

Here is an easy, 3-step process for calculating donor loyalty (RFM) scores using MS Excel or a similar spreadsheet application.

*NOTE: You'll be pulling data from your CRM for this purpose. **Don't worry, you don't have to be an Excel expert!***

1. Define a timeframe. Determine how far back you want to look--10-15 years? 3 years? Since the beginning of your campaign?

2. Export the Data* into Excel. Here's the data to pull:

- CRM ID
- First Name
- Last Name
- Last Gift Date
- Total # of Gifts
- Total Giving Amount

3. Assign Scores for R, F, and M. Here's how to do that using the "V-lookup" function in Excel:

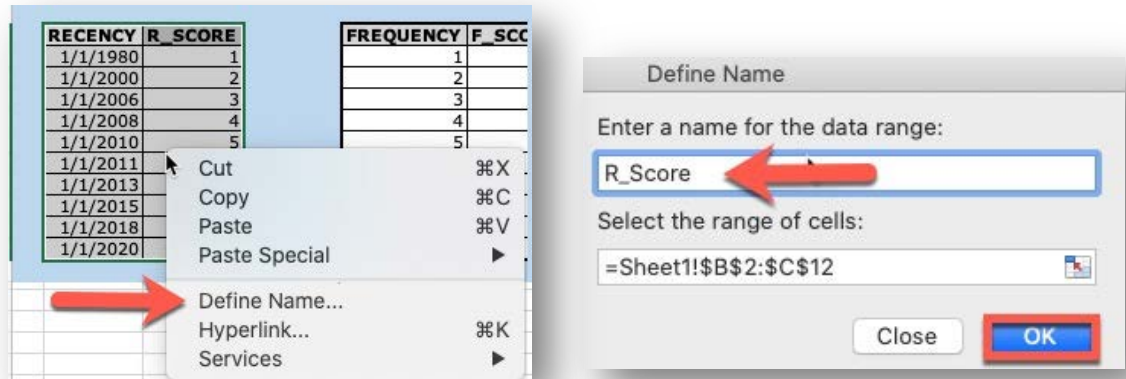
- a.** Create an "RFM Legend" by creating a table of values for each category and assigning a point range of 1-10:
- Paste the range of values in each column:
 - Recency: Last Gift Date
 - Frequency: Number of Gifts
 - Money: Total Giving Amount

| RECENCY | R_SCORE |
|----------|---------|
| 1/1/1980 | 1 |
| 1/1/2000 | 2 |
| 1/1/2006 | 3 |
| 1/1/2008 | 4 |
| 1/1/2010 | 5 |
| 1/1/2011 | 6 |
| 1/1/2013 | 7 |
| 1/1/2015 | 8 |
| 1/1/2018 | 9 |
| 1/1/2020 | 10 |

| FREQUENCY | F_SCORE |
|-----------|---------|
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |
| 4 | 4 |
| 5 | 5 |
| 10 | 6 |
| 15 | 7 |
| 20 | 8 |
| 25 | 9 |
| 30 | 10 |

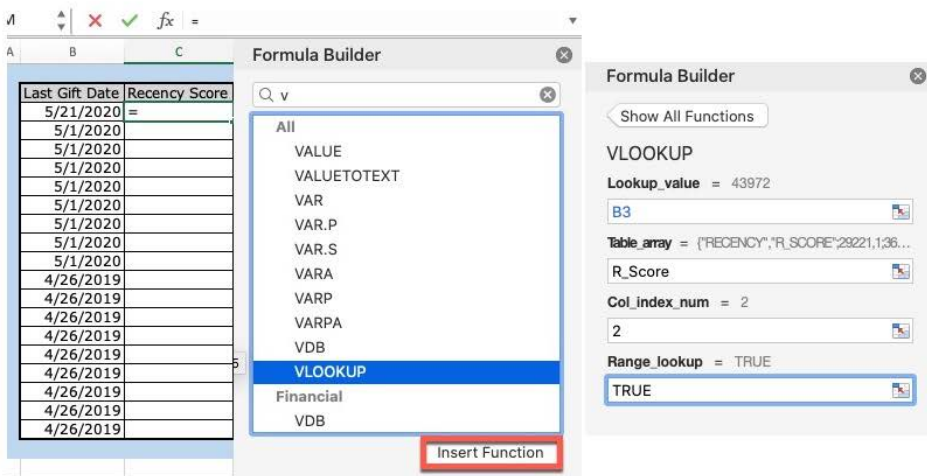
| MONEY | M_SCORE |
|-----------|---------|
| \$1 | 1 |
| \$50 | 2 |
| \$100 | 3 |
| \$250 | 4 |
| \$500 | 5 |
| \$1,000 | 6 |
| \$5,000 | 7 |
| \$10,000 | 8 |
| \$50,000 | 9 |
| \$100,000 | 10 |

- Highlight the table.
- Right-click and select "Define Name". Enter the name and Click "OK".
Repeat for each table in the legend.



- b.** Go to your exported list and click on the first cell of the "Recency Score" column.

- Click on the function (f_x) button at the top of the sheet and select VLOOKUP. Click "Insert Function".
- In the Formula Builder dialog box, Enter the values as shown here:



1. Lookup_value = First cell in the column (B3)
2. Table_array = Table name (R_Score)
3. Col_index_num = Column number in table (2)
4. Range_lookup = TRUE

- Copy the formula to each of the score columns. Change the "Table array" to the name you defined for that table (e.g., go from *R_Score* to *F_Score*, and so on)

Formula Builder

Show All Functions

VLOOKUP

Lookup_value = 1

D3

Table_array = {FREQUENCY, F_SCORE, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10}

F_Score

Col_index_num = 2

Result: 1

Done

- Populate the scores down the column by hovering over the first score cell. When you see the **black "+"**, drag down to the bottom of the column. Repeat in each score column.

| Frequency Score | Total Giving |
|-----------------|--------------|
| 1 | \$20 |
| 10 | \$13,010 |

- SUM the scores in each row in the **RFM Total** column. Use the **black "+"** function (drag down) to populate the column with the RFM scores.

Now you have RFM scores for all your donors!

| Last Gift Date | Recency Score | Total Gift Count | Frequency Score | Total Giving | Monetary Score | RFM Total |
|----------------|---------------|------------------|-----------------|--------------|----------------|-----------|
| 5/21/2020 | 10 | 1 | 1 | \$20 | 1 | 13 |
| 5/1/2020 | 10 | 64 | 10 | \$13,010 | 8 | 36 |
| 5/1/2020 | 10 | 2 | 2 | \$14,800 | 8 | 28 |
| 5/1/2020 | 10 | 2 | 2 | \$250 | 4 | 20 |
| 5/1/2020 | 10 | 2 | 2 | \$724 | 5 | 22 |
| 5/1/2020 | 10 | 1 | 1 | \$11,000 | 8 | 27 |
| 5/1/2020 | 10 | 46 | 10 | \$46,000 | 8 | 36 |
| 5/1/2020 | 10 | 35 | 10 | \$1,568 | 6 | 32 |
| 5/1/2020 | 10 | 17 | 7 | \$28,736 | 8 | 33 |
| 4/26/2019 | 9 | 8 | 5 | \$100,000 | 10 | 34 |
| 4/26/2019 | 9 | 8 | 5 | \$42,000 | 8 | 30 |
| 4/26/2019 | 9 | 8 | 5 | \$25,387 | 8 | 30 |
| 4/26/2019 | 9 | 7 | 5 | \$76,128 | 9 | 32 |
| 4/26/2019 | 9 | 5 | 5 | \$1,944 | 6 | 26 |
| 4/26/2019 | 9 | 5 | 5 | \$7,239 | 7 | 28 |
| 4/26/2019 | 9 | 5 | 5 | \$69 | 2 | 18 |
| 4/26/2019 | 9 | 5 | 5 | \$87 | 2 | 18 |
| 4/26/2019 | 9 | 4 | 4 | \$879,121 | 10 | 33 |