



Insight

**Annual
Program Analysis**

Annual Program Analysis

LAUTMAN MASKA NEILL & COMPANY			Insight Annual Summary								
Sample Client											
Fiscal Year 2017											
House											
Description	Mail Date	Quantity	Gifts	% Resp	Gross	Avg Gift	Gross/M	Cost	Cost/M	Net	Net/M
<i>January 2017 Member Card Appeal</i>											
	1/24/17	9,358	827	8.84%	\$42,026	\$50.82	\$4,491	\$8,804	\$941	\$33,222	\$3,550
Projections		7,221	665	9.22%	\$33,957	\$51.03	\$4,702	\$8,579	\$1,188	\$25,378	\$3,514
Difference		2,137	162	-0.38%	\$8,069	(\$0.21)	(\$212)	\$225	(\$247)	\$7,844	\$36
<i>January 2016 Member Ca</i>											
		11,247	852	7.58%	\$42,453	\$49.83	\$3,775	\$13,498	\$1,200	\$28,955	\$2,574
Difference		-1,889	-25	1.26%	(\$427)	\$0.99	\$716	\$4,695	\$259	\$4,268	\$976
<i>March 2017 Appeal</i>											
	3/22/17	9,113	511	5.61%	\$24,284	\$47.52	\$2,665	\$7,198	\$790	\$17,086	\$1,875
Projections		7,221	455	6.31%	\$21,840	\$47.97	\$3,025	\$7,864	\$1,089	\$13,976	\$1,936
Difference		1,892	56	-0.70%	\$2,444	(\$0.45)	(\$360)	(\$665)	(\$299)	\$3,109	(\$61)
<i>March 2016 Appeal</i>											
		9,643	607	6.29%	\$29,023	\$47.81	\$3,010	\$9,956	\$1,032	\$19,067	\$1,977
Difference		-530	-96	-0.69%	(\$4,739)	(\$0.29)	(\$345)	\$2,758	\$243	(\$1,981)	(\$102)
<i>May 2017 Appeal</i>											
	5/23/17	9,850	586	5.95%	\$24,496	\$41.80	\$2,487	\$7,832	\$795	\$16,664	\$1,692
Projections		7,221	455	6.31%	\$20,911	\$45.93	\$2,896	\$7,149	\$990	\$13,762	\$1,906
Difference		2,629	131	-0.36%	\$3,585	(\$4.13)	(\$409)	\$683	(\$195)	\$2,902	(\$214)
<i>No Comparison Campaign</i>											
Difference											

Annual Summary Report: Provides overall results for all campaigns within the specified year and compares them to projections. Campaigns are split out between programs and include spillover income from gifts from previous year campaigns. Results can also be limited by date.

LAUTMAN MASKA NEILL & COMPANY											Insight
Sample Client											Comparison Report
House campaigns mailed between 01/01 and 12/31											
House											
Description	Mail Date	Quantity	Gifts	% Resp	Gross	Avg Gift	Gross/M	Cost	Cost/M	Net	Net/M
<i>January 2017 Member Card Appeal</i>											
	1/24/17	9,358	827	8.84%	\$42,026	\$50.82	\$4,491	\$8,804	\$941	\$33,222	\$3,550
<i>January 2016 Member Card Appeal</i>											
	2/2/16	11,247	835	7.42%	\$41,898	\$50.18	\$3,725	\$13,498	\$1,200	\$28,400	\$2,525
Total		20,605	1,662	8.07%	\$83,924	\$50.50	\$4,073	\$22,302	\$1,082	\$61,622	\$2,991
<i>March 2017 Appeal</i>											
	3/22/17	9,113	511	5.61%	\$24,284	\$47.52	\$2,665	\$7,198	\$790	\$17,086	\$1,875
<i>March 2016 Appeal</i>											
	3/21/16	9,643	581	6.03%	\$27,983	\$48.16	\$2,902	\$9,956	\$1,032	\$18,027	\$1,869
Total		18,756	1,092	5.82%	\$52,267	\$47.86	\$2,787	\$17,155	\$915	\$35,112	\$1,872
<i>May 2017 Appeal</i>											
	5/23/17	9,850	586	5.95%	\$24,496	\$41.80	\$2,487	\$7,832	\$795	\$16,664	\$1,692
Total		9,850	586	5.95%	\$24,496	\$41.80	\$2,487	\$7,832	\$795	\$16,664	\$1,692
<i>June 2017 Planned Giving</i>											
	6/19/17	8,355	78	0.93%	\$3,363	\$43.12	\$403	\$18,522	\$2,217	(\$15,159)	(\$1,814)
<i>April 2016 Planned Giving</i>											
	4/11/16	9,941	54	0.54%	\$2,110	\$39.07	\$212	\$15,166	\$1,526	(\$13,056)	(\$1,313)
Total		18,296	132	0.72%	\$5,473	\$41.46	\$299	\$33,688	\$1,841	(\$28,215)	(\$1,542)

Comparison Report: Provides a head to head comparison of the same campaign, or multiple campaigns, mailed over several years. This report can go back as far as 5 years to measure year over year results, and is an essential tool for budgeting.

Annual Program Analysis

LAUTMAN MASKA NEILL & COMPANY		Insight Segment Report								
Sample Client										
0-12 months										
	Quantity	Gifts	% Resp	Gross	Avg Gift	Gross/M	Cost	Cost/M	Net	Net/M
\$5-24.99										
January 2017 Member Card A	1,550	211	13.61%	\$3,239	\$15.35	\$2,090	\$1,367	\$882	\$1,872	\$1,208
March 2017 Appeal	1,530	127	8.30%	\$2,137	\$16.83	\$1,397	\$1,130	\$739	\$1,007	\$658
May 2017 Appeal	1,636	171	10.45%	\$2,214	\$12.94	\$1,353	\$1,219	\$745	\$995	\$608
September 2017 Appeal	1,518	178	11.73%	\$2,499	\$14.04	\$1,646	\$1,689	\$1,113	\$810	\$534
November 2017 Appeal	1,440	159	11.04%	\$2,469	\$15.53	\$1,715	\$853	\$592	\$1,616	\$1,122
December 2017 Appeal	1,406	97	6.90%	\$1,845	\$19.02	\$1,312	\$804	\$572	\$1,041	\$740
Total \$5-24.99	9,080	943	10.39%	\$14,403	\$15.27	\$1,586	\$7,061	\$778	\$7,341	\$809
\$25-49.99										
January 2017 Member Card A	2,195	276	12.57%	\$7,314	\$26.50	\$3,332	\$1,935	\$882	\$5,379	\$2,450
March 2017 Appeal	2,253	190	8.43%	\$5,354	\$28.18	\$2,376	\$1,664	\$739	\$3,690	\$1,638
May 2017 Appeal	2,584	192	7.43%	\$5,128	\$26.71	\$1,985	\$1,925	\$745	\$3,204	\$1,240
September 2017 Appeal	2,301	217	9.43%	\$6,164	\$28.41	\$2,679	\$2,560	\$1,113	\$3,604	\$1,566
November 2017 Appeal	2,215	201	9.07%	\$5,771	\$28.71	\$2,605	\$1,304	\$589	\$4,467	\$2,017
December 2017 Appeal	2,215	120	5.42%	\$3,455	\$28.79	\$1,560	\$1,267	\$572	\$2,188	\$988
Total \$25-49.99	13,763	1,196	8.69%	\$33,186	\$27.75	\$2,411	\$10,655	\$774	\$22,531	\$1,637
\$50-99.99										
January 2017 Member Card A	1,144	126	11.01%	\$6,793	\$53.91	\$5,938	\$1,009	\$882	\$5,784	\$5,056
March 2017 Appeal	1,204	73	6.06%	\$4,539	\$62.18	\$3,770	\$889	\$739	\$3,650	\$3,031
May 2017 Appeal	1,268	77	6.07%	\$4,059	\$52.71	\$3,201	\$945	\$745	\$3,114	\$2,456
September 2017 Appeal	1,168	105	8.99%	\$5,878	\$55.98	\$5,033	\$1,300	\$1,113	\$4,578	\$3,920
November 2017 Appeal	1,088	102	9.38%	\$5,832	\$57.18	\$5,360	\$648	\$595	\$5,184	\$4,765
December 2017 Appeal	1,088	49	4.50%	\$2,600	\$53.06	\$2,390	\$622	\$572	\$1,978	\$1,818
Total \$50-99.99	6,960	532	7.64%	\$29,701	\$55.83	\$4,267	\$5,412	\$778	\$24,289	\$3,490
\$100-499.99										
January 2017 Member Card A	1,220	135	11.07%	\$17,200	\$127.41	\$14,098	\$1,447	\$1,186	\$15,753	\$12,912
March 2017 Appeal	1,180	60	5.08%	\$8,229	\$137.15	\$6,974	\$1,205	\$1,021	\$7,024	\$5,952

Segment Report: Provides segmentation results across multiple campaigns, within each program, in order to analyze overall historical segment performance to determine the best donors and lists to target.

Annual Program Analysis

LMNC List

Prepared for: Sample Client

Fiscal Year	List	List Select	Quantity	Donors Acq	Acq Gifts	Acq Resp Rate	Acq Revenue	Avg Gift	List Cost	List CTA	List CPM	Acq Total Cost	Acq CTA	Acq CPM	1 Yr Donors	1 Yr Subs Revenue	1 Yr Cume Revenue	Net DV1	1 Yr ROI	2 Yr Donors	2 Yr Subs Revenue	2 Yr Cume	Net DV2	2 Yr ROI
2016	Total		251,786	1,386	1,386	0.55%	\$63,955	\$46.14	\$0	\$0.00	\$0.00	\$100,662	\$72.63	\$399.79	869	\$238,300	\$302,255	\$145.45	✓	429	\$184,680	\$486,935	\$278.70	✓
2017	2x Multis		31,625	66	66	0.21%	\$8,049	\$121.95	\$0	\$0.00	\$0.00	\$8,478	\$128.45	\$268.08	30	\$5,351	\$13,400	\$74.58	✓	0	\$0	\$13,400	\$74.58	✓
	2x+ Multis		51,646	174	175	0.34%	\$10,915	\$62.37	\$0	\$0.00	\$0.00	\$20,907	\$119.47	\$404.81	33	\$4,247	\$15,162	(\$33.02)	✗	0	\$0	\$15,162	(\$33.02)	✗
	3x+ Multis		21,817	0	0	0.00%	\$0.00	\$0	\$0	\$0.00	\$0.00	\$6,992	\$0.00	\$320.46	0	\$0	\$0	\$0.00	✗	0	\$0	\$0	\$0.00	✗
	Lapsed		87,797	20	20	0.02%	\$743	\$37.15	\$0	\$0.00	\$0.00	\$34,156	\$1,707.81	\$389.04	10	\$2,013	\$2,756	(\$1,570.01)	✗	0	\$0	\$2,756	(\$1,570.01)	✗
	List 1		94,189	291	291	0.31%	\$13,688	\$47.04	\$0	\$0.00	\$0.00	\$39,301	\$135.06	\$417.26	96	\$18,672	\$32,360	(\$23.85)	✗	0	\$0	\$32,360	(\$23.85)	✗
	List 10		4,782	11	11	0.23%	\$410	\$37.27	\$0	\$0.00	\$0.00	\$1,928	\$175.29	\$403.23	7	\$1,551	\$1,961	\$2.98	✓	0	\$0	\$1,961	\$2.98	✓
	List 100		1,376	9	9	0.65%	\$255	\$28.33	\$0	\$0.00	\$0.00	\$479	\$53.20	\$347.97	2	\$150	\$405	(\$8.20)	✗	0	\$0	\$405	(\$8.20)	✗
	L24 \$10+		1,376	9	9	0.65%	\$255	\$28.33	\$0	\$0.00	\$0.00	\$479	\$53.20	\$347.97	2	\$150	\$405	(\$8.20)	✗	0	\$0	\$405	(\$8.20)	✗
	List 101		90,130	316	319	0.35%	\$13,325	\$41.77	\$0	\$0.00	\$0.00	\$26,044	\$81.64	\$288.96	128	\$44,332	\$57,657	\$100.04	✓	0	\$0	\$57,657	\$100.04	✓
			34,422	114	115	0.33%	\$4,705	\$40.91	\$0	\$0.00	\$0.00	\$9,985	\$86.83	\$290.08	57	\$36,020	\$40,725	\$269.65	✓	0	\$0	\$40,725	\$269.65	✓
		13-18 months	29,099	80	80	0.27%	\$3,215	\$40.19	\$0	\$0.00	\$0.00	\$8,414	\$105.18	\$289.16	24	\$3,335	\$6,550	(\$23.31)	✗	0	\$0	\$6,550	(\$23.31)	✗
		7-12 months	26,609	122	124	0.47%	\$5,405	\$43.59	\$0	\$0.00	\$0.00	\$7,645	\$61.65	\$287.29	47	\$4,977	\$10,382	\$22.44	✓	0	\$0	\$10,382	\$22.44	✓
	List 102		4,921	0	0	0.00%	\$0.00	\$0	\$0	\$0.00	\$0.00	\$2,258	\$0.00	\$458.83	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗
		12 MO \$10+	4,921	0	0	0.00%	\$0.00	\$0	\$0	\$0.00	\$0.00	\$2,258	\$0.00	\$458.83	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗
	List 103		4,617	8	8	0.17%	\$190	\$23.75	\$0	\$0.00	\$0.00	\$1,607	\$200.82	\$347.97	2	\$1,050	\$1,240	(\$45.82)	✗	0	\$0	\$1,240	(\$45.82)	✗
	L24 10+		4,617	8	8	0.17%	\$190	\$23.75	\$0	\$0.00	\$0.00	\$1,607	\$200.82	\$347.97	2	\$1,050	\$1,240	(\$45.82)	✗	0	\$0	\$1,240	(\$45.82)	✗
	List 104		5,286	0	0	0.00%	\$0.00	\$28	\$0.00	\$55.23	\$2,072	\$0.00	\$391.94	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗	
	List 105		3,336	0	0	0.00%	\$0.00	\$562	\$0.00	\$168.53	\$1,836	\$0.00	\$550.23	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗	
			651	0	0	0.00%	\$0.00	\$9	\$0.00	\$14.00	\$258	\$0.00	\$395.70	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗	
	Donors		2,685	0	0	0.00%	\$0.00	\$553	\$0.00	\$206.00	\$1,578	\$0.00	\$587.70	0	\$0	\$0.00	\$0.00	✗	0	\$0	\$0	\$0.00	✗	

List ROI Report: Reviews the gross and net revenue performance for lists and list selects at the time of acquisition, and up to three years after that point.

LAUTMAN MASKA NEILL & COMPANY		Insight								
Sample Client					Annual Cash Flow Report					
Fiscal Year 2017; includes campaign gifts only										
House campaigns										
First Gift:	1/9/2017	Base Cpgn Qty:	70,171	Proj Cpgn Qty:	51,626	Comp Cpgn Qty:	74,347			
Last Gift:	12/31/2017	Base Cpgn Gifts:	3,864	Proj Cpgn Gifts:	3,301	Comp Cpgn Gifts:	3,711			
Days of Returns:	357	Base Cpgn Gross:	\$194,296	Proj Cpgn Gross:	\$161,064	Comp Cpgn Gross:	\$196,099			
Weeks:	51	Base Cpgn Cost:	\$74,007	Proj Cpgn Cost:	\$61,406	Comp Cpgn Cost:	\$99,016			
		Base Cpgn Net:	\$135,524	Proj Cpgn Net:	\$99,658	Comp Cpgn Net:	\$97,083			
Base Period (gifts received 1/1/2017 to 12/31/2017)					Comparison Period (gifts received 1/1/2016 to 12/31/2016)					
Mnth	Date	Campaign Gifts	Campaign Gross	Cum Campaign Gross	% Comp	Date	Campaign Gifts	Campaign Gross	Cum Campaign Gross	% Act
1	Jan 17	0	\$0	\$0	0%					
2	Feb 17	367	\$18,965	\$18,965	10%	Feb 16	152	\$7,684	\$7,684	4%
3	Mar 17	274	\$12,818	\$31,783	16%	Mar 16	467	\$23,115	\$30,799	16%
4	Apr 17	361	\$16,219	\$48,002	24%	Apr 16	316	\$13,733	\$44,532	23%
5	May 17	193	\$10,589	\$58,591	30%	May 16	292	\$13,526	\$58,058	30%
6	Jun 17	492	\$20,319	\$78,910	40%	Jun 16	159	\$9,526	\$67,584	34%
7	Jul 17	153	\$6,191	\$85,101	43%	Jul 16	452	\$19,431	\$87,015	44%
8	Aug 17	54	\$2,428	\$87,529	45%	Aug 16	69	\$3,968	\$90,983	46%
9	Sep 17	181	\$11,289	\$98,818	50%	Sep 16	45	\$1,699	\$92,682	47%
10	Oct 17	369	\$15,403	\$114,221	58%	Oct 16	345	\$15,843	\$108,525	55%
11	Nov 17	419	\$24,366	\$138,587	71%	Nov 16	520	\$24,858	\$133,383	68%
12	Dec 17	1001	\$55,709	\$194,296	99%	Dec 16	894	\$62,716	\$196,099	100%

Annual Cash Flow Report: Provides cash flow for multiple campaigns across an entire year, and can be selected by week and by month, and selected with or without spillover income. Cash flow can be limited by date range, both for the selected base period and comparison period, and can be compared to actuals or budget projections.