

Don't Just 'Renew' Donors—Cultivate a 'Relationship'

By Anne and Josef Kottler



Creating and maintaining a strong connection with donors is essential to any nonprofit. It begins with a clear articulation of the

brand "pillars" your organization stands for, making donors feel aligned with your mission. Through your welcome stream, appeal, cultivation and retention communications, you can deepen your relationship by creating "stickiness" and steward donors toward deepening their engagement.

START WITH AN EFFECTIVE ON-BOARDING STRATEGY.

The first step in creating a bond with new donors is to welcome them into your community of like-minded people who share a common interest—supporting your worthwhile cause.

Continued on page 5



In their welcome kit, Audubon invites new donors to tell them about their interests.

PLEASE TAKE A MINUTE TO TELL US MORE ABOUT YOURSELF

I AM ALSO INTERESTED IN LEARNING MORE ABOUT:

- ☐ Receiving income for life from a tax-advantaged charitable gift to National Audubon
- ☐ Paperless or recycled paper programs
- ☐ Including National Audubon in my will
- ☐ Local volunteer opportunities
- ☐ Travel opportunities with Audubon
- ☐ Advocacy and policy issues
- ☐ Citizen scientist/wildlife programs
- ☐ Classroom-based educational programs for my school
- ☐ Managing my membership online

MY CONTACT INFORMATION:

My email address is: _____

My phone number is: _____

I prefer to be contacted by:

☐ Mail ☐ Phone ☐ E-mail

Audubon
225 North Street, 10th Floor, New York, NY 10014

AUDUBON ADVOCATE MONTHLY GIVING FORM & SURVEY (FORM 58-03)

Perseverance, your additional gift for Audubon is now needed to protect birds and wildlife jeopardized by climate change. Please give as generously as you can.

RECEIVED REQUESTED: Within 18 Days

Sample A. Samplexxxxxxxxx
123 Any Street
Anytown City, ST 01234-5678
Phone: 800.555.1234

Your gift is tax deductible up to \$100 which is allocated to Audubon programs.

STEP 1: SELECT YOUR DONATION TYPE

☐ YES! I'd like to become an Audubon Advocate monthly gift donor. Charge my credit card each month for the amount indicated below:

☐ \$10 ☐ \$15 ☐ \$20 ☐ \$25 ☐ \$30 ☐ Other: _____

☐ Interest. I'd like to make an additional gift by check in the amount of:

☐ \$25 ☐ \$50 ☐ Other: _____

STEP 2: SELECT YOUR PAYMENT METHOD

☐ Charge m/c: ☐ MasterCard ☐ Visa ☐ American Express

Card #: _____ Expiration Date: ____/____/____

Signature needed for authorization: _____

☐ Check enclosed (payable to Audubon) — for one-time gifts only

☐ EFT (enter VOD on check).

IT'S YOUR OPINION MATTERS (Please fill out survey on back.)

In This Issue: Let It Grow: Cultivation and Retention

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Donor Cultivation: Build a Happiness Delivery Plan

By Claire Axelrad



Are you caught in the trap of transactional fundraising?

Donors come in. Donors go out. One-time gifts are here today, gone tomorrow. It's like being on a non-stop treadmill. Just exhausting!

There's a way to catch your breath and even begin to enjoy breathing again. Instead of continuing on as a *transactional* fundraiser, become a donor experience *transformist*!

THE GIFT IS THE BEGINNING.

Before you can create a transformative donor experience, you must undergo a transforma-

tion of how you think about donor acquisition and retention. If your holy grail is simply getting the gift, you're missing the point.

Your holy grail should be building the relationship, so you'll achieve donor loyalty.

Otherwise, you'll miss out on the long-term value of every donor you bring in.

Sadly, absent cultivation, most donors will fade away. According to the Fundraising Effectiveness Project, average new donor retention is under 32 percent. You can keep trying to fill your funding bucket up to less than a third of capacity every year until the end of time. It won't be enough to nourish your cause.

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President's Perspective

Just Like a Garden-Fresh Tomato!

By Marie Kosanovich



Growing up, my family always had a huge garden in our backyard. Tomatoes, green peppers, zucchini, green beans, cucumbers, swiss chard, onions, radishes, you name it. As an adult, I look back at helping my dad in the garden fondly—when I'm pretty sure I hated it at the time. Turning over the soil, digging, planting, weeding, picking, watering and dodging bugs or other creepy crawlies, all during the humid summer afternoons and evenings when I'd much rather be going to the pool or playing a dozen forms of "It Tag."

But the payoff of all this labor (outside of teaching your kids a good work ethic, I guess) was something I really looked forward to—a garden-fresh tomato! Ironically, I also learned a concept that is now very important in my professional career—cultivation.

This month, we're focusing on cultivation. And how appropriate for spring! Time to cultivate and grow your connection with your donors, members or constituents. But I have a confession to make—when I see a cultivation campaign coming up for one of my clients, my mind reverts back to when I was a kid having to help Dad in the garden. I know I have to do it, but I don't necessarily want to.

The fundraiser in me says, "What a lost opportunity! Why would I ever pass up a chance to raise money?" No harm in sending an envelope in there, right? (People DO still write checks these days, after all.) I mean, if we aren't asking our donors for money, someone else is—isn't that what we're always told? Besides, we cultivate our donors through our acknowledgments...just disregard the reply form that's attached to the thank-you letter.

The truth is that cultivation mailings are probably one of the most important campaigns to nurture and grow the relationships with your donors. We all appreciate when friends reach out to us to let us know they're thinking about us and not just asking for a favor. Donor cultivation is just that. Reaching out to your donors to let them know you are thinking about them, separate from always asking for money.

Cultivation campaigns—just like vegetables in a garden—come in a variety of forms. Whether it's a personal note card from the CEO, a telephone call from donor services or an email letting the donor know how their money is being put to good use, we should be taking every opportunity we have to connect with our donors separate from a solicited ask.

The rewards may not be immediate, but with a little patience, it will be well worth your time and investment—just like that garden fresh tomato!

Best,

Marie Kosanovich
mkosanovich@lautmandc.com

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Calendar of Events

WEDMAR
13

DM 101
8:30am – 4:30pm
SEIU, Washington, DC



THURMAR
21

Lunch and Learn
Topic: Mid-level Giving
12pm – 2pm
SEIU, Washington, DC



WEDAPR
3

DM 101
8:30am – 4:30pm
NAPCO, Philadelphia, PA



WEDAPR
10

DM 201
8:30am – 4:30pm
SEIU, Washington, DC

WEDAPR
10

Happy Hour
4:30pm – 6:30pm
Location TBD



TUESAPR
30

Webinar
Testing Strategies
1:00pm – 2:00pm



Deadline for registration is 24 hours before the event, space permitting.
Cancellations must be received 48 hours in advance. No-shows will be billed.
Register at dmaw.org or call (703) 689-3629.

Quick Takes

Every month DMAW asks people in our industry for their 'quick take' on a topic

What is an effective strategy for retaining episodic donors?



COURTNEY

At Save the Children, various teams collaborate on a multichannel approach to convert episodic donors via mail, telemarketing and email.

We have had success converting emergency donors by modeling them for an emergency-centric gift catalog, mailing most recent donors our agency newsletter and calling these donors immediately after an emergency to convert them to undesigned sustainers. We are also in the process of developing an emergency donor email stream.

Via mail, we have seen success mailing our undesigned lapsed donors traditional house file mailings, the gift catalog as well as modeling deeply lapsed (37+ M) and mailing a "welcome back" version of our acquisition mailing twice per year.

Additionally, we recently launched an early reactivation effort to convert direct mail acquired donors faster. This effort attempts to reactivate donors that have been unresponsive after a full year of house mailings by mailing them the acquisition package they donated to originally.

— Courtney Quinn
Director, Acquisition and New Donor Engagement
Save the Children
cquinn@savechildren.org



DUKE

Episodic donors drive nonprofits crazy! Many are singularly focused on specific emotional causes and will not give until that cause rolls around again.

My staff and I constantly call, email and mail to seek feedback from these donors. We want to know what motivates them to give and whether or not we can turn these irregular donors into regular donors.

One "old school" winning strategy my team employs is to literally go to the highest level donor homes, announced or unannounced, with a gift of thanks and willingness to engage.

We also encourage these donors to be volunteers and invite them to special events—especially if it deals with their donation subject matter. If you use these techniques, make sure to constantly share stories of the importance of their gifts—plus how their "ongoing gifts" on a regular basis could make an even greater impact!

— F. Duke Haddad, EdD, CFRE
Executive Director of Development
Salvation Army Indiana Division
duke_haddad@usc.salvationarmy.org



LAURENCE

For episodic donors to remain loyal to your organization, they have to experience your mission emotionally.

Deep emotional connection with your mission in action is the key to getting renewed support and higher gifts.

This is why well-planned tours and in-person meetings, where a client shares his or her story of transformation, are so effective. Also, small gatherings called "Parties With a Purpose" (PWAP) are effective for generating emotional connection while simultaneously raising funds.

Fundraising is people-to-people and, giving a tour, hearing from a client and gathering for a PWAP, restores the emotional connection in a way that other fundraising methods do not.

— Laurence Pagnoni
Chairman
LAPA Fundraising
lpagnoni@lapafundraising.com



ROBIN

As we know, acquiring new donors is costlier than renewing current or even episodic donors. The critical thing to remember when it comes to renewing these donors is how you respond to them.

Mailing a thank-you letter as soon as possible is essential; but things—such as making thank-you telephone calls, sending thank-you emails, sending first-time and episodic donors' a donor impact report, asking for a second gift and including personal notes—are beneficial to advancing the relationships.

Most importantly, having a formal donor stewardship plan for both first-time and episodic donors is necessary. This plan outlines the steps you need to take by certain date milestones to build and deepen the relationship with this donor. As with all fundraising work, you can't operate without a systematic and comprehensive plan, including one for renewing episodic and first-time donors.

— Robin L. Cabral, MA, CFRE
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Cultivate a 'Relationship'

Continued from page 1

Nonprofits spend a small fortune developing fundraising appeals to send to their new donors. But how much thought and attention goes into getting to know them? Before you ask new donors to reach into their wallets again, we recommend sending a personalized acknowledgement thanking them for their support. This can include customer service information about the brand pillars of your organization to further educate them about who you are—and what distinguishes you. A more robust welcome kit can follow along with a second ask.

USING EMAILS TO FOSTER EARLY ENGAGEMENT.

For digitally sourced donors, a simple first step is an auto-responder email to acknowledge and thank them for their gift, and welcome them into the growing community of people who care about your cause. We suggest following this with a welcome series of three to five emails, which provide a variety of ways to engage with your community—such as surveys, special offers and polls.

Although you may be tempted to immediately ask for a second gift, this should not be the focus of your initial email communications. As the series



Save the Children asks donors to vote on a child photo to include in next year's calendar.

continues, the ask messaging and CTA can be dialed up. However, be sure to immediately ask for their snail mail address, so you can start sending them your direct mail appeals. You can incentivize doing so by offering an inexpensive gift or special report on a topic they previously expressed interest in.

CREATIVE STRATEGIES FOR IMPROVING YOUR RENEWAL.

If you are a membership organization, you likely send a series of retention communications, asking members to renew with an annual gift. If not, you may deploy an annual gift campaign to accomplish the same thing. A typical membership retention series consists of five to eight mailed efforts, which are deployed over the course of five to eight months—while an annual gift campaign usually consists of far fewer efforts, as they are harder to distinguish from other appeals in your mail plan.

Within your creative, you can maximize personalization and use donor history to reflect the relationship you have with donors. Use donor-centric copy and approaches that underscore how you are working together toward a common cause. Be sure to thank them often!

The key to maximizing retention results is to improve the experience for donors all year long, so they feel more connected and engaged. One way to do so is to let them know their opinion matters, via surveys, which can provide you with key insights for targeting future communications. Focus on a two-way dialogue with members throughout the year, and watch your renewal rates soar.

HOLD EXCLUSIVE EVENTS TO FURTHER CULTIVATE.

The Environmental Defense Fund and World Wildlife Fund (WWF) hold special regional events for mid-level donors with speakers, photographers and other experts. They are often held at fun venues and may include cocktails and appetizers, along with a captivating presentation for members to attend. These regional events provide great opportunities for donors to interact with leadership and reinforce be-



Save the Children sends donors packages throughout the year without an ask.

ing part of a community that cares about your cause.

In addition to regional events, WWF holds an annual partners symposium at their D.C. headquarters, which features seminars, field trips and opportunities to network with fellow partners.



Invitations to exclusive events are another way to engage donors and make them feel special.

When donors feel like partners, renewing them becomes easier.

Cultivating a sense of shared mission between a nonprofit and its donors can contribute to a longer term relationship and higher lifetime value. Use retention strategies that go from simply renewing donors to engaging them and building a sense of ownership. Show them that they are the ones making a difference.

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GREATER ENGAGEMENT: WORDS OF WISDOM ON EVERYTHING AND ANYTHING THAT DRAWS IN YOUR SUPPORTERS AND DEEPENS RELATIONSHIPS

How Nonprofits Can Use Journey Mapping to Cultivate Donors—and What They’re Missing Out On!

By Melissa Garonzik



When was the last time you had a great customer service experience? Perhaps it was getting an update about how the product you just purchased also provides social impact; or you were airing your grievances to a customer service representative, and they responded appropriately.

Thinking about that experience, how did it make you feel? Did you feel recognized, heard and valued?

If the answer is yes, you were most likely on an intentional customer path based on your behavior, also known as a “journey map.” By implementing journey mapping within your organization, your donors can feel this way (and not just like an ATM), leading to increased retention rates and cultivation of long-term, mission-based donors.

As Ralph Waldo Emerson said, “Life is a journey, not a destination.” In this technological era of constant communication, we are all on at least one customer or donor journey, both literally and figuratively. With that in mind, what journey do we want to take our donors on and how do we get there?

BUT FIRST, ANALYTICS

To determine this, you’ll first need to start with analytics. What donor segments are you having trouble retaining? Who needs the most love? Once you determine the segment you want to pilot for journey mapping, make sure all the appropriate people are at the table. The process should not happen in a vacuum.

Depending on the segment and the structure of your organization, at the very minimum, you’ll need a representative from your annual giving/direct marketing team, donor relations team and communications/marketing team.

Once you are all together, start with current state. For example, let’s walk through what a new donor journey might currently look like for an organization...

- **Step 1:** Make their first gift online.
- **Step 2:** Receive an email confirmation for their gift.
- **Step 3:** Add to the general email list.
- **Step 4:** Receive new donor welcome mail piece.
- **Step 5:** Add to the direct marketing mailing list.
- **Step 6:** Ask for an additional gift this fiscal year.

What are the emotions and attitudes you think this experience evokes? Are you addressing the donor’s behaviors, expectations and needs in each step? Do you think this makes them feel recognized, heard and valued?

Once you have defined current state, it’s time to address future state. What does your aspirational journey look like? Perhaps it now looks like this:

- **Step 1:** Make their first gift online .
- **Step 2:** Receive an email confirmation for their gift.
- **Step 3:** Receive welcome email No. 1 welcoming them to your organization, and asking them to follow you on social media.
- **Step 4:** Receive welcome email No. 2, asking them to fill out their communication preferences and areas of interest.
- **Step 5:** Receive the new donor-welcome mail piece.
- **Step 6:** Add to the direct marketing mailing list.
- **Step 7:** Ask for an additional gift this fiscal year.

Now that you have a vision, how do you make sure it comes to fruition? First, assign a project manager from your working group to be accountable for implementation and execution. Next, determine how you are going to leverage the technology and processes you currently have. Whether your

systems are sophisticated or basic, creating journeys for your donors is still feasible. Last, do some test runs with a small randomly selected group of your donor segment. This will help work out any kinks, and then you can roll out the improved journey to your larger audience.

From this experience, you’ll get to know your donors better and learn what motivates their giving, specific areas of interest, communication preferences and engagement behaviors (i.e. how often they open email, follow your organization on social media, etc.).

Which leads to the importance of personalization. Based on these learnings, we can customize content, so our donors feel recognized, heard and valued, circling back to a great donor experience.

As with any journey, it’s long and evolving, and you may end up taking the road less traveled. It won’t be easy, but it will be worth it, and you’ll end up with a cultivated loyal donor base that will support your organization year after year.

Melissa Garonzik is the director of annual giving at Children’s Hospital of Philadelphia. With 17 years of development experience in the health care, higher education and nonprofit sectors she has spent the past 10 years focused on annual giving becoming a recognized leader in the field. She can be reached at garonzikm@email.chop.edu.



BEHAVIORAL SCIENCE INSIGHTS

Reaching Donors When You Don’t Have an ‘Aunt Bertha’

By Barb Perell



I had the pleasure of attending the DMAW Annual Meeting and hearing from keynote speaker Nancy Harhut about how to hack the brains of donors, members and other humans. It was fascinating!

Nancy shared a story about where her interest in fundraising began—at age eight when, incentivized by a banana-seat bike prize, she was tasked with selling Christmas cards to raise money for her school. Her loving Aunt Bertha helped her favorite niece out by pestering her factory co-workers to buy cards. Aunt Bertha was Nancy’s secret weapon—and you better believe she won that bike!

So, how do you reach your fundraising goals when you don’t have an Aunt Bertha? The answer: behavioral science. Yes, Bertha standing right in front of you ever so gently nudging you to buy Christmas cards from her niece is compelling. But nonprofits can be just as effective by leveraging some well-researched behavioral biases. And yes, there’s a science to it, but the root of its effectiveness is in its simplicity. Nancy shared three hacks to get into the brains of donors.

HACK NO. 1: THE BRAIN PREFERS SIMPLE AND EASY

Simply put, our brains are lazy. They will look for shortcuts in decision making to conserve mental energy. Decisions are often not deliberate, but rather automatic and reflexive. Our brains need:

Cognitive fluency: In direct response fundraising, this translates into using easy-to-read fonts, rhyming when possible, visual clues, like handwritten arrows pointing to a package feature, and listing your calls-to-action in priority order.

Choice architecture: Create the path of least resistance by providing “add to calendar” links and pre-selecting options, like credit-card processing fee

add-ons. Just remember, there’s always a choice and we never want to force the behavior.

Framing: Giving context to an offer has been shown to be more impactful. For example, lay out the consequence of saying no, relate a donor’s support to a benefit they care about (support our theater’s bathroom renovations!), give donors a new way to look at solutions and anchor the offer in something familiar (for the price of a cup of coffee).

HACK NO. 2: PEOPLE ARE MOST INTERESTED IN THEMSELVES

Humans are hardwired for self-preservation and most people think they are better than average. So, reminding donors about what’s important to them is key. Try using:

Personalization: Salutations, length of membership, location, specific local connection (we need 15 people from your state to donate!) and relatable tidbits resonate.

Self-concept: Reinforce how people see themselves, label them and help them be seen as they want to be (you are a loyal partner, carry our tote bag to show you are saving the planet!).

Control and choice: Leave the choice up to the donor—you choose the amount of your gift, you choose which premium

you’d like, cancel any time. But limit the choices and make sure they are clear.

HACK NO. 3: 80% OF OUR DECISIONS ARE DRIVEN BY EMOTION.

People decide emotionally and then justify rationally: “I want that expensive thing. It’s okay that it’s over my budget because it’s on sale.” Our emotions make us nearly incapable of choosing without fear, anger, pleasure or guilt. Tap into the emotional centers of your donors via:

Social norms: Everyone else is doing it, don’t you want to? Here’s what other people are doing and saying. C’mon!

Loss aversion: Don’t miss out! This thing you love is going away soon. Match-in gift deadline tonight!

Storytelling: Specific and personal details evoke a mental visual that sticks with donors. And using actual visuals like photos and videos helps, too.

All nonprofit fundraising campaigns can benefit from these hacks—and many are already employing them. And now you know the reasons behind why they work and can use them more thoughtfully to motivate your donors even more. I think Aunt Bertha would be proud.

Barb Perell is VP of Marketing at Avalon Consulting and can be reached at barbp@avalonconsulting.net.

REACHING DONORS
WHEN YOU DON’T
HAVE AN

“AUNT BERTHA”

DMAW ANNUAL MEETING PRESENTATION RECAP



Donor Cultivation
Continued from page 1

It's downright depressing. But... there's a fix. If you can retain a donor even once, the average subsequent retention rate goes up to 64 percent—a huge increase! **And it's within your control.**

FILL DONORS CUPS WITH JOY! If you communicate only once or twice before asking for a second gift, your donor's cup will feel half empty. Their warm glow will evaporate—*unless* you focus on filling their cup to the brim. Direct mail guru Tom Ahern suggests you shouldn't consider a first-time giver a "donor." Rather, look at the first gift as the gift of *attention*. They're letting you know they're *inclined* to become a regular donor, but not until you show your worth.

You show you're worthy of further attention when you deliver donor love. The joy that comes from giving won't last unless you continue to communicate with your donor over time and pay greater attention to cultivation. Donors tell us as much over and over again. It's the old "out of sight, out of mind" axiom in action.

Donors are practically screaming: "*Give us what we need!*" "*Delight us!*" "*Don't treat us like ATMs!*" "*Engage us!*" "*Demonstrate our impact!*" "*Show us you know us!*"

BUILD A HAPPINESS DELIVERY PLAN It's the job of the fundraiser to nip any donor screaming in the bud. Make your donor feel good every way you can, online and offline. It's best to use a mix of delivery channels because you often won't know where your donor hangs out and pays attention. Put your eggs in different baskets, so your donor is likely to discover something somewhere that delights them!

Here's what you should think every step of the way:

- "Will this (tweet) make my donor happy?"
- "Will this (email) bring them emotional satisfaction?"
- "Will this (video) spark joy?"

If yes, great! If not, back to the drawing board. Consider these elements of your Happiness Delivery Plan:

- 1. PROMPT, PERSONAL, RELEVANT THANK-YOU.** This should be *purely* a thank-you. Something that makes your donor feel valued... gives them a warm glow...and begins the transformation from one transactional gift to a budding relationship. No impersonal receipt. No report. No brochure. No ask.
- Get it out in 48 hours.
 - Use their correctly spelled name—no "Dear Friend."
 - Assure the letter relates back to the

campaign to which they responded. Mention the purpose for which they donated.

- Make it all about the donor, not about you/your organization.
- Be sure it doesn't appear to be another fundraising appeal. Avoid "the need is still so great." Eschew data. Stay away from your process.
- Stick with specific, heartwarming, inspiring impact.
- Be sure to give the donor credit for creating that impact.
- Add a personal handwritten note.
- Give contact information; let them know you're there to help.

2. WELCOME PACKAGE. Warmly invite first-time donors to join your family. Nothing expensive. Just notice they're new, and let them know some ways they can become involved that don't involve making another monetary gift. Not yet.

3. TOKEN GIFT. If you want gifts, you must give them. You can include inexpensive tokens in your thank-you, welcome package or simply as random acts of donor kindness. Content is also a gift, so if you primarily communicate with donors through a newsletter or blog, don't leave the content entirely up to your marketing staff. Too often, marketing staff think about branding, sales and what the organization wants to tell constituents—rather than what donors want to hear. Donors want less lecture, more love. It's your role to think from the donor's perspective. Offer:

- Stories of impact.
- Useful content such as "how-to tips," white papers, recommendations, expert advice and so on.
- Fun, relatable content like jokes, entertaining pictures, recipes, inspirational quotes, etc.

4. EMOTIONAL EXPERIENCE. How do you leave your donors feeling after they interact with you? The Temkin Group, which specializes in customer loyalty in the commercial sector, found positive emotions drive loyalty. The top three emotions? Excited, appreciated and happy. The bottom? Disappointed and frustrated. Know that giving is not always its own reward. What if you received the same thank-you letter from your nephew every year after his birthday? "Thanks for the gift." No mention of what it was, how they plan to use it, that you'd given a special gift this year in honor of their "big" birthday, that you'd given it for a specific purpose (to use on your upcoming family vacation) and how it was exactly what they needed. You know only they received it; you get no rewarding emotional pay-off. You feel disappointed. Frustrated. That's what it's like for your donor most of the time. Unless you...**show up, virtually, and call your donor out as your hero!** Demonstrate repeatedly how you're using their gift. Per research, our emotional systems like newness. If donors don't hear back from you until the next time you ask for a gift, they'll likely forget about you. Maybe they'll renew. Maybe not. They're certainly

“MAKE YOUR DONOR FEEL GOOD EVERY WAY YOU CAN, ONLINE AND OFFLINE. IT'S BEST TO USE A MIX OF DELIVERY CHANNELS BECAUSE YOU OFTEN WON'T KNOW WHERE YOUR DONOR HANGS OUT AND PAYS ATTENTION. PUT YOUR EGGS IN DIFFERENT BASKETS, SO YOUR DONOR IS LIKELY TO DISCOVER SOMETHING SOMEWHERE THAT DELIGHTS THEM!”

unlikely to give more. **Seeing is believing.** So take donors on field trips. Create hands-on volunteer activities just for them. Bring clients in to talk at meetings and events. Read thank-you notes from clients to them or slip a few into their thank-you letters. Invite them to write letters to the editor or offer testimonials at community meetings. Make donors the voice of your organization, and let the *experience* really sink in.

SUMMARY
The key to effective donor cultivation is

to emotionally move your donor. Make donor cultivation about recognition and praise. Make your donor feel like they mean more to you than they think. This is what will make your donor happy. And it's the only way you'll turn an otherwise one-time gift transaction into a transformative, life-altering experience.

Claire Axelrad, JD, CFRE brings 30 years frontline development and marketing experience to her work as principal of Clairification. She can be reached at claire@clairification.com.

SURVEYS SAY:

Why donors leave

- **46% leave for reasons tied to lack of meaningful info or appreciation** (Penelope Burk, [Donor-Centered Fundraising](#)).
- **53% leave due to lack of communication** (Bloomerang, "Nonprofit Donor Loyalty Primer" Infographic via Dr. Adrian Sargent, "Managing Donor Defection").

What donors want

- **60% want impact and success stories** and will renew based on organization's ability to show what it can accomplish. (Software Advice; see also [The 2013 Millennial Impact Report](#). Achieve. The Case Foundation.)
- **75% use information about a nonprofit's impact** in their giving decisions (Informed Giving: [Information Donors Want and How Nonprofit Can Provide It](#). Root Cause. 2013).
- **75% list "information on results achieved with their gifts"** as their top requirement to motivation for future giving. ([The Burk Donor Survey](#). Cygnus Applied Research, Inc. 2013).
- **93% would give a second gift** to the same organization if its fundraising were donor-centered (Penelope Burk, [Donor-Centered Fundraising](#)).

What donors will do

- **70% would increase their philanthropy** if they received what they needed (Penelope Burk, [Donor-Centered Fundraising](#)).
- **35% want to give more** (2014 U.S.Trust Study of High Net Worth Philanthropy)



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TACTICS WITH BIG IMPACT

Surprise and Delight

By Angela Struebing



Recently, I ordered a pair of flats from Tieks shoes. When they arrived in the shipping box, I expected to find a regular shoebox inside, like every other pair of shoes I've ever received. Instead, I found a smaller, uniquely shaped teal box decorated with ribbon and a sunflower bow. I smiled at the surprise, instantly pleased, though I hadn't even seen the shoes yet.

In a similar experience, I unexpectedly received a lovely practical day planner from the clothing store Boden last Christmas, just for being a loyal customer (okay, so maybe I buy a lot of clothes). The gift had nothing to do with my dress purchases—it was simply a delightful, clever surprise that serves as an everyday reminder of the company.

Naturally, the thoughtful, savvy efforts on the part of those businesses caused this fundraiser to consider the different ways nonprofits "surprise and delight" their donors—also known as cultivation and stewardship. Those customer experiences I had on the commercial side earned my business for years to come. And sometimes, more importantly, I become a brand ambassador for these companies, encouraging others to support them as well. So, what can we do to instill that same loyalty and word-of-mouth advertising in members and donors?

Well, there are touches, extra personalization and surprises organizations can incorporate in their direct response efforts to show how much they value a donor and how well they know them. Sometimes these cost a little extra, but there are techniques you can apply that cost nothing at

all. Before you begin, be sure to split test and measure short- and long-term KPIs, such as time to second gift, retention and upgrading—or perhaps you may just decide that these special touches are right for all your valued donors. Here are a few ideas you can try.

FREE OPTIONS

- A **shout-out** of thanks on Facebook or Twitter is a simple way to provide public recognition for donors active on those platforms.
- A triggered **non-HTML email** can be programmed to be sent a few days after the auto-responder to look like a genuine thank-you from a person (rather than the organization).
- **Personalized messaging** based on life-cycle or affinity can easily be applied to direct mail efforts through laser-printed versions to show the donor how well the organization knows them. The same goes for email with variable text.

ADDITIONAL CHANNEL TOUCHES

- **Texting** is becoming a more accepted way of engaging with donors, especially at the major gift level. Don't be afraid to send a quick text to donors to say thank you to inform them of an urgent issue or to let them know you're thinking of them. This is a true one-on-one communication, but there are platforms that allow you to mass text as well. A religious client we partner with used to text prayers to major donors. The result was a more meaningful relationship between the CEO and those donors that was deepened during personal visits.
- A good old-fashioned **phone call** also works, and not just as a thank-you right after their gift, but also later in their lifecycle to report on the impact of their gift or provide an update on an issue important to them.
- We see more online-to-offline conversion than the other way around. Consider mailing a **thank-you note or acknowledgment letter** to online donors. This will get them used to hearing from you through the mail.



Photo: iStock/Getty Images

EXTRA COMPONENTS

- The **welcome kit** is a perfect place to add a little something extra for the donor. It could be a supporter decal, a bookmark or address labels—a special perk the donor won't be expecting. If the premium can be mission-focused and serve as a reminder of their gift and the organization, that's even better.
- An **anniversary note** is a great reminder to a donor that they gave at this time last year—this is especially productive for "in honor of/in memory of" donors. Show that you remember their loved one, too!
- For a museum client, we used to send two free visitor passes about a month before the renewal series started. Extended hours are another perceived benefit that gives a little something extra to your valued members.
- The addition of a **personal video or impact video** in an email can effectively show the difference a donor's contribution is making and often elicit an emotional response from them as well. For DRTV sustainers, we often release new spots to them ahead of time or include special behind-the-scenes footage as a delight tactic.
- One last story about the importance of donor "care and feeding": I gave two donations to food banks at the same time—one to a local Maryland nonprofit and another to a large national nonprofit with the same mission. They both thanked me with an obligatory auto-responder. The difference was I received an email from the Maryland food bank a few days later asking me why I had chosen to support them. Sent from and signed by the organization's executive director, it looked

very personal. I replied with my reason and then received yet another response, leading to a back and forth between us. A relationship was established, and now I support them regularly. I guess it all comes back to the golden rule: treat others how you want to be treated. Follow this advice when it comes to your interactions with your donors, and it will set you on the road to healthy, happy (maybe

even delightful) relationships with them that last for years to come. Angela Struebing is a professor at George Washington University's Graduate School of Political Management. Angela has spent two decades helping political organizations and nonprofits alike raise as much money as possible across multiple channels. Please reach out to discuss anything from fundraising campaigns to management topics at angelastruebing@gmail.com.

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The Thank-You Challenge

By Andy Laudano



The “2016 U.S. Trust Study of High Net Worth Philanthropy” found the primary stated motivations for giving were: believing in the mission of the organization; believing their gift can make a difference; experiencing personal satisfaction, enjoyment or fulfillment; supporting the same causes annually; giving back to the community and adhering to religious beliefs.

Belief is connected to three of the six responses. Belief is emotional, not rational. Belief is heart, not head. Therefore, the way we say thank you matters. A lot. Being more strategic in how you say thank you helps deepen your connection to people that have given to your cause. This one area—acknowledgements—can solve many of your retention challenges and help increase multi-year donors, who will drive most of your net revenue.

Not enough? Consider this—your acknowledgement program can:

- **Increase your total direct response revenue 3 to 10 percent**
- **Increase loyalty**
- **Increase donor value**

Most organizations think of acknowledgements as a linear process. Sure, gift receipts complete a linear process. But this type of thinking is too linear—with blinders on as to how you can best connect with donors. What if, instead of a linear process, acknowledgements were part of a cycle?

Being strategic in how you say thank you is a way to create a pattern with donor engagement. But how? It starts with being comfortable inserting an offer in your acknowledgement. This may seem foundational, but many nonprofits wrestle with how soon they can ask again. Effective use of an offer in your acknowledgements can grow the commitment of a donor, fostering their belief in your mission. Remember, belief is part of the top two reasons donors give. Belief is

highest when someone completes the act of donating. Therefore, it’s in the time of highest belief that you should go further in connecting, which means making an ask in acknowledgement.

3 ACKNOWLEDGEMENT FACTORS

A more strategic acknowledgement program considers:

- Timing.** For offline, your acknowledgement should be sent within 72 hours. For online, it should be immediately after the gift is processed by your merchant.
- Personalization.** This isn’t a time to be templated. The more personal a thank-you, the better. The gift amount and data are no-brainers, but there are likely other pieces of data from the donor’s gift you

“EFFECTIVE USE OF AN OFFER IN YOUR ACKNOWLEDGEMENTS CAN GROW THE COMMITMENT OF A DONOR, FOSTERING THEIR BELIEF IN YOUR MISSION.”

can leverage. Forward-thinking nonprofits are going a step further with online acknowledgments by leveraging meta-data into personalization, highlighting location and consideration of device type in how they say thank you. **Channel mix.** This is an area where most organizations think too linearly. If someone gives via direct mail, it shouldn’t be the only channel used to say thank you. A transaction channel doesn’t mean it’s their only way to communicate. Think about relationships in your life. When someone does something special for you, you work to make sure the thank-you is meaningful. This might include a combination of channels: direct mail, email marketing, SMS, phone calls and perhaps

even a chatbot in social (given you’ve connected your data points).

THE THANK-YOU CHALLENGE

Understanding the theory of a better thank-you is the first step to improving.

The next step is more difficult—accepting the challenge of improving your acknowledgement program. Here are two ways we’ve improved gross and net revenue through optimizing acknowledgements:

- Map your thank-you journey.** Sure, you can go all-in on a donor journey mapping process to better understand communication points, timing and channel mix for your entire organization. Investing in this process is worth it. If you’re not ready, grab multiple stacks of Post-It notes and begin laying out your thank-you journey on a wall or conference room table. Visualizing your current efforts will most likely reveal theories on how to improve it.
- Take to testing.** As direct marketers, we test in acquisition and renewal to try to find a better control. With 3 to 10 percent of our direct mail revenue coming in through acknowledgements, shouldn’t we be testing there as well?

Once you’ve visualized the process, identify two or three variables you can test to optimize your program. We’ve seen variables, like a “best-of” newsletter inclusion, matching gifts and channel integration, make a significant impact on retention. Now I extend the challenge to our whole sector to improve the way we say thank you. On the surface, this may seem difficult, time-consuming and even a little intimidating as it’s, of course, a transformation of your acknowledgement program. But if it were easy, it wouldn’t be considered a challenge, right?

Andy Laudano is the senior VP of client strategy at RKD Group. He is a multidecade strategist and direct response expert who spends his days (and many nights) consulting nonprofits on multichannel marketing and fundraising strategy. He’s pretty good at it, too. Andy can be reached at alaudano@rkdgroup.com.

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News Notes

- **Marketing General Incorporated**, a full-service membership marketing agency, is celebrating its 40th anniversary in 2019. According to a press release, MGI partners with associations to raise new membership counts, increase dues revenue and boost non-dues revenue streams. It’s the largest association-focused direct marketing agency in North America. “The countless close and enduring partnerships we have built with associations and nonprofits since 1979 are the true hallmarks of the MGI story,” said MGI president Rick Whelan, CDM, who has represented the agency since 1986. “Since our founding, we have always strived to provide unsurpassed personal attention through our core values of teamwork, passion and leadership.”
- **Rachel Norris** has joined the AMH Print Group as manufacturers representative. She brings 12 years of envelope and print knowledge, which will enhance the AMH Print Group’s ability to continue to offer superior customer service and responsiveness for all of its print-related products.
- **The Bureau of Labor Statistics**, part of the U.S. Department of Labor, has recently announced that commercial printing, screen printing and print support activities are no longer official jobs, according to The Washington Post. John Stewart, supervisory economist at the Bureau of Labor Statistics said that the Labor Department “can’t



allow any industry in data to shrink so small that it could be used to identify a specific company.” The article goes on to say that printing has shed about a third of its jobs since the Great Recession, which is more than every sector except clothing manufacturing—also no longer has enough U.S. jobs to warrant many lines in the database.

- Royle Printing has appointed **Todd Gawronski** as director of business development, where he will be responsible for developing new business opportunities and creating customized solution for customers—specifically in catalog and direct mail—according to a press release. “Todd has a great deal of experience and success in working with a variety of catalog companies, demonstrating his knowledge of design, data and robust mail plans. As we continue to grow and expand our capabilities in this niche, I’m confident Todd will become a valued resource for our clients and production team,” said Chris Carpenter, president and owner of Royle Printing.
- **Uberflip**, a content experience platform provider, has established a partnership with PFL, a tactile sales enablement and marketing automation solution, according to a press release. The two companies will work together to automate direct mail campaigns based on Uberflip content triggers that use intent and behavior data for communication.

Is something exciting happening in your company or organization?

Tell us about it!

Email the editor, Nhu Te, at dmawadvents@dmaw.org



DMAW Educational Foundation

Professor's Institute—A Win-Win Way to Prepare Students for Successful Careers in Marketing

By Liz Murphy



When it was established in 1986, the DMAW/EF founders understood that to attract the best college students to enter the direct and interactive marketing industry, they would have to educate faculty first. By bridging the gap between the boardroom and the classroom—supporting professors and students by diffusing knowledge, experience and opportunity—they could help inspire students to become the next generation of marketers.

From this understanding, the Professors Institute was born. This annual conference is open to all Mid-Atlantic college and university educators—at no cost! It brings marketing, analytics and communications professors together with direct response professionals to participate in a collaborative two-day event. The Professors' Institute planners invite the best in the industry to present on current and emerging marketing trends, case studies and how-to's. The goal is to pass on to the professors real-time marketing expertise they can take back to the classroom to train students. It's a win-win for everyone since it connects local marketing firms looking for the best and brightest with professors from local universities and their top students.

This year, the 2019 Professors' Institute (Jan. 3 to 4) hosted a record 26 educators from 16 academic institutions. Professors came from Virginia, Delaware, D.C., Pennsylvania and Maryland representing institutions such as George Washington University, James Madison University, American University, Radford University, Salisbury University, Christopher Newport University, Towson University and more.

As always, professors attend at no cost. Meeting logistics including meals are underwritten by the DMAW/EF, and our

sponsors and hotel rooms are provided for professors who come from more than 50 miles away. This year, sessions were held at the World Wildlife Fund, which generously offered their space at no cost to the foundation. We had great participation and a wonderfully appreciative audience.

Professors heard how to keep your brand healthy from David Young at National Geographic Partners; examined cases studies about multichannel marketing from Lynn Waller and Chrissy Hyre of CCAH; learned how commercial brands are creatively using search advertising from Katy Greene of McGarrah Jessee; explored how to optimize the donor journey from Sarah Robie of the World Wildlife Fund; and discovered the best practices of commercial marketers from Tori Richards of the CDR Fundraising Group.

In addition, every year, the Professors' Institute also features a "Career Panel" made up of young marketing industry professionals who share advice for landing a marketing job that educators can pass on to their students.

For professors looking for real-world examples they can use to teach their students about direct marketing, the Professors' Institute is a great opportunity to hear industry professionals share best practices and case studies in direct response marketing and analytics. It affords them an opportunity to network

with fellow educators and marketing professionals and meet and connect with potential local industry experts for class speakers.

This year's Professors Institute was made possible by World Wildlife Fund, American University, MS in Marketing, DMAW and The Production Management Group. If you are interested in participating in the 2020 Professors' Institute as a presenter or a sponsor, contact Liz Murphy at liz.murphy@beaconfire-red.com or (571) 841-2219. For more information, visit <http://dmawef.org/2019-professors-institute>.

Next up for the DMAW/EF is the Spring Collegiate MAXIs—an oral case competition for the students in the Mid-Atlantic region, where student teams create an Integrated Marketing Communications plan designed to help resolve the challenge of a selected nonprofit organization. This all-day competition (held on Apr. 12) will give students the opportunity to tackle real-world marketing problems and improve key professional skills, like business writing and presenting. For more information contact Amy Steinbicker at amy@dmawef.org or (703) 407-1663.

Liz Murphy is EVP & partner at Beaconfire RED, a nonprofit marketing agency in Washington, D.C., that creates innovative digital experiences that inspire people to act for the greater social good. She is also a board member of the DMAW/EF.



Did You Know?

The DMAW/EF, a separate nonprofit organization from DMAW, relies heavily on contributions from DMAW members to fund its work.

Please donate today!

Member Spotlight

With parents who have been in the sector for over 20 years, Rachel Kottler was destined to work in the direct marketing world. She remembers how she was introduced to direct marketing—by playing the game of "Best Tag Line" on long car rides, where she most often won.

After moving back to Washington, D.C., four years ago, Rachel decided to follow in her parents' footsteps, and they suggested that she look into Lautman, Maska, Neill & Company. She's been there ever since. Rachel fell in love with the field because of her clients and the missions they support.

In her first six months, she was lucky enough to help Human Rights Campaign with their email efforts about *Obergefell vs. Hodges* Supreme Court case that ended up making marriage equality legal in all 50 states. That case changed lives, and being part of the advocacy plans showed her the power you have as a digital communicator.

Location: Washington, D.C.

Education: George Washington University, B.A. in Political Communication, double minored in Spanish and Journalism

DMAW Member Since: 2015

Who do you consider your mentors?

My mentors are my dad, Josef Kottler, who is an amazing copywriter; my mom, Anne Kottler, who is my role model; and my manager, Lesley Hostetter, who is an excellent fundraiser. My dad really helped mold me into the writer I am today. Growing up, he always gave me constructive feedback and had high expectations for what I could produce. My mom has taught me a lot about how to work with others

and treat people with kindness and respect. Lesley has helped me grow in so many ways—from improving my writing and analysis, to enabling me to take risks, try new things and grow.

What advice would you offer a novice who wants to move up in direct marketing?

First, don't be afraid to ask questions! By asking questions, you are being proactive and are able to learn from the get-go, instead of doing something wrong because you were too afraid to ask. Second, don't be afraid to bring new ideas to the table! You never know when one might stick. Third, find people you work with who you think are good at their job and proactively observe what they do, so you can mirror those same behaviors.

What is the most helpful step you took to advance your direct marketing career?

Finding a company that believes in me and provides me with the opportunity to take on leadership within the company and the industry.

Tell us about your volunteer experiences with DMAW.

This year is my second year on the planning committee for Digital Day Forum (mark your calendars for June 4!). Last year, I was a MAXI judge and plan to help again this year. I have also volunteered at the Bridge Conference. If you are interested in volunteering, I highly recommend it! You will meet great people and feel good knowing you are helping the industry succeed.

Describe yourself in three words.

Motivated, outgoing, loyal.

Describe your life in six words.

A mix of adventure and habit.



RACHEL KOTTLER
Digital Account Manager
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rkottler@lautmandc.com

Rachel's Favorites



Restaurant Himitsu



Films Anything Marvel



Books Anything from John Grisham



Music Beyonce



Leisure Interests I am a fitness instructor and also run a volunteer reading program at an elementary school in D.C., Reading All-Stars.



Quote "To accomplish great things, we must dream as well as act." — Anatole France

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