

DXO Performance Metrics Dashboard

WHEN TO USE THE DXO PERFORMANCE METRICS DASHBOARD

The DXO (Donor Experience Officer) Dashboard displays individual and (to managers) team progress toward annual performance year (July 1 – June 30) goals. DXO goals are 120% of the previous year's retention revenue from the portfolio and 80% retention of retention-tier donors. The dashboard displays a view of the overall portfolio, donor count, retention donor count, revenue, revenue gift count, percent to goal, and revenue stats.

Use this report when you need to...

- DXOs use this dashboard to see their metric goals and their progress toward the goals as well as how the donor/prospect groups (retention, SYBUNT, and novel) within their portfolio are contributing to their revenue metrics
- DXO Managers, as well as annual giving/marketing leadership, can use the dashboard to look at goals, portfolios, and progress towards goals for individuals and the team overall. DXO Managers will also be looking at the breakdown of how gifts come in: direct solicitation, soft solicitation, or unsolicited.
- DXOs can download (or print) and share this report with their development and campus colleagues to share their progress towards goals as well.

RELATED REPORTS AND LIMITATIONS:

- [Portfolio Dashboard](#) – with parameter set to DXO, the Portfolio Dashboard shows how assigned plans are being interacted with and includes views detailing portfolio composition, expected ask dates, and days in stage for plans. This doesn't include Novel plans unless a DXO has made substantive contact and has assigned themselves as plan manager.
- [Prospect Plan Report](#) – With Plan Group of DXO_Novel, DXO_Retention, and DXO_SYBUNT selected, a DXO can look at all of his/her assigned and unassigned plans in the portfolio.
- [Prospect Activity Report](#) - DXOs can use this report to look at all assigned and unassigned plans for which they have a completed or pending step. They use this to have a full view of their activity in a given timeframe, typically on a monthly basis.
- **Comprehensive Portfolio Spreadsheet/Total Prospect Strategy (CPS/TPS)** report – This report is created through the use of SQL to append to a static table of plans in a DXO's portfolio. It includes preferred greeting, contact information, giving history, region, and other helpful columns. DXOs use this weekly-updated spreadsheet to inform their strategy, track high-level notes and interests, and compare against solicitation lists. They also use it as their source file for importing into Yesware for outreach cadences. This report is not available for other audiences.
- For all graphs, hovering on the gray, red, or tan highlighted areas will show the relevant data.
- This report can be downloaded in several formats including PDF and can be printed.

WHAT IS INCLUDED IN THE DXO PERFORMANCE METRICS DASHBOARD

- **Portfolio Graph** – count of donor plans within each tier of the portfolio: Retention, SYBUNT, and Novel
- **Donor Count Graph** – count of donors who have made a gift to UW within the performance year per tier
- **Retention Donor Count** – count of donors retained categorized by solicitation type. Gray dashed line indicates total year to date of retained donors and gray highlighted bar at top of graph shows the annual

donors retained goal. Hovering at the bottom of the bar will display the numerical 80 % goal for the year and hovering at the top of the bar shows 100% donors retained.

- **Revenue Graph** – shows cash received to unit by DXOs from donors that is counted toward revenue goals categorized by determined tier. The gray dashed line shows dollars received year to date. The gray highlighted bar indicates the span from prior year’s revenue to present year’s goal. Hovering at the top of the bar will show the revenue goal for the DXO and hovering at the bottom of the bar will show revenue received to the unit from retention tier donors the previous year to the DXO’s priority fund(s). Hovering on tan, gray, and red will show revenue received from each portfolio tier this performance year.
- **Revenue Gift Count** - count of gifts per Solicitation Type per DXO Plan Type
- **Percent to Goal** – percent achieved toward revenue and retention goals
- **Revenue Stats**
 - Gifts per Donor - Average gift count per Revenue donor per DXO Plan Type
 - Revenue per Donor - Average gift amount per Revenue donor per DXO Plan Type
 - Revenue Per Gift - Average gift amount per DXO Plan Type
- For all graphs, hovering on the gray, red, or tan highlighted areas will show the relevant data.

HOW TO GENERATE THE DXO PERFORMANCE METRICS DASHBOARD

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click the DXO Performance Metrics Dashboard link.
4. Select a value for **Performance Year**.
5. Select a value for **Fundraiser**.
6. Click **View Report**.

Note: Managers may wish to select ‘Team’ under “View By’. From there, they can select a specific Fundraiser to view his/her individual stats in chart form, or select the gray ‘View Team’ button to see a table of everyone’s data.

To print:

- Download as: PDF
- Scaling: At most 1 page wide
- Paper Size: Letter
- Orientation: Portrait

REPORT GLOSSARY

Report Section	Element	Description
Individual Team	Performance Year	The year in which data is tracked, beginning 7/1 of the year selected and ending 6/30. For example, 2020 reflected 7/1/20-6/30/21.
Individual	Portfolio	<p>Unique count of prospects in each tier. Each prospect has a plan with an associated plan group attribute reflecting the tier they are a part of in a DXO's portfolio:</p> <p>Retention - Retention Tier donors made a pledge or payment to the specific fund/s the DXO supports from 7/1- 6/30 of the prior year.</p> <p>SYBUNT (some year but unfortunately not this) - SYBUNT Tier donors gave some in the past three performance years but not last performance year to the unit's priority and/or discretionary fund(s)</p> <p>Novel – Novel Tier donors are believed to have the capacity to give at a Leadership Annual Giving level but have not yet given at that level. Novel tier may also include non-donors who have capacity for LAG and/or MG giving and/or are prospects for unit defined priorities.</p>
Individual Team	Donor Count	Number of unique donors per DXO Plan Type calculated by new commitments to UW
Individual Team	Goal	<p>The current performance year's goal for the following metrics by DXO:</p> <p>Retention – 80% of the Retention-tier donors make a gift to UW within the performance year</p>

		Revenue – 120% of the revenue that the Retention-tier donors gave last year to the priority fund(s) a DXO’s portfolio is based on is brought in from all donors in the portfolio to funds within the unit.
Individual Team	Retention Tier Count	Number of Retention Tier prospects with new commitments to priority funds in prior performance year at time goals were set
Individual Team	Retention Revenue Prior Year	Total recognition amount of cash gifts to priority funds from Retention Tier prospects in prior performance year at time goals were set
Individual Team	Retention Donor Count	Number of unique donors who have made a gift in this performance year in the Retention tier per Solicitation Type
Individual Team	Revenue	Total Recognition amount per DXO Plan Type calculated by cash to priority units
Individual Team	Revenue Gift Count	Count of gifts per Solicitation Type per DXO Plan Type to priority units
Individual Team	Percent to Goal	Progress towards meeting retention and revenue metric goals
Individual	Portfolio - Performance Year	DXO Performance Year that is encompassed by the DXO plan group attribute start and end dates (July 1 – June 30)
Individual	Gifts Per Donor	Average gift count per Revenue donor per DXO Plan Type
Individual	Revenue Per Donor	Average gift amount per Revenue donor per DXO Plan Type
Individual	Revenue Per Gift	Average gift amount per DXO Plan Type