field is empty. The 'Appeal' dropdown menu is set to '2003-05 Summer Ask'. Buttons for 'Setup Appeals...', 'Cancel', and 'OK' are visible at the bottom.

ASSIGNING GIFTS TO AN APPEAL

Once you start receiving gifts in response to an appeal, you can assign those gifts to the appeal so that your analysis of the appeal will be complete.

When using Gift Input from the Web:

- Select the Gift to edit.**
 After downloading gifts from the web, double-click on the name of the donor. This opens the Gift Details dialog box. (After the gift is posted, you can edit the gift in the contact's MPD tab.) Double-click on the gift or right-click and select **Edit gift....**
- Select the Appeal they are responding to.
- If their gift includes their regular pledge amount + an extra gift for the appeal, you can assign just a portion of their gift to the appeal. Click **OK**.
- You can also **Setup Appeals...** here if you had not done so previously.

The screenshot shows the 'Gift Details' dialog box with the following fields:

- Name: [Empty]
- Contact: Mr and Mrs. Michael R. [Empty]
- Date: 5/21/2003
- Amount: 100
- Appeal: 2003-05 Summer Ask
- Personal gift: [Checked]
- Available on Web: [Checked]
- CCC Details:
 - Donation ID: K9900
 - Account ID: 41000000
 - Account Name: Donnings, Medical Fund And Appls
 - Designation: 000000
 - Motivation: Z01000

The 'Gifts' table at the bottom left shows:

Date	Amount	Motiv
5/14/03	\$75.00	
4/30/03	\$50.00	
3/19/03	\$50.00	
2/20/03	\$75.00	
1/22/03	\$100.00	SGS200

The 'Gifts' table at the bottom right shows:

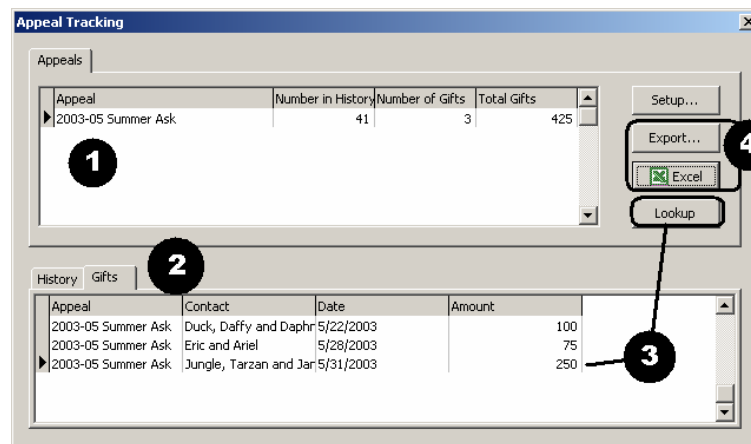
Date	Amount	Appeal
5/22/2003	\$100.00	(50) 2003-0
4/24/2003	\$50.00	
3/19/2003	\$50.00	
2/20/2003	\$50.00	
1/22/2003	\$50.00	

TRACKING THE RESULTS OF AN APPEAL: TOOLS | APPEAL TRACKING

The *bottom line* of Appeal Tracking. In this example, we sent 41 appeals and have received 3 gifts in response (so far).

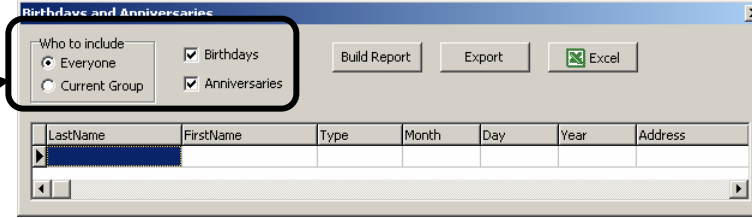
Select Tools | Appeal Tracking.

1. View the list of appeals, how many 'history' events are associated with that appeal, the number of gifts received in response and the total \$\$ amount of the gifts.
2. **Double-click** on the appeal name to view the details in the lower box. You can toggle between the history (the 41 appeals sent) and the gifts received (3) in response to the appeal.
3. Press **Lookup** to show all the contacts listed in the box (either the 41 in the History tab or the 3 in the Gifts tab).
4. **Export** the displayed group to Excel or a .csv file. You might want to do this to print out a list of names for thank you, etc.

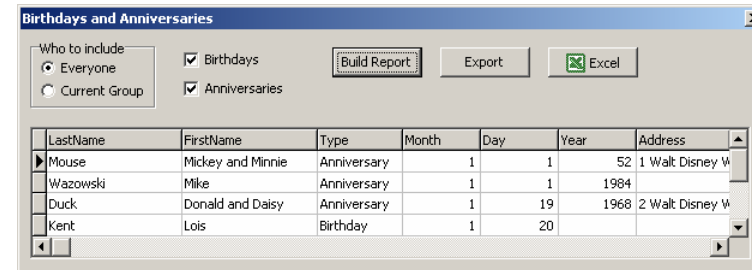


Tools | Birthdays & Anniversaries

- Select **Tools | Birthday & Anniversary Report**.
- Identify **who** and **what**:
- Press **Build Report**.



- See the report sorted by month, then day, then year. Note that TntMPD is not overly particular about the year. It will accept both "52" and "1952" or no value at all.
- You can then **Export** the table to a .csv file or to **Excel**.



Tools | All Pictures

Selecting this link shows you:

- All the pictures you have loaded in your TntMPD database.
- The first and last name of the contact (but not the spouse's name).
- The file format used.
- The size of the file.
- The original filename.



Tip: From this screen you can see the file-size of all your pictures. Try to keep your pictures 25 KB or less.

