

Weekly & Monthly Performance Analysis

How to review, analyse, and act on your numbers — a dashboard that drives decisions, not just reports.

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The Weekly vs Monthly Rhythm

Different questions need different review cycles.

WHAT THIS MEANS

Weekly reviews answer “is this campaign on pace?” Monthly reviews answer “is the system actually compounding?” Each cadence has its own job.

WEEKLY — TACTICAL & FAST

Total raised, new donors, average gift, conversion rate, cost per donor — numbers that tell you whether to adjust spend or creative this week.

MONTHLY — STRATEGIC & TRENDED

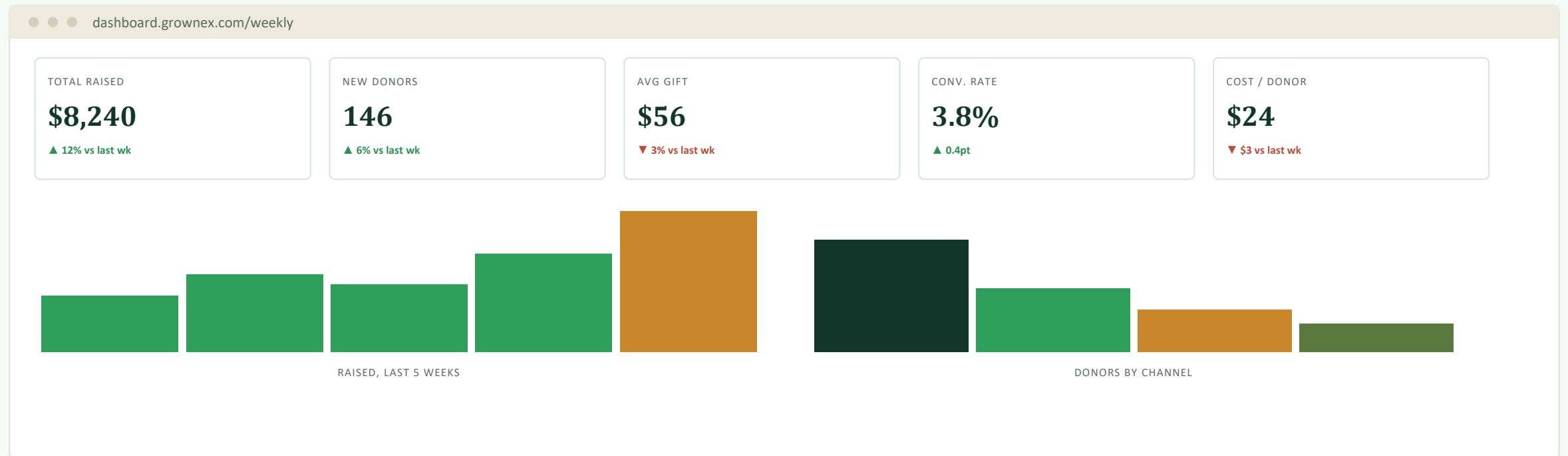
Repeat donor rate, monthly churn, donor LTV, LTV:CAC ratio — numbers that only mean something once you see them move over weeks.

CHECKLIST

- ✓ A fixed weekly slot exists for the pacing review
- ✓ A fixed monthly slot exists, separate from the weekly one
- ✓ Weekly review looks at the current campaign only
- ✓ Both reviews end with a written decision, not just a look

The Core KPI Dashboard

One screen, ten numbers — everything else lives one click deeper.



CHECKLIST

- ✓ No more than 8–10 metrics on the front screen
- ✓ Every card shows a trend, not just a static number
- ✓ Dashboard updates on the same day every week
- ✓ One person is accountable for keeping it current

Weekly Review

A 20-minute pacing check, not a deep-dive.

WHAT THIS MEANS

The weekly review exists to catch a campaign drifting off pace early enough to fix it. It should be fast, focused on the current campaign, and end with one clear decision.

A REAL WEEKLY NOTE

“Week 2 of 4: 38% of goal raised, on pace for 76% by close. Cost per donor up \$3 — check if the cold audience needs a refresh before Friday’s push.”

CHECKLIST

- ✓ Total raised compared against the campaign’s expected pace
- ✓ Cost per donor checked against last week, not just the target
- ✓ Landing page conversion rate reviewed for sudden drops
- ✓ Underperforming channel or creative flagged, if any
- ✓ One action written down before the review ends

Monthly Review

Where you check if the whole system is actually compounding.

WHAT THIS MEANS

The monthly review looks across campaigns, not inside one. This is where retention, channel mix, and lifetime value get judged — questions that need weeks of data to answer honestly.

A REAL MONTHLY NOTE

“Repeat donor rate holding at 22%, up from 18% last quarter. LTV:CAC now 3.2:1, driven mostly by the monthly-giving upgrade sequence — worth doubling budget there next month.”

CHECKLIST

- ✓ Repeat donor rate and monthly churn reviewed against last month
- ✓ Donor LTV and LTV:CAC ratio recalculated
- ✓ Channel mix reviewed — where revenue actually came from
- ✓ One under- and one over-performing channel identified
- ✓ Budget reallocation decision made for next month

KPI Analysis Tactics

A number moving is not the same as understanding why.

WHAT THIS MEANS

Most dashboards report numbers; few explain them. Real analysis means asking why a number moved before deciding what to do about it.

TACTIC: RATIOS OVER RAW NUMBERS

“200 new donors” means nothing alone. “200 new donors at \$18 cost per donor, down from \$24” is a real signal.

TACTIC: SEGMENT BEFORE CONCLUDING

A flat conversion rate can hide a channel improving and another declining. Break it down before deciding the overall trend means anything.

CHECKLIST

- ✓ Every headline number has a paired efficiency ratio
- ✓ Numbers compared to the same period last cycle
- ✓ A moving metric is segmented before a conclusion
- ✓ Seasonal or one-off events are noted next to the number
- ✓ The “so what” is written down, not just the number

Turning Analysis Into Growth Actions

A dashboard that doesn't change a decision is just decoration.

If this metric is...	...then the likely action is
Cost per donor rising, volume flat	Refresh creative or audience before increasing budget
Conversion rate falling, traffic stable	Audit the landing page, not the ad — the leak is downstream
Repeat donor rate flat for 2+ months	Revisit the Retention Playbook's thank-you and impact-update cadence
LTV:CAC improving steadily	Safe to increase acquisition budget on the winning channel
One channel's cost per donor far below the rest	Reallocate budget there before scaling the underperformer
Monthly donor churn rising	Check the Retention Playbook's monthly-giving engagement stream

Full Example, Assembled

One month, both cadences, one real decision.

