TARGETING YOUR AUDIENCE WITH <u>PRECISION</u> DATA PROCESSING

DMAW Production Week April 21, 2021



Our Presenters



Joanne Meredith

Vice President Annual Giving & Membership National Geographic



David Padilla, EMCM

President CorePro Data Direct



Alex Newell

Senior Sourcing Manager Production Solutions **DMAW Production Week** Wednesday, April 21, 2021

- Success Stories
- Selective Segmentation
- Performance Comparisons
- Data Processing Timeline
- Importance of Clean Instructions
- Do's and Don'ts! of Data





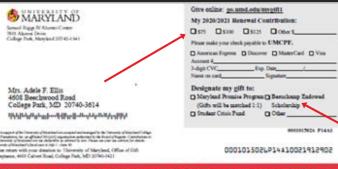
Survey Question 1

ON A SCALE OF 1 – 10, HOW INTIMIDATED DOES THE THOUGHT OF DATA PROCESSING MAKE YOU FEEL?



Success Story #1: Maryland Central Appeal

August 2020



UNIVERSITY OF MARYLAND ANNUAL FUND DRIVE

MARYLAND

Dear Mrs. Ellis,

Thank you for your continued commitment to the University of Maryland.

Your gifts are making a positive impact on our ability to provide emergency resources and scholarships to deserving students...thank you! In fact, your past contributions of as much as \$50 are now helping some of our very best students and educational programs.

Indeed, as your support to the University of Maryland continues to grow, you are helping ensure for all of us that our collective future is as bright as our past.

When alumni and friends like you contribute to scholarships like the Maryland Promise Program or emergency funds such as the Student Crisis Fund, you are supporting the power of giving and all of its benefits to our Maryland community.

I am asking you and fellow alumni a and their families have been impocted finan friends will help provide resources for our st

to count you among our loyal Terp supports

So if you could renew your annual co course, every gift counts, and if you can give

Sincerely

Executive Dire d Annual Giving

P.S. With your renewal gift, Mrs. Ellis, we can ensure that Maryland students he resources they need to be successful. A special scholarship gift to the Maryland matched dollar-for-dollar. Please make your commitment for fiscal year 2020/20 tax-deductible gift today. Thank you!

August 2019



MARYLAND

Success Story #1: Maryland Central Appeal

Targeted Segments:
Mail only donors
Q1 online donors
Black & Gold donors
Adjusted ask levels
Proven appeal

OND Central Appear Performance Comparison							
	<u>Aug 2020</u>	Aug 2019 Difference +/-					
Quantity:	11,712	8,522	3,190				
Response Rate:	10.72%	4.20%	6.52%				
Revenue:	\$142,705	\$33,496	\$109,209				
Donors:	1,256	358	898				
Average Gift:	\$113	\$93.56	\$19.44				
Gift Ranges:	\$2-\$12,000	\$5-\$5,000					

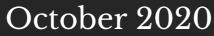
LIMD Control Anneal Performance Comparison

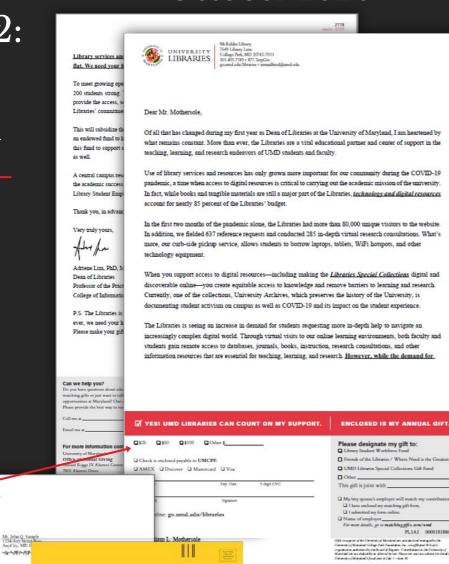
August 2020 326% Increase in revenue 251% Increase in donors

Success Story #2: Libraries Renewal Appeal

CUNIVERSITY LIBRARIES

You are a vital Libraries partner.





Read, College Park, MD 20740-3421

MARYLAND

Information in the American State of the State of State

0000181886PL1A10022032713

December 2019



anto 2

January 2020

Dear Ms. Williams.

As the new Dean of Libraries, I write today to introduce myself and share my excitement at joining the ourstanding University of Maryland Libraries. Evidence abounds that UMD students and faculty are thriving in their lives and studies, and that they view the Libraries as a valuable educational partner and center of support in their academic endeavors.

To meet our users' growing academic and information needs, we in the Libraries rely heavily on our 300-person strong student employee workforce. Our undergraduate student workers and graduate assistants provide services that are vital to our library mission and critical for supporting the foundational teaching and service programs of the Libraries. As a sign of our appreciation for this work, my colleagues and I want to ensure that our student employees eam good wages, learn foundational leadership skills, and gain real-world job experience: in a supportive environment.



To demonstrate my commitment to our student employees, I am creating the Library. Student Employee Workforce Fund. This find will subsidize the Librarie' budget for student workers and training programs, and will grow ultimately into an endowed fund to help us continue employing students for many years to come. I am making a personal financial contribution to this new fund to ensure that our student workers know they are valued and appreciated.

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I hope you will join me in this effort by making a gift of \$100, \$75, or \$50 to the *Library Student Employee Horkforce Fund*. I know our students will appreciate your support of their quest for academic success. Together, we can enhance students' employment-based learning experiences and ensure that the Libraries' important mission is sustained, now and in the future.

Very truly yours,

Adriene Lim, PhD, MLIS Dean of Libraries Professor of the Practice, College of Information Students

P.S. Giving is easy! Make your gift by visiting go.umd.edu/makeagift or use the enclosed envelope. Thank you!



Success Story #2: Maryland Libraries Renewal

Targeted Segments:
First ask via Libraries
Adjusted ask levels
Personalization
Copy & Length
Envelope teaser

Libraries Performance Comparison

	<u>Oct 2020</u>	<u>Dec 2019</u>	Difference +/-		
Quantity:	2,848	3,845	-997		
Response Rate:	8.2%	1.20%	7%		
Revenue:	\$24,505	\$3,885	\$20,620		
Donors:	233	48			
Average Gift:	\$100	\$80	\$20		
Gift Ranges:	\$5-\$2,500	\$5-\$500			

October 2020 531% Increase in revenue 385% Increase in donors

Sept 2018: Qty: 8,454 Resp%: 1.53% Rev: \$9,704 Donors: 129 Avg\$: \$75.23

Quick win: Review your ask levels

	FY20 Ask Levels								
All Segments	Ask 1	Ask 2	Ask 3	Ask 4	Ask 5				
\$0-\$50	\$100	\$50	\$25	\$10	Surprise Us!				
\$51-\$100	\$100	\$75	\$50	\$25	Surprise Us!				
\$101-\$250	\$250	\$100	\$75	\$50	Surprise Us!				
\$251-\$500	\$500	\$250	\$100	\$75	Surprise Us!				
\$500-\$1,000	\$1,000	\$500	\$250	\$100	Surprise Us!				
\$1,001-\$4,999	\$2,500	\$1,500	\$1,000	\$500	Surprise Us!				
\$5,000+	\$5,000	\$7,500	\$10,000	Surprise Us!	Added this level in April 2020				

Quick Win: Review your plan

2020 OVERALL GIVING DISTRIBUTION BY MONTH BY SUBSECTOR

SUBSECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	ост	NOV	DEC
Animal Welfare	6.6%	7.1%	9.0%	6.2%	6.9%	6.8%	7.6%	6.9%	5.6%	7.7%	8.6%	21.0%
Arts and Culture	8.6%	6.1%	6.7%	7.7%	7.4%	8.7%	7.0%	6.0%	7.1%	7.7%	7.7%	19.4%
Environment	6.0%	5.4%	5.0%	7.8%	6.2%	10.6%	7.5%	8.4%	6.8%	10.4%	7.3%	18.8%
Faith-Based	6.8%	6.3%	7.6%	7.0%	7.5%	8.5%	7.5%	6.2%	7.4%	8.2%	7.8%	19.1%
Healthcare	7.7%	6.1%	7.9%	8.5%	7.5%	7.3%	6.4%	6.0%	6.7%	6.4%	7.6%	21.7%
Higher Education	6.8%	6.4%	6.8%	5.0%	5.9%	12.9%	7.7%	6.5%	6.3%	7.8%	8.5%	19.6%
Human Services	6.1%	5.4%	7.6%	10.4%	7.7%	8.0%	6.8%	6.2%	6.5%	6.9%	8.3%	20.2%
International Affairs	6.7%	6.6%	7.9%	11.8%	6.9%	8.5%	7.4%	5.6%	5.6%	6.9%	6.5%	19.5%
K–12 Education	8.6%	6.2%	5.6%	5.0%	6.4%	13.5%	5.6%	6.0%	6.2%	7.3%	7.4%	22.3%
Medical Research	9.0%	7.1%	8.7%	6.0%	4.5%	7.4%	6.1%	4.4%	6.7%	6.9%	7.0%	26.0%
Public and Society Benefit	7.1%	6.3%	7.3%	5.7%	5.8%	10.9%	9.1%	7.4%	7.1%	9.3%	8.0%	16.0%
ALL SUBSECTORS	7.1%	6.1%	7.1%	7.3%	6.7%	10.2%	7.1%	6.2%	6.4%	7.4%	7.9%	20.3%

Green: Likely Pandemic driven; Red: Peak Months

Source: Blackbaud Charitable Giving Report Feb 2021

Speaking Directly to Donors: *Personalization Strategies: Opportunities in your data*

- Name
- City/Location
- Past or recent giving
- Years supporting
- Loyalty Society
- Internal Contact



University of Maryland 1000 Hiltop Carde, Ba	Baltimore County	Enclosed is my gift of: S Make check papable to UMRC Foundation Designate my gift to: President's Fund My gift is joint inb Mode productionause temployer will match my gift.
12/31/1996	\$25	My employer spaces e employer win maker my gir. Employer's name: My matching ailt form is enclosed. I will submit my form online.
 Mr. John Q. S 		Give online before June 30, 2019 giving.umbc.edu/renewal
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that offer the best inte UMBC you help to tra	rnship and servic nsform lives and m	I support for scholarships, research, and experiences e opportunities for our students. When you give to nake big breakthroughs. a difference. Thank you for your generosity and for
your support this fisca	l year.	
		Give online before June 30, 2019 giving.umbc.edu/renewal
		GRIT&GREATNESS The Campaign for UMIRC
	All contributions raised are admir	under The University of Maryland Foundation, Inc. EIN: 52-1125663 mistered by the UMBC Foundation for the benefit of UMBC. 3-20.6 INC IMBC Foundation: 1000 HIMB or Link Jacknesse MI 27500

main 4839



##First Name##,

Please give a gift of support to UMBC before midnight when our fiscal year ends.

Every gift and every amount will make a difference. Will you help?

Your gift can truly transform lives and make big breakthroughs. Annual gifts to UMBC provide continued support for scholarships, research, and experiences that offer the best internship and service opportunities for our students.

I hope we can count you as one of the last 800 alumni donors needed before midnight.

Thank you, in advance, for your support and generosity.

Sincere

Greg Simmons '04 Vice President for Institutional Advancement

>>>Count me in for a gift of \$25<<< >>>Count me in for a gift of \$50<<< >>>Count me in a for a gift of \$100<<< >>>Other Amount<<<

All funds raised are administered by the UMBC Foundation for the benefit of UMBC.

Survey Question 2

WHAT CAN YOU DO WITH YOUR DATA <u>TODAY</u> TO CHANGE YOUR RESULTS?

- 1) IMPROVE SEGMENTATION
- 2) MORE PERSONALIZATION
- 3) DATA HYGIENE
- 4) COLLABORATE WITH DATA PARTNERS





PROS & CONS

Data Services Partnership

Experienced

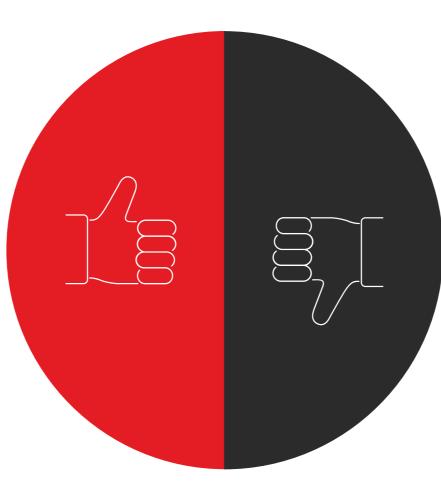
Not their first rodeo. A lot of very knowledgeable specialists work for data services agencies.

Saves Time

Services performed hundreds or even thousands of times every week. Automation is at the core of most agencies' standard procedures

Saves Money

Leverages data mining and postal discount processes that affect your project's bottom line.



You still need Instructions

An outline of the data processing requirements throughout the life of the project is still required.

You still need to offer guidance

When running a first-time project, guidance is very important to ensure total accuracy and pave the way for future projects.

It costs more than in-house

Unless you have a dedicated in-house data team, outsourcing will cost more in the short-term, but will yield exponentially greater savings in the long run.



Importance of Clean & Concise Data Processing Instructions

1 3 First in your list

Data processing is <u>not</u> the LAST thing you think of, it's the FIRST.



Fool-proof

Prevents unwanted processes and eliminates or, at the very least, diminishes unnecessary delays.



Laying out all steps in a clear manner optimizes efficiency for all parties involved. You can concentrate on reviewing results instead of re-visiting instructions.





Standard Processing Timeline

01.

02.

03.

Data Import

File Structure/Layout File format List of Lists Report

Data Hygiene

CASS NCOA / PCOA DMA / Suppressions Merge/Purge Enhancements / Appends

Data Segmentation

Audience Selection Control vs. Test Multi-buyers

Postal Treatment

04.

Full rate First Class Automation Discount Drop-shipping Commingling / Co-Pallets

Setup Preparation

05.

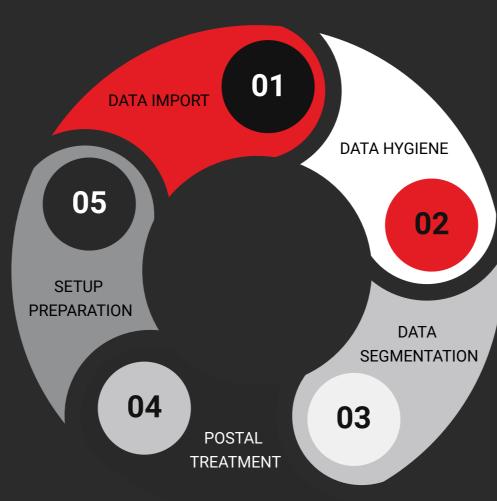
Variable Fields Dollar builds Scanlines Salutation Defaults

What information does your partner need?

* Do you need a password to open the data file(s)?
* Do you need a file layout?
* Do you have a list of expected files to be received?

 * Do you have FINAL art files?
 * Did you add notes/placeholders
 where variable data will need to be used on each personalization component?
 * Have you separated multiple component versions adequately?

* Do you need to presort?
* Do you have the mail owner's MID (Mailer ID) or CRID?
* Is the mail owner a Non-Profit? Do they have a NP Permit open?
* Do you have tracking information? Is this an Informed Delivery (ID) project?



- * What CASS return codes can you suppress?
- * What NCOA return codes can you suppress?
- * Is there a M/P list priority to follow? Will you also need matching record priority?
- * Will you need to suppress any records based on specific criteria?
- * How many packages should there be at the end of the process?
- * Is there a possibility of overlap between panel/package segments? How do you prioritize the selections in this case?
- * Do you need random or specific "nth" selections?



So...how long does it take?



Standard | 24 to 48 hours

Intermediate | 48 to 72 hours

Advanced | 3 to 7 business days

Complex | Up to 2 weeks



DO



01

Gather all needed files to complete the project

Having all files and documents ready for data processing - including art files - makes the process go faster and smoother for all parties involved.

02

Follow the standard data processing timeline as a guide

While progress points vary based on the scope of the project and the processor's unique priorities, the sample guideline can be used as a guide for standard expectations.

03

Stick to a standard format to review reports

By standardizing the format and layout of data reports for most if not all accounts or projects, your processor might be able to automate many steps that will help not only in timeliness but also, accuracy.

\bigotimes

04

Review all reports and send all changes at the same time

While edits might be sent and received at different times from the end client, the best approach is to consolidate edits into the minimum amount of communications either via email or a different source.



05

Keep track of changes.

By keeping track of all changes, you will be able to audit the project and communicate feedback to your processor in order to make the process leaner and more efficient in the future.



DON'T



01

Do not send incomplete data instructions

Sending incomplete instructions could yield incorrect assumptions or extend the processing time of your project unnecessarily, not to mention an increased risk of processing inaccuracies.

02

Do not provide "tentative" documents

This includes art and copy files. Just like incomplete data instructions, sending multiple versions of a document increases the risk of processing inaccuracies.

03

Do not include "boomerang" requests

Do not add the same processing request in different parts of the data instructions document, especially if it contains conflicting or opposite information.

04

Do not request files for manual edits

It is exponentially better to send specific requests to your data processor so they can make data changes electronically rather than requesting a subset of data for the client to edit manually.

05

Do not provide processing "orders"

Do not specify how you want the project completed, instead emphasize what the end result should look like. Your data processor will identify the best and most logical manner to accomplish the end goal.







Survey Question 3

AFTER TODAY'S SESSION, ON A SCALE OF 1 TO 10, DO YOU FEEL YOU ARE MORE PREPARED TO TACKE DATA PROCESSING?



DMAW Production Week Wednesday, April 21, 2021

Key Takeaways



Leverage partnerships tobecome an extension of

)) your team.

Alex Newell



DMAW Production Week Wednesday, April 21, 2021

THANK YOU!

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MORE.

DAVID PADILLA david@coreprodata.com

ALEX NEWELL anewell@psmail.com

