

Projecting Future Revenue

Dynamic Yearly Projector (DYP)

- Projects future revenue based on Donor Management Scorecard
 - Individual donor lifecycle
 - Key metrics
 - Universe and retained/regained donor counts
 - Retention/reactivation rates
 - Gifts/gift frequency
 - Revenue
 - Average gift
 - Donor value

Multiple Scenarios

- Base line – trends remain the same
- One or more growth scenarios
 - New and reactivated donor counts
 - Changes in donor value or retention
- Requirements to achieve a specific revenue number within a particular timeframe

DYP Summary - Example

- Scenario 3 – accelerated growth
 - Total Acquisition investment of \$1,500,000 over 5 years.
 - Consistent investment in new donor acquisition. Test and rollout to \$500,000/year in media spend more quickly than Scenario 2
 - Increased and ongoing investment in lapsed reactivation programs. Levels are higher than Scenario 2.

DYP Summary - Example

	Proj 18	Proj 19	Proj 20	Proj 21	Proj 22
Legacy Revenue Individuals No Caselo	\$3,447,354	\$3,291,609	\$3,131,098	\$2,990,138	\$2,805,320
New /Reactivated Single Gift Revenue	\$69,246	\$139,685	\$266,314	\$450,622	\$593,141
New Sponsor Revenue	\$12,000	\$53,040	\$143,876	\$305,206	\$492,806
New Major/Mids		\$64,000	\$243,200	\$578,560	\$1,102,848
Grand Total Revenue	\$3,528,600	\$3,548,535	\$3,784,488	\$4,324,526	\$5,054,115
Gross Revenue Growth		0.6%	6.6%	14.3%	16.9%
Legacy Donor File	4,607	4,326	4,075	3,856	3,667
New /Reactivated Single Gift	1,020	1,912	3,362	5,271	6,313
New Sponsors	80	308	747	1,456	2,089
Total Donors	5,707	6,546	8,184	10,583	12,069
Donor File Growth(decline)		840	1,638	2,399	1,486
YOY Donor File % Change		14.7%	25.0%	29.3%	14.0%

Channel Reports

Channel Reports Objective

- Gain insight into marketing program performance and insight to understand revenue and donor file trends.

Channel Reports

- Strategy
- Channel Definitions
- Metrics
- Donor segments

Channel Strategy

- Acquisition
- Cultivation
- Development (major donors and organizations)
- Other (includes estate giving, white mail)

Cultivation Channel Definitions

- Appeals
- Newsletters
- Lapsed Regain
- Receipting
- Welcome Series
- Monthly - Check
- Monthly CC
- Bank Checks
- Web-Email
- Web-Internet
- Telemarketing
- Other Cultivation

Channel Report - Metrics

- Revenue
- Donor counts
- Gifts
- Avg. Gift

Channel Report – Donor Segments

- Total file
- General, Mids and Majors
- Staff only, Org only, Staff and Org

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Channel Report

Channel	Revenue Year To Date			Revenue			GPI			GPI		
	Revenue	Volume	Eq. YTD	Revenue	Volume	Eq. YTD	GPI	Volume	Eq. YTD	GPI	Volume	Eq. YTD
Masterworks	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Masterworks - US	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00	95.00
Masterworks - US - Retail	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00	80.00
Masterworks - US - Wholesale	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00
Masterworks - Int'l	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Masterworks - Int'l - Retail	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
Masterworks - Int'l - Wholesale	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

Appeal Campaigns

Appeal Performance Reports

- Metrics
- Drill downs
- Other analytics

Appeal Performance Metrics

- Mail quantity
- Responses/response rate
- Income/average gift
- Cost
- Net income
- ROI
- Cost/response
- Net/response
- GYPM/NYPM

Appeal Performance Drill Downs

Total Appeal

	MRI Recommended Select Compared to Proforma										
	Mail Qty	Gifts	Revenue	Cost	Net Rev.	Avg Gift	Resp Rate	NYPM	Cost/Resp	NPR	ROI
Total MRI Select	246,123	3,143	\$289,519	\$74,813	\$214,706	\$92.12	1.28%	\$872	\$23.80	\$68.31	3.87
Proforma	247,233	3,002	\$274,683	\$75,150	\$199,533	\$91.50	1.21%	\$807	\$25.03	\$66.47	3.66
Diff.	(1,110)	141	\$14,836	(\$337)	\$15,173	\$0.62	0.06%	\$65	(\$1.23)	\$1.85	0.21
% Diff	-0.4%	4.7%	5.4%	-0.4%	7.6%	0.7%	5.2%	8.1%	-4.9%	2.8%	5.9%

Appeal Performance Drill Downs

Total by Segment

	Mail Qty	Gifts	Revenue	Cost	Net Rev.	Avg Gift	% Resp.	NYPM	NPR	ROI
New Tier 1-4	9,395	46	\$4,913	\$2,819	\$2,094	\$106.80	0.49%	\$223	\$45.52	1.74
0-12 Tiers 1-8	93,848	2,405	\$225,505	\$28,155	\$197,350	\$93.77	2.56%	\$2,103	\$82.06	8.01
13-24 Tiers 1-3	44,945	385	\$35,266	\$13,483	\$21,783	\$91.60	0.86%	\$485	\$56.58	2.62
25-60 Tiers 1-3	65,500	232	\$15,585	\$20,625	(\$5,040)	\$67.18	0.35%	(\$77)	(\$21.73)	0.76
61-120 Tier 1	32,435	75	\$8,250	\$9,731	(\$1,481)	\$110.00	0.23%	(\$46)	(\$19.74)	0.85
New Names	39,263	19	\$1,308	\$11,779	(\$10,471)	\$68.84	0.05%	(\$267)	(\$551.10)	0.11
Total	285,386	3,162	\$290,827	\$86,592	\$204,235	\$91.98	1.11%	\$716	\$64.59	3.36

Appeal Performance Drill Downs

Total by Segment and Tier

Segment	Tier	Mail Qty	Gifts	Revenue	Cost	Net. Rev	Avg Gift	% Resp.	NYPM	Cost/Resp	NPR	ROI
0-12	1	18,523	537	\$122,108	\$5,557	\$116,551	\$227.39	2.90%	\$6,292	\$10	\$217.04	21.97
0-12	2	11,677	419	\$29,116	\$5,503	\$25,613	\$69.49	3.59%	\$2,193	\$8	\$61.13	8.31
0-12	3	12,074	377	\$26,137	\$3,622	\$22,515	\$69.33	3.12%	\$1,865	\$10	\$59.72	7.22
0-12	4	11,285	299	\$15,039	\$3,386	\$11,654	\$50.30	2.65%	\$1,033	\$11	\$38.98	4.44
0-12	5	10,460	284	\$14,991	\$3,138	\$11,853	\$52.79	2.72%	\$1,133	\$11	\$41.74	4.78
0-12	6	10,013	195	\$7,840	\$3,004	\$4,836	\$40.20	1.95%	\$483	\$15	\$24.80	2.61
0-12	7	9,851	167	\$6,906	\$2,955	\$3,951	\$38.96	1.70%	\$360	\$18	\$21.26	2.20
0-12	8	9,965	127	\$3,768	\$2,990	\$778	\$29.67	1.27%	\$78	\$24	\$6.13	1.26
Total 0-12		105,093	2,453	\$230,453	\$31,529	\$198,924	\$93.95	2.33%	\$1,893	\$13	\$81.09	7.31

Appeal Performance Other Analytics

- Shifts in file composition
- Response curves
- Changes in schedules
 - Drop dates
 - Other appeals or newsletters
- Changes in offer or creative

Other Analytics

Other Analytics

- Matchback reports
- Website traffic
- Email file/email performance
- White mail analysis

Thank You


