

Interview Questions for Pursuant E-Book *Essential Metrics Your Nonprofit Should Monitor*

First, tell me the intended nonprofit size to benefit from the software.

BIG PICTURE

Tracking every metric can be a bit overwhelming at first, especially if an organization isn't used to keeping metrics. Let's talk about the big picture metrics they should be watching, especially as they get their feet wet with metrics.

1. If they're keeping track of the number of donors, what figure is the most important and why?
2. Everyone knows to look at fundraising. How can tracking the dollars raised each year help the nonprofit administrator?
3. Talk about donor coverage ratio. What does this mean? How do you get this number?
4. Why does cost per dollar raised need to be tracked?
5. Anything else you think potential customers should know about metrics for the big picture of the organization's health?

GIVING PYRAMID

The giving pyramid refers to your levels of donors, which seems it would make it easier to focus your marketing and fundraising efforts each year.

1. How should an organization classify and track their major donors?
2. Talk to me about mid-level donors. What should you track with mid-level donors, and what can you do with that information?
3. Explain donor migration to me and why that matters.

ACQUISITION

One of the goals of any organization is to acquire more donors, which improves their ability to do outreach in the world.

1. Let's talk about tracking new donors and dollars by source. What new information could this reveal? How could that be used by the organization?
2. How about new donors or dollars by channel?
3. Why is it important to track your new donor acquisition cost?

LOYALTY

Of course, it's less costly to keep your current donor list actively engaged than it is to acquire new donors. Your current donors have already been enlightened on your organization's good works and have an established connection to you.

1. How do you go about tracking donor retention? Explain this process to me.
2. How can you use those donor retention metrics to improve your relationships with donors?

3. When you track lifetime value of someone's donations, do you count their entire donor history from the first moment they made a small donation?
4. How would this information guide your spending to acquire and retain donors?
5. Explain giving frequency to me.
6. Help me understand giving capacity. How can you assess that for your current donors? How does that work with prospective donors?

LIFECYCLE

1. What is the lifecycle of the donor?
2. How can you use the metrics for new donors and dollars?
3. Let's talk about the different parts of the lifecycle and what the metrics mean. What do you learn from new continuing donors and dollars?
4. What do you gain from tracking your key multi-year donors and dollars?
5. How about reactivated donors and dollars?
6. What do you learn from tracking your lapsed donors and dollars?

DONOR EXPERIENCE

If you make donating easy and keep your donors happy, it follows that you'll have a better time fundraising.

1. How can you track experience satisfaction for fundraising?
2. Explain donor commitment/preference to me.
3. Customer complaints don't seem as if they'd be as overt in nonprofits. How do you gather this information, and what do you do with it?

DONOR PREFERENCE

You want to give your donors a pleasant and easy donation experience because it ensures a completed donation. I know I'll abandon a shopping experience if online checkout is a hassle. Meanwhile, Amazon easily gets my business.

1. What is contactability in the metrics? Explain online revenue as a percent of contactability to me.
2. How do you track channel preference?
3. How do social media engagement metrics help you?