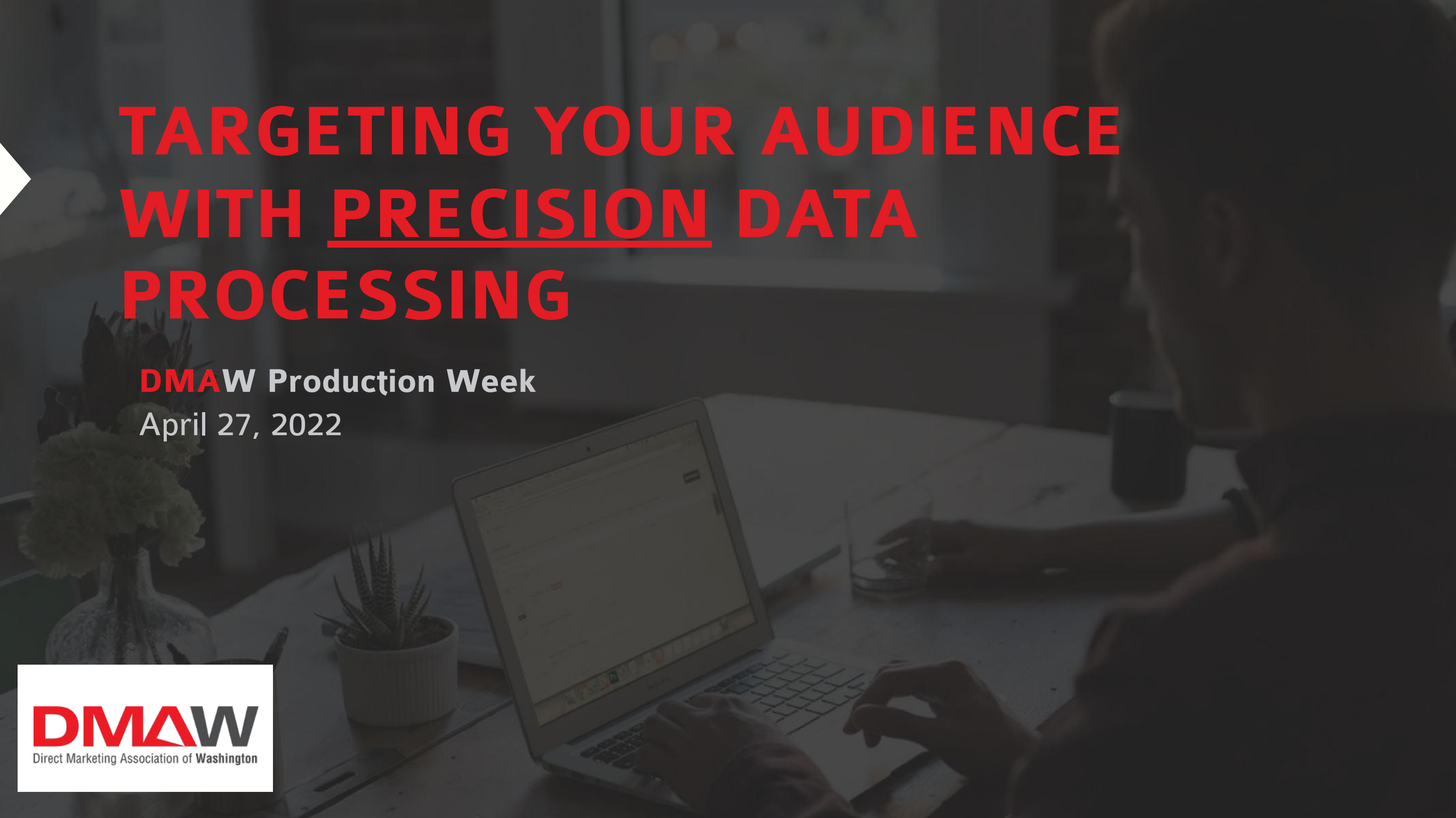
TARGETING YOUR AUDIENCE WITH PRECISION DATA PROCESSING

DMAW Production Week

April 27, 2022



DMAW
Direct Marketing Association of Washington

Our Presenters

Laura Rynkiewicz

Audience Strategist

Nexus Direct

David Padilla, EMCM

President

CorePro Data Direct

DMAW Production Week
Wednesday, April 27, 2022

- Planning and Preparation
- Dirty Data
  - Is having a clean database important?
- It's all about the "Personal Touch"
- Data Processing Timeline
- Importance of Clean Instructions
- Do's and Don'ts! of Data

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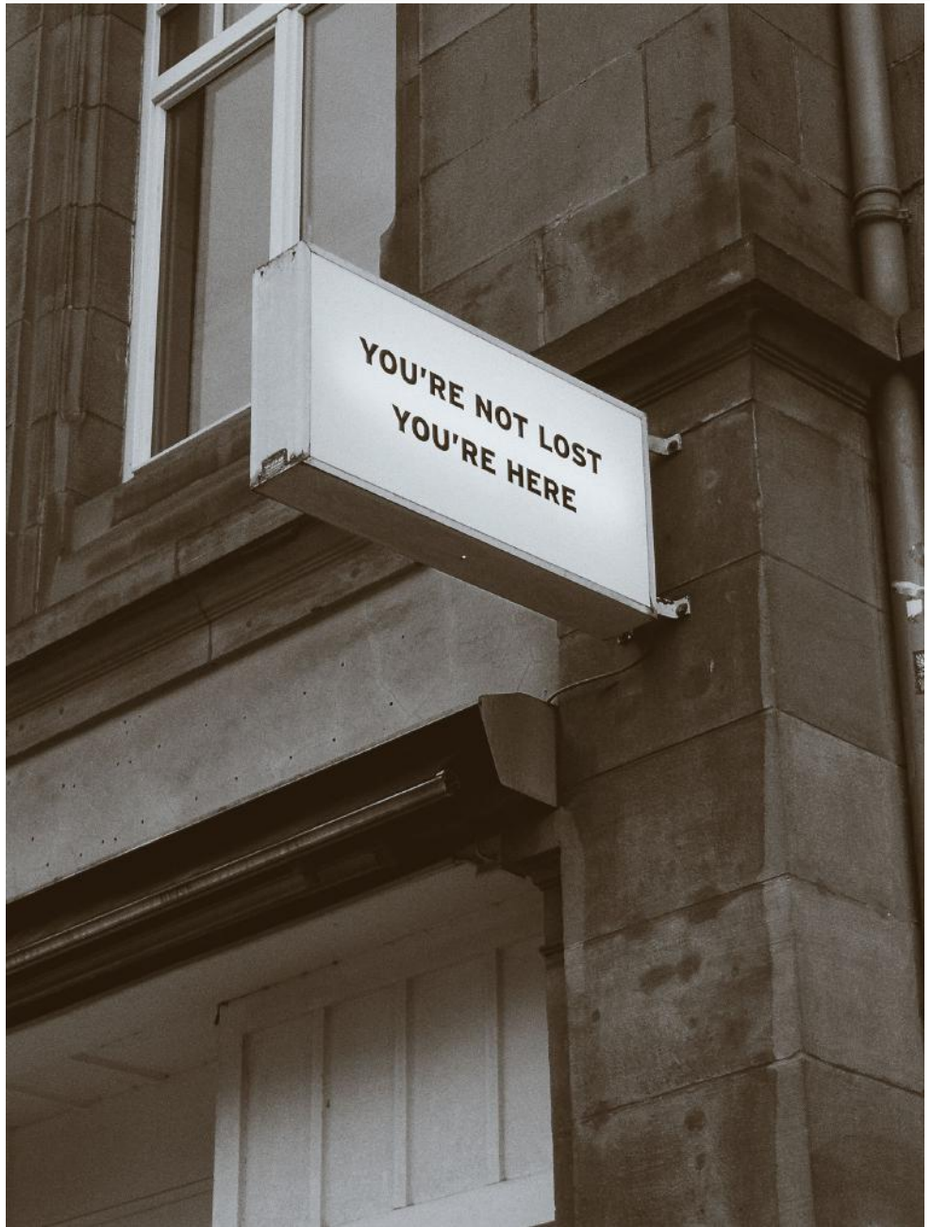
Survey Question 1

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



“Before anything else, preparation is the key to success.”

— Alexander Graham Bell

“Begin with the end in mind”

— Stephen Covey

DMAW Production Week
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NO ONE LIKES DIRTY DATA

Why is having a clean database important?

1

Results Driven

Easiest and most cost-effective step to improving results.

2

Time-Efficient

Saves time and money on data processing, direct mail print, production, postage, and returned mail.

3

Donor Safe

It reduces donor complaints.

4

Accurate Testing

It creates more opportunity for successful testing.

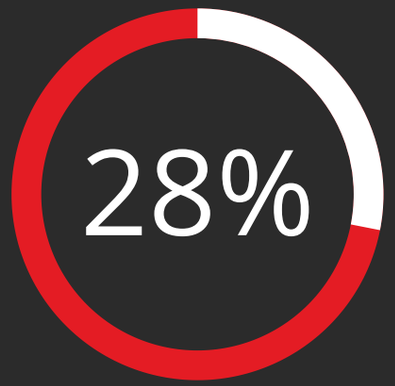
STATISTICS

What happens when you clean your database?

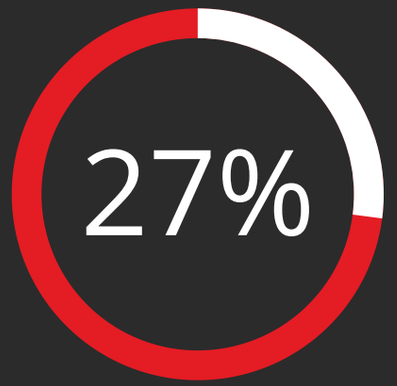
You learn that, on average, 73% of it is unusable!!

	Input	Duplicates	Non-mailable Records *	Output
Active	86,473	33,357	28,495	24,621
Lapsed	190,949	84,836	54,466	51,647
Total	**277,422**	**118,193**	**82,961**	**76,268**

**Blank addresses, foreign addresses, NCOA bad addresses & Deceased*



Active



Lapsed

PERSONAL TOUCH

This personalization test received:

26.5% higher response rate

87% more gross revenue

64.5% higher average gift

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PERSONAL TOUCH

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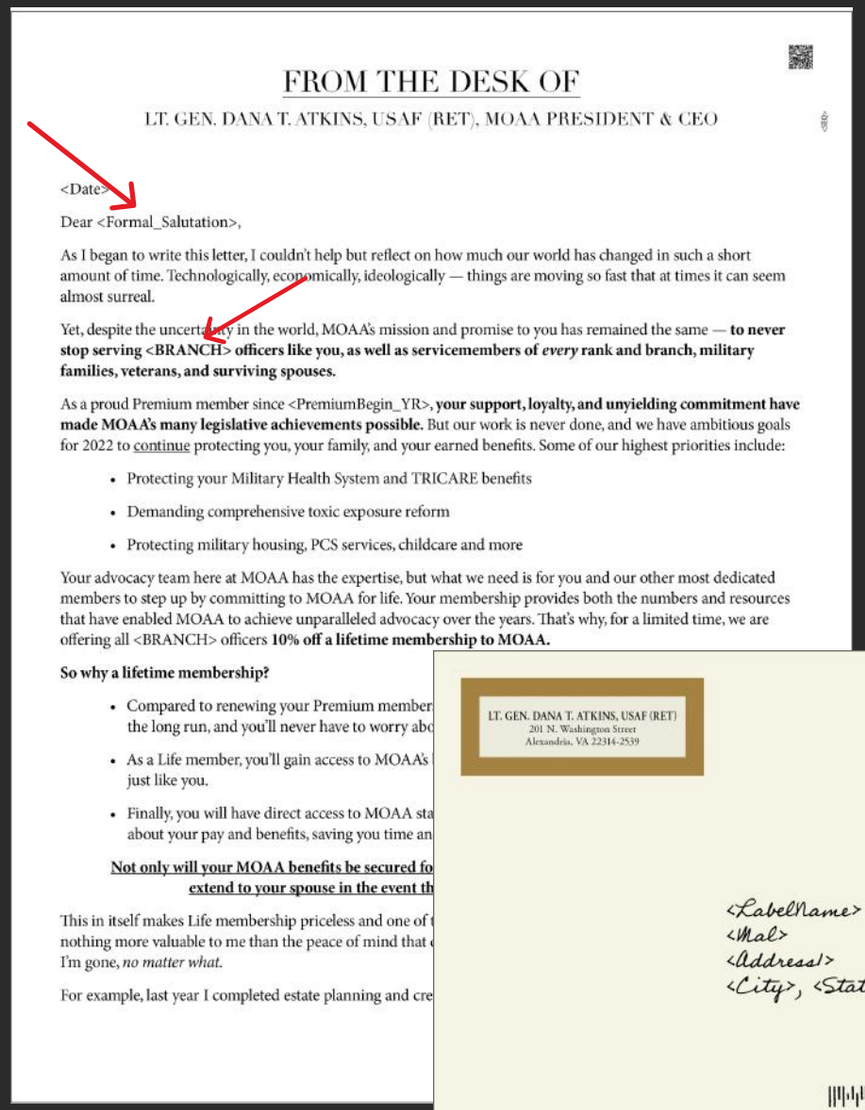


FROM THE DESK OF

LT. GEN. DANA T. ATKINS, USAF (RET), MOAA PRESIDENT & CEO

<Date>

Dear <Formal_Salutation>,

As I began to write this letter, I couldn't help but reflect on how much our world has changed in such a short amount of time. Technologically, economically, ideologically — things are moving so fast that at times it can seem almost surreal.

Yet, despite the uncertainty in the world, MOAA's mission and promise to you has remained the same — **to never stop serving <BRANCH> officers like you, as well as servicemembers of *every* rank and branch, military families, veterans, and surviving spouses.**

As a proud Premium member since <PremiumBegin_YR>, **your support, loyalty, and unyielding commitment have made MOAA's many legislative achievements possible.** But our work is never done, and we have ambitious goals for 2022 to continue protecting you, your family, and your earned benefits. Some of our highest priorities include:

- Protecting your Military Health System and TRICARE benefits
- Demanding comprehensive toxic exposure reform
- Protecting military housing, PCS services, childcare and more

Your advocacy team here at MOAA has the expertise, but what we need is for you and our other most dedicated members to step up by committing to MOAA for life. Your membership provides both the numbers and resources that have enabled MOAA to achieve unparalleled advocacy over the years. That's why, for a limited time, we are offering all <BRANCH> officers **10% off a lifetime membership to MOAA.**

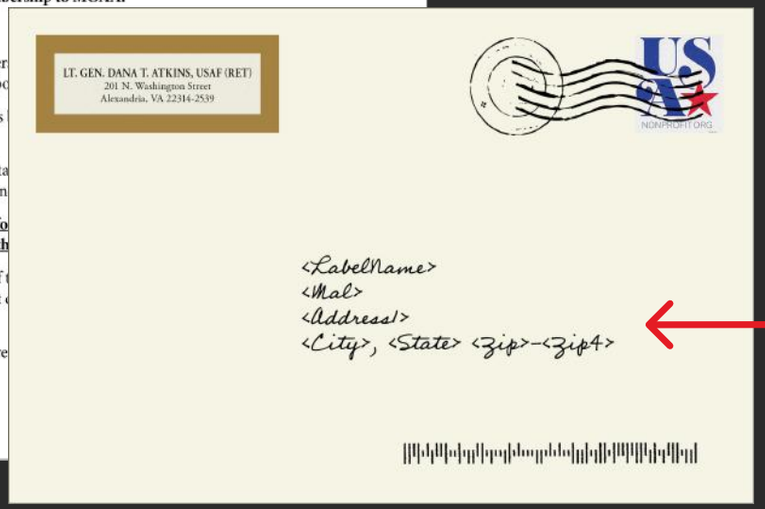
So why a lifetime membership?

- Compared to renewing your Premium member
  the long run, and you'll never have to worry abo
- As a Life member, you'll gain access to MOAA's
  just like you.
- Finally, you will have direct access to MOAA sta
  about your pay and benefits, saving you time an

Not only will your MOAA benefits be secured fo
extend to your spouse in the event th

This in itself makes Life membership priceless and one of t
nothing more valuable to me than the peace of mind that
I'm gone, *no matter what.*

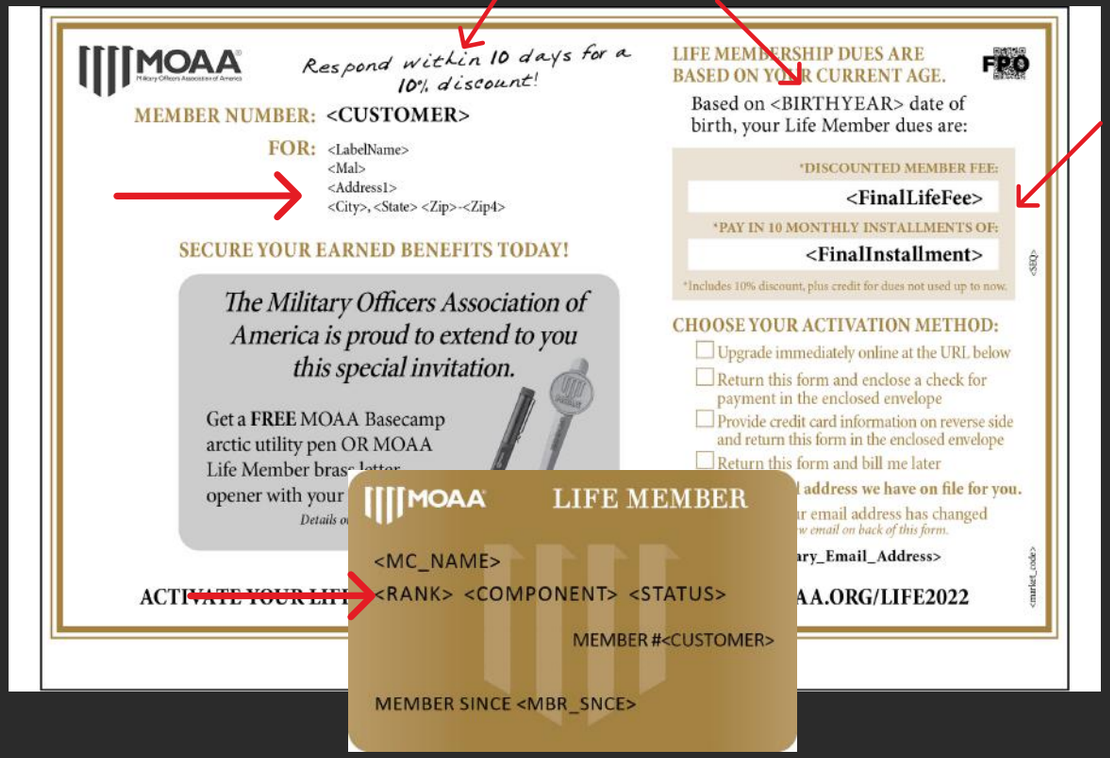
For example, last year I completed estate planning and cre



LT. GEN. DANA T. ATKINS, USAF (RET)
201 N. Washington Street
Alexandria, VA 22314-2539

NONPROFIT ORG

<LabelName>
<Mal>
<Address1>
<City>, <State> <Zip>-<Zip4>



MOAA

Respond within 10 days for a 10% discount!

MEMBER NUMBER: <CUSTOMER>

FOR: <LabelName>
<Mal>
<Address1>
<City>, <State> <Zip>-<Zip4>

SECURE YOUR EARNED BENEFITS TODAY!

The Military Officers Association of America is proud to extend to you this special invitation.

Get a **FREE** MOAA Basecamp arctic utility pen OR MOAA Life Member brass letter opener with your

Details o

ACTIVATE YOUR LIFE

LIFE MEMBERSHIP DUES ARE BASED ON YOUR CURRENT AGE.

FPO

Based on <BIRTHYEAR> date of birth, your Life Member dues are:

*DISCOUNTED MEMBER FEE:
<FinalLifeFee>

*PAY IN 10 MONTHLY INSTALLMENTS OF:
<FinalInstallment>

*Includes 10% discount, plus credit for dues not used up to now.

CHOOSE YOUR ACTIVATION METHOD:

- ☐ Upgrade immediately online at the URL below
- ☐ Return this form and enclose a check for payment in the enclosed envelope
- ☐ Provide credit card information on reverse side and return this form in the enclosed envelope
- ☐ Return this form and bill me later

l address we have on file for you.
r email address has changed
w email on back of this form.

ary_Email_Address>

AA.ORG/LIFE2022

<market_code>

MOAA LIFE MEMBER

<MC_NAME>
<RANK> <COMPONENT> <STATUS>
MEMBER #<CUSTOMER>
MEMBER SINCE <MBR_SNCE>

Understanding who makes up your database, craft simple changes that produce big results

1. If you find you have a large, lapsed file – start with the most recently lapsed multi-givers

2. If you find you have active one-time givers – work on strategies to convert them to multi-donors

3. If you find your DM givers have emails, implement pre and post DM emails. It's inexpensive and your response rate will go up

4. If you have non-donors – determine where they came from first, apply a donor profile and test them in acquisition
   - If they came from previous direct mail efforts like a survey or engagement device, continue testing them, they are warm leads

5. If you see multi-donors giving frequently but small gifts, try to convert them to sustainer and then upgrade them

If you have segments that are not as responsive, be strategic when you mail them, perhaps hold them to mail at holiday/end of year when it is a more active giving season

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Survey Question 2

WHAT CAN YOU DO WITH YOUR DATA TODAY TO CHANGE YOUR RESULTS?

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

“YOU DO NOT NEED TO HIRE A PARTNER”

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

First in your list

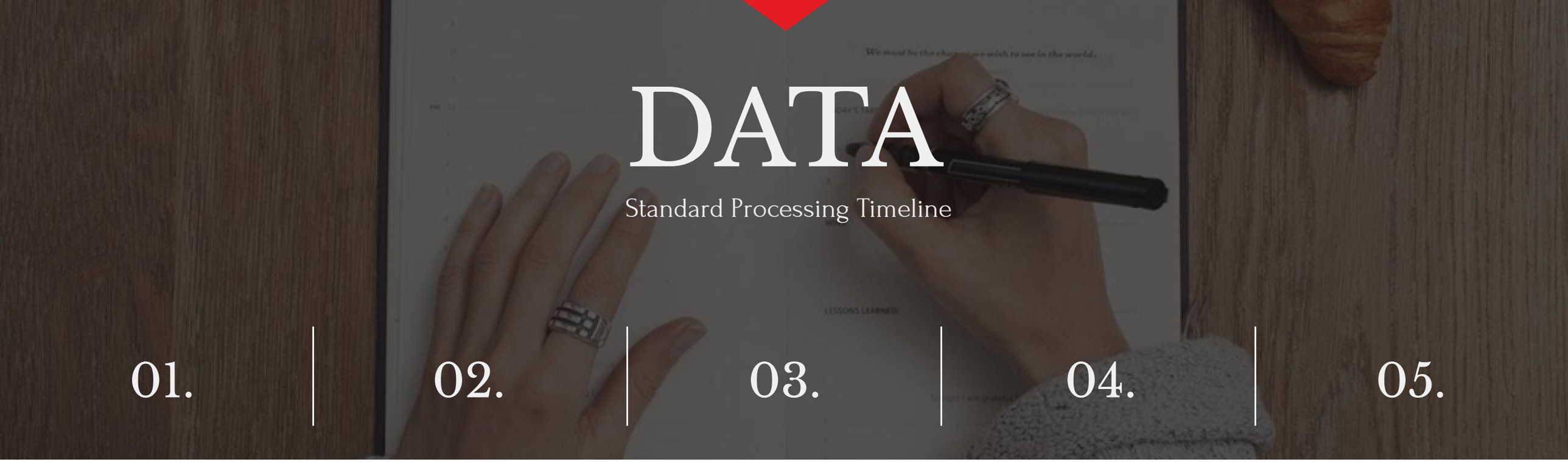
Data processing is not the LAST thing you think of, it's the FIRST.

Fool-proof

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

Set-it & Forget-it

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.



DATA

Standard Processing Timeline

01.

Data Import

Secure Data Transfer
CA/DD Signed
File Structure/Layout
File format
List of Lists Report

02.

Data Hygiene

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

03.

Data Segmentation

Audience Selection
Control vs. Test
Multi-buyers

04.

Postal Treatment

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

05.

Setup Preparation

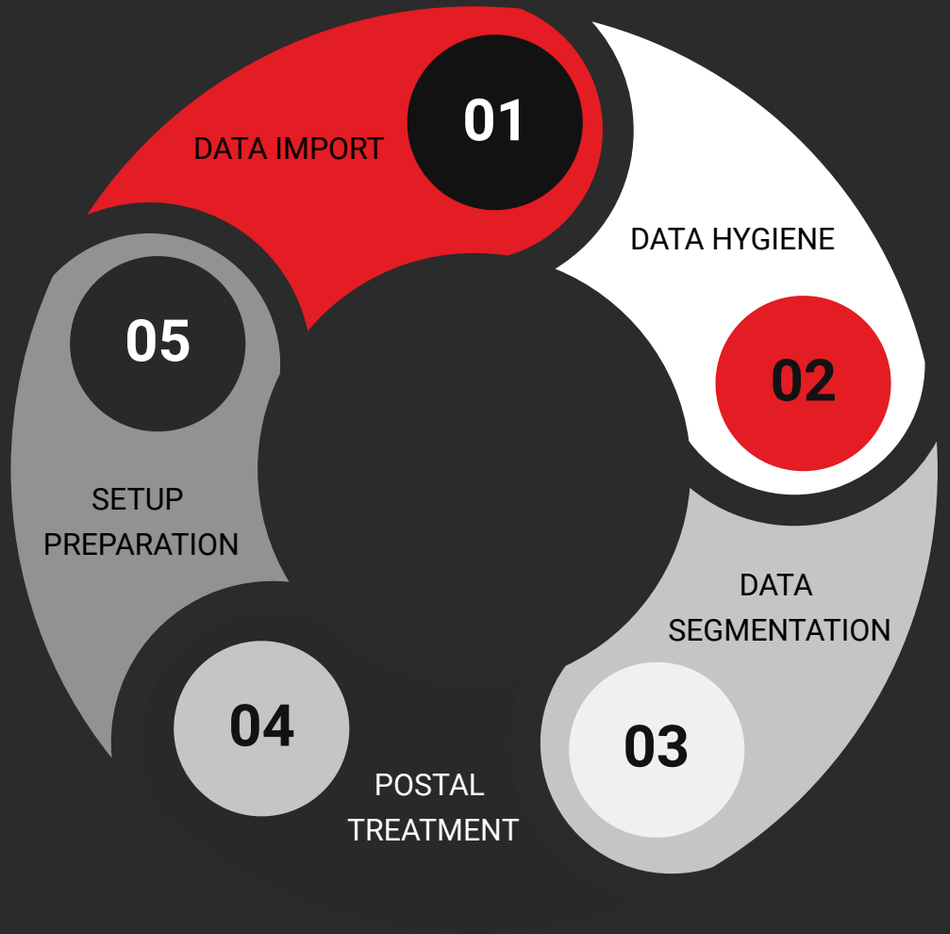
Variable Fields
Dollar builds
Scanlines
Salutation Defaults

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?

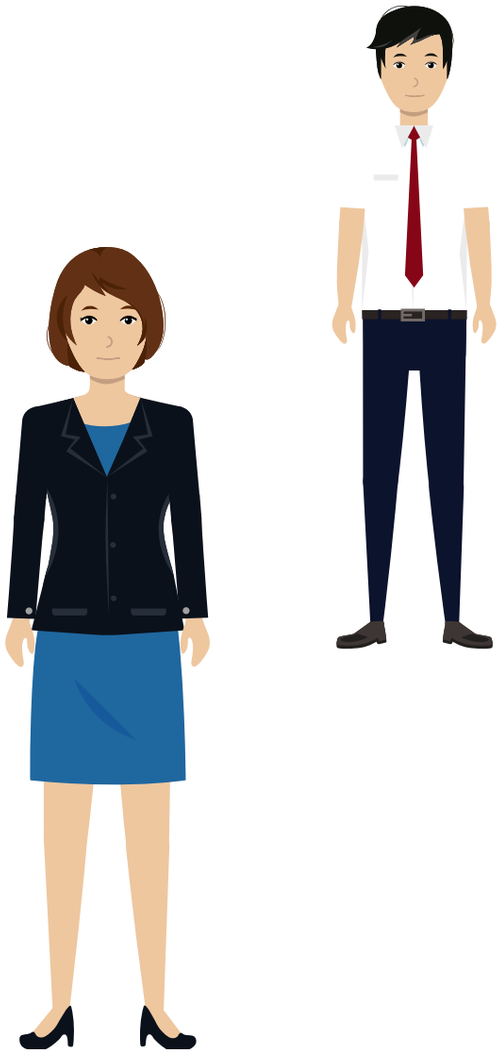
Standard | 24 to 48 hours

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.

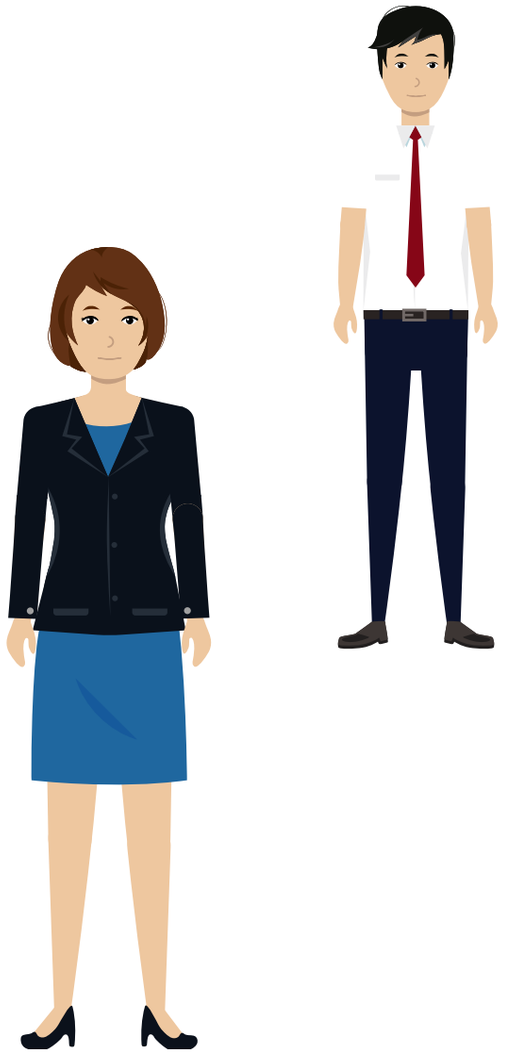
04 Review all reports and send all changes at the same time

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 TACKLE DATA PROCESSING?

Key Takeaways

> "Have a clear picture of your audience will provide better results, bringing you closer to your organization's goals"
>
> Laura Rynkiewicz

> "Keep your data instructions clean and detailed."
>
> David Padilla

THANK YOU!

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