

# *Davie* Marketing Efforts: How To

## 1. Request an appeal for your marketing effort (not necessary for each and every marketing effort)

A. Complete the Marketing Appeal Request Form

<http://davie.unc.edu/forms/marketing-appeal-request-form/>

*\*Note that you need to request different appeals based on the type of efforts you are doing: mail, email, phone, events, web, other. These must be created before a marketing effort can be activated*

## 2. Create a Package

A. Select "Packages" from the Marketing and Communications main page.

B. Select "Add a ... package" specific to the type of package you are creating

- Name the package using the Davie Naming Convention  
[Site Abbreviation] FY[XX] [Description] [mail, email, etc] Package
- Enter a description
- Select your Site
- Select a Category describing the physical package recipients will receive
- Select Package code from the Package code drop down. The code is auto generated.
- Click Save.

*\*Note: Other areas of the form include:*

- Channel code: leave blank
- Costs: After cost per piece is calculated, that information can be put into the package. With this information, Davie can calculate ROI for your marketing effort
- Letter: leave blank
- Export definition: leave blank (this is determined by the marketing effort template)

## 3. Create your Selection(s)

*\*Note: Query class is required. Complete Query Request Form found on Davie Portal if you need to request the selections to be created for you.*

A. Selections can be created from queries in the Analysis functional area or from the Marketing and Communications main page, by choosing Information Library, then Add an ad-hoc query.

*\*Note: Check the information library to confirm the selection needed doesn't already exist - selection may just need to be edited or saved as static selection. Selections will either be used in Segment or Universe. A selection can be created from an ad-hoc or smart query. It must be saved as a Static selection for use in the Marketing Effort. The calculation and activation processes will refresh the selections, giving you the newest data despite the selection being static.*

## 4. Create your Segment(s)

*\*Note: Query class is required. Contact the helpdesk if you need to request segments be created for you.*

A. Under the Marketing and Communications main page, select "Segments". You can add multiple selections to a segment, but only the intersection of all selections will make up the segment.

Ex: FY16 donors selection + young alumni selection = FY16 donors who are young alumni segment

B. Select Add a Constituent Segment

- Name the segment utilizing the Davie Naming Convention  
[Site Abbreviation] FY[XX] [Description] Segment
- Enter a Description
- Select your Site
- Select Segment Code under Code (The code will auto generate.)
- Select "Add" to search for and add your selection(s). It is sometimes possible to create segments to be used across a fiscal year (or across multiple fiscal years).



Ex: All faculty/staff = CAF FYXX Faculty Staff Segment; this segment was created with a query that pulls the most up-to-date faculty staff information.

## 5. Add a Direct Marketing Effort

A. Under Marketing and Communications, select “Marketing Efforts”, “Add a Direct Marketing Effort”

B. Select the appropriate Marketing Template

C. On the Create Effort Tab

- Name the effort using the Davie Naming Convention

- [Site Abbreviation] FY[XX] [Description] Marketing Effort

- Enter a Description of the marketing effort, select the appeal, your site and choose the expected launch date of the effort

- Save

D. Add segments (with packages) to the Direct Marketing Effort

- On the Segments tab, select the Add button and select Constituent Segment

- Add your segment

- Add your package

- \*Note: List segments are for rented or purchased lists of constituents NOT in Davie. Once your segment is added, you have created your Source Code.*

E. On the Source Code tab

- Select your site's abbreviation

- Select the Appeal type: Acquisition, Reactivation, Renewal or Other

- Select Fiscal Year and enter value, then Save

F. Add additional segments as needed.

*Note: Direct marketing efforts create segment hierarchies. Therefore, if a constituent qualifies for multiple segments, they will only appear in the highest placed segment in the effort.*

G. On the Universe tab, leave the default settings in the Universe section (one per household is for mail to combine spouses and it should be unchecked for email efforts). If you wish to add selections to define your Universe, use the Add button under Additional Universe criteria.

*\*Note: The universe is a way to apply criteria across your segments.*

*Ex: for an email marketing effort, you could add ALL FYXX Constituents with Primary Email Address to your Universe. When adding multiple selections to your universe, you are creating an "or." Therefore, if you add FY17 donors and all alumni to your universe, it will include all constituents in your segments that are either a FY17 donor OR alum.*

H. On the Exclusions tab, select the Add button in the “Selections to Exclude” area to add your exclusion selections. You can also add previously activated marketing efforts as exclusions.

*\*Note: When adding previous marketing efforts, the entire household will not be excluded. Only the individual who was the primary qualifier for the marketing effort being excluded will be removed. Deceased and inactive constituents are excluded automatically! You can override inactive and include them in the effort. You can add multiple selections and marketing efforts to exclusions and all will be excluded. Exclusion selections are not required.*

I. On the Effort Settings tab review the following:

- Source code: edit and update the source code based on the appropriate site, appeal type and fiscal year

- Export: confirm appropriate export definition

- Address Processing: Leave as is

- Seeds: If preferred, you may add any number of names and addresses as ""seeds""

- KPIs: This tab will show you stats on your marketing effort as a whole after activation

- Finder Numbers: Leave as is



- Budget/Expenses: The package is found here. Within the package, price per piece can be updated for the marketing effort to track ROI

## **6. Review and Activate your Marketing Effort**

- A. Calculate your effort to get a preview of your segments.
  - On the left side of the Marketing Effort, select "Calculate Segment Counts". Processing options should match what has been checked under the Address Processing tab.
  - Click "Start". Be sure to wait for the calculation to tell you when it is completed.
- B. Return to your Marketing Effort by selecting the "Go To" link in the top left corner
- C. On the left side of the Marketing Effort, select Export Effort
  - Select "Start" to begin the export.
  - When the status changes to Completed, verify you have no exceptions and click on your Export Definition's name under Export Outputs to Download Output.
  - Select your download type...CSV is recommended.
- D. Return to your Marketing Effort by selecting the "Go To" link in the top left corner
- F. When you have determined that the marketing effort needs no changes and is ready to mail, select "Request marketing effort activation" on the left side of the screen. Your request will be scheduled to complete in 1-2 business days. Once activated, constituents included in the effort will have their records marked as having received it. There is no way to un-do activation.
- G. Once activated, return to your marketing effort to export the list. After activation, it is important to re-export your effort. This will provide you with the most up to date information.

### **Important reminders about your output**

- \* Spouse fields in the export definition include ALL active and inactive spouses on constituent records included in your criteria.
- \* The spouse may or may NOT be in your marketing effort's criteria.
- \* The spouse fields should only be used if you would like to send the effort to both spouses
- \* Remember to not send your effort to both spouses if the spouse inactive field is equal to ""TRUE"" (yes).
- \* Name format options are what allow you to ""marry"" spouses in an effort by including or excluding spouse names from the addressee or salutation name in your output.
- \* Some name format options were created to always include the spouse because some units always mail to both members of the household.
- \* Some name format options only include the spouse if they are in the effort criteria.
- \* See the list of available name format options with the descriptions of what they do on the Davie portal under the marketing training documents.
- \* Contact the helpdesk if you would like to request a new name format option be created (on hold)

