

9 Digital Tools to Help You Win in December

By Liz Murphy



Every July, one of my clients places a small, artificial Christmas tree on her desk. This was her signal that it was time to get cracking on her end-of-year planning and strategy. It's time, folks! It may be summer outside, but winter is coming. I've gathered a few digital tools that can help you plan, execute and win with your digital end-of-year (EOY) campaigns.

1. YOUR BRAIN, EXPERTISE AND EXPERIENCE ARE YOUR BEST TOOLS!

Don't start drafting your 2019 EOY digital plan without doing this first:

- Gather all your performance and testing data from last year and aggregate in a report or presentation.
- Schedule a kickoff session with your teams, and ground the discussion with last year's data and results. Document what worked,

what didn't and why (if you know), and what you want to do again. This is the start of your plan.

- Outline this year's donor, revenue, activation and reactivation goals.
- Now, open up the floor to new ideas and channels. Don't forget to prioritize any new channels, offers and audiences you had success with from January to July of this year that you want to add in the mix.
- Decide what you want to test and when, and schedule tests so you have the data you need to roll out and to benefit from to get the biggest bang.
- Wrap it all up in a multichannel or digital campaign plan and calendar. Create templated schedules that you can easily update with tools such as Smartsheet (smartsheet.com).

I know you'll be tempted to start your planning with a brainstorming session, but don't give in to the impulse without reviewing

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8 Levels of Data Hygiene to Make Your Campaigns Great

By John Bell



Meticulous data hygiene is essential to your direct marketing program's success. Follow these eight levels to get the best results for your efforts.

- ✓ Reduced postage rates
- ✓ Faster delivery
- ✓ Less undeliverable mail
- ✓ Less waste
- ✓ Save on printing and mailing costs
- ✓ Increased response rates

1. CASS

Coding Accuracy Support System Certification (CASS) improves address accuracy.

- Required by the United States Postal Service for automation discounts, the CASS process standardizes addresses, corrects ZIPs, and applies carrier route, ZIP+4 and a Delivery Point Barcode.

- Delivery Point Validation verifies the existence of the address down to the apartment or suite number.
- The Locatable Address Conversion System changes rural-style addresses to city-style addresses and corrects street names that have changed.

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President's Perspective

Plan Ahead for Year-End

By Marie Kosanovich



The holidays were pretty magical when I was young. Every single room of our house was decorated for Christmas from shortly after Thanksgiving until the middle of January, although the tree wasn't put up until Dec. 24. (My family celebrates Christmas on Jan. 7, so it's not as late as you think!)

The bookshelves in our living room were decorated with dozens upon dozens of Christmas cards. Looking back, mom approached her annual Christmas card campaign like any direct response professional would. She planned on mailing her cards

a few days before Thanksgiving, knowing the time it would take to arrive "in home."

Close family members usually received much nicer cards. One year she even cross-stitched homemade cards for a few select relatives. She never typed a "family newsletter" but would painstakingly write long personal notes on each and every card she sent.

"Why don't you just sign your name, mom?" I asked. "Wouldn't that be easier?" She wisely told me that adding these personal touches lets people know you care about them. "It's even more important for me to write friends I haven't spoken to in years," she said. "They want to know how I'm doing, and hopefully I'll hear back from them to hear how their family is doing as well."

If you haven't guessed, this is our annual year-end issue of DMAW Marketing AdVents. Year-end! Really, we're just now getting to summer as you read this! However, in our industry, year-end is already here. By the time this issue arrives on your desk, strategy memos for November and December campaigns are being written, copy is being drafted, personal touches are being developed, art concepts are being created, price estimates are sent and time is being reserved on multiple pieces of manufacturing equipment. You might think this is like any other time of year, except everything is in overdrive with the additional campaigns and higher volumes that we see at year-end.

The key to making sure your year-end plans go without a hitch is proper planning. It's never too early (or too late!) to start your year-end campaign strategy. Take the time to think about all your campaigns from the donors' perspectives. What does the cadence look like from their points of view? Is there an adequate mix of cultivation as well as solicitation?

Make sure you're tapping into your partners' resources, especially your own DMAW network! It's now when your DMAW Sourcebook is invaluable—listing potential partners and other members who could provide advice or assistance—giving you that "been there, done that" insight and wisdom.

Without a good plan, if there is a major hiccup, things could get chaotic. Having a good, solid plan in place gives you the flexibility needed should something go awry—because, as you know, things can and will go wrong.

Most importantly, remember what we tell our donors...the extra effort "you" put in at the end of the year makes a difference in feeding the hungry, healing the sick, advocating for civil rights, saving the earth and much, much more. And isn't that what's really magical about the year-end holidays?

Best,
Marie Kosanovich
mkosanovich@lautmandc.com

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Denise Hubbard, Names in the News, 410-392-0313, denisehubbard@nincal.com

Karin Kirchoff, K2D Strategies, 703-812-8260, kkirchoff@k2dstrategies.com

Tracy Lea, The Harrington Agency, 202-543-7671, tlea@theharringtonagency.com

Stacie Mruk, The Nature Conservancy, 703-841-3924, smruk@tnc.org

Jade Nguyen, The Lukens Company, 703-845-8484, jnguyen@thelukenscompany.com

DeDi Oxenberg, CDR Fundraising Group, 301-858-1500, doxenberg@cdrfg.com

Polly Papsadore, PMG, 443-539-2603, polly@pmgdirect.net

Heather Philpot Pete, Infogroup Nonprofit Solutions, 402-836-5865, heather.philpot@infogroup.com

Alan Rich, Nova Label Co., 301-386-4433, alan@novalabel.com

Rebecca Shapalis, Avalon Consulting Group, 202-429-6080, ext. 110, rebeccas@avalonconsulting.net

Karen Somerville, American Nurses Association, 202 491-1114, kcfsomerville@gmail.com

Laura Zylstra, Deluxe, 207-380-0432, laura.zylstra@deluxe.com

DMAW Executive Director

Donna Tschiffely, donna@dmaw.org, 703-689-DMAW, fax 703-481-DMAW

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Calendar of Events



Photo: JRomero, iStock/Getty Images

WED JULY
10

2019 MAXI Awards Ceremony
4:30PM-6:30PM
Gaylord National Hotel & Convention Center
National Harbor, MD

WED JULY
10
- FRI JULY 12

14th Annual Bridge to Integrated Marketing & Fundraising Conference
"Change the World With Ideals!"
Gaylord National Hotel & Convention Center, National Harbor, MD

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.

THUR AUG
8

Summer Happy Hour
5:30PM-7PM
TBD, Virginia

THUR SEPT
19

Lunch & Learn
2020 Election Planning
12PM-2PM
SEIU, Washington, DC

THUR OCT
17

Copywriting Workshop
9AM-12PM
AARP, Washington, DC

THUR OCT
24

Autumn Happy Hour
5:30PM-7PM
TBD, Washington, DC



Photo: Westend61, iStock/Getty Images

Quick Takes

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

What strategies should nonprofits use to ensure success this year-end?



AMY
Do not underestimate the role that paid social media can play in driving donor engagement and donations at year-end.

A strategically positioned, paid social media campaign that complements traditional year-end fundraising efforts can—for a very modest investment—significantly and cost-effectively boost year-end giving in all channels.

By enabling nonprofits to build very specific custom audiences to target current donors, as well as develop look-alike audiences to mirror existing ones, social media allows nonprofits to engage with donors and key prospects as they make their real-time, year-end giving decisions!

— Amy Graves Beaudoin
Chief Communications Officer/
Principal
ABG Creative
amygravesbeaudoincreative@gmail.com



CRAIG
I always say that year-end is the Super Bowl of fundraising. You only get one shot at it. So nonprofits need to put in the time now to plan for it.

Do the analysis, read past results and evaluate tests. Identify key segments and figure out what the timing, cadence and themes across channels will be. And with the shortage of paper, make sure your vendors have your volume estimates so you don't have unexpected delays.

Every day from Oct. 1 through Dec. 31 is a critical fundraising day.

Make sure you're ready with a solid fundraising plan.

— Craig DePole
President
Newport ONE
cdepole@newportone.com



CATHY
The 2018 experience for so many nonprofits reminds us all of the importance of integrated strategies.

Last year, we saw some small declines or small increases in clients' year-end direct mail programs. Online programs were much more volatile, caused, we believe, by a combination of post-election donor fatigue and stock market tumult at the end of the year.

We can't control the stock market, the tweets of the President or the decisions of the Federal Reserve Board, but we can and should ensure that we are maximizing all channels.

With so much riding on year-end, organizations need to double down on integrated strategies, especially since, as we found in our "2017 National Progressive Donor Survey," higher and higher numbers of direct mail donors are moving online, and more and more folks are going multichannel.

— Cathy Grams
Sr. Vice President
ABD Direct
cathy.grams@abdata.com



JEFF
Review your results from the past five years. Is one campaign stronger in October or November than in December?

Dig into your donor data to look for pockets of stronger response. Check to make sure your offer is clear and simple. Put your account and creative teams to work to answer the question, "Why should my charity's request for a donation make it to the top of a donor's mountain of direct mail packages?"

When was the last time you gave a gift through your or your client's donation page? Was it as easy as you think it should be? Take the pulse of your donors. Identify a few donors for a tiny focus group. I'd suggest varying financial levels of donors who have given three or more gifts in the past six months. Show the donors your upcoming campaigns, and ask them for their thoughts and suggestions.

Tailor special language for donor-advised funds (DAF) on your reply slip, and make sure the free DAF widget is embedded on your giving page as well. Don't be afraid to ask for a gift multiple times at the end of the year.

— Jeff Johnson
Senior Director
Inova Health Foundation
jeffrey.johnson@inova.org

DATA AND TECHNOLOGY OUTLOOK

Giving Tuesday: The Pretty Good, the Rather Great and the Kind of Awesome

By Karen Hopper



The problem with Giving Tuesday, if you ask me, is that it's so close to the end-of-year fundraising frenzy. No sooner is it over, then everyone in our industry turns their

focus to the hectic December messaging schedule. I say let's move Giving Tuesday to, like, mid-July. Sure, it probably won't perform as well without the backdrop of Thanksgiving and the holiday spirit, but it will make life so much easier for nonprofit fundraisers, and isn't that what it's all about?

Ha, of course that's not what it's all about. But my firm, M+R, is all about making life easier for nonprofit fundraisers—helping them raise more money to change the world. So we've crunched some numbers and compiled some thoughts to give you the lay of the Giving Tuesday land and help you start planning for this year's shenanigans.

FIRST, SOME NUMBERS FROM 2018

We surveyed a couple dozen nonprofits across a variety of organization sizes and issue areas about their Giving Tuesday strategies, tactics and results. We found some fascinating trends around email, overall revenue and use of social media.

• On average,* the nonprofits we studied sent three Giving Tuesday email messages in 2018 (Figure 1), with the more ambitious among them sending as many as six appeals.

And just as with the holiday season and presidential elections, Giving Tuesday creep is a thing—more and more groups are starting their promotions (email, web and social) early, with 58% of reporting

of nonprofits (13 of 18) that sent two or more emails on Giving Tuesday reported that their final email, sent in the afternoon or evening of Giving Tuesday, was the highest performer of the whole set (in

“ THE VAST MAJORITY OF NONPROFITS THAT SENT TWO OR MORE EMAILS ON GIVING TUESDAY REPORTED THAT THEIR FINAL EMAIL, SENT IN THE AFTERNOON OR EVENING OF GIVING TUESDAY, WAS THE HIGHEST PERFORMER OF THE WHOLE SET. ”

organizations announcing their special offers and matching gifts one or more days before Tuesday.

Anecdotally, messages right at the deadline performed best. The vast majority

terms of response rate, revenue or both). What's more, three out of the five groups that sent a deadline extension message on Wednesday reported that message was the highest performing of the bunch. ▶

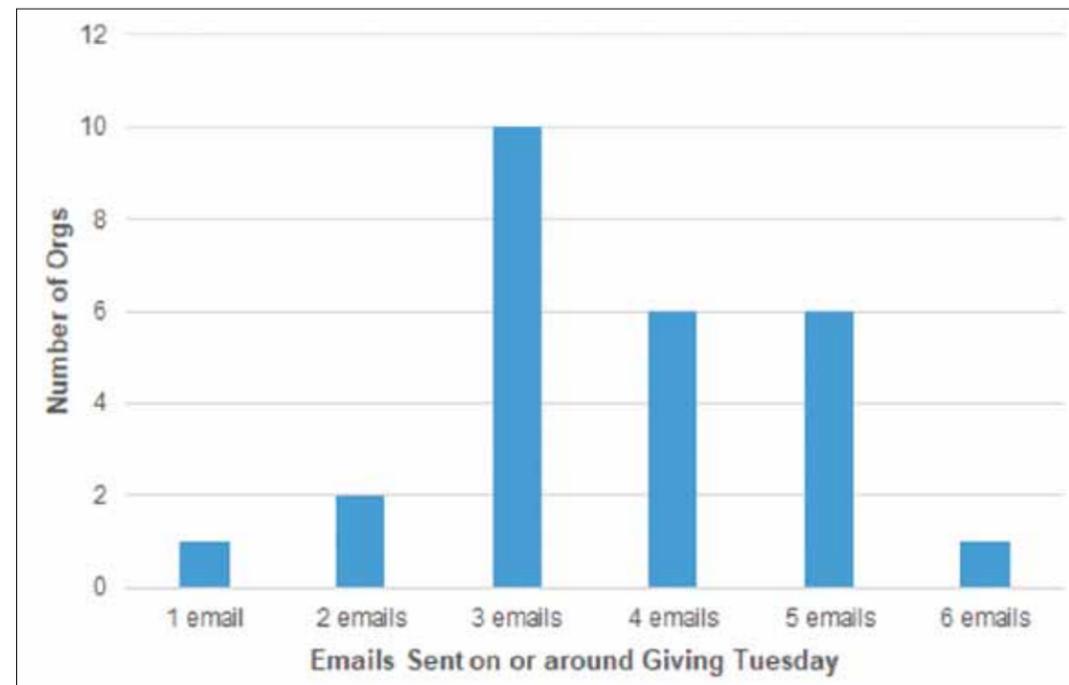
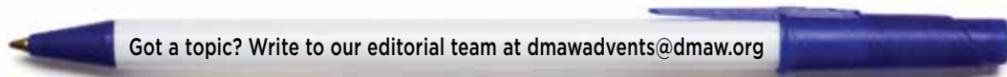


Figure 1: Most organizations sent at least three appeals promoting Giving Tuesday.



Apparently, the only thing better than a last chance is another last chance.

• Email response rates were generally strong on Giving Tuesday. **Several nonprofits recorded response rates typically only seen during emergencies or at the end-of-year deadline email (0.15% to 0.26%).** Remember, the average response rate for a fundraising email is 0.06%, according to the “2019 M+R Benchmarks Study.”

• **On average, nonprofits increased online Giving Tuesday revenue over 2017 totals.** And while a handful of the nonprofits we surveyed did see modest decreases year over year, others saw increases as large as 300%. Collectively, the 25 groups we reviewed raised \$10 million on and around Giving Tuesday—not including revenue from emerging but harder-to-track sources, such as SMS or Facebook Fundraisers. Not a bad warmup for the end-of-year main event.

YEAR-END FUNDRAISING

“But wait,” you might be thinking. “Isn’t there a good chance that our trusty, reliable end-of-year donors are

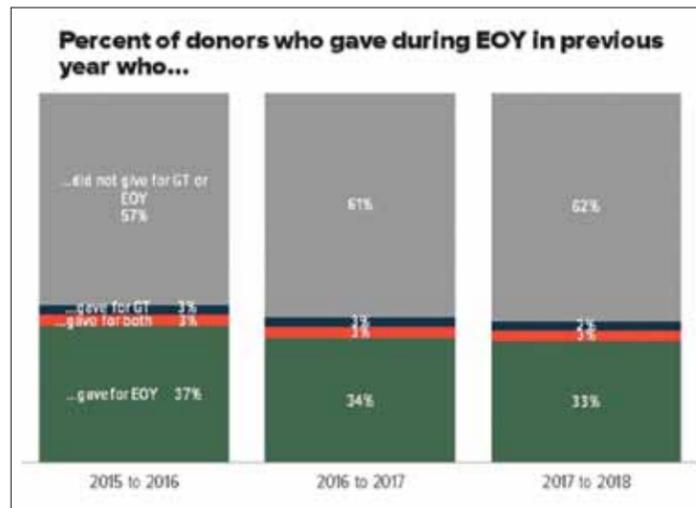


Figure 2: A good amount of EOY donors simply don't come back to give again the following year.

being swayed by shiny #GivingTuesday promotions and abandoning us in our time of EOY need?”

Thanks to detailed transaction data from more than 50 organizations, we can honestly say: **Nope. That's not true.**

There's a lot going on here, so let's

break it down. First, a large but mostly stable chunk of EOY donors simply don't come back to give again the following year, whether to Giving Tuesday or at other points in December. (That's the gray bar in figure 2.)

The data also shows that even though Giving Tuesday has seen a meteoric rise in the past three years, the

proportion of donors who move from one bucket (EOY donor) to another (Giving-Tuesday-only donor) is staying relatively steady...and tiny—2% to 3%. So no, last-chance, December-deadline donors are not turning into Giving Tuesday donors in droves.

TRENDS AND TIPS FOR 2019

Giving Tuesday continues to grow, and we're pretty sure 2019 will be another banner year. Here's our top five recommendations to make the most of it!

“**ON GIVING TUESDAY, SEVERAL NONPROFITS RECORDED RESPONSE RATES TYPICALLY ONLY SEEN DURING EMERGENCIES OR AT THE END-OF-YEAR DEADLINE EMAIL.**”

1. Facebook Fundraisers, yo! Take a look at Figure 3 on page 7. November? That's Giving Tuesday \$\$\$! Facebook is a big promoter of Giving Tuesday and, obviously, of Facebook Fundraisers. So jump on it and invite your supporters to participate.

Percent of Facebook revenue raised in each month

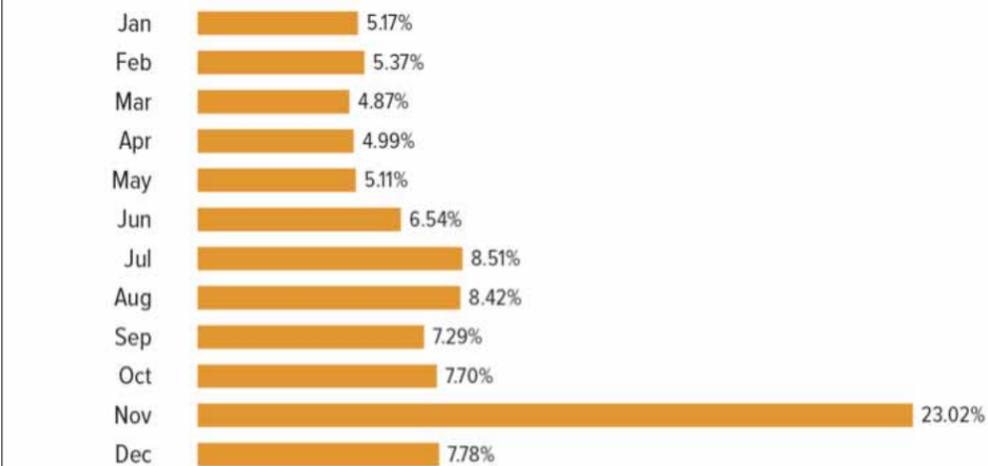


Figure 3: November brings in the most \$\$\$ for Facebook Fundraisers.

2. Social media in general. Giving Tuesday has become a highly social activity, and that includes Facebook, Twitter and Instagram. Now that Instagram has donate buttons, encouraging your 'gram audience to spread the word and increase giving is easier than ever.

3. Keep it time-limited. Despite the timeline creep we've seen lately, Giving Tuesday is still just Tuesday. A little promotion before is fine (especially if you're asking people to create Facebook Fundraisers), but keeping your promotions via email, web, social and ads to the few days before and day of is the best way to make the most of the event. Then, of course, do the whole thing again for Dec. 31.

4. Creative! Like *EVERYTHING,* Giving Tuesday is crowded and competitive. Standing out in the crowd—and also differentiating your Giving Tuesday campaign from your own year-end efforts—calls for specific, relevant and bold creative and offers. Special matching gifts. Restricted campaigns. Fun premiums. Crowdfunded projects. That kind of thing!

5. Spend some money. Like end of year, Giving Tuesday has become a time when people are conditioned to give. Social and traditional media are already promoting it—which means putting some additional dollars via specific search and targeted advertising can

yield strong results. If you're curious how much organizations like yours spend on advertising, you can find that in the M+R Benchmarks Study!

* As with our annual Benchmarks Study, the average numbers we refer to in this post represent the median figure among surveyed nonprofits.

As a data nerd with deep hands-on digital marketing experience, Karen is the senior data strategist at M+R. As her title would suggest, she brings a data-driven perspective to everything she does, from testing to creative, email to social media and advertising to websites to text messages. She's spent the past three years managing M+R's conversion optimization program, relentlessly proving best practices are actually best practices through A/B testing. When she isn't messing around with Optimizely and Google

Optimize, she plays a role on the M+R data team, where she's the in-house Google Analytics expert and helps develop user personas to optimize supporter funnels.

Congratulations to all the 2019 MAXI Award winners!
You make us all proud!

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Perennial Favorites: Annual Fundraising Campaigns, FTW!

By Rachel Henzlik



Tried-and-true anchor campaigns like year-end, integrated e-renewals, matching gifts, anniversary campaigns, membership month and giving days can drive the most revenue year after year.

At the “Perennial Favorites: Annual Fundraising Campaigns, FTW!” DMAW Lunch & Learn session last October, attendees learned the best practices and innovations to maximize these workhorse campaigns. We’re revisiting many of these tips and insights now as we move into the strongest fundraising season.

Presenters Kerri Kerr, chief operating officer at Avalon Consulting Group;



Myles King, director of annual and digital fundraising at The John F. Kennedy Center for the Performing Arts (JFKC); and Laura Connors, vice president of membership at the National Parks Conservation Association shared their insights.

Reminding us of the adage, “We are not our audience,” Kerri noted that at best, an organization may get in front of its most committed supporters once a week through any channel. Thus, when implementing an anchor campaign, organizations need to stick to best practices: that the campaign is branded, has a clearly defined goal and has a deadline in order to drive urgency.

But aside from adhering to these best practices, organizations should innovate! Kerri referenced the National Museum of the American Indian’s (NMAI) recent e-renewal effort. Even though the campaign had hit its fundraising goal days before its deadline, NMAI decided to increase the campaign goal.

NMAI realized that if the message was resonating so well with donors, it should take full advantage of that success and see if it could turn that momentum into even more donations. This became NMAI’s highest-performing e-renewal series yet!

Kerri also described Farm Sanctuary’s first-ever Giving Day on Oct. 2, chosen to coincide with World Farm Animals Day, which raised more than double the goal. Your organization’s very own giving day can work best when built around a preexisting milestone like an anniversary or another meaningful day or week.

Laura described National Parks Conservation Association’s efforts to drive response in a competitive year-end environment through a matching-gift campaign. An urgent “today-only” triple-match offer was added to the campaign to stand out from numerous year-end, matching-gift offers, and a postcard-style message was added near the end of the email series to mix up formats.

Of great interest to me (a history major!) was JFKC’s anniversary campaign, celebrating President John F. Kennedy’s 100th birthday on May 29, 2017. Named “JFKC: A Centennial Celebration of John F. Kennedy,” this multichannel campaign resulted in nearly \$550,000 in gross revenue!

This campaign differed from past JFKC fundraising efforts in that it was themed around President Kennedy himself and his support for the arts. By referencing the popular president’s legacy and not solely discussing performing arts (as had

“TRIED-AND-TRUE ANCHOR CAMPAIGNS LIKE YEAR-END, INTEGRATED E-RENEWALS, MATCHING GIFTS, ANNIVERSARY CAMPAIGNS, MEMBERSHIP MONTH AND GIVING DAYS CAN DRIVE THE MOST REVENUE YEAR AFTER YEAR. AT THE ‘PERENNIAL FAVORITES: ANNUAL FUNDRAISING CAMPAIGNS, FTW!’ DMAW LUNCH & LEARN SESSION LAST OCTOBER, ATTENDEES LEARNED THE BEST PRACTICES AND INNOVATIONS TO MAXIMIZE THESE WORKHORSE CAMPAIGNS.”

been done in the past), JFKC was able to diversify its audience and mail new lists (such as museums and historical societies) and harness elements of the President’s image when branding the campaign (“35 Days of Giving” in honor of JFK being the 35th president).

On its website and through its emails, JFKC also created a series of videos telling the story of President Kennedy to engage donors with the campaign. JFKC even included major donors in select portions of

the email campaign, but before scheduling those sends, JFKC “primed the pump” and told these prospects of the upcoming outreach.

This created a new avenue to engage with major donors and kept JFKC on their brains! From this discussion, we see that a healthy mix of best practices, bold innovations and teamwork really does result in greater success!

Rachel Henzlik is a direct response specialist at AARP Foundation. She can be reached at rhenzlik@aarp.org.

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9 Digital Tools
Continued from page 1

last year's and this year's performance. It will keep you grounded and focused.

2. BEAT (OR LEARN FROM) YOUR COMPETITORS

Paid search can make or break your EOY. Being competitive in the paid search environment can yield amazing results. SEMRush (semrush.com) and SpyFu (spyfu.com) are two powerful SEM and SEO research tools. They allow you to look at how your competitors behave in search, forecast your campaign costs, see competing creative and dig into elements of SEO as well.

Answerthepublic.com is a cool, free tool that helps you create hundreds of variations of keyphrase searches based on real data. Save time and beat your competition.

Get tips on how to optimize your Google AdWords and Facebook campaigns with free webinars from Beaconfire RED at bfred.us/webinars.

3. TRACKING AND MEASUREMENT

If you can't measure it (or measure it properly), you can't improve it. Most organizations use their eCRM source coding to track revenue, but you should also be using Google Analytics (GA) UTM parameters.

These tracking parameters show you a much bigger picture, such as what path your users are taking before they give (many donors land on a form or a page and "travel" around before giving on a non-campaign form) and how various digital channels are interacting with each other to bring in revenue.

GA offers a free Campaign URL Builder at ga-dev-tools.appspot.com/campaign-url-builder/, so you can track response not only by campaign and channel, but also by custom fields, such as ad creative version, and more. We recommend

using GA tracking parameters for all your channels—email, advertising, direct mail URLs and social, so you can see how other channels are assisting and influencing others. To streamline the process, you can create (or have someone create for you) a complete GA Campaign URL Builder in Google sheets that automates the creation of your tracking links. Below is a picture of the one we built for our internal marketing team. Plug and play!

If you're looking to refine or update your digital KPIs or measurement strategy, I'm a huge fan of Avinash Kaushik and his Occam's Razor blog. Here's a great article he wrote about how to create a digital marketing and measurement model: bit.ly/2HJaaSY.

4. TESTING

You have to test to improve response. Start with Google's free Optimize A/B Test Tool (bit.ly/2XBnegg).

Optimizely's free A/B sample size calculator (bit.ly/2Mr3pcH) will tell you how long you may need to wait for your results to be significant. Use this free test significance calculator (abtestguide.com/calc) to determine if your test result is significant.

5. THE RIGHT MESSAGE FOR THE RIGHT AUDIENCE

Our friends at EveryAction created this easy-to-use donor persona spreadsheet (bit.ly/30Y5TIQ) to build out individual personas for all your various donor types (sustainer, lapsed, one-time, tribute and more). Do this exercise before your EOY planning kickoff meeting, and ensure you're addressing all your donors' needs.

Builder	Required	Optional	Copy and Paste this for use in Marketing packages
GDPR & Cookie Strip Post	http://www.beaconfire-red.com/cookie-policy/		http://www.beaconfire-red.com/cookie-policy/
2018 Newsletter Sign post (Note: Should have year social and vertical)	http://www.beaconfire-red.com/2018-newsletter-sign-post/		http://www.beaconfire-red.com/2018-newsletter-sign-post/
2018 Newsletter	http://www.beaconfire-red.com/2018-newsletter/		http://www.beaconfire-red.com/2018-newsletter/
Nonprofit Event Email Invitation - 1	http://www.beaconfire-red.com/nonprofit-event-email-invitation-1/		http://www.beaconfire-red.com/nonprofit-event-email-invitation-1/
Nonprofit Event Email Invitation - New P	http://www.beaconfire-red.com/nonprofit-event-email-invitation-new-p/		http://www.beaconfire-red.com/nonprofit-event-email-invitation-new-p/
GDPR Welcome - social media	http://www.beaconfire-red.com/gdpr-welcome-social-media/		http://www.beaconfire-red.com/gdpr-welcome-social-media/
GDPR Welcome - Profile promotion	http://www.beaconfire-red.com/gdpr-welcome-profile-promotion/		http://www.beaconfire-red.com/gdpr-welcome-profile-promotion/
GDPR Welcome	http://www.beaconfire-red.com/gdpr-welcome/		http://www.beaconfire-red.com/gdpr-welcome/
Nonprofit Event - Profile Promotion	http://www.beaconfire-red.com/nonprofit-event-profile-promotion/		http://www.beaconfire-red.com/nonprofit-event-profile-promotion/
GDPR Welcome - Client Exiter Egg post	http://www.beaconfire-red.com/gdpr-welcome-client-exiter-egg-post/		http://www.beaconfire-red.com/gdpr-welcome-client-exiter-egg-post/
GDPR Welcome - Client Exiter Egg post - "Have order" - is there but doesn't mean anything	http://www.beaconfire-red.com/gdpr-welcome-client-exiter-egg-post-have-order-is-there-but-doesnt-mean-anything/		http://www.beaconfire-red.com/gdpr-welcome-client-exiter-egg-post-have-order-is-there-but-doesnt-mean-anything/

6. REAL-TIME DASHBOARDS

EOY is too fast-paced to have to pull a report every day. Your marketers need the data to optimize constantly, and you need to be able to report results quickly and on-demand.

Use Google Data Studio (bit.ly/2Qxp01A), a free dashboarding and data visualization tool, to create easily shared and real-time dashboards that pull in data from multiple sources: your database, eCRM, GA, social platforms, Google AdWords, Bing, other advertising platforms, e-commerce platforms and more.

You can build the dashboard with many different reporting tabs corresponding to each metric you want to report on. And you can build in a place on each tab for your actionable insights. It's a marketer's dream.

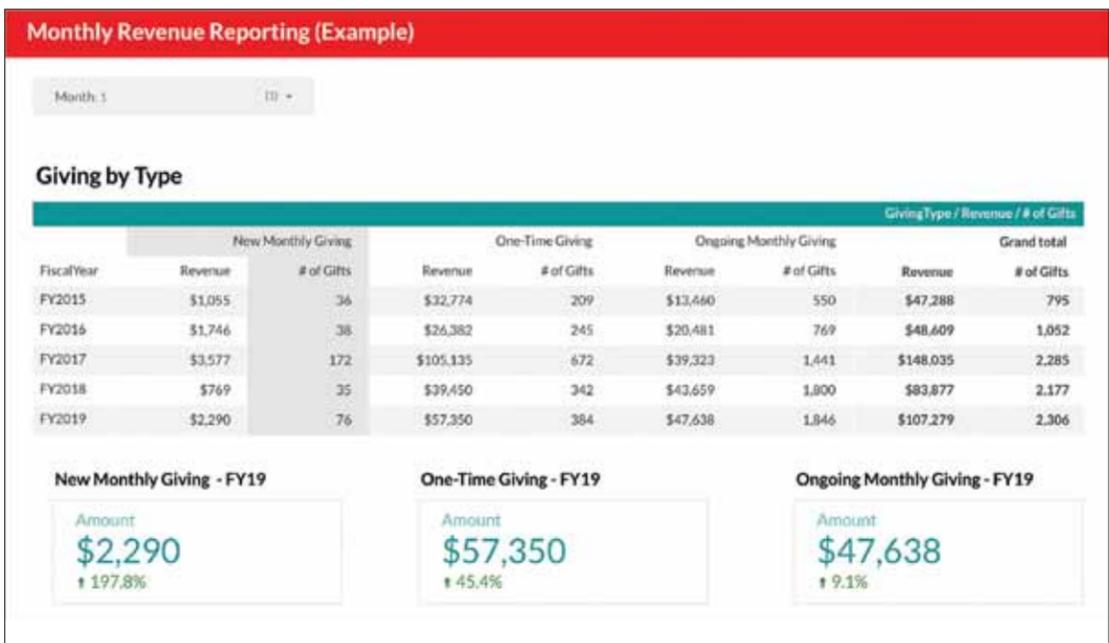
Another important benefit of Google Data Studio is that it allows you to securely analyze data via connections to data warehouses rather than insecure downloads of data into offline spreadsheets.

On page 11, you can see a page from a sample client dashboard that Beaconfire RED built in Data Studio.

7. LANDING PAGE AND DONATION FORM OPTIMIZATION

If you're building or testing anything new, including a new donation form, be sure to do cross-browser testing.

Older donors are often not using the most recent browsers, and they are not tech savvy enough to persevere if the form isn't working for them.



Use crossbrowsertesting.com or browserstack.com to QA your pages. And don't forget Google is putting a premium on how fast your pages load. Check your page or form speed here: bit.ly/30Uy714.

8. AUDIO SCRIPTING

We're writing more and more audio ads here at Beaconfire RED. If you want to test them for EOY, we found this free tool to help us write scripts that are just the right length: bit.ly/2Wz5rLM.

9. OPTIMIZE YOUR DONATION FORM ASK STRINGS

This is more of a tactic than a tool, but a very important one. July to October is a great time to test gift amounts with prospects, lapsed and donors. Start with your donation forms. Begin with the form that gets the most traffic and revenue, and then move on to others.

Pull transaction data, and create a gift distribution report—how many people are giving X amount. Then, compare those gift distribution amounts (e.g. 1,000 people gave a gift of \$35) to the actual gift string (suggested gift amounts) on your donation form.

Make sure you do the analysis month by month so you can account for the seasonality of EOY and other seasonal campaigns you might have.

Are you seeing a good number of gifts higher than your ask string? Test a higher amount. Is there a big cluster of low-

dollar gifts below or at the lowest ask in the string? Test a slightly higher string to inch them up. You can test with specific audiences (organic, PPC, major gifts, direct mail) or multiple audiences (and

analyze the results by audience type). I hope this collection of digital tools and strategies helps you plan the best EOY ever. Best of luck.

Liz is a partner and EVP of marketing of Beaconfire RED, a full-service digital agency that provides smart digital marketing, design and web development solutions to leading nonprofit organizations. Liz is an integrated marketing and fundraising expert with in-depth knowledge of digital, creative and fundraising strategies and direct response marketing. She helps clients such as National Trust for Historic Preservation, Habitat for Humanity, BrightFocus Foundation and others increase their digital reach, engagement and revenue. She can be reached at liz.murphy@beaconfire-red.com.

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The Only Constant is Change

By Amy Sukol



Remember when... heck, it may have been yesterday...everyone said, "Direct mail is dead! Donors are only going to give online!"? It turns out, direct mail

hasn't died. In fact, it remains one of the most powerful fundraising tools we have.

But it is true that the explosion of the internet—and the digital fundraising tools that have accompanied it—has given donors more ways to give and changed our industry forever. Pandora's box of change has opened, and its contents are coming out fast and furious.

If we hope to continue to help the organizations we serve raise the funds they need, we have to look to the future (and the inevitable change that's coming)



with our eyes wide open. This seems like a tall order to fill. But the truth is you don't need a crystal ball to get a sense of some of the biggest changes or challenges that are on the horizon.

THE LONG-TERM HEALTH OF THE UNITED STATES POSTAL SERVICE

Earlier this year, the postmaster general of the USPS testified before the House Oversight and Reform Committee that the USPS is on course to run out of cash within five years.

That, of course, would be a fairly catastrophic change for our industry—not to mention our country.

We can hope that this crisis will be averted, but we should also prepare for the worst. There may be much bigger changes in our future—think reduced delivery to rural areas or elimination of Saturday delivery.

The truth is, we don't know what changes need to be made to save the USPS; but we can be almost certain that change is coming.

What can you do? Continue to diversify the ways your donors can give, and stay informed about postal issues through organizations like the Alliance of Nonprofit

Mailers. And when someone from our industry asks you for help in reaching out to your elected officials, do it!

DATA PRIVACY

In the post-recession world when so many organizations' donor lists had shrunk, we were hungry for names. Along came modeled list products, and a whole new world opened up to us. Through the magic of data, we could find potential donors to our causes in ways we never thought possible. And that was just the beginning.

Through Google, Facebook and the incredible wealth of data that became available to us, we could share our message with potential donors in even more targeted ways.

But in the wake of the 2016 presidential elections and the bad actors and excesses that emerged from it, we are now at risk of losing the very data that we have come to depend on. While increased data privacy legislation started across the Atlantic with the General Data Protection Regulation (GDPR), it has already made its way to our shores. California's Consumer Privacy Act of 2018 has far-reaching implications for direct response fundraisers. And Georgia is working on legislation of its own.

In an industry driven by data, this new legislation can have far-reaching effects on our ability to reach potential donors. What can you do? First, recognize the need to protect your data and be proactive about using best practice security standards. And, again, stay informed, throw your support behind industry organizations who are advocating on behalf of our industry, and take action when asked.

CHANGES IN THE TAX CODE

A great deal of work from some of the leading thinkers and organizations in the nonprofit world has gone in to predicting the impact of changes in the tax code to charitable giving. As a result, we've consistently lobbied to save the charitable deduction.

Last year, however, the threat to tax-advantaged giving came from another direction—the increase of the standard deduction. In advance of this change, we all wondered what the impact would be.



IN THE POST-RECESSION WORLD WHEN SO MANY ORGANIZATIONS' DONOR LISTS HAD SHRUNK, WE WERE HUNGRY FOR NAMES. ALONG CAME MODELED LIST PRODUCTS, AND A WHOLE NEW WORLD OPENED UP TO US. THROUGH THE MAGIC OF DATA, WE COULD FIND POTENTIAL DONORS TO OUR CAUSES IN WAYS WE NEVER THOUGHT POSSIBLE. AND THAT WAS JUST THE BEGINNING.

It's difficult to know what the impact of the changes in the tax code were. But of one thing I'm certain—it confused people. Even tax accountants found it difficult in 2018 to predict how much a given taxpayer would owe on April 15.

A donor who is unsure how a charitable donation is going to impact his or her tax situation is less likely to give. So what can we do? Stay informed about how tax changes have impacted organizations,

and continue to communicate with donors about the impact they are having in changing the world—in addition to the tax implications of their gifts.

Amy Sukol takes pride in safeguarding and stewarding the personal connection between nonprofits and their donors. In her role as EVP at Lautman Maska Neill & Company, Amy accomplishes this by utilizing her two decades of experience in all areas of the direct response fundraising process.

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OUT OF THE TRENCHES: YOUR DIRECT MARKETING COLLEAGUES TAKE A BIG-PICTURE LOOK AT THINGS

8 Quick Tips for Planning Your Creative Strategies for Year-End Fundraising

By John Thompson



The lights in your neighborhood twinkle with holiday cheer. Soft snowflakes drift down in the chilly night sky and settle on your eyelashes. From somewhere, the comforting aroma of a wood fire reaches your nose...

Wait. It's 95 degrees, the smog is thick, and you're sweating like a linebacker in preseason training camp.

However, it's never too soon to start planning creative strategies for your year-end fundraising. Why is early planning so important?

Because you have six short weeks—over three major holidays—to capitalize on a general public focus on philanthropy, with a “hard stop” of Dec. 31. Because most organizations recognize this as the year's most critical revenue season.

Because every other organization that competes for your donors' financial support will be jamming mailboxes and screens with appeals that command the attention of your prospects and donors alike.

Turn up the air-conditioning, sip a cold beverage, and read on. Here are eight tips to jump-start your year-end fundraising.

TIP NO. 1

(This may be the most important tip of all!) View your year-end multichannel direct response fundraising as a continuum composed of individual campaigns. For instance, Thanksgiving + Giving Tuesday + December holiday + year-end. Obviously, each organization uses its own variation of these campaign topics.

From your donors' points of view, this is one continuous conversation. Therefore, before moving on to tactics, consider the voice, stories, offers and asks that your donors will receive from you—in order and in all channels—as one coordinated stream of messages. These guided contacts need to resonate in donors' hearts and demonstrate in donors' heads the value of their support and should consistently impart your brand and purpose as you make your appeals to them.

TIP NO. 2

Establish a single strong subtheme across all or most of your year-end campaigns, such as a holiday wish list. Subsequent campaigns cross items off that list—like food for two families or a gift for a child—as the campaigns progress. Subthemes help tie various elements together to make

your voice sound consistent, even if the channels, tactics, offers and timing change. Alternatively...

TIP NO. 3

Change the voices telling one campaign story, repeated over a few months, but with different points of view (POV). Think of a doctor POV followed by a patient POV, a nurse POV and a mom POV—all in support of one story of healing and hope.

TIP NO. 4

Instead of trying to get a gift, flip your approach, and give a gift to donors in at least one of the contacts in your year-end cycle. It could be a gift of thanks, a gift of praise, a video clip of a family saying thank-you or singing a song to the donor.

De-emphasize or even eliminate the appeal for a gift from the donor in this instance. Use the spirit of the season as a reason to strengthen your donor's relationship with you.

TIP NO. 5

Just as holiday appeals may trigger heartfelt giving, in contrast, your year-end tax-deductible gift appeals (with a strident Dec. 31 deadline) should break out

from the ongoing conversation as a very transactional and urgent message, without the bells and whistles or even the stories that drove your other year-end campaigns. And yes, despite changes in tax laws, donors still do respond to the year-end deadline, though perhaps not in as large numbers as in years past.

TIP NO. 6

Capitalize again on the spirit of the season to reach qualified donors who have lapsed 13 months or more by phone, reminding them how important their support is and how much impact they could have during the holiday season.

The holiday season is a great opportunity to contact good donors who have been silent for a while in a much more intimate channel than direct mail or email. This technique has met with eye-popping success as a reactivation tactic at year-end.

TIP NO. 7

Competition for space on social media skyrockets around the holidays, not just from increased nonprofit pushes, but from retail and e-commerce as well. Purchase social media placement earlier in the season in order to take advantage of lower costs-per-action during a less competitive time frame, while also increasing brand awareness before the really big pushes in the final weeks of the year.

TIP NO. 8

If December 2018 results were any indication, nonprofits are, more than ever, at the mercy of the stock market and political issues. Starting your year-end digital advertising campaigns in October makes great sense financially as well as strategically.

Spread your digital marketing and advertising investment throughout the entire fourth quarter to minimize your revenue risk, rather than focusing your spend on a limited run solely in December.

It will have a direct impact on how many ads you invest in, obviously, and when you will deploy them. This, in turn, will have a direct impact on your integrated year-end online and offline creative strategies. Most organizations agree that success with year-end fundraising, more often than not, predicts



CAPITALIZE AGAIN ON THE SPIRIT OF THE SEASON TO REACH QUALIFIED DONORS WHO HAVE LAPSED 13 MONTHS OR MORE BY PHONE, REMINDING THEM HOW IMPORTANT THEIR SUPPORT IS AND HOW MUCH IMPACT THEY COULD HAVE DURING THE HOLIDAY SEASON.



success for the year. Competition for share of the donor's wallet is fierce. Mailboxes are full.

Demand drives channel and media costs up. It's a crowded competitive landscape, all vying for attention in a compressed period of time. For so many reasons, the stakes are higher than ever.

That's why it pays to start early. It also pays to rethink traditional campaign strategies that end up looking so much like every other fundraising appeal in the season. Challenge your teams to take a fresh look at your year-end giving

creative strategies, across all channels and media. So finish up that cold beverage, and get to work.

John Thompson is the chief creative officer at TrueSense Marketing. He oversees creative strategy and works closely with the TrueSense creative team to find and cultivate the heroic hearts that will support over 140 clients, across all channels. John and his team focus on moving donors from transactional interactions with their organizations of choice to transformational relationships. John is a 40-year veteran of direct response fundraising and creative services, a seasoned agency executive, an active industry participant and a thought leader in nonprofit marketing. He can be reached at john.thompson@truesense.com.



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8 Levels of Data Hygiene

Continued from page 1

- Delivery Sequence File measures the deliverability of a mail piece and identifies if an address is seasonal, vacant, business or residential. It is a separate process apart from CASS that also improves address accuracy.

2. NCOA

National Change of Address (NCOA) keeps your direct mail list up to date with the 14% of Americans who move each year. Also required by the USPS for automation discounts, your mailing addresses must be updated with NCOALink within 95 days of the mail date. Beginning in 2018, the USPS began using a new Move Update validation process, which allows it to better identify and penalize mailers that do not practice proper data hygiene. Mail pieces are scanned, and each mailing's compliance scores are maintained on a Mailer Scorecard. These results are aggregated across the calendar month and are measured against the established thresholds. Any Change of Address errors exceeding the threshold, which is an error rate of 0.5%, will be fined a Move Update assessment fee.

- NCOALink provides weekly updates to individual, family and business moves, including temporary moves, and identifies undeliverable addresses. Full Service Providers (FSP) use a 48-month dataset, featuring 160 million changes of address. Limited Service Providers use an 18-month dataset featuring 60 million changes of address. Both services perform the necessary address cleansing to ensure that mailings will be eligible for postage automation discounts and that individual mail pieces will be much more likely to reach their desired targets. Since FSP goes back four years, it's advantageous to use this service on files long neglected in terms of address hygiene.

3. PCOA

Proprietary Change of Address (PCOA) finds people who move who don't file a change of address notice with the USPS.

As noted above, 14% of the U.S. population moves every year, yet 40% of them do not report their address change to the USPS, and this percentage is expected to increase.

Most people, however, do inform their utility providers, subscription services and favorite catalog companies. PCOA uses these sources to extend the reach of NCOA by about 3%. This service is not required by the USPS but can significantly improve deliverability to the right person.

4. DECEASED RECORDS PROCESSING

Determine what makes sense for your organization and specific mailings.

“DONOR FILE DEDUPE IDENTIFIES DUPLICATE AND POTENTIAL DUPLICATE RECORDS THAT CAN BE CONSOLIDATED OR TREATED IN THE MANNER BEST DETERMINED BY YOUR ORGANIZATION. FACTORS INCLUDE INDIVIDUAL AND HOUSEHOLD (DIFFERENT NAMES AT THE SAME RESIDENTIAL ADDRESS) LEVELS AND THE MATCH CRITERIA YOU CHOOSE, WHICH CAN ALLOW FOR FEW, SLIGHT OR MANY VARIATIONS ON A RECORD. YOUR SERVICE PROVIDER CAN ADVISE YOU ON THE BEST APPROACH FOR YOUR CAMPAIGN OR PROGRAM.”

Periodically match your file against one or more databases that contain reported deceased records. Consider keeping these names on your house list or testing their performance.

Mailings to deceased individuals often have strong response rates, as the surviving spouse may want to continue contributing to the organizations the couple had supported together, or perhaps the record was incorrectly flagged as deceased. Of course if a family member has contacted your organization asking to remove the deceased person

from future mailings, immediately do so. In acquisition, since the family has no prior relationship with your organization, records flagged as deceased are less likely to be productive and are typically cleansed from the list.

5. PRISON SUPPRESSION

Unlikely to become donors or customers, individuals with jail or prison addresses are typically omitted from mailings.

6. DMACHOICE DO NOT MAIL PREFERENCE (PANDER) FILE

People who have directed the Direct Marketing Association (now part of the Association of National Advertisers) to remove their names from direct mail lists should be omitted from acquisition mailings. However, people on your house file have expressed an interest in your organization at some point, so continue to mail to them unless they specifically request to be removed from your list.

7. PROFANITY SUPPRESSION

Screens out addresses containing inappropriate words or phrases. Disgruntled people may submit an offensive name or address to an organization list to upset a recipient. Seek out a service provider that offers a continuously updated data file designed to flag profanity and buzzwords.

8. DONOR FILE DEDUPE

Identifies duplicate and potential duplicate records that can be consolidated or treated in the manner best determined by your organization. Factors include individual and household (different names at the same residential address) levels and the match criteria you choose, which can allow for few, slight or many variations on a record. Your service provider can advise you on the best approach for your campaign or program.

A thorough, customized data hygiene program will provide the clean and accurate data you need to reach new levels of campaign performance. Get started now with your next mailing project!

John Bell is vice president of sales for MMI Direct, a pioneer in data hygiene and data processing for over 45 years, specializing in precise, innovative and customized data solutions for its clients. Learn more at mmidirect.com, or reach John at john@mmidirect.com.

Marketing AdVents

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Job Exchange: Submit via email to Ann Walsh, ann@dmaw.org, to receive a reply confirming cost. Payment required prior to posting online. Deadline for print version is the 15th of the month preceding publication. All ads posted to website within 24 hours. Costs: Members - \$100 for first 50 words and \$1 for each additional word. Not-Yet-Members - \$200 for first 50 words and \$1 for each additional word.

News Notes: Submit items of professional interest or significant personal news about members to Editor Nhu Te.

Deadline for Articles and News Notes: 15th of the second month preceding issue date (e.g., deadline for May issue is March 15).

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Executive Director: Donna Tschiffely 703-689-3629, donna@dmaw.org

Editor: Nhu Te 215-238-5431, dmawadvents@dmaw.org

Advertising: Terri Jones 703-471-4902, tjones@dmaw.org

Design: Albert J. Gaspari NAPCO Media, 215-238-5366

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Mount Royal
Printing & Communications
6310 Blair Hill Lane
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410-296-1117

NAPCOMEDIA
1500 Spring Garden St.,
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Philadelphia, PA 19130
215-238-5300

News Notes



Photo: iStock/Getty Images

● **The United States Postal Service** has been financially struggling, with a reported financial loss for the 12th year straight in 2018. Net losses went from \$2.7 billion in 2017 to nearly \$4 billion in 2018, according to Thomas Publishing Company. In the first quarter of fiscal year 2019, USPS reported a loss of \$1.5 billion. Since then, USPS has been working on solutions to address the growing economic challenges. In April, U.S. Postmaster General Megan Brennan proposed to reduce mail delivery from six days to five days a week while expanding package delivery services to seven days. While Brennan expressed the many benefits of the proposal, Congress and the Postal Workers Union opposed the reduction of delivery days. However, the price of stamps is set to rise by \$0.05, and mail services are set to rise by an average of 2.5%. The increase is expected to create an additional \$1.7 billion in revenue, according to Joseph Corbett, chief financial officer and EVP of USPS.

● **North American Communications** (NAC), a printing, mailing and fulfillment operation, suddenly closed its headquarters in Duncansville, Pennsylvania, on May 20, according to Printing Impressions. The close resulted in 201 employees losing their jobs. In an interview with Printing Impressions, NAC president Rob Herman and CEO Nick Robinson said there were two

mitigating factors that led to the close. First, NAC closed its larger Juarez, Mexico, cross-border direct mail and fulfillment operation, which employed about 650 workers. Second, NAC was unable to secure outside financing due to lawsuits and countersuits that remain in the U.S. District Court of Johnstown, Pennsylvania. "While we did everything in our power to mitigate the negative impact of these and other events, in the end, we simply ran out of options," Robinson said in the interview. "This was to be the 40th year of business for NAC, which makes our circumstances and this announcement all the more disheartening."

● **PebblePost**, a digital-to-direct mail marketing platform, has appointed **Jacob Ross** as president, according to a press release. Ross will report to Lewis Gersh, the company's CEO, and will help lead the company into its next phase of growth. Previously, Ross served as chief product officer of MediaMath, chief revenue officer at MetaMarkets, managing director of Criteo, among other leadership positions at Demand Media and Right Media. "PebblePost invented Programmatic Direct Mail, and we've had tremendous success with our innovative brand clients. I'm thrilled Jacob has joined this adventure; he will play a pivotal role in helping our company scale and grow," Gersh said.

Is something exciting happening in your company or organization?

Tell us about it!
Email the editor, Nhu Te,
[at dmawadvents@dmaw.org](mailto:dmawadvents@dmaw.org)



DMAW Educational Foundation

Internships Offer ROI for Students and Employers

By Leigh Ann Doyle



I had two internships—one while I was in college and another just after graduating. The first was full of learning opportunities; I gained valuable work skills, and

it gave me the chance to figure out what things were important for me to look for in a job. The second allowed me to experience—firsthand—what it was like to work at a vibrant direct-response firm; I am still employed many years later doing work that I love!

Internships are not a new concept, but their importance for our industry is growing. And not just because students want to be prepared to enter their chosen fields when they graduate, but also

because it's a great way for employers to find good talent.

Many companies hire interns for the summer, but spring and fall semester internships are invaluable to students. Students often need internships to fulfill university graduation requirements, to gain work experience and to learn more about the field they want to pursue as a career. Companies interested in helping students achieve success in their future careers can also reap the benefits.

Sunny Matani, senior account representative and intern coordinator at CCAH, believes that internships are no longer just an option, but a necessity for both students and businesses.

"With college degrees becoming more and more prevalent each year, it's absolutely critical for students to find a way to stand out when applying for jobs. And the best way to do that is to have actual hands-on experience in the area they want to work. Internships give students an edge in their job search while allowing employers to build a pipeline of trained job candidates," Sunny said.

Students who work as interns gain real-life job experience that companies look for in new hires while also getting the chance to learn more about a company and the type of work available. By offering internships, companies effectively have the opportunity to market their "brand" to young professionals.

Sunny believes that companies should treat every intern who walks through their doors as a future employee. In some ways,

an internship is an extended interview, through which a student can learn about the company, and the company can evaluate the student's potential. Anyone can look good on paper, but nothing compares to having the chance to see how a person actually handles the day-to-day aspects of his or her work.

There are other benefits that interns bring to a company. In working with interns over the years, Sunny has observed that they bring much-needed energy and ideas. "These kids are driven, passionate and hungry for personal and professional success." Seeing students with such passion and a desire to learn is inspiring for companies.

Just as students benefit from the mentoring and hands-on work experience, companies also benefit from the new perspectives that interns often bring.

Internships are more than career starters for up-and-coming grads; their benefits are often felt over the long haul. When students are given the chance to apply what they are learning in the classroom, it helps prepare them for success. The National Association of Colleges and Employers reports that students who completed at least one internship in college report higher levels of satisfaction with their overall career outcomes.

It's a win-win!

Leigh Ann Doyle is an account manager at PMG, managing direct mail production for several nonprofit fundraising programs. She serves on the board of the DMAW/EF. She can be reached at leighann.doyle@pmgdirect.net.



Did You Know?

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

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Member Spotlight

PK Drago lives in the Trinidad neighborhood of Washington, D.C., with two roommates who she has been friends with since college. She made her way into direct marketing through her organization at the time, volunteering to help on smaller projects that led to bigger projects, new responsibilities and eventually a full-time marketing position.

The direct marketing field allowed her to be creative and analytical to support organizations that are making a difference and find better ways to connect with people. It also doesn't hurt that she works with people who are passionate about what they do.

Location: Washington, D.C

Education: The George Washington University, B.A. in International Affairs

DMAW Member Since: 2018

Who do you consider your mentors?

Throughout my career, I've been lucky to work with some incredible colleagues, managers and teams. Among them, Laura Zylstra, Heather Phibbs and Susanne Slater stand out for their support and encouragement, for challenging me and for leading by example.

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

I'm sure you've heard this answer countless times before, but it's still true, so I'll risk sounding unoriginal: Connect with other people in the industry, whether that's through groups like DMAW, happy hours, training or online communities. Even people who are eager to learn and ready to put in the work don't always know where to start. Sharing experiences, exchanging ideas and learning more about



PK DRAGO
Account Executive
Lautman Maska Neill & Company
pkdrago@lautmandc.com

other people working in direct marketing will help you find the right path to achieve your goals.

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

I talked to leaders in the field—networking, it works! When I started thinking about a transition from a broader development role at a nonprofit (that included direct marketing) to a full-time direct marketing role on the agency side, I asked a lot of people about their career paths, their experiences, their day-to-day responsibilities and the challenges they faced. The insight and advice they shared inspired me to make the switch and helped me understand how to frame my skills and experience for the new positions I was pursuing.

Tell us about your experiences with DMAW.

Volunteering is an important part of my life. I currently work with Planned Parenthood, Red Cross and RISSE—an organization based in Upstate New York that provides support services to refugees and immigrants. I'm fairly new to DMAW and the agency scene, so my experience has been limited; but I recently attended DM201 here in Washington, D.C., and shared my experience on the DMAW blog. As a total joiner, I'm looking forward to every opportunity to stay involved!

Describe yourself in three words.

Curious, flexible, creative

Describe your life in six words.

While more aspirational than accurate (and yes, more than six words), I'm partial to Martha Stewart's high school yearbook quote: "I do what I please, and I do it with ease."

PK's Favorites

Restaurants Ghibellina, Ted's Bulletin, Iron Gate

Films "Moonstruck" and "Jurassic Park"

Books Too many to name, but I'm currently reading Carl Sagan's "Contact," and I just finished Margaret Atwood's "The Penelopiad."

Music Everything from pop hits to music your grandpa loves, especially Fleetwood Mac. Lately, it's been Jenny Lewis, Haim, Robyn and Lizzo.

Leisure Interests Yoga, hiking, quilting, crosswords and eating my way through *The New York Times* cooking section.

Quote "Not today, Satan." — Bianca del Rio

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