



# INSTANT INSIGHTS

FOR CHARITIES

## Unlock privacy safe supporter insights

Instant Insights is a privacy-safe multi-tabbed interactive dashboard that's built specifically for charities and nonprofits. Delivered out-of-the-box and ready to use from day one, with no extra setup and no learning curve.

Total supporters in past 12 months

136

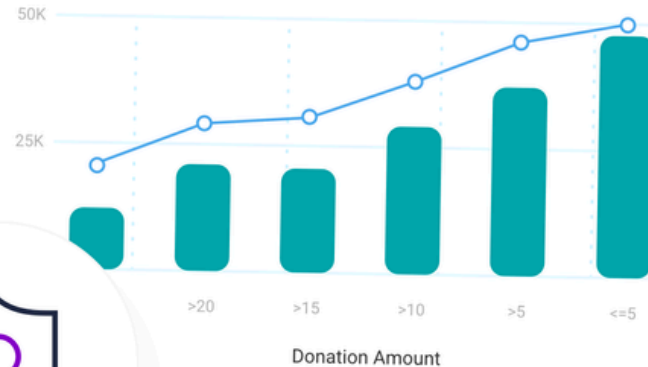
vs previous period: 126.

Average donation value

Sum (Response Revenue) / Sum (Communication Cost)

£35.48

Top supporters - last 12 months Pareto



### Act on insights instantly – delivered within 24 hours

Fast insights give you a head start on engagement, helping you quickly identify and target supporters most likely to give.

### Protect supporter privacy with full GDPR compliance

Instant Insights is privacy safe and requires no personally identifiable data, so you maintain compliance while still gaining serious insight.

### Cost-effective and ready-to-use from day one

No integrations, no technical debt, no learning curve, no hidden costs and accessible for organisations of any size.



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# INSTANT INSIGHTS

FOR CHARITIES

## Fast, privacy-safe and deeply insightful

The dashboard comes pre-populated with visual tiles built for the charity sector, highlighting supporter giving patterns and potential fundraising opportunities. Everything is organised into 10 easy-to-navigate tabs, each offering a different lens on your data so you can explore supporter behaviour from multiple angles.

## Turn simple data into powerful insight

All that's required to build a fully interactive dashboard of supporter insights for your organisation is just three data fields - supporter ID, donation date, and donation amount. All metrics are built around best-practice standards in the charity sector, helping you clearly demonstrate marketing impact while focusing on what matters most.



Complete data overview



12-month overview



Quarterly overview



Monthly overview



Recency frequency value



High value supporters



Lapsed



Fundraising efficiency



Supporter retention



Value change

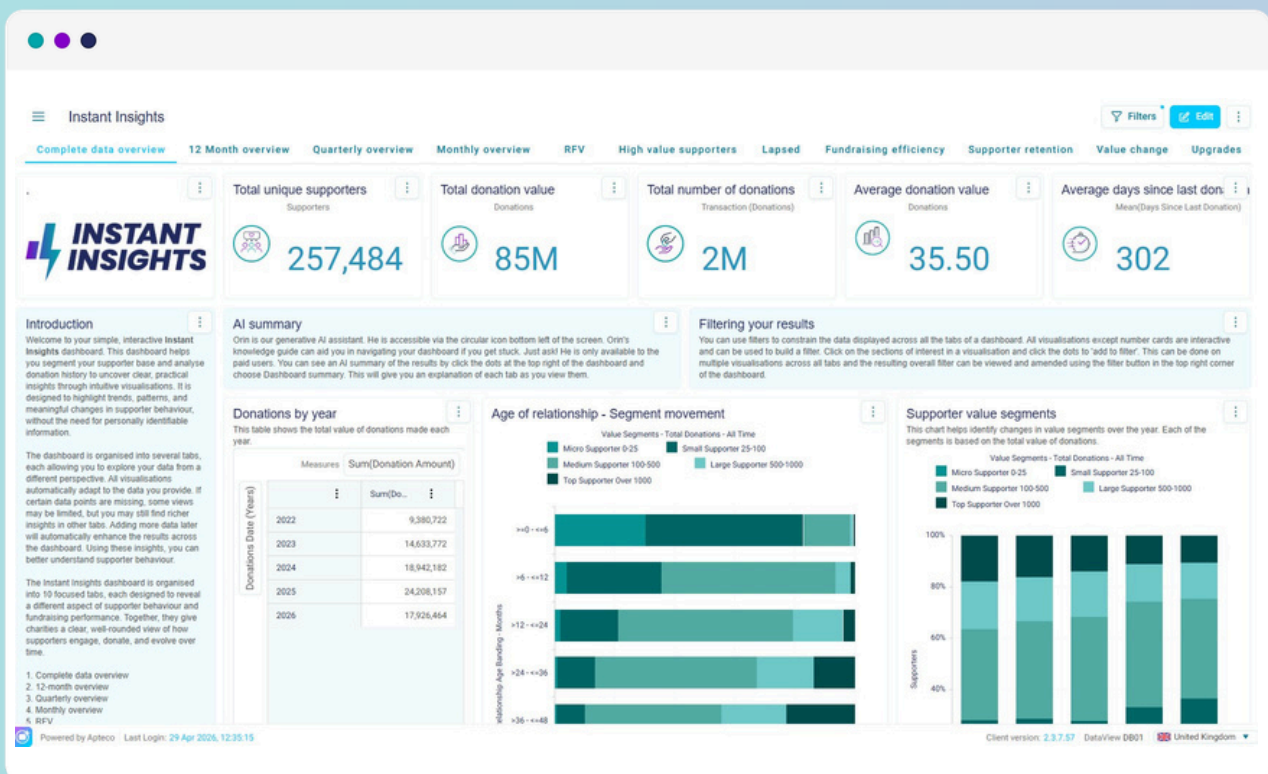


Explore visualisations. Filter instantly. Share insights.

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# Complete data overview

Start with a complete data overview to understand the overall picture of your supporter base. This tab brings together total volumes across the full period of your data, giving you a clear, high-level view of overall performance.



Apply filters across the entire dashboard, making it easy to focus on specific groups or timeframes.

Most visuals - with the exception of number cards - are interactive too, so you can click directly into the data and refine your analysis in seconds.

Explore:

- Supporters and donations by year
- Total unique supporters
- Donations by year
- Total donation value, number of gifts, and average donation
- Age of relationship (segment movement)
- Data grids



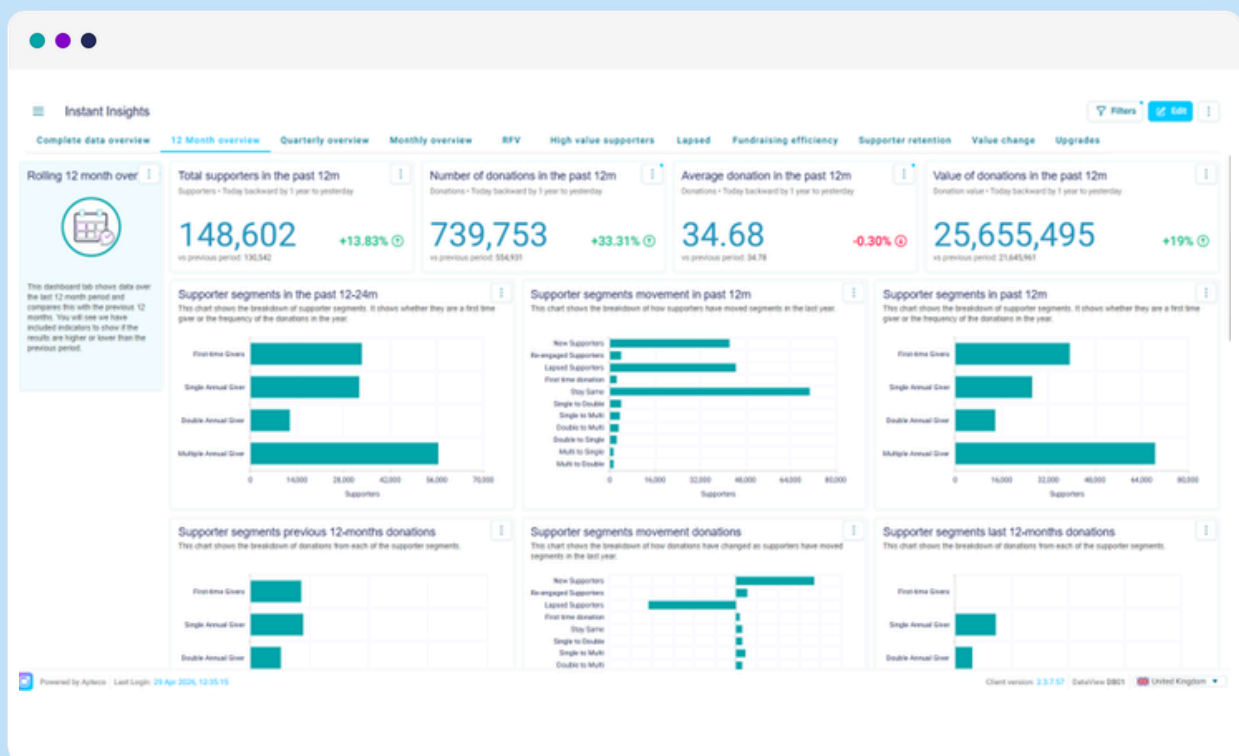
Smart, privacy-safe, actionable insight.

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# 12-month, quarterly & monthly views



Understand how your fundraising performs over time with dedicated 12-month, quarterly, and monthly views. These tabs help you quickly spot trends, seasonality, and shifts in performance – so you can see not just what’s happening, but when and why.



Each view shows donation volumes and total income for the most recent period, alongside a comparison to the previous one.

Clear indicators highlight whether performance is up or down, making it easy to track progress at a glance and respond quickly to changes.

Explore:

- Supporters in the selected period
- Donation amounts – average, lowest, highest
- Year-on-year comparisons
- First and last donation timing

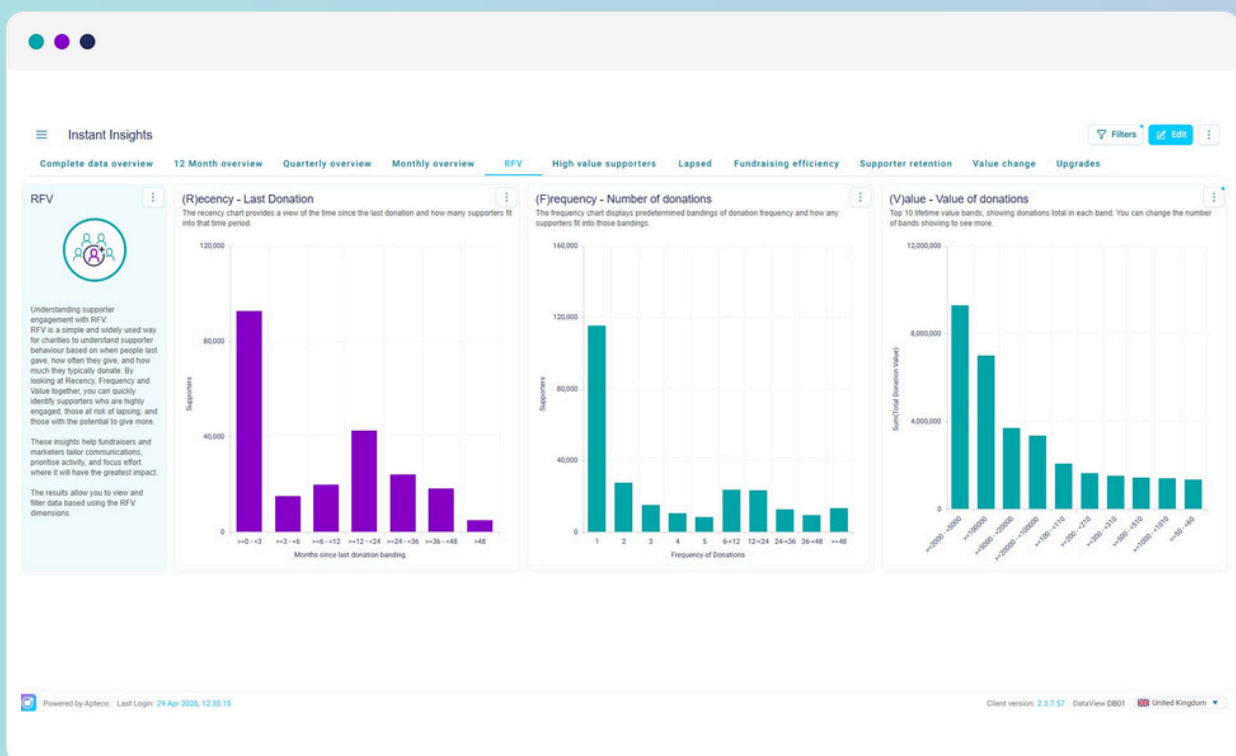


No integrations. No complexity. Just faster insight.

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# Recency, Frequency, Value

Recency, Frequency, Value (RFV) analysis helps you understand supporter behaviour and focus fundraising efforts. By analysing how recently supporters donated, how often they give, and how much they contribute, you can quickly identify your most engaged supporters, those at risk of lapsing, and those with potential to give more.



This approach helps you focus your resources and maximise impact where it matters most. Making it easier to prioritise activity – whether that’s nurturing loyal supporters, re-engaging those at risk, or identifying individuals with the potential to give more over time.

Explore:

- Recency – last donation
- Frequency – number of donations
- Value of donations – view supporters across lifetime value bands

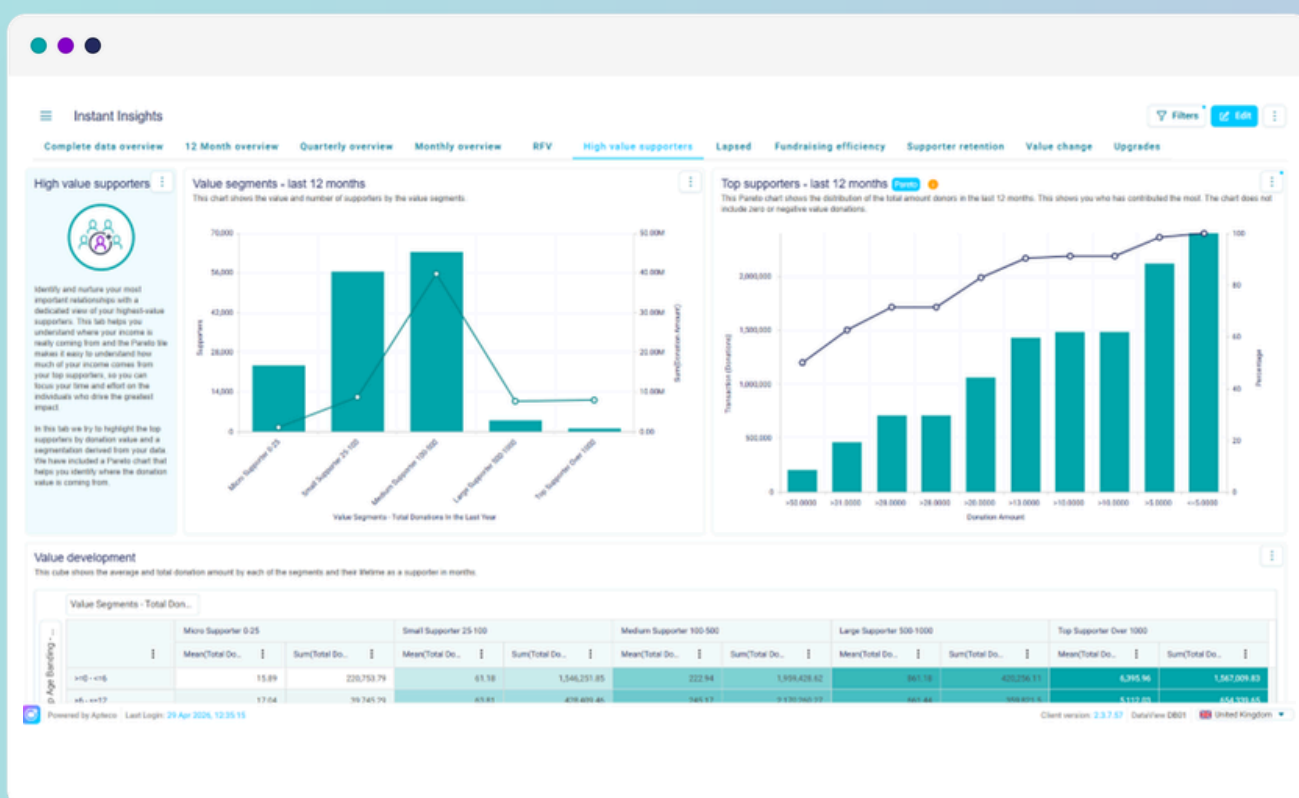


Clear, actionable data you can use instantly.

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# High value supporters

Identify and nurture your most important relationships with a dedicated view of your highest-value supporters. This tab helps you understand where your income is really coming from, so you can focus your time and effort on the individuals who drive the greatest impact.



Using clear segmentation and visual analysis, you can quickly spot your top contributors and see how value is distributed across your supporter base.

A built-in Pareto tile makes it easy to understand how much of your income comes from your top supporters - helping you prioritise stewardship and maximise return.

## Explore

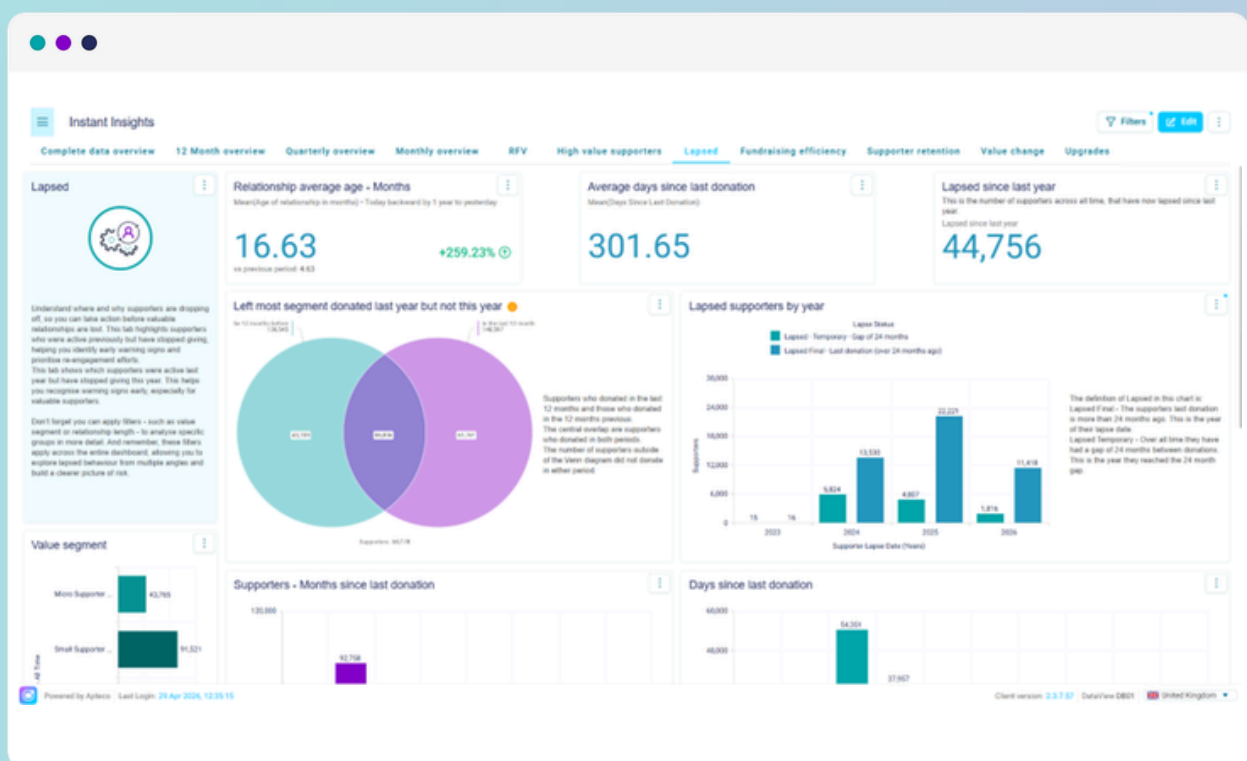
- Supporter value segments
- Top supporters (last 12 months)
- Value development
- Value segment by relationship age
- Top donation value bands



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Understand where and why supporters are dropping off, so you can take action before valuable relationships are lost. This tab highlights supporters who were active previously but have stopped giving, helping you identify early warning signs and prioritise re-engagement efforts.



You can apply filters – such as value segment or relationship length – to analyse specific groups in more detail.

And remember, these filters apply across the entire dashboard, allowing you to explore lapsed behaviour from multiple angles and build a clearer picture of risk.

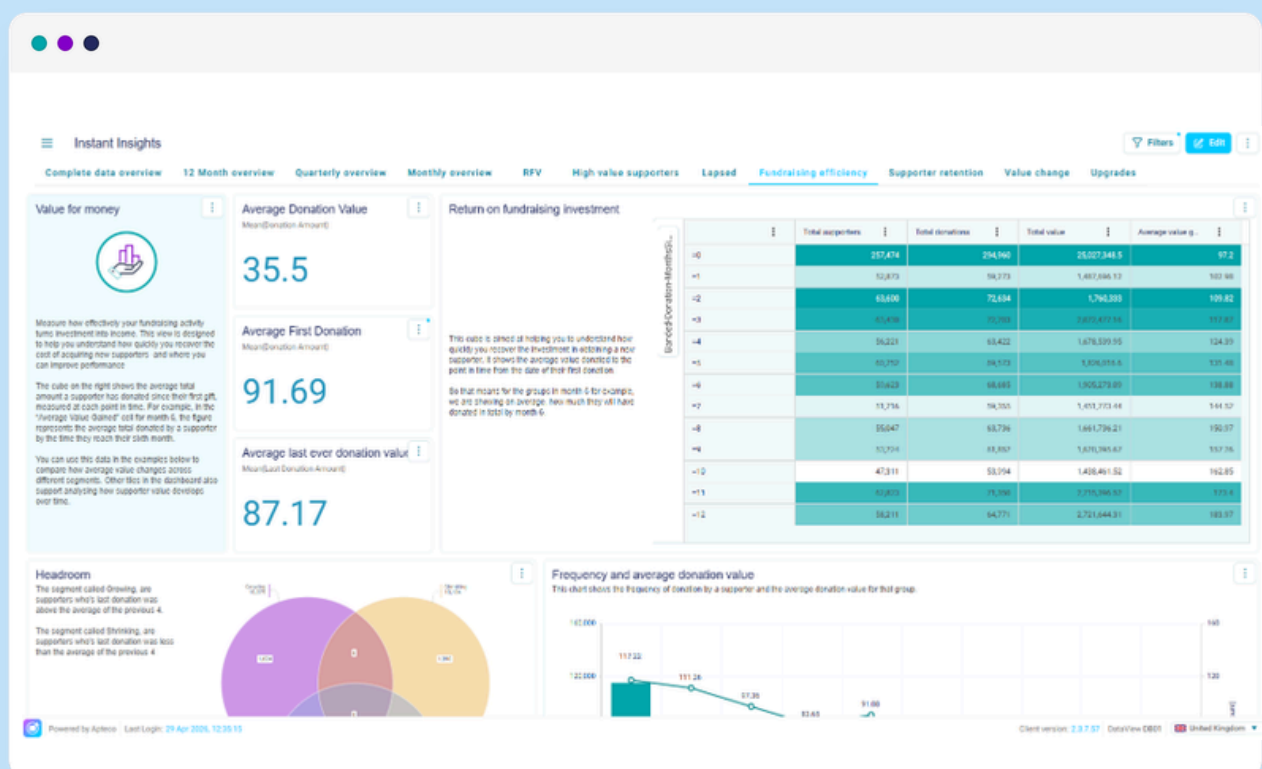
Explore:

- Lapsed supporters over different timeframes
- Time since last donation
- Age of relationship
- Value segment
- Dropouts by relationship age
- Dropouts by value segment



# Fundraising efficiency

Measure how effectively your fundraising activity turns investment into income. This view is designed to help you understand how quickly you recover the cost of acquiring new supporters - and where you can improve performance.



At the core of this tab is a view showing the average value generated by supporters over time, starting from their first donation.

This allows you to see how supporter value builds month by month and compare performance across different segments.

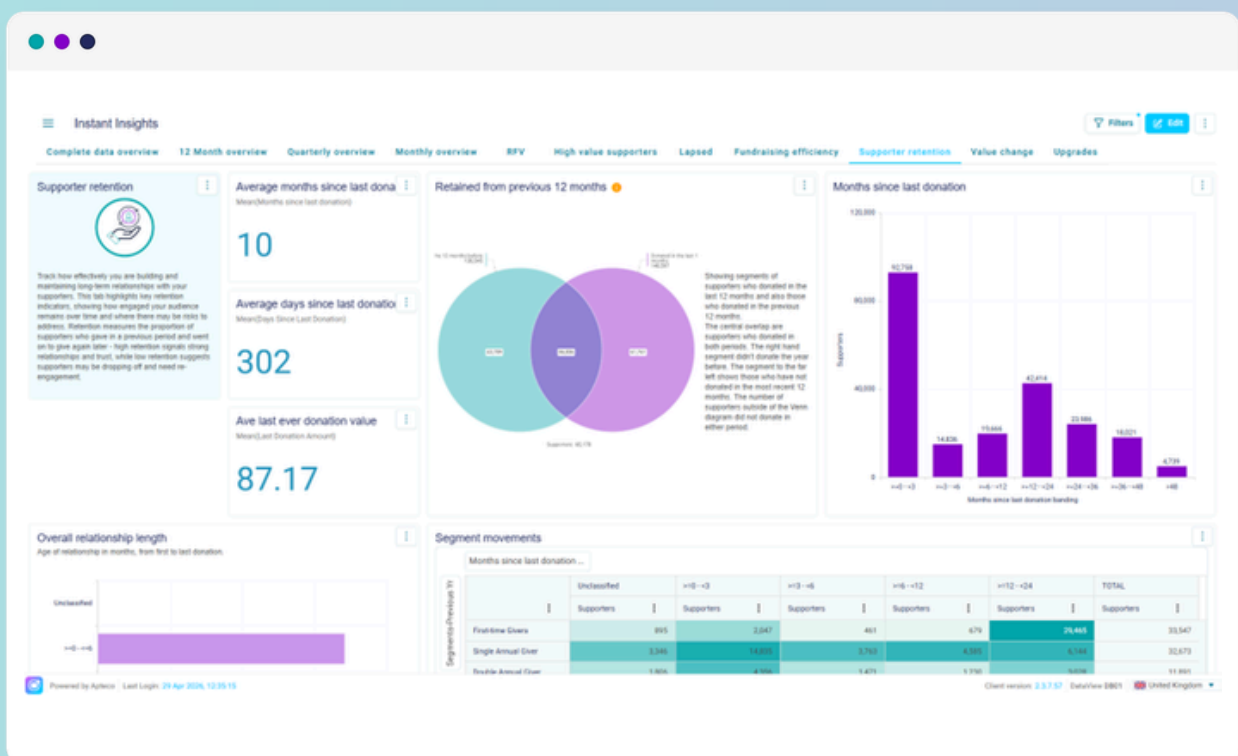
Explore:

- Return on fundraising investment
- Average donation amount
- Last donation value
- Headroom analysis
- Frequency and average value (Pareto)



# Supporter retention

Track how well you are building and maintaining long-term relationships with your supporters. This tab highlights key indicators of retention, helping you understand how engaged your audience remains over time - and where there may be risks to address.



High retention signals strong relationships and trust, while low retention suggests supporters may be dropping off and need re-engagement.

These insights help you strengthen retention strategies, improve supporter experience, and build more sustainable, long-term income.

Explore:

- Time since last donation
- Last donation value
- Overall relationship length
- Segment movements

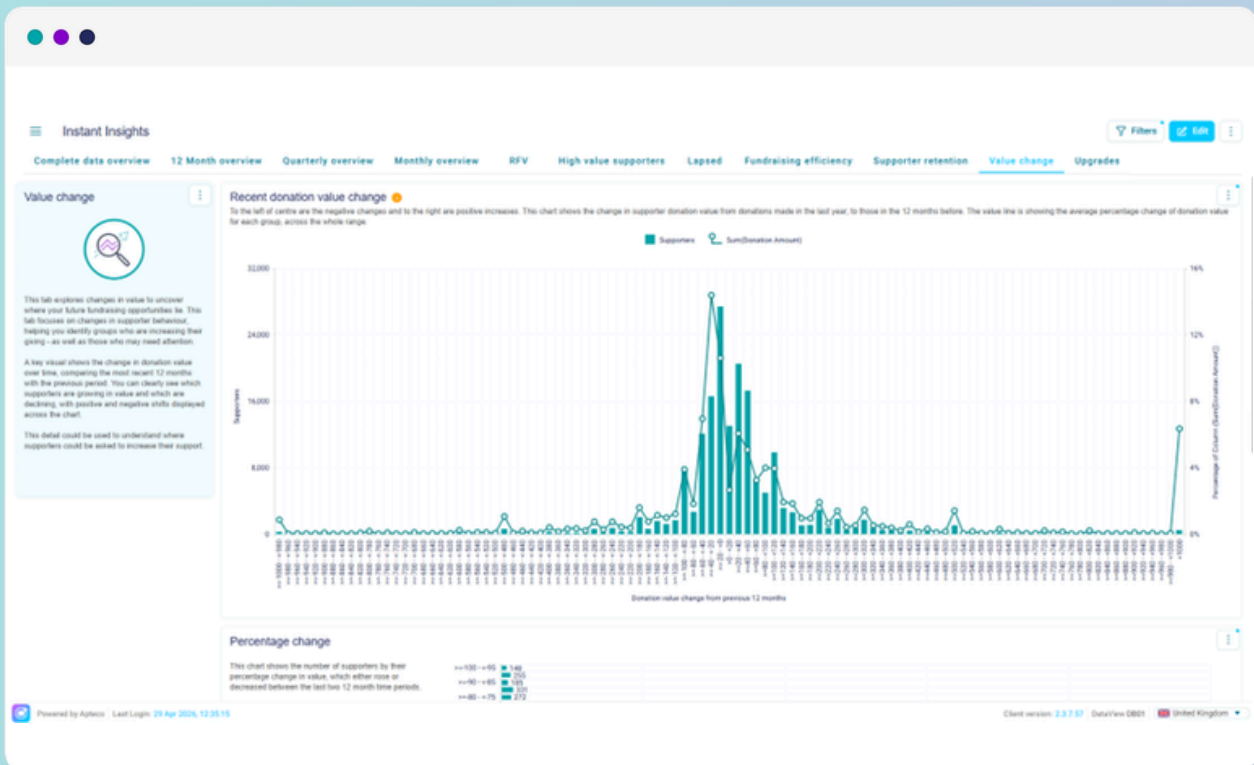


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# Value change

Explore changes in value to uncover where your future fundraising opportunities lie. This tab focuses on changes in supporter behaviour, helping you identify groups who are increasing their giving – as well as those who may need attention.



You can clearly see which supporters are growing in value and which are declining, with positive and negative shifts displayed across the chart.

By focusing on these changes, you can take a more proactive approach – nurturing growth opportunities while addressing risks before they impact your fundraising performance.

## Explore

- Changes in recent donation values
- Percentage changes in donation value



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ONLY £200



## Enable on-demand data refresh

BUY NOW

Upload a new CSV file to seamlessly replace your data so your insights stay relevant, your reporting stays accurate, and your decisions are based on the latest information.

## UPGRADE FOR EXTRA *POWER!*

ONLY £200



## Switch on integrated data exports

BUY NOW

Instantly export supporter IDs and create highly targeted, insight-led lists for your next campaign or fundraising activity.



# Plus...

**Your Instant Insights subscription also includes access to Orin, Apteco's generative AI assistant.**

Available on every tab, Orin can quickly summarise what the data is telling you and help guide you through the dashboard whenever you need a hand interpreting or navigating the insights.



Get clarity. Get results. Get started today.

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