

Scoring Frameworks Help Increase Fundraising Success

Scoring frameworks, like the Recency, Frequency, and Monetary value (RFM) score, help to identify the donors who are the best fit for each of your campaigns or outreach programs. Matching your donors to specific outreach endeavors improves your fundraising success and your relationships with your constituents.

REQUIRED EDITIONS

Available in: Lightning Experience

Education Cloud: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Nonprofit Cloud: **Enterprise**, **Unlimited**, and **Developer** Editions

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Determine who is a good candidate for a campaign by determining donors' RFM scores.
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Your Salesforce admin adds the RFM score to the Donor Profile page in the Philanthropy and Partnerships app. The score is placed on the page with the Related Records Detail Display, usually near the donor's giving data rollups.
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A donor's score is updated by running the Data Processing Engine job.

About RFM Scores

Determine who is a good candidate for a campaign by determining donors' RFM scores.

Work smarter, not harder!

Knowing your constituents and understanding their alignment to your campaigns is vital to successful and efficient engagement. The RFM score helps you identify the right prospects for a campaign or gift proposal. It can also help you determine the touchpoints that yield the best engagement, so that you can allocate resources more effectively in future campaigns.

What Are RFM Scores?

Recency, Frequency, and Monetary Value (RFM) score analysis is a tool you can use to identify your best donors based on their giving habits.

The recency score represents the last time that the constituents donated. The frequency score represents how often constituents donate. And the Monetary Value score represents the amount that the constituents donated. The fields and objects that these scores are based on are defined during setup. The weight of each of these attributes is also determined during setup. These three individual scores are then aggregated into one combined RFM score.

RFM scores are used for reporting, segmentation, and list building of donors. Specifically, RFM score analysis helps you:

- Determine how many donations come from first-time as opposed to repeat donors.
- Predict the constituents who are likely to donate again.
- Predict the right amount to request in a gift solicitation.
- Understand how best to turn occasional donors into regularly committed donors.
- Identify the donors who haven't donated in a while so that you can engage them and strengthen their relationship with you.

How Is the RFM Score Determined?

The individual components of the score are pulled from the fields on the DonorGiftSummary object. The source for the Recency score is the DaysSinceLastGift field on the DonorGiftSummary object. The source for the Frequency score is the GiftCount field on the DonorGiftSummary object. The source for the Monetary Value score is the TotalGiftsAmount field on the DonorGiftSummary object. Your Salesforce admin sets a series of ranges for each score. The ranges are used to calculate the scores. Each donor to your organization receives an RFM score on their Donor Gift Summary that represents the aggregated score of the recency, frequency, and monetary value of their gifts. You can also include the individual scores for recency, frequency, and monetary value on the Donor Gift Summary.

Marketers and fundraisers can pull reports or create lists or segments of constituents based on their RFM scores to craft campaigns and proposals specific to their giving habits. RFM scores help fundraisers predict the donors who are a good fit for campaigns and identify the donors who can become more committed constituents.

Where is the Donor's RFM Score?

Your Salesforce admin adds the RFM score to the Donor Profile page in the Philanthropy and Partnerships app. The score is placed on the page with the Related Records Detail Display, usually near the donor's giving data rollups.

How a Donor's RFM Score is Updated

A donor's score is updated by running the Data Processing Engine job.

If your Salesforce admin sets up a schedule for running the RFM Score Calculation data processing engine definition, the Donors' RFM scores get updated after the DPE job is completed. The scores get updated after every run of the scheduled job.

If your admin doesn't set up a schedule for running the RFM Score Calculation DPE definition, the admin can run the job manually as needed.

SEE ALSO:

- [Segmentation](#)
- [Build a Report in Lightning Experience](#)

DID THIS ARTICLE SOLVE YOUR ISSUE?

Let us know so we can improve!

 Yes

 No
