Marketing AdVents

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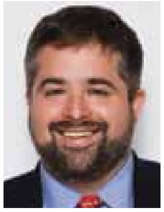
A Shift in Fundraising Strategy: Donor Journey Automation

By A.J. Minogue



We are closer than ever to converting the data we collect into meaningful, well-timed touchpoints that convey our gratitude and respect for donors at all giving levels and preferences, while maximizing net revenue for our missions. When I started in this field, personalization and message tailoring were mostly reserved for major donors, where the ROI was highest.

It's not that we didn't want to give each donor the same white glove treatment, but doing so was not practical. Thanks to newer technology, in the form of cross-channel campaign management (CCCM) tools, donor journeys can now be automated. CCCM tools are software that allow users to structure and execute donor journeys, meaning you can more easily create a communication stream that reaches out with the right messaging, at the right time, to the right people.

Most likely up until now, your direct marketing fundraising operation has included annualized, expiration date based and/or rolling communications. Some of your campaigns are preemptively designed to incorporate multichannel touchpoints, and others focus on one channel. You schedule and budget estimated quantities and timelines for all of these activities well in advance.

Let's fast-forward and imagine your organization has researched, selected and implemented a CCCM tool. Your new tool threatens to disrupt all of this, because it has the capacity to respond to donors. Instead of gearing up for your predictable "Appeal No. 1" production schedule as your fiscal year approaches, you set up a workflow prepared to fire off a series of donor interactions following a triggering event. First, a dated activity occurs and is captured in your database (such as a join, anniversary, an online interaction

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> "One of the biggest challenges is keeping up with enough relevant content to fit all of the variable touchpoints built into your workflows, especially if you want your donor journeys to match combinations of interests, captured by email preference centers, surveys, appends and prior responsiveness."

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Data Analytics

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Livestreaming: Putting the 'Fun' in 'Fundraising'

By Marc Almanzor

In June, video gamers from around the world congregated in Bloomington, Minnesota, for Doctors Without Borders/Médecins Sans Frontières (MSF)'s largest fundraising event: Summer Games Done Quick.

For a week, these players took turns finishing video games as fast as possible, 24 hours a day.

Through their efforts, they raised $3 million in a record-setting performance. While the amount raised is impressive, what makes this event unique is that it was broadcast live on Twitch to over 150,000 viewers, and almost all the gifts received were via online donations. The numbers only tell half the story though; to understand how a livestreamed event performed so well, one must understand the principles of livestream fundraising and streamer culture.

It is a lack of understanding that leaves many organizations curious, but unable to capitalize on this medium.

Thankfully, while the platform may be relatively new to organizations, many of the principles behind livestream fundraising should be familiar to those with direct response and peer-to-peer fundraising experience:

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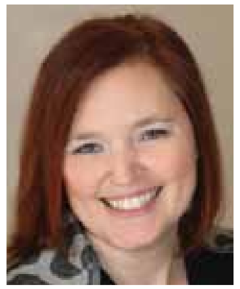
President's Perspective

Understanding Data Privacy

By Marie Kosanovich



Several years ago, my dad was running out of address labels. "Don't worry about ordering more, Dad. I'll add you as a seed." (I'll spare you the discussion that immediately followed as I tried to explain to him what a "seed" is.)

Fast forward several months later, he tells me "Ree, sweetie, you can stop sending me all that mail. I have enough." Puzzled, I looked through his stack of mail and saw a myriad nonprofit packages—none of which I had the pleasure of working with. "Dad, have you ever donated to a nonprofit organization?"

At which point he begins to tell me about how he thought donating $10 for a free tree to plant in his backyard was a great bargain.

My dad has such an incredible lifetime of experiences. It always brings me great joy to be able to share with him some of the professional knowledge I have gained. What followed was a conversation about how organizations exchange data for marketing purposes. Up until that point, to Dad, "data" was just numbers—for example, statistics he read daily in The Wall Street Journal.

As marketers, we know the value that data—whether it's numbers, names or otherwise—has on every strategic decision we make about our next steps…the next campaign. We work with it so often that we can become impervious to the privacy of the information we are handling. For example, we easily justify how it's OK to email data, because it doesn't have anything "personal" like credit card information, but the truth is, the name and address are the epitome of personal information. Think about the following scenarios (all of which have happened in the past month alone).

A donor recently requested that all of the donor's solicitations come addressed based on the donor's initials only and not the donor's full name. Why? Because the donor believes it's more likely that the donor's house will be broken into if the donor's full name and address appear together on the donor's mail.

A friend of one of my colleagues received a catalog she didn't request. And when she asked my co-worker how this happened, she questioned whether it was legal that her name was exchanged in this manner.

A prospective donor filed a complaint with the Office of the Attorney General, because she had been solicited "multiple times" by a certain nonprofit organization (when in fact all records show it happened only once).

These real examples of data privacy concerns are just three of thousands, and I'm certain you have your own similar stories to share. The subject of data privacy has become more and more prevalent in our industry, and it's not likely to end anytime soon—the more data technology allows us to collect, the more we use, the more invasive marketing appears and the more the consumer/donor feels there is no such thing as data privacy.

If you aren't already familiar with terms like GDPR and CCPA—learn about them through DMAW or other industry sources. These latest regulations are impacting our sector, and there are 19 other states considering data privacy laws—all of which will change the way we do business. In the meantime, we need to protect the data we use as if our lives depend on it…because the truth is, they do!

Best,
Marie Kosanovich
mkosanovich@lautmandc.com

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DMAW
Direct Marketing Association of Washington

Calendar of Events

THUR OCT 17

Copywriting Workshop

9AM-12PM
AARP, Washington, D.C.

THUR OCT 24

Autumn Happy Hour

5:30PM-7PM
Arlington Rooftop Bar & Grill, Washington, D.C.

THUR NOV 21

Lunch & Learn Major Donor, Planned Giving, Donor Advised Funds

12PM-2PM
SEIU, Washington, D.C.

TUES DEC 3

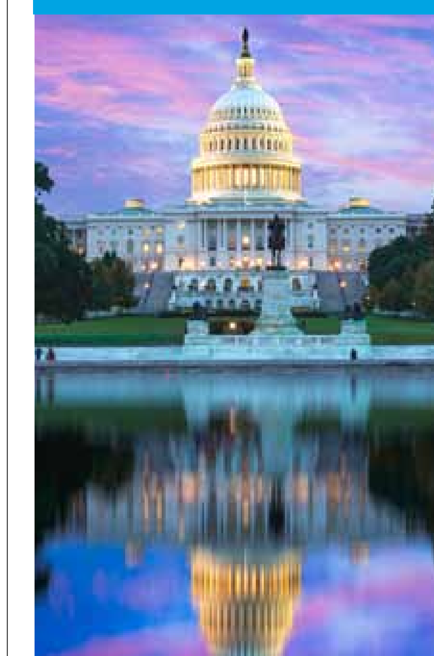
Best of Direct Awards Gala & Reception

6PM-9PM
National Press Club
Washington, D.C.

THUR JAN 16

2020 Annual Meeting, Keynote and Networking Reception

6PM-9PM
SEIU, Washington, D.C.



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's your No. 1 priority when moving into the busy Q4 fundraising season?

What we want to be focused on is providing a brilliant, proven winner to mail that will hit on all chords with donors and potential donors, thus driving the largest Q4 to date for each of our clients.

What our clients want us to be focused on is maximizing all efficiencies, with long lead times and quick execution to result in a record-setting Q4.

What really happens is we ALL put 110% into everything we do, pushing our own personal limits to deliver a strong and emotional year-end campaign across all channels that delivers solid results for the client (and then all bite our nails until the books are closed in January!).

— DeDi Oxenberg
VP of Client Services
CDR Fundraising Group
doxenberg@cdrfg.com

Most nonprofits experienced a mediocre (and some a really bad) Q4 last year, with many theories as to what contributed (tax law changes, turmoil in the government, lack of connection with the charity on a national level, stock market performance, etc.)

This year, with #GivingTuesday falling in December and more economic uncertainty, I'm looking forward to helping our partners find their next breakthrough by connecting with donors on a more emotional level through personalization and segmentation of digital efforts and looking for new opportunities to leverage or better compete against personal fundraising tools, such as GoFundMe and Facebook Fundraisers.

— Ioannis Saratsis
Senior Account Manager, Digital
RKD Group
isaratsis@rkdgroup.com

Communication! Checking in daily with my teams, clients and vendor partners is an absolute must this time of year.

Without direct and ongoing communications, we risk missing critical approvals and deadlines, which puts the mail date in jeopardy—and I can't prepare my client for that possible outcome.

It seems that even when we start prepping for fall campaigns in May, it's never quite enough lead time.

So, having a clear understanding of the full strategy and schedule as early (and often) as possible will save a lot of headache and confusion later on.

— Lynsey R. Gallagher
Account Director
Lautman Maska Neill & Company
lgallagher@lautmandc.com

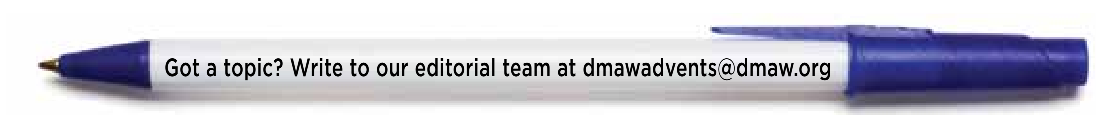
Q4 is a battlefield for designers. Our part comes at the end of the schedule — every delay farther upstream has to be absorbed to keep the mailing on time.

To prepare, I adopt an Iron Man training regime, including daily workouts with alarming Russian coaches, a diet that consists exclusively of raw eggs and wheat germ, and Buddhist meditation with a ninth-level yogi, as I don't want to injure any clients when they want the impossible.

Because in the end, it's about meeting the deadline and the budget.

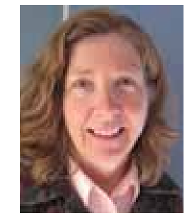
Kids, I am a professional. Don't try this at home.

— Steven D. Fleshman
Founder/Creative Partner
DR2
dr2steve@aol.com



Habits and Best Practices: Are They Serving Our Goals?

By Anne Morrison



Every day, week and month, we plan, review, execute and report on numerous aspects of our fundraising programs.

We adhere to best practices or are working to do so. Yet research teaches us that much of what we do regularly is a habit, not best practice.

What we do, how we organize our staff, how we run meetings, our formats for strategy documents and the measurements in our results reports are sometimes based on familiarity and a bit of "this is what we've always done."

It is time to question our habits and practices.

Why? Because we know it's imperative that we increase the population of high-value donors to drive revenue and compensate for a decrease in new donors, or because we have a new and different challenge to meet.

How will we achieve our goals and meet new challenges if our habits, practices and structures have not changed?

QUESTION STAFFING

Are your team members allocated to reach today's strategy and revenue goals? Or is the structure still based on historical patterns?

- Start by making a list of roles and steps in the process for each fundraising program, such as planning, managing, delivering and reporting for acquisition, retention, reactivation, mid-level, sustainer.
- Estimate the time by person for each item on your list.
- Convert the time into FTEs.
  - If one person is 100% dedicated to one step, that is an FTE of 1.0 (one full-time equivalent). Another team member spends 0.25 on that same process. The combined FTE is 1.25.

You will learn how many or how few "staff person hours" are dedicated to the areas of your fundraising program. This exercise may reveal surprises. The hours are a budget you can spend—I call this your mind-share budget.

I worked with an organization trying to grow its monthly donor program. After mapping out roles, it learned that 20 staff members had a part in the process, yet the population of sustainers was not growing. Sustainers were an afterthought, even though many staff touched it. The organization's mind-share budget was spread out instead of consolidated, resulting in little strategic time devoted to its goal. This exercise showed the opportunity to restructure.

A different organization growing its sustainer program wanted everyone laser-focused on increasing monthly donors. The manager started hosting lunch and breakfast events. The food was the draw, but the goal was to educate the entire staff, including non-fundraisers, and to generate ideas for growing the sustainer population.

This manager figured out how to increase the mind-share budget, gaining ideas and focus on the goal. Today, most of its active donors give monthly. Here are some bold questions:

- Every year we conduct tests in acquisition to improve results and efficiently acquire new donors. But have we measured how many hours staff and partners spend each year on acquisition? And as a subset, how many hours are devoted to testing?
- What if we didn't test for just one year?
- Could we reallocate the hours conducting tests in acquisition to grow or build our mid-level programs?
- Could this reallocation of time solve a roadblock or roll out a stalled idea?
- Can we borrow from one to serve the other?

These questions may not be the right ones for you. You may scoff at the notion. But asking bold, new questions will energize staff and generate ideas with solutions.

QUESTION YOUR REPORTS

- Has your KPI report evolved to meet today's fundraising goals, or is it still built on traditional best practices?
- Is it a high-level summary that also provides diagnostic insights into the two to three elements that drive overall trends?
- Does your dashboard include a trend of donors giving at higher amounts and a trend of your most loyal donors (those giving five or more years in a row)? These two segments donate a large percentage of annual revenue.

QUESTION HOW YOUR MEETINGS ARE RUN

- Change just one meeting—how it is run, when it occurs or the format of the agenda. Maybe everyone stands up instead of sitting.
- Turning the "usual" on its head generates new ideas.
- A client asked me to present their analysis backwards; they asked me to start with LTV. It was an enlightening and educational experience after years presenting in the donor life-cycle order that puts LTV last. This idea conflicted with our standard approach, our habit.

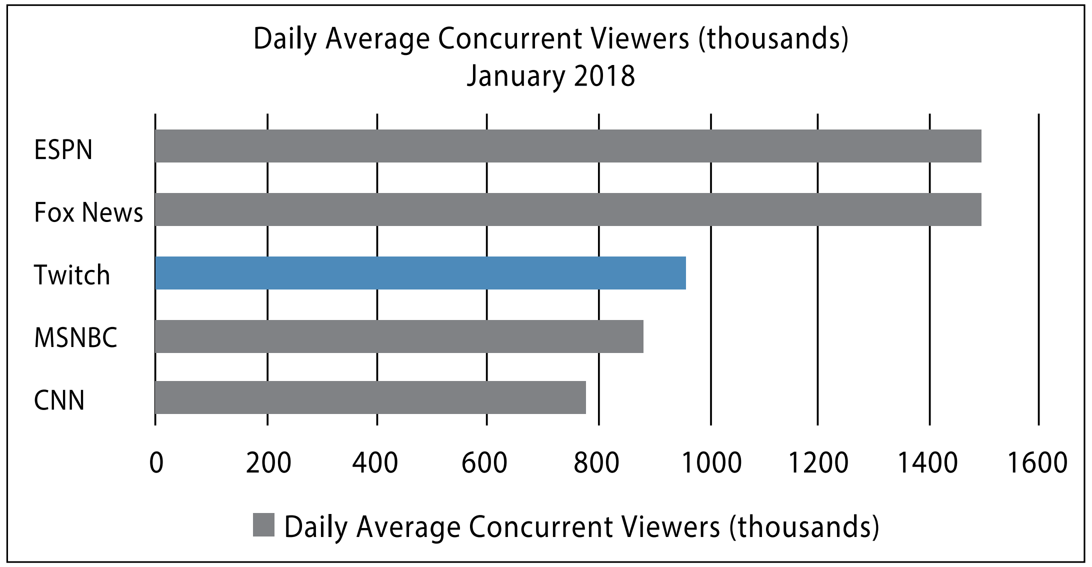
It is time to question our habits, practices, structures and reports to be sure we are spending our mind share budget for our best outcome.

Anne Morrison consults with nonprofits and agencies to improve their reports, dashboards and analytics. You can contact her via email at annemorrisonconsulting@gmail.com.

Livestreaming

Continued from page 1

- Community building
- Integrated social media strategies
- Volunteer management



Community building is often cited by streamers as their primary motivation for streaming. Unless organizations are willing to invest the time in either forming a livestream community, or at least participating in the livestream world, it will be difficult for them to succeed in this fundraising channel. Individual streamers generally build communities around themselves, or in many cases, they may be part of a greater community built around a specific game or playstyle (like speed running).

Some even form charity stream teams—communities whose primary purpose is to raise money for different causes. Some examples are Charitystreams.org and Good4Gaming. As more organizations take part in events, like TwitchCon, they provide more opportunities to connect with streamers and recruit them to their cause.

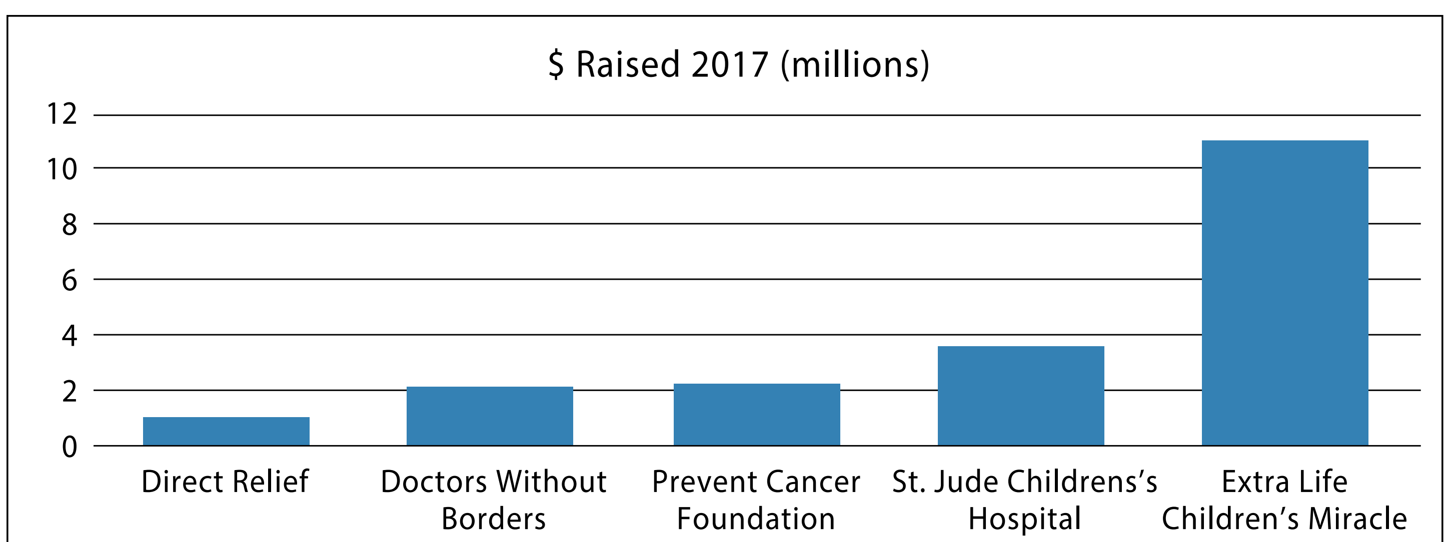
There are other ways of connecting with streamers, though. Many streamers use Twitter, Instagram and, most importantly, Discord (a voice and text-chatting platform) to engage with their fans and draw in viewers. Social media managers know that engagement is the lynchpin of their strategies. It just so happens that engagement is what most streamers and their audiences crave.

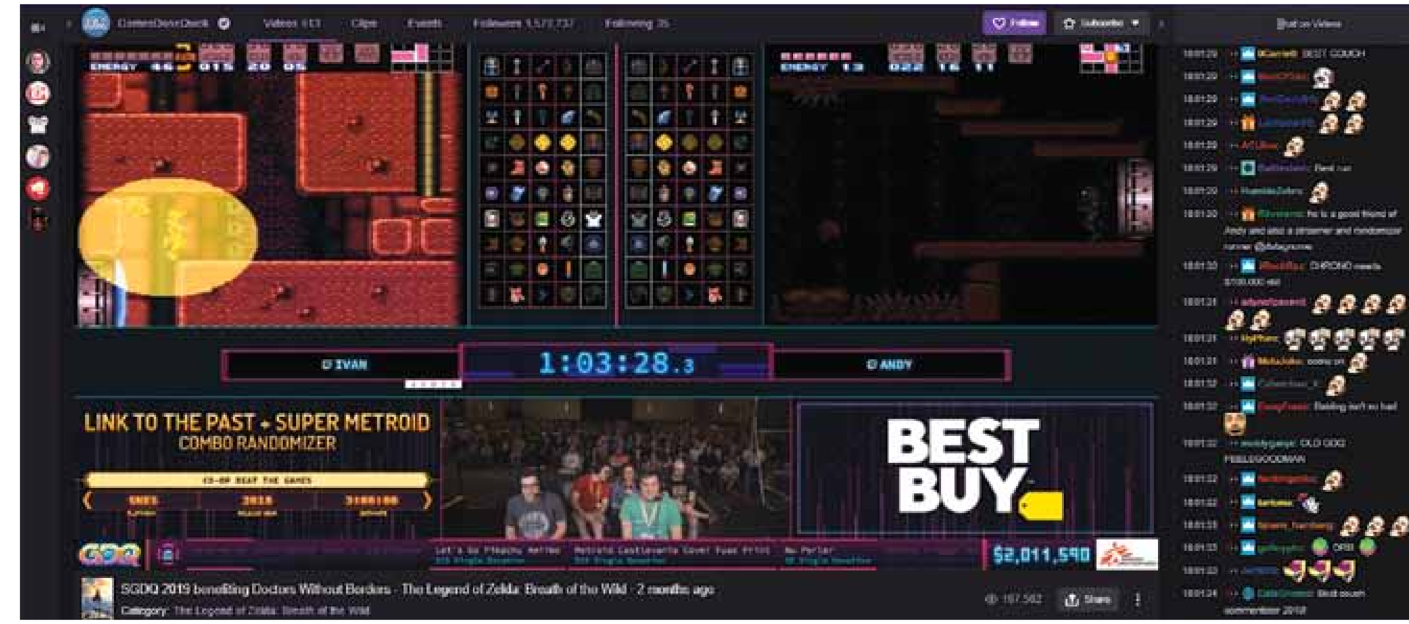
Livestreaming satisfies that hunger, because everything is immediate. You no longer need to wait two weeks for a gift to be acknowledged by mail. The streamer will often acknowledge you verbally and with a popup alert for all to see and hear. Adding interesting donation incentives and milestones, such as eating a potentially terrible jelly bean (Google "BeanBoozled" when you get a chance), giving away goodies or playing a game blindfolded (see Zallard1's record speedrun of Punch Out at Summer Games Done Quick), in exchange for a donation makes it fun for everyone watching.

How many people are watching? In January 2018, Business Insider reported that Twitch was averaging 962,000 concurrent viewers per day, which places it in direct competition with traditional mass media markets.

While the growth of Twitch itself is impressive, investment in the most popular streaming platforms is a strong indicator that this will not be a passing fad. Amazon spent almost $1 billion to acquire Twitch, Google owns YouTube, Facebook remains a ubiquitous aspect of modern life and Microsoft owns Mixer.

With this level of backing, organizations should be assured that their own investment in streaming will be equally worthwhile as their engagement and acknowledgement of the medium is its own form of positive participation. For example, simply providing streamers with resources, such as your branding for their screen overlays, not only provides streamers a sense of pride in associating with an organization's brand, but also gives organizations a low-cost marketing opportunity.





Speedrunners Ivan and Andy compete to finish a Zelda/Metroid randomized game in front of a full room and lively online audience during Summer Games Done Quick 2019 in Bloomington, Minnesota. The graphic overlay displays basic game information, branding for the beneficiary Doctors Without Borders and branding for Best Buy, one of the event sponsors.

Streamers as volunteer ambassadors. Beyond the use of branding, streamers are also encouraged to talk about the organization they are raising money for. They already have a captive audience, so it is a prime opportunity to raise awareness for an organization. Organizations should also take it upon themselves to participate in the streamer's chat to engage directly with viewers, who are also potential donors.

Organizations that invested early have seen positive returns. According to Cohort3, The Children's Miracle Network Hospitals, through their fundraising program Extra Life, is leading the way. Extra Life streamers raised $11 million in 2017 and $50 million since its inception in 2009. St. Jude Children's Hospital raised $3.4 million in 2017 and $18 million overall in livestream fundraising. MSF and Prevent Cancer Foundation each raised a little over $2 million in 2017, and Direct Relief rounded out the 2017 top five with around $1 million raised.

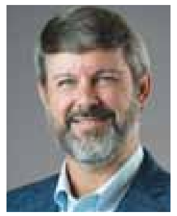
Given the size of the market, the numbers above indicate that nonprofits are only scratching the surface of what livestream fundraising can do for them. To coin a popular Twitch phrase: Get on the livestream hype train!

Marc Almanzor is the manager of development systems at Doctors Without Borders/Médecins Sans Frontières. Marc has over 15 years' experience in nonprofit fundraising, with roles in direct response, major gifts, foundation giving, database management and operations. He can also be found streaming on Twitch several nights a week. To learn more about this topic, reach out to Marc at marc.almanzor@newyork.msf.org.

TACTICS WITH BIG IMPACT

Models Are Not Just for Prospecting Anymore

By Bruce Demaree



The value of nonprofit cooperative data modeling is firmly established. Mail plans that used to include multiple list rental and exchange relationships now rely on the power of cooperative modeling to turbocharge results. Organizations have seen the benefits modeling offers to donor acquisition campaigns.

But acquisition performance is just one aspect of how modeling can help nonprofits succeed. Unique analytic strategies combined with powerful data offer a variety of important solutions far beyond new donor prospecting.

Now that you're reaping the rewards of response modeling, consider these solutions to help exceed your fundraising goals!

LAPSED MODELING

When used to predict which of your lapsed donors can successfully reinstate as active contributors to your organization, modeling is an extremely effective tool. Working with strong cooperative data enables organizations of all sizes to revive dormant donor relationships by finding not only who is most able to give again, but also at what contribution level.

If your organization is large or mid-sized and regularly captures new gifts from lapsed donors in sizable quantity, a customized reinstatement model can leverage this important behavior.

Photo: Credit: Photographer is my life, iStock/Getty Images

By evaluating which of your lapsed donors returned to active status and using a wealth of nonprofit transactions, good modeling and data will be able to predict which of your lapsed donors are most likely to give again, and what gift amount they are most likely to give to your organization. The customization of this model is important, as it represents the opportunity to gain specific predictions about who will give to your mission and what gift they will give to your organization.

> “WORKING WITH STRONG COOPERATIVE DATA ENABLES ORGANIZATIONS OF ALL SIZES TO REVIVE DORMANT DONOR RELATIONSHIPS BY FINDING NOT ONLY WHO IS MOST ABLE TO GIVE AGAIN, BUT ALSO AT WHAT CONTRIBUTION LEVEL.”

Smaller organizations can also benefit from lapsed modeling solutions. Comprehensively understanding who has given to other nonprofits offers insight to determine who will reactivate to yours. As your program grows, a modeler's ability to refine and customize your reinstatement process will grow, too.

WARM PROSPECT MODELING

The benefits of using modeling to score data have proven time after time that warm prospect audiences can be targeted for a specific event or cause successfully. Modelers have the ability to profile and segment in ways that focus your marketing efforts on the right prospect for the right outcome.

When an organization has volunteers, event attendees, members, activists and ticket-buyers, scoring that list can be useful in targeting a specific audience or mission. Modelers can apply scores to each name so you can predict who has the capacity to donate based on the modeler's database of knowledge. When you have an annual fundraiser gala that needs to yield an amount of donations to break even, scoring for the propensity to give at a certain level can help you plan for a successful event.

Most modelers charge competitively to make this worth the time and expense—so you're only paying about $0.05 a name to get this valuable information. These scorings are best used within 90 days, as databases are typically updated on a monthly and quarterly basis.

LTV MODELS

While models predicting response are fundamental to nonprofit acquisition prospecting, fulfilling key Lifetime Value (LTV) metrics is often a more important goal. From a modeling perspective, it may require the blending of upfront returns with predictions about donors' ability to give additional gifts over the course of time, and at what giving levels.

Understanding an organization's historic LTV performance and future goals enables the creation of models designed to specifically achieve these objectives. Campaign performance will need to be evaluated over a greater timeframe as front-end response may appear lower than usual as gift performance is prioritized.

> “THE BENEFITS OF USING MODELING TO SCORE DATA HAVE PROVEN TIME AFTER TIME THAT WARM PROSPECT AUDIENCES CAN BE TARGETED FOR A SPECIFIC EVENT OR CAUSE SUCCESSFULLY. MODELERS HAVE THE ABILITY TO PROFILE AND SEGMENT IN WAYS THAT FOCUS YOUR MARKETING EFFORTS ON THE RIGHT PROSPECT FOR THE RIGHT OUTCOME.”

Work carefully with your modeler to define campaign success. Given the correct data and direction, LTV models help you cure the "one and done" syndrome and find the dedicated and productive donors needed for your organization's long-term success.

CONCLUSION

When choosing your modelers, ask these questions:

• What data do you work with?
• What is your experience in the nonprofit sector?

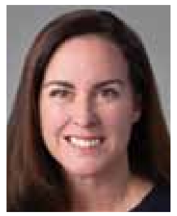
This is crucial to obtaining the results you expect and need. A good cooperative database modeler should be willing to demonstrate its results with confidence in the manner that most benefits your organization.

Bruce Demaree is president of DonorBase, the cooperative database devoted exclusively to nonprofits and fundraisers. Bruce oversees product development, internal processes and team staffing at the company. He can be reached at bruce.demaree@donorbase.com.

MARKETING ADVENTS OCTOBER 2019

Data Literacy Is Key

Allison Porter



While donating is often an emotional response, fundraising strategy should not be. Now more than ever, fundraisers are focusing on how data must guide their fundraising decision-making, providing their leadership and boards with the information they need to make thoughtful, data-based decisions.

Data can help provide strategic guidance: from a minor head-to-head email test to the broader decisions—like how much you should be investing in acquiring new donors to grow your program, or what the impact of new sustainers will be on strengthening the long-term value of your donor file.

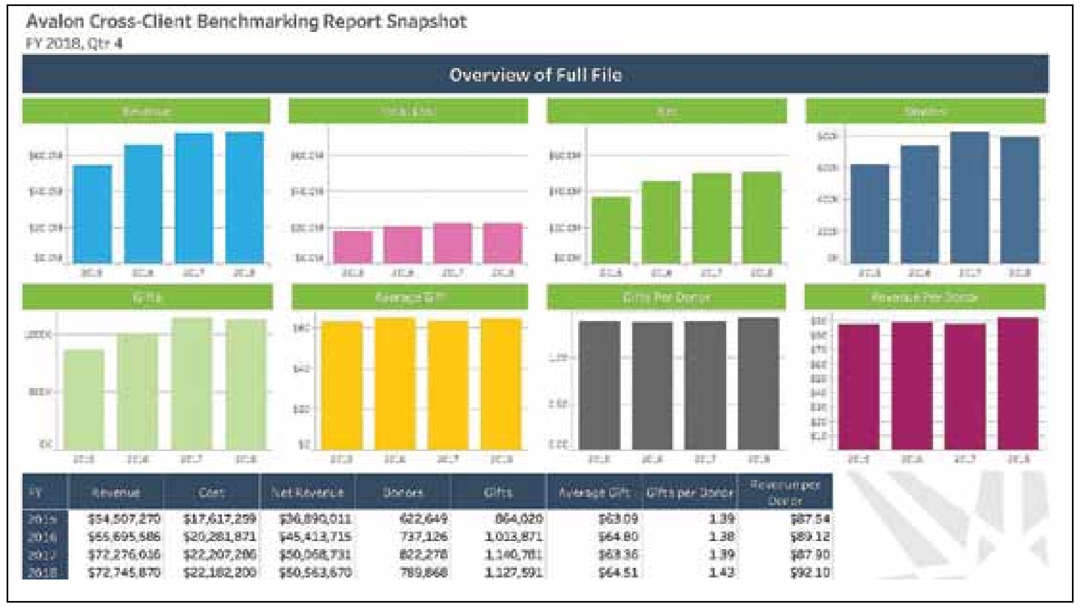


Figure 2: Track and compare your program's year-to-date performance.

DATA SKILLS FOR ALL

But in order to have this information at your fingertips and ensure that your organization is interpreting it correctly, you need to focus on strengthening your organization's data literacy at all levels.

According to Blackbaud's Steve McLaughlin, writing in npEngage recently:

> *"Data literacy will become one of the most important skills for a nonprofit professional to possess…Can you read a chart? Can you explain what is happening based on data? Can you balance quantitative and qualitative information? Can you make data-driven decisions? Build these skills, and hire for them, too."*

Ongoing learning and teaching data literacy as part of long-term staff and leadership development is critical. As fundraisers, we need to continuously foster a learning culture where questions can be asked about complicated data concepts. And because data learning isn't finite, we need to give everyone baseline information and then keep teaching from there—constantly updating and improving.

With all the performance testing we do, as well as the myriad markets we're exploring for acquisition, data literacy is particularly necessary for optimizing direct mail results. We look at our data on a forensic level. Not just at initial results, but results over time as donors stay on the file or leave, always studying the patterns and trends we can test.

Figure 1: An at-a-glance overview of your KPIs.

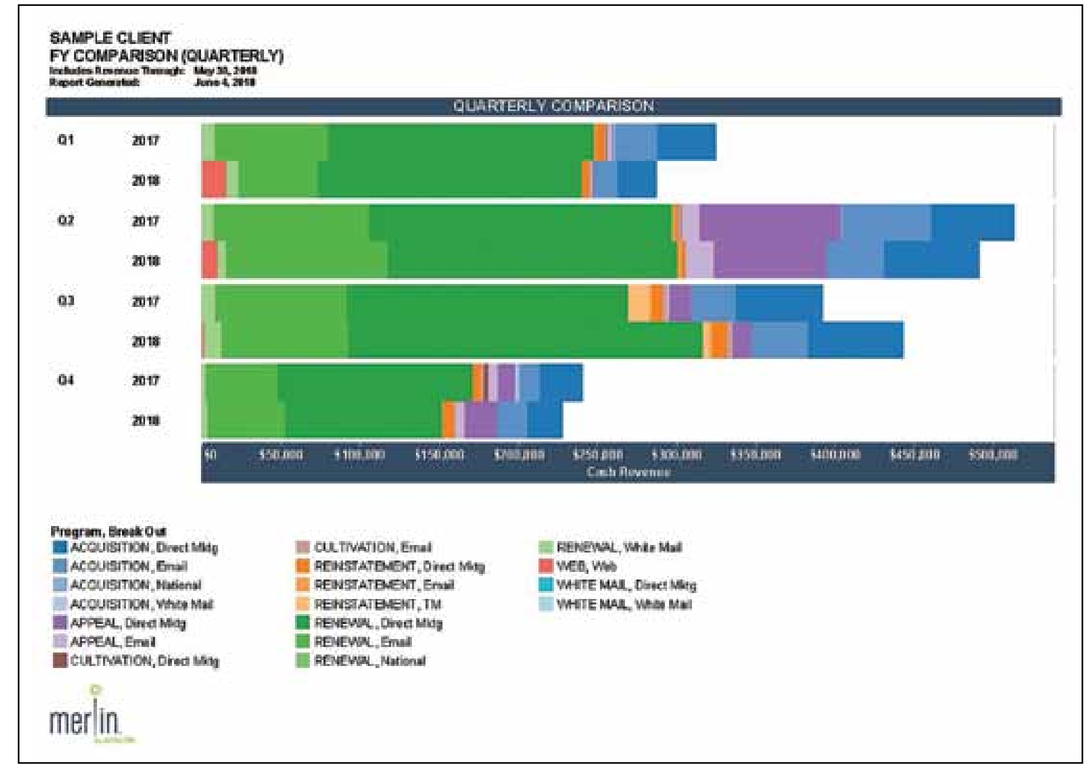


Figure 3: Quarterly year-over-year comparison by program.

TOOLS THAT PROVIDE INSIGHTS INTO NONPROFIT DONORS

Nonprofits are often frustrated by not having the tools they need to really know their donors. But free, unique donor profile reports are offered by many of the donor co-op database companies—with demographic and behavioral information and industry benchmarks.

This kind of data work helps us round out our understanding of who donors are and what motivates them. But what is the data telling us about our fundraising program?

It's vital for all direct marketers these days to analyze their own data and draw evidence-based conclusions that they can act on—in the mail and online. In this age of big data, being able to glean key information from your data to improve your program can be the low-hanging fruit of fundraising.

The key top-level stats that direct marketers should have at their fingertips include:

- Year-to-date revenue compared to budget
- Monthly revenue tracking
- Cumulative revenue to date compared to prior years
- Year-over-year revenue by channel (white mail, telemarketing, email, direct mail, website, etc.)
- Year-over-year comparisons with revenue variance by program

If you don't have a firm grasp on all of these top-level tracking numbers—in addition to your individual campaign reports—there's no way you can understand where your programs are on track or off track and be able to make the necessary adjustments.

Whatever data system you use, you need daily access to clearly understandable data reports that give you the answers you need—to know where your file stands at all times, inform your next steps and help strategize long-range planning.

Allison Porter is the president & co-founder of Avalon Consulting Group. Connect with Allison via email at allisonp@avalonconsulting.net. Visit avalonconsulting.net for more information on how Avalon can help you meet your fundraising goals.

Donor Journey Automation

Continued from page 1

or a volunteer sign-up). Then a query at the beginning of a workflow identifies the donors who share these criteria within the same timeframe.

A communication, such as an email, is sent out to the identified group. The outcome of that send (open, click-through, bounce) is the next dated event captured in your data and, in turn, triggers the next event (like a follow-up phone call, retargeting or a mailing). While you can set minimum quantities for efficiency when printing or for the purpose of ensuring test segment sizes, technically, you can design workflows to be initiated for any quantity and carried through to any number of subsequent actions.

One of the biggest challenges is keeping up with enough relevant content to fit all of the variable touchpoints built into your workflows, especially if you want your donor journeys to match combinations of interests, captured by email preference centers, surveys, appends and prior responsiveness.

Potentially, each workflow becomes its own "choose your own adventure." The danger is mapping out more interactions than you have content to support, either right now or sustainably into the future.

Imagine you are writing thank-you cards after your wedding — you set out to address everyone with maximum personalization, but at some point, it's inevitable that your messages get a bit repetitive. It's not a failure of your data (you have faithfully recorded each present and giver), but in the variability of your messaging.

Don't plan to convert your complete communications calendar to a series of multifaceted, cross-channel donor journeys immediately. It's advisable

> **DON'T PLAN TO CONVERT YOUR COMPLETE COMMUNICATIONS CALENDAR TO A SERIES OF MULTIFACETED, CROSS-CHANNEL DONOR JOURNEYS IMMEDIATELY. IT'S ADVISABLE TO EMPHASIZE LESS EXPENSIVE ONLINE CHANNELS FIRST.**

to emphasize less expensive online channels first. You should also identify some repetitive and rolling activities (like a welcome series, an anniversary touchpoint, a membership renewal, a monthly statement, acknowledgements) and implement them in your new tool, taking advantage of the multiple touchpoint capacity, and build from there. Just like any other technique, you should test it. Because marketing through this tool is significantly different, I suggest creating a representative hold-out population and implementing your regular direct marketing program to that group, and compare your success metrics at the conclusion of a predefined timeline.

Depending on the nature and goals of your automated workflows, those success metrics may vary, but they will be health-of-the-file stats, like conversion or retention rates, and aggregate changes in donor value.

You shouldn't try to compare campaign statistics, because the workflows may span across multiple traditional campaigns for some or all of the donors included in them.

In addition to changing how you interact with donors, these tools can also be transformative to cross-departmental teams. They provide a space for technical, operational, analytical, creative and strategic work to come together. If you believe that collaboration and unifying multiple skill sets is positive, these tools are great for your organization.

Like so many good ideas, these tools are not turnkey solutions ready to transform your work tomorrow. However, with patience and planning, you can start to move those donor journeys from your white board to reality. Good luck!

A.J. Minogue is the director of data analysis and reporting at UJA-Federation of New York. He has held similar roles at the ASPCA, National Audubon Society and Amnesty International, USA. A.J. can be reached at minoguea@ujafedny.org.

Marketing AdVents

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News Notes

● **John E. Groman,** one of four original founders of Epsilon, passed away on Aug. 24 at the age of 74. After graduating from Harvard Business School and Yale University, John co-founded Epsilon along with Tom Jones, Hal Brierly and Bob Drummond. The company, which focused on nonprofit database and direct marketing, was originally called Fraternal Systems, Inc., but changed its name to Epsilon in 1970. "Anyone who ever met John saw that he was a 'larger than life' personality. When I first met him in my 20s, it was hard not to be intimidated by him. He was so freaking smart—among the handful of smartest people I've ever met—and totally fearless in his opinions. Just sitting in a meeting with him felt like a creative master class, although his critiques were sometimes painful—but almost always correct," said Tom Gaffny, who previously worked at Epsilon for 28 years.

Photo: iStock/Getty Images

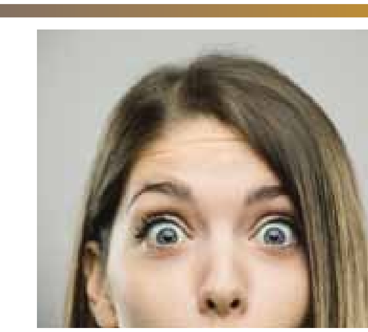
● Full-service direct mail production and mailing services company **Johnson & Quin** has opened up a chapter into a new era. According to a press release on BusinessWire, the company has announced that all client direct mail programs are now printed and personalized on high-speed color inkjet presses. The company has removed all monochrome laser printers in its facility in Niles, Illinois. Additionally, Johnson & Quin is adding a third color inkjet press—a Screen Truepress Jet520ZZ Advanced High-Speed Color Inkjet Printing System. This addition complements two existing screen color inkjet presses, the release said. "Johnson & Quin added its first high-speed color inkjet press four years ago. Our staff and clients have quickly adapted to this efficient and flexible technology, allowing us to convert all programs to color inkjet production with its many benefits. At Johnson & Quin we are continually seeking out new technologies and pressing the limits of those technologies to improve quality, increase production speeds and lower costs," **Bob Arkema,** EVP at Johnson & Quin, said in the release.

● According to Business Insider, the **United States Postal Service** reported that in the second quarter of 2019, it moved 47 million fewer packages than it did in the same period of 2018 (a 3.2% decline). Meanwhile, it also reported that its revenue in that sector increased 4.8%. As an explanation, USPS said in its quarterly report that "certain major customers in the Postal Service have recently begun diverting additional volume from the Postal Service's network by in-sourcing the last-mile delivery." Although USPS didn't disclose which customers were taking their packages out of the USPS network, analysts suspect that it's Amazon and FedEx.

Is something exciting happening in your company or organization?

Tell us about it!

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



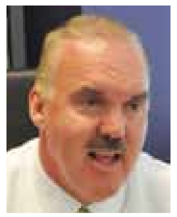
MARKETING ADVENTS OCTOBER 2019

DMAW/EF

DMAW Educational Foundation

And It Started With Just 2 Numbers

By Rick Whelan



Even with all the advances in the art of almost instant global personal communications, I still like to write a personal note or card now and then to friends. Each time I do, I almost always have to search for the right zip code to send it to.

We take the success of routine mail delivery for granted, but it was not always so. With the advent of World War II, the post office was experiencing a severe shortage of delivery staff and had to come up with a more efficient way to sort, bundle and deliver mail across the country.

Thus, in 1943, large cities were tagged with a two-digit code; those two digits grew to five in 1963. Zip plus four digits was added in 1983 and, soon after, the "sprayed-on" Intelligent Mail barcode was added. Now, we even have "Informed Delivery," so we know what is coming and when.

Today, there are 57,000 unique city/state zip code combinations that give the post office the exact location of your business, house, condo, apartment, trailer or even boat. I tell people that for the cost of a stamp, the USPS will hunt you down and deliver my direct mail piece—there is no place to hide.

USPS's website shows it adding over 4,000 new addresses and processing over 484 million pieces of mail every day. It even boasts about delivering 3.5 million corporate emails daily. The post office is ever-evolving, and now is the "final mile" deliverer of many e-commerce purchases. There is even talk about adding additional retail and banking services to many post office locations, as is common in Europe.

How far we have come from those early days of mail delivery will pale in comparison to where we'll be in the next decades. The advances in technology seem to come faster and faster every year. As with all other aspects of our busy lives, the need to communicate with one another almost instantaneously has led to 24/7 messaging and, sadly, traditional mail has fallen out of favor as just too slow.

I realize I am a bit old-fashioned, but I'd still argue that the joy of receiving a personal letter, holiday card or postcard will never be fully replaced with technology. Somehow, the delight and satisfaction of opening a letter or card from a loved one will never be replaced with an email or electronic card. They are not better or worse, just different.

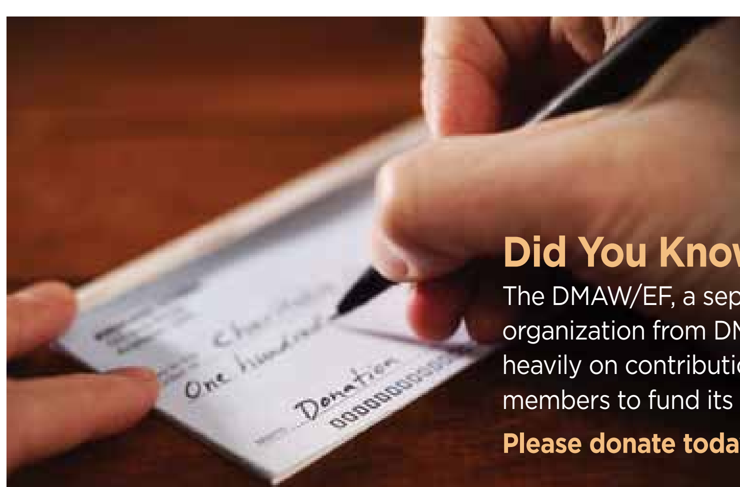
But there is another way to find joy: through volunteering. Carving out time in this fast-paced 24/7 world to give back to others does a body good. Literally.

The benefits of volunteering are huge. Not only does volunteering help people in need, worthwhile causes and the community, volunteering offers benefits for you, too. You can meet friends, connect with the industry, learn new skills and advance your career. Plus, it's known to reduce stress, combat depression, keep you mentally stimulated and provide a sense of purpose. While it's true that the more you volunteer, the more benefits you'll experience, volunteering doesn't have to involve a long-term commitment or take tons of time out of your busy schedule. Giving, even in simple ways, can help.

If you are looking for ways to improve your health and happiness, consider volunteering! The DMAW/EF has programs, like the Collegiate Maxi Awards*, our Mentor For a Day initiative and the Professor's Institute, that could use your help. To find out how you can get involved, contact Amy Steinbicker at amy@dmawef.org or 703-407-1663.

**This all-day competition, where student teams create an integrated marketing communications plan designed to help resolve the challenge of a selected nonprofit organization, gives students the opportunity to tackle real-world marketing problems and improve key professional skills, like business writing and presenting. The next one is scheduled for Nov. 15.*

A widely-known industry expert, Rick Whelan has developed creative strategies for MGI clients for 30+ years. As company president, he is responsible for the organization's overall direction and guidance. He is an esteemed member of the DMAW Hall of Leaders, recognizing his lifetime contributions to direct marketing. A frequent presenter and speaker, Rick has also authored numerous articles on association marketing. He is also a board member of 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

MICHELE LUNSFORD
Sr. Marketing & Communications Officer
Humanity & Inclusion
mlunsford@hi.org

Michele Lunsford was introduced into the direct marketing world in 2016 when she joined Humanity & Inclusion, then known as Handicap International. At Humanity & Inclusion, she has had the incredible opportunity to support its fundraising team in all aspects of digital marketing, because the communications and fundraising teams work together as one team.

Humanity & Inclusion is raising funds for a great cause. The organization's teams work in 60 countries to ensure that people with disabilities can stand tall during conflict and disaster, and in all situations of poverty and exclusion. During the most difficult times, Humanity & Inclusion staff are there, and that's what made Michele fall in love with her work.

She's not just supporting the design of an appeal email, so that the organization hits its numbers at the end of the year; she's supporting the design of an appeal, so that she can help change the lives of people with disabilities around the globe.

Location: Silver Spring, Maryland

Education: Trinity Washington University, B.A. in communications; and American University, M.A. in strategic communications in marketing

DMAW Member Since: 2017

Whom do you consider your mentors?
One past and one present. As the youngest of five children and the first to attend college, sitting in a classroom at Trinity University felt daunting. That is, until I attended a journalism class led by Dr. Raúl Tovares. Dr. Tovares was instrumental in me finding my place in communications and helping me see the possibilities for my career. Present day, my mentor is my director at Humanity & Inclusion, Mica Bevington. Mica has a vast range of communications experience and has a genuine interest in teaching me everything she knows—all things communications and "working mom" related. She consistently supports and encourages me. And whether she knows it or not, she pushes me to do more, be better and take on new challenges no matter how uncomfortable it makes me feel.

What advice would you offer a novice who wants to move up in direct marketing?
Talk to everyone and find a good mentor. OK, so maybe not everyone (stranger danger), but find the right people and observe them. What kinds of things are they doing? How are they connecting with others? Follow their lead. Finding a good mentor is vital. It may take time before you find a perfect fit, but keep putting yourself out there. Seasoned professionals want to be helpful and share their knowledge. Don't be afraid to ask someone out for coffee. Also be sure to jump on every opportunity you can to engage with folks from DMAW and other similar networks. Be active on LinkedIn groups. And share what you're doing with others. Because someday, you'll be on the other side of the table.

What is the most helpful step you took to advance your direct marketing career?
I raised my hand—a lot. If there was something new or interesting that I wanted to learn and be a part of, I put myself out there. Even in moments when I already had a full plate, I asked to be included in a project or campaign where I knew I would take away a great deal of experience. It shows initiative and it makes for a good team player. I'm fortunate to be surrounded by fundraising professionals who know a great deal about direct marketing, so I did a lot of listening and observing before diving in.

Tell us about your experiences with DMAW.
I've attended Digital Day for the last three years and, at all of these events, I had the opportunity to connect with some of the most incredible marketing folks in the field. Digital Day draws a diverse group of marketing professionals that I've enjoyed interacting with. I've learned so many tips, tricks and best practices in these daylong gatherings that have impacted my work at Humanity & Inclusion.

Describe yourself in three words.
Driven, energetic, passionate.

Describe your life in six words.
Seeking adventure with coffee in hand.

Michele's Favorites

Restaurants Mi Rancho in Silver Spring, Maryland

Films "You've Got Mail" and "When Harry Met Sally"—anything with Meg Ryan.

Books Anything by Sophie Kinsella! I also enjoy travel books, like "Eat Pray Love" and "Into the Wild."

Music I have a range of favorites from Maroon 5 and Lily Allen to Michael Bublé and the Dixie Chicks.

Leisure Interests Hiking, swimming and park crawls (because my kids are too young for bar crawls) with the family.

Quote "Sometimes I'll start a sentence, and I don't even know where it's going. I just hope I find it along the way." — Michael Scott