Davie 201 – Direct Marketing Efforts

Davie

TABLE OF CONTENTS

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DIRECT MARKETING

Direct marketing provides your organization a way to communicate your mission to your donors and prospects, generate revenue, and cultivate existing relationships with constituents. The Marketing & Communications functional area of ***Davie*** provides direct marketing features for you to plan and execute all facets of your direct and public marketing efforts.

Lesson Objectives

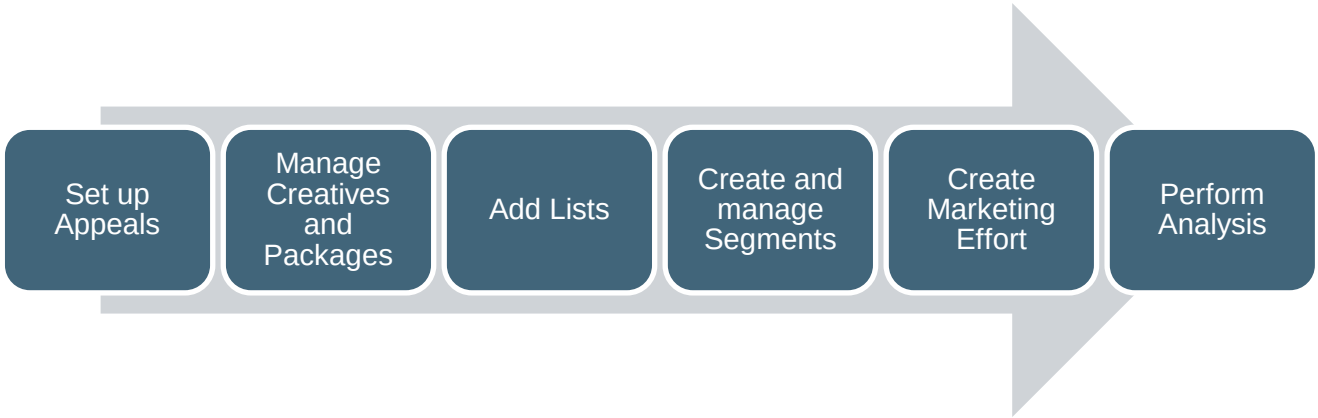
After you complete this lesson, you will be able to:

- Request and understand Appeals
- Understand source codes and finder numbers
- Define seeds
- Create an ask ladder
- Add creatives and packages
- Add and manage acquisition lists
- Use selections and segments
- Create a marketing effort
- Activate a marketing effort
- Export a marketing effort
- View a marketing effort on a constituent record
- Generate marketing effort and appeal reports

Direct Marketing Overview

Direct Marketing functionality includes several pieces that work together in the overall workflow of the program.

The following graphic illustrates the process of managing direct marketing in the program:



Marketing Hierarchy

When you manage your direct marketing program, it is helpful to understand some items before you create a marketing effort. These items include appeals, source codes, finder numbers, seeds, and ask ladders.

Appeal Structure

Appeals are umbrella reporting devices that will be used to track the overall effort for each business unit. The appeal will be tracked on a constituent's record as well as on revenue transactions that are entered based on revenue received as a result of the appeal. Appeal categories/groupings will be used to provide overall reporting and querying capabilities. Appeal categories area also directly tied to Mail Preferences that allow for the system to track and implement granular Communication Preferences of constituents. A sample appeal structure is shown in the graphic below.

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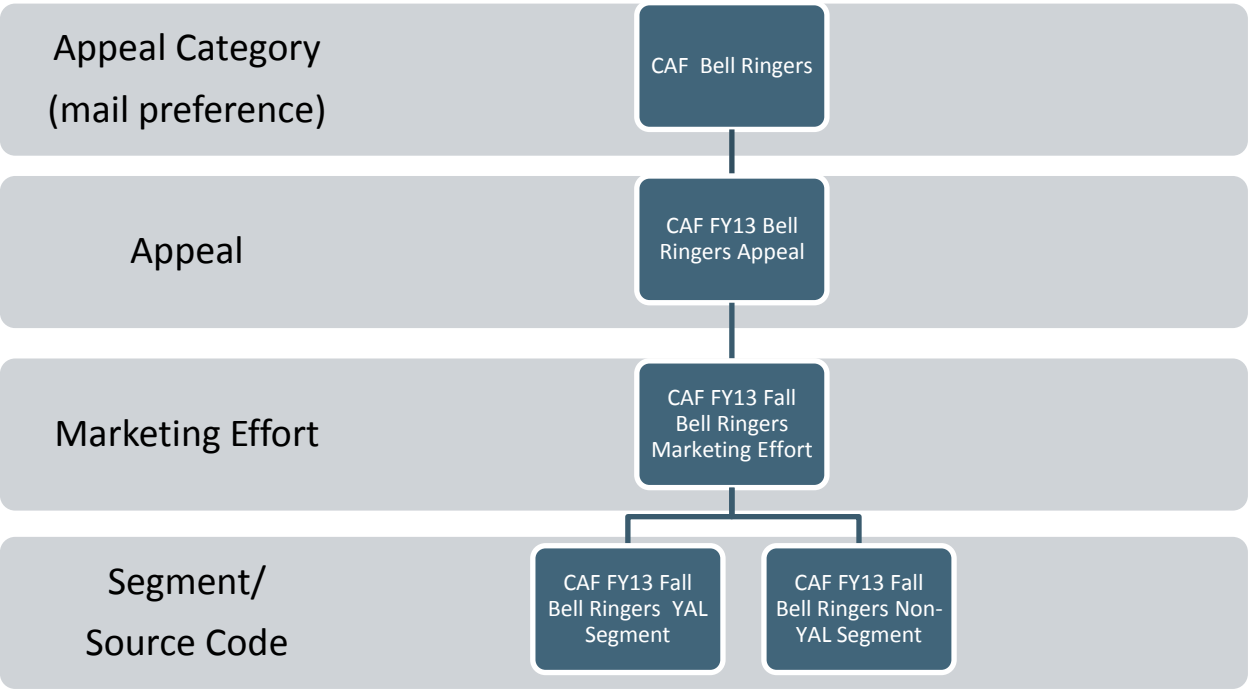

Appeals

Appeals are created by central administrators at the GAA and University Development office. The appeal request form can be found at the Davie Portal in the forms area: http://davie.unc.edu. You will need to identify your appeal category that will link to an appeal mail preference (usually general solicitation or magazine) and select an appeal report code (mail, phone, web, email, other). Appeals are also used in membership and events solicitations.

Once an appeal has been created for you, you can find it using the Appeal search.

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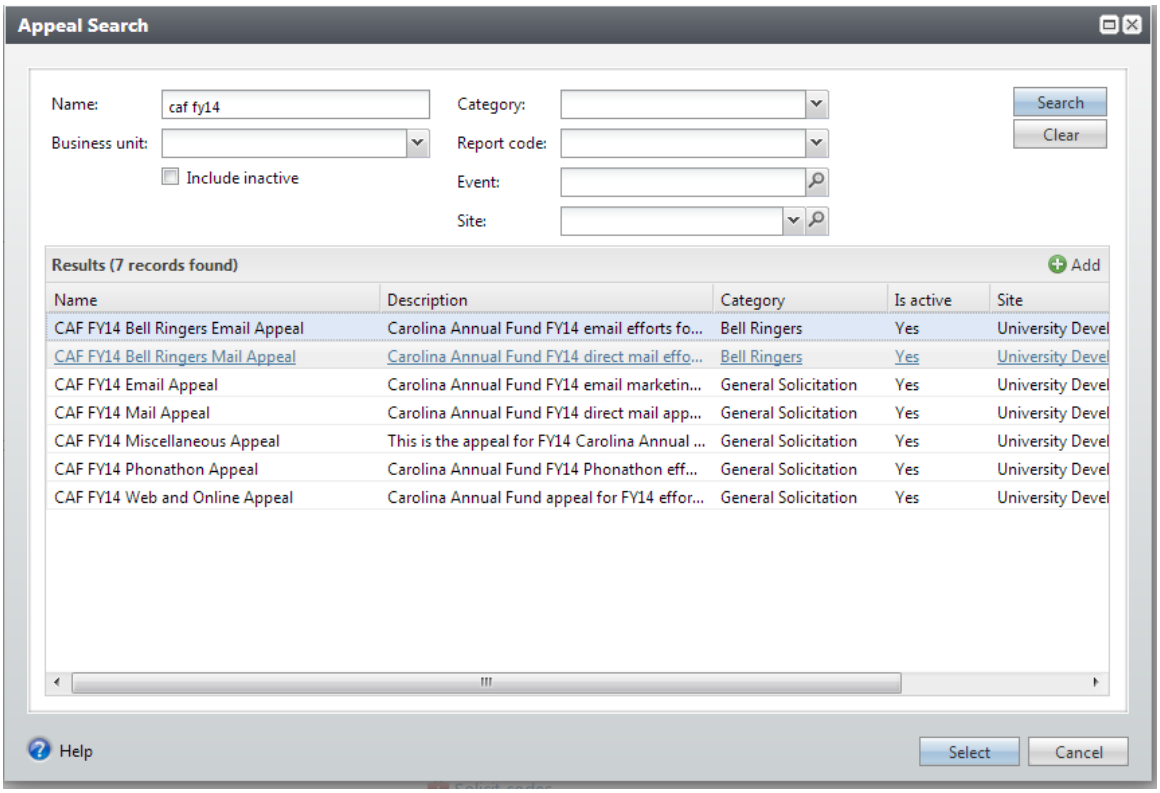

After you select your appeal, you can see the details on the appeal as shown below:

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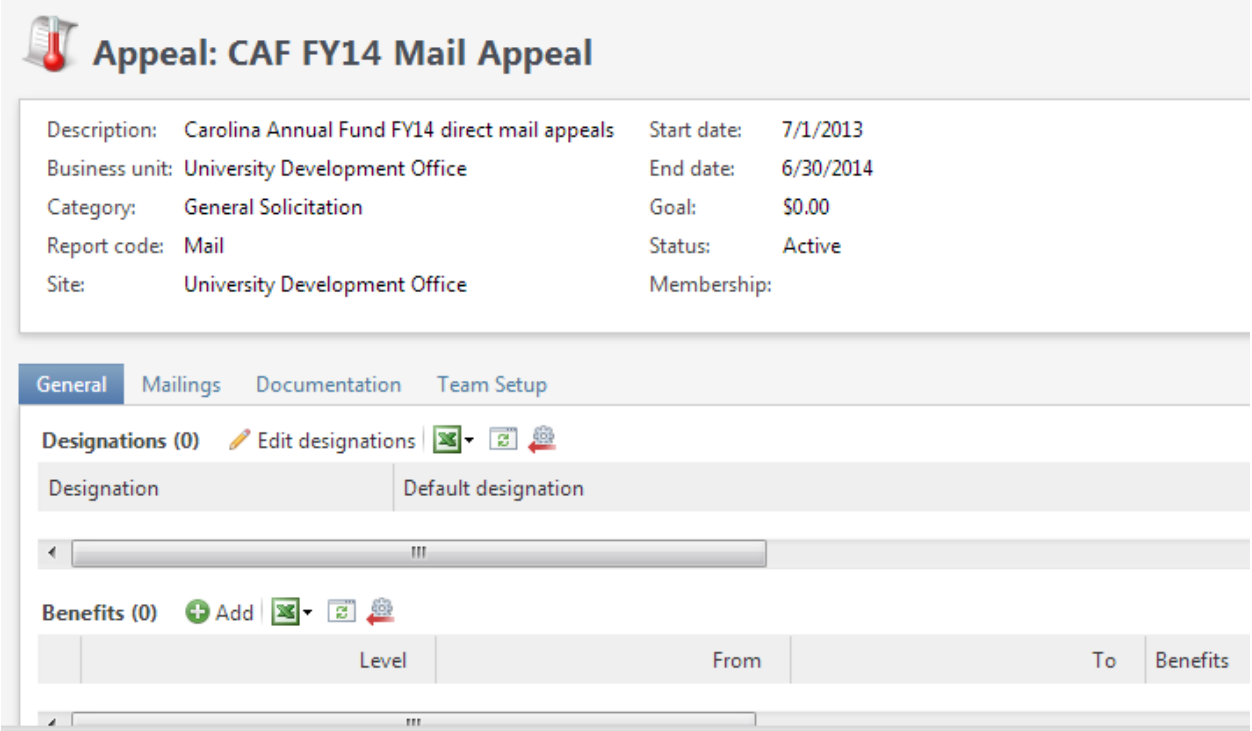

Source Codes

Source codes represent the segment or audience solicited and allow units the ability to measure the responses of their direct marketing efforts. Source codes help establish the specific combination of solicitation effort, package, segment, etc. that result in a particular gift or membership. Source codes are used in a solicitation effort that targets multiple audiences (segments or lists) with different types of package treatments (letters, emails, postcards, etc.).

The source code is made up of multiple parts:

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# Chars	Description	Example	Definition
3 or 4	Site Abbreviation	CAF	Three- or four-character code representing the UNC-CH site.
2	Appeal/Marketing Effort	AQ	Two-character code indicating the type of appeal or marketing effort. • Reactivation - RA • Acquisition - AQ • Renewal - RE • Other - OT
2	Fiscal year of solicitation	12	Two-digit code representing the current fiscal year of the marketing effort
3	Package	0W1	Three-character auto-generated code representing the package (letter, email, postcard, etc.)
3	Segment	A01	Three-character auto-generated code representing the constituent segment of the marketing effort

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Finder Numbers

A finder number is a sequential number assigned to each name on a mailing list, and printed on each reply form. The finder number is used to speed the data entry of responses to an appeal by eliminating the need to enter a name and address, or a constituent ID and source code. Finder numbers consist of 17 digits.

Finder numbers are used to match a gift to a particular mailing, to enable tracking and reporting on mailing performance. Activating a marketing effort generates the finder numbers. In a Mailing export, finder number is included as an export field.

Finder number, UNC ID(s) and source code are all required on remittance pieces for proper data entry in case the legal donor/payer is not represented by the finder number when mailing to spouses/partners.

Seeds

Seeds represent people at your organization who can be included in a marketing effort for the purpose of verifying that the mail house is doing its job correctly in sending out the mailing pieces. Other times, you may want to specify constituents such as your Board Members as seeds, simply because they want to see each mailing.

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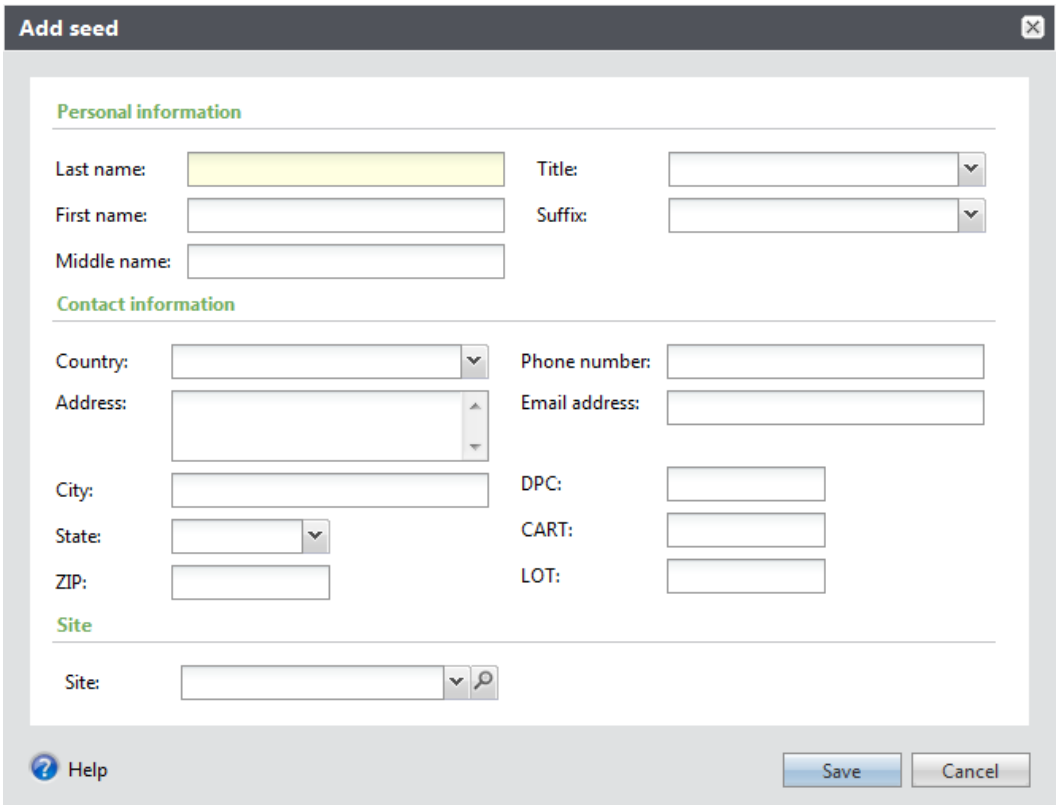

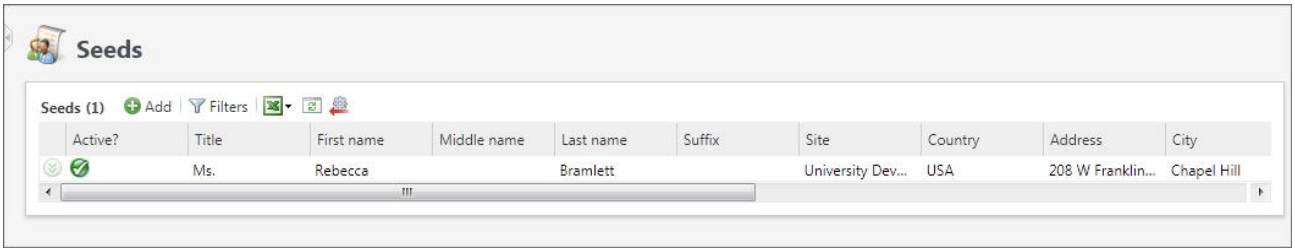

Additional information about Seeds:

- Seeds included in a marketing effort receive each unique package within that effort.
- Because you know seeds will not give based on that mailing, they are not included in counts and they do not affect any calculations or ROI numbers for the mailing.
- Seeds may be added, edited, deleted, or marked as inactive.

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- Seeds can also be marked inactive when they are not needed anymore instead of deleting them from the database.
- Seeds are not added as constituent records in your database.

Ask Ladders

An ask ladder is a set of fixed or calculated ask amounts included on a response device that is based on an "entry amount" value from the constituent's giving history, such as the amount of last fiscal year's giving.

The parameters you define for an ask ladder determine the lower and upper limits of an entry amount range and the ask amount calculations that apply to constituents whose entry amounts fall within that range.

You assign ask ladders to segments in a mailing to ensure each segment member receives the appropriate ask ladder on their marketing effort. You can also apply an ask ladder override to apply a different ask ladder to members of a selection rather than the one specified for their segment.

Davie supports three types of ask ladders: fixed, add, and multiple. The table below illustrates how ask amounts are calculated for each type.

Amount Range	Type	Ask 1	Ask 2	Ask 3	Round	Ask Ladder
0 (Entry amount range = $0 - $24.99)	Fixed	25	50	75	1	**$25, $50, $75** Applies to all entry amounts less than $25
25 (Entry amount range = $25 - $49.99)	Add	25	35	45	5	$25 (+25, +35, +45) = **$50, $60, $70** $30 (+25, +35, +45) = **$55, $65, $75** $35 (+25, +35, +45) = **$60, $70, $80** $40 (+25, +35, +45) = **$65, $75, $85** $45 (+25, +35, +45) = **$70, $80, $90**
50 (Entry amount range = $50+)	Multiply	1.5	2	2.5	10	(50*1.5, 50*2, 50*2.5) = **$75, $100, $125** (60*1.5, 60*2, 60*2.5) = **$90, $120, $150** (70*1.5, 70*2, 70*2.5) = **$105, $140, $175**

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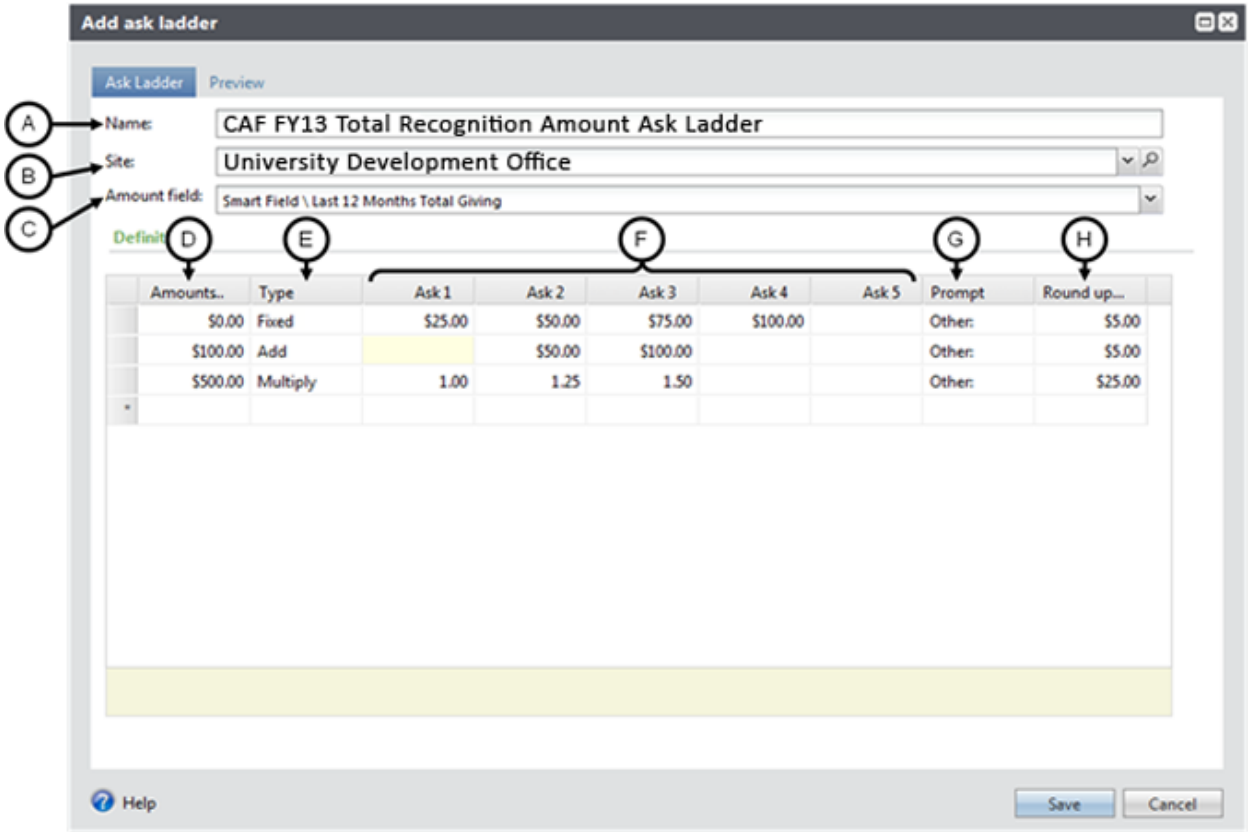

A. Enter a unique name to help identify the ask ladder. Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Ask Ladder)

B. Select the site to use the ask ladder. An ask ladder can be used with only marketing efforts assigned to the same site.

C. Select the type of entry amount to use for this ask ladder. The values available for this field are any smart field or dollar amount field associated with the record source, such as total fiscal year recognition amount.

   To create an ask ladder with fixed values, select "<none>." If you select "<none>," you can define only one row in the grid because that ask ladder is used for all constituents included in the marketing effort.

D. Enter values for the lower limits of your entry amount ranges.

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E. Select the method to calculate ask amounts.

- Select “Add” to add the values entered in the Ask columns to entry amounts.
- Select “Multiple” to multiply the entry amount by the amounts entered in the Ask columns.
- Select “Fixed” to use the values entered in the Ask columns for all constituents in this entry amount range. Fixed ask ladders are useful for constituents who do not have an entry amount defined.

F. Enter values according to the calculation method selected in the **Type** field.

- If you select “Add,” enter the values to add to the entry amount, such as 50, 75, and 100. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $80, $105, $130 (if rounded to 1 or 5).
- If you select “Multiple,” enter the values to multiply by the entry amount, such as 1.5, 2, and 2.5. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $45, $60, $75 (if rounded to 1 or 5).
- If you selected “Fixed,” enter the fixed values to use for the entry amount range, such as 50, 75, 100. For all constituents in the entry amount range, the ask ladder included on the marketing effort would be $50, $75, and $100.

G. Enter the text to appear on the marketing effort for write-in ask amounts, such as “Other Amount.”

H. Enter a whole number to round up calculated ask amounts. For example, if you enter 10, the program rounds all calculated ask amounts up to the tens place value.

Vendors

You can purchase an assortment of items and services from vendors. These can include acquisition lists and creatives such as graphics, full pamphlets, or small gifts (such as a pen with your organization’s name on it) to include in your marketing efforts.

The Vendors area of ***Davie*** allows you to manage and keep track of all the vendors that provide products and services to your organization in one central place. If you need a new vendor record added to ***Davie***, us the Request a New Individual Constituent function on the Constituent main page. In the comments, make sure to ask that the record be made a vendor.

NOTES

You can associate vendors with lists you purchase, or packages you provide with marketing efforts.

Creatives

Creatives are the content used in packages you include with marketing efforts such as newsletters, brochures, mailing labels, notepads, etc.

The Creatives page in ***Davie*** is a permanent place to store creative content. Creatives can be tied to a vendor if desired.

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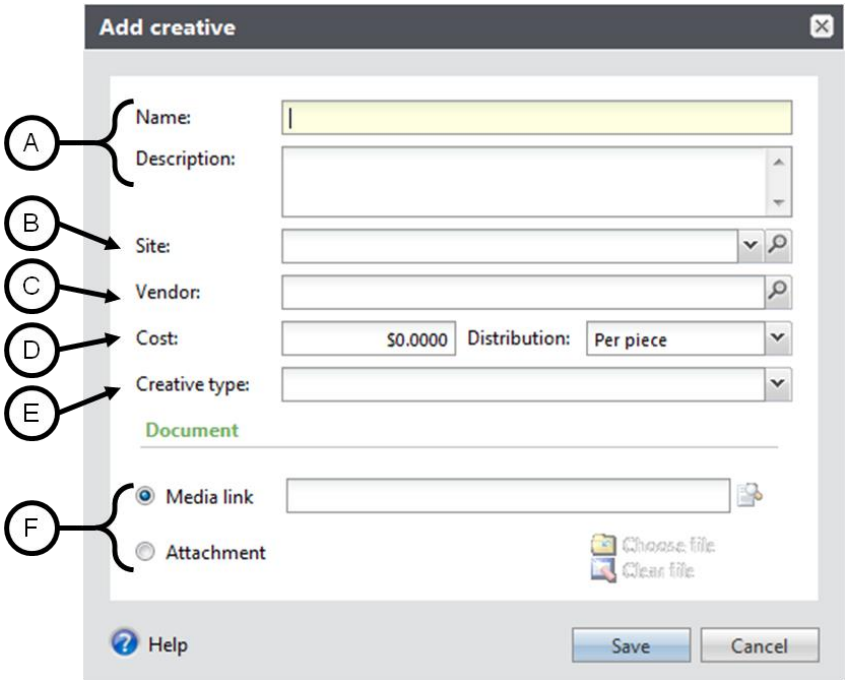

A. Enter a unique name and description for the creative. Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Creative)

B. Select the site associated with the creative. (required)

C. Search for and select the vendor associated with the creative.

D. Enter the cost for the creative and select whether the cost is per piece, per response, or per marketing effort. To not include the creative in the overall cost of a package or marketing effort, select "Do not include."

E. To group the creative with similar ones, select the type of the creative.

F. To link the creative to a digital file stored outside of your database, select **Media link** and enter the web address or file path for the file. Be sure the file you are linking is saved to a shared location on your network so other users in your department can access it. (***Davie*** users outside of your area will not be able to access the file.)

To store a digital file on your server as an attachment to the creative, select **Attachment** and click the file icon to browse to the file. When you save the creative, a program uploads the file to the server and stores

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it in the database so users can access it from any workstation that runs the program. (All ***Davie*** users with marketing permissions will be able to access an attachment.)

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Packages

Packages allow you to group items delivered to a constituent or recipient in a marketing effort. For example, a package may contain an appeal letter along with mailing labels in an envelope with your organization's logo. Creatives stored within ***Davie*** can be grouped together in one package.

A typical marketing effort may have multiple letters whose contents are based on the audience receiving the letter. A new package would be needed for each letter. For example, one letter may acknowledge past donors while another letter may ask prospects to make their first gift.

Mail Packages

The following graphic provides details about the fields and options on the Add mail package window.

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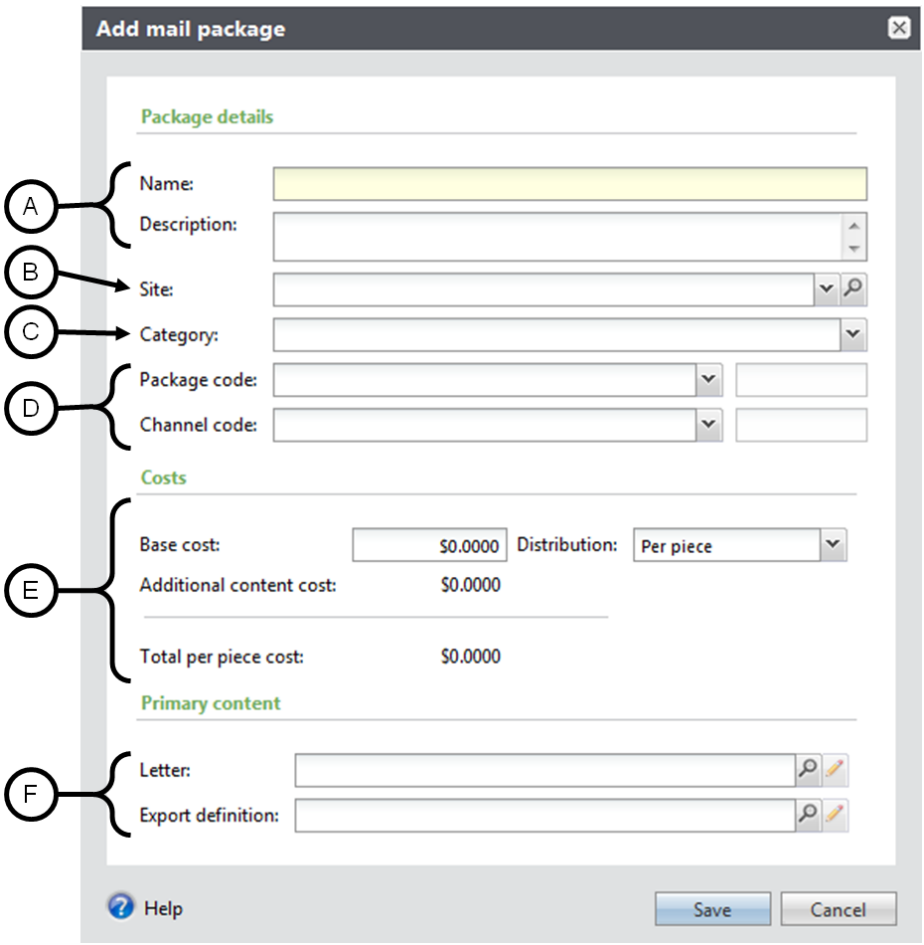

A. Enter a unique name and description to help identify the package. Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Mail Package)

B. Select the site associated with the package. (required)

C. To group the package with similar packages, select the category. (if applicable)

D. To help track the effectiveness of the mail package, select the package code so a code will be automatically generated for your source code. Channel code is not used.

E. Enter the starting cost, or the cost before you include content, for the package. Select whether the cost is per piece, per response, per thousand, or per marketing effort. To not include the package in the overall

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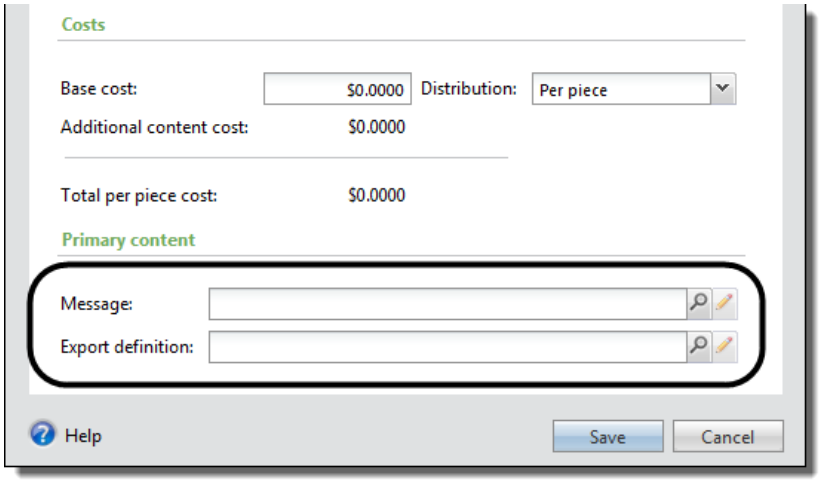
cost of the marketing effort, select "Do not include." Additional cost is calculated from any creatives associated with that package.

F. Search for and select the letter to include in the package. When you select a letter, the **Export definition** field displays the export definition used with the letter.

Email Packages

The fields and options on the Add email package are very similar to those on the Add mail package window. The only differences between the add forms are in the Primary content frame.



The **Message** field displays. Search for and select the direct marketing email message in ***Davie*** to use with this package. If you are sending your broadcast emails through a different tool, you will not select a message. (Please note that sending email from ***Davie*** will be phased in slowly during the ***Davie*** Stabilization Phase as workload permits.)

In the **Export definition** field, search for and select the export definition to use with the package.

Phone Packages

The fields and options on the Add phone package are very similar to those on the Add mail package window. The only differences between the add forms are in the Primary content frame.

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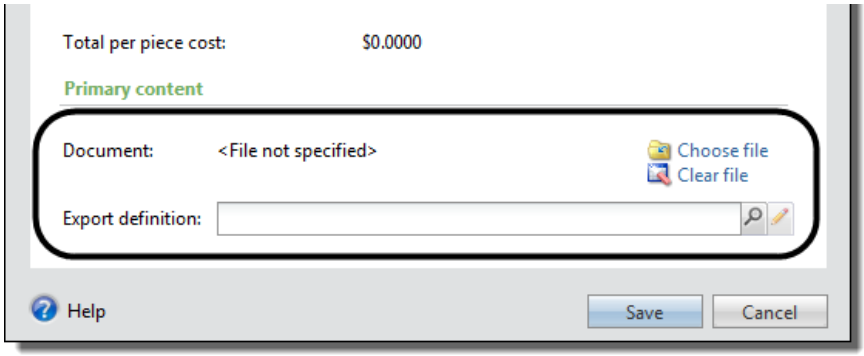
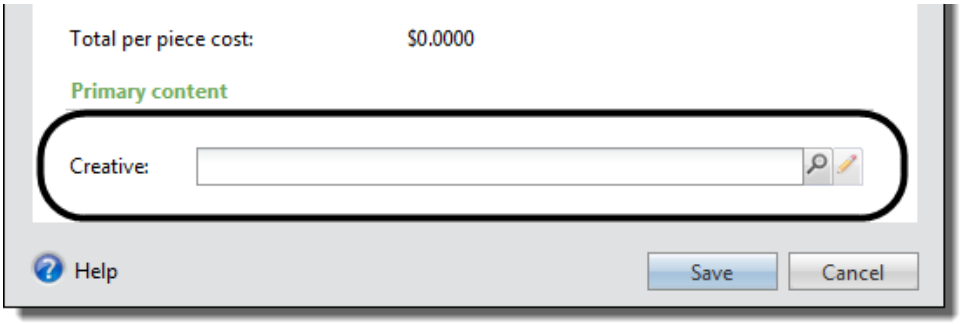


To attach a Microsoft Word document to the package, such as the script for callers to use, in the **Document** field, click the file icon. On the Open window, browse to and select the document to use with the package.

In the **Export definition** field, search for and select the export definition to use with the package.

Public Media Packages

The fields and options on the Add public media package are very similar to those on the Add mail package window. The only differences between the add forms are in the Primary content frame.



In the Creative field, search for and select the creative information to use with the package, such as a digital media file for a radio advertisement or an image file for a billboard or website banner advertisement.

The Package Record

On a package record, you can view details about the package. You can also view information about the cost and primary content of the package.

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Creatives Tab

On this tab, you can view the creatives included in the package. When applicable, the program automatically includes the cost of these creatives as additional content cost to calculate the total cost per piece for the package.

Documents Tab

On this tab, you can view the documents included in the package such as pamphlets or reports. For each document, you can view its type and cost. When applicable, the program automatically includes the cost of these documents as additional content cost to calculate the total cost per piece for the package.

Materials and Expenses Tab

When your packages have associated materials, such as paper, envelopes, and shipping containers, you can track these items on the Materials and Expenses tab on the package record.

Your organization may also incur additional costs, or expenses, such as for postage or to print documents that can also be tracked on this tab.

Export Definitions

An export definition contains the fields you will use to merge into your marketing efforts. For each type of marketing effort, export definitions have been created for multiple channels, such as mail, email, and phone.

If one of the configured export definitions will not work for you, you can request a new export definition be created by contacting the ***Davie*** helpdesk at http://***Davie***.unc.edu.

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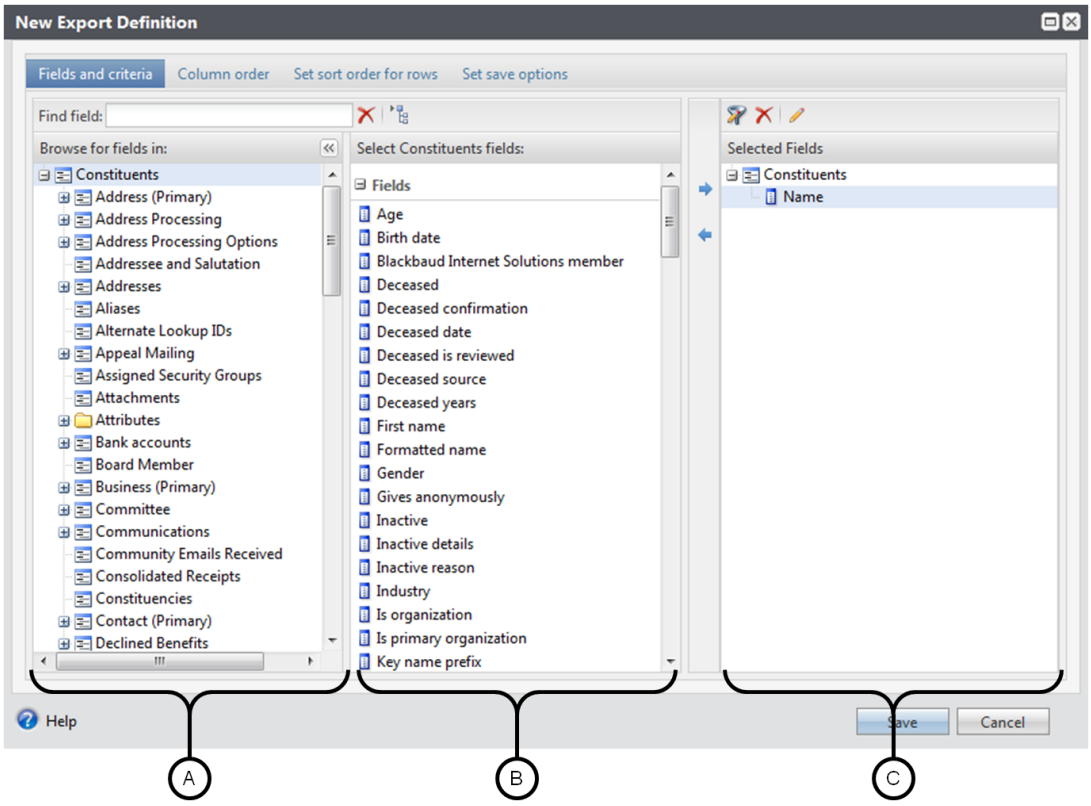


A. The **Field Explorer** frame displays the tables available for the export definition.

B. This frame displays all fields from the table selected in the **Field Explorer** frame. To specify an output field for the export, select the field in this frame and drag it into the **Selected Fields** frame.

   When you drag a one-to-many field into the **Selected Fields** frame, the Criteria window displays. On this window, you can select the number to export and define how the export sorts and filters the fields.

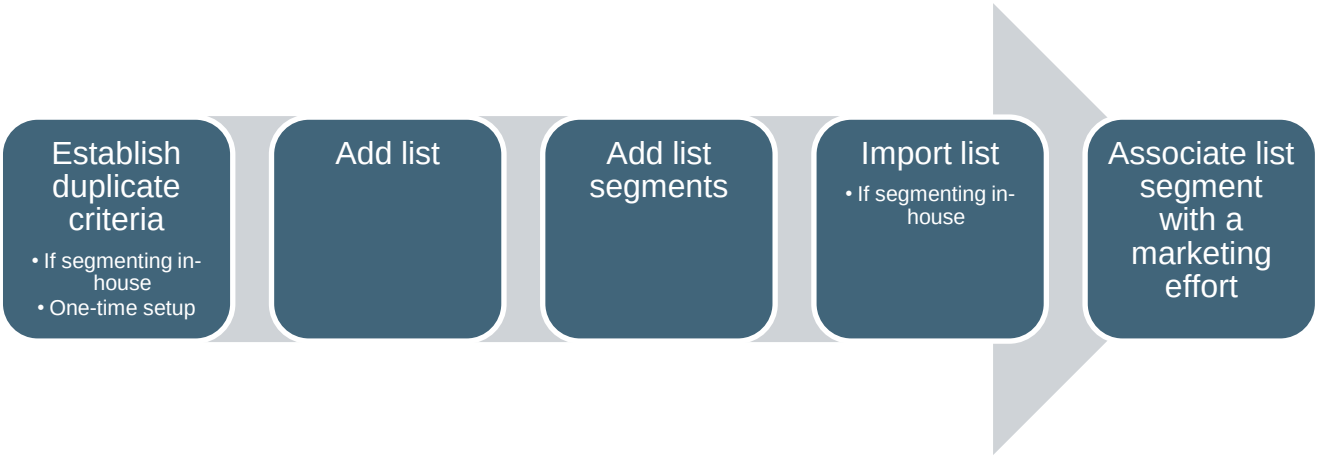
C. The **Selected Fields** frame displays the fields that will be included in the export. These fields display as column headings on the export output.
   Note: Depending on the source view of the export definition, some fields may default into the Selected Fields frame. These are only defaults and you can remove them if necessary.

NOTES

Acquisition Lists

Acquisition lists are files with names and addresses of potential donors that you rent or purchase from another source. These prospects do NOT have constituent records yet in ***Davie***.

The acquisition list files may also contain other information that is not essential for sending a mailing but that you may find useful to report on the success or failure of a particular list. For this reason, nonessential fields (fields other than name and address) are considered part of each list and are not discarded.



If your organization purchases an acquisition list and sends it directly to a strategy vendor for segmentation, you do not complete the "Establish duplicate criteria" or "Import list" steps at this time. You do, however, go through the process to add a list, add list segments, and associate the list segment with a marketing effort. This process is necessary in order to report on list performance.

Establish Duplicate Criteria

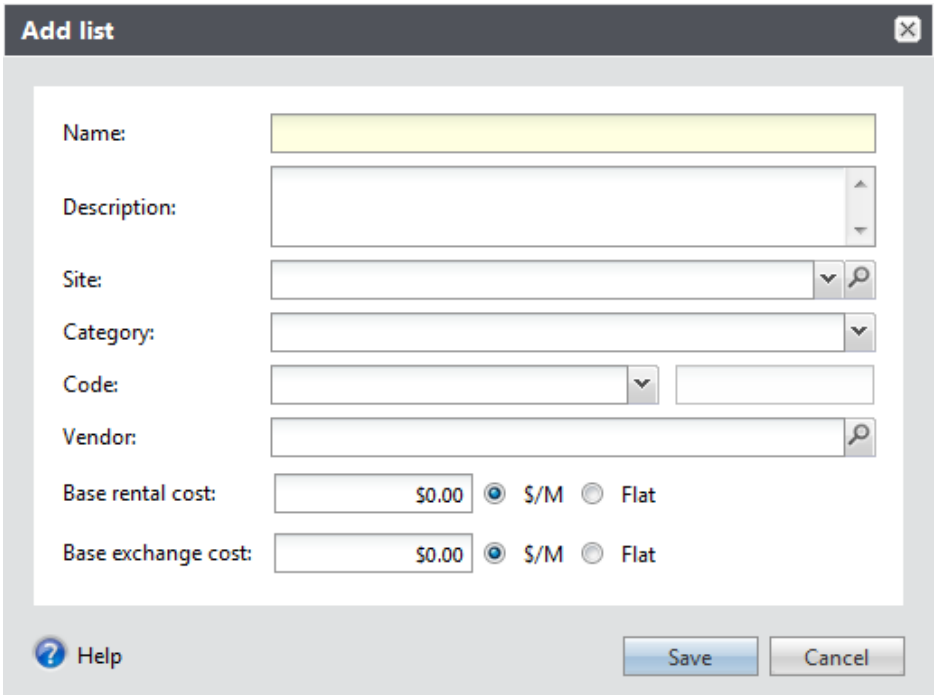
Before you import a list into the program, an administrator needs to configure the criteria to determine whether a record on the list is already present in your record source. Please submit a request through the helpdesk at http://***Davie***.unc.edu.

NOTES

Add Lists

The List record acts as a list header that holds general information about the list. It serves as a way to group related segments that make up the list.

For example, within a list called The CAF FY13 Green Club List, you can have a segment called CAF FY13 Green Club Lifetime Members Segment, a segment called CAF FY13 Green Club Annual Members Segment, and a segment called CAF FY13 Green Club Monthly Members Segment



When you add a new acquisition list, the list record appears. To access the list record at a later date, you can open the list on the Acquisition Lists page.

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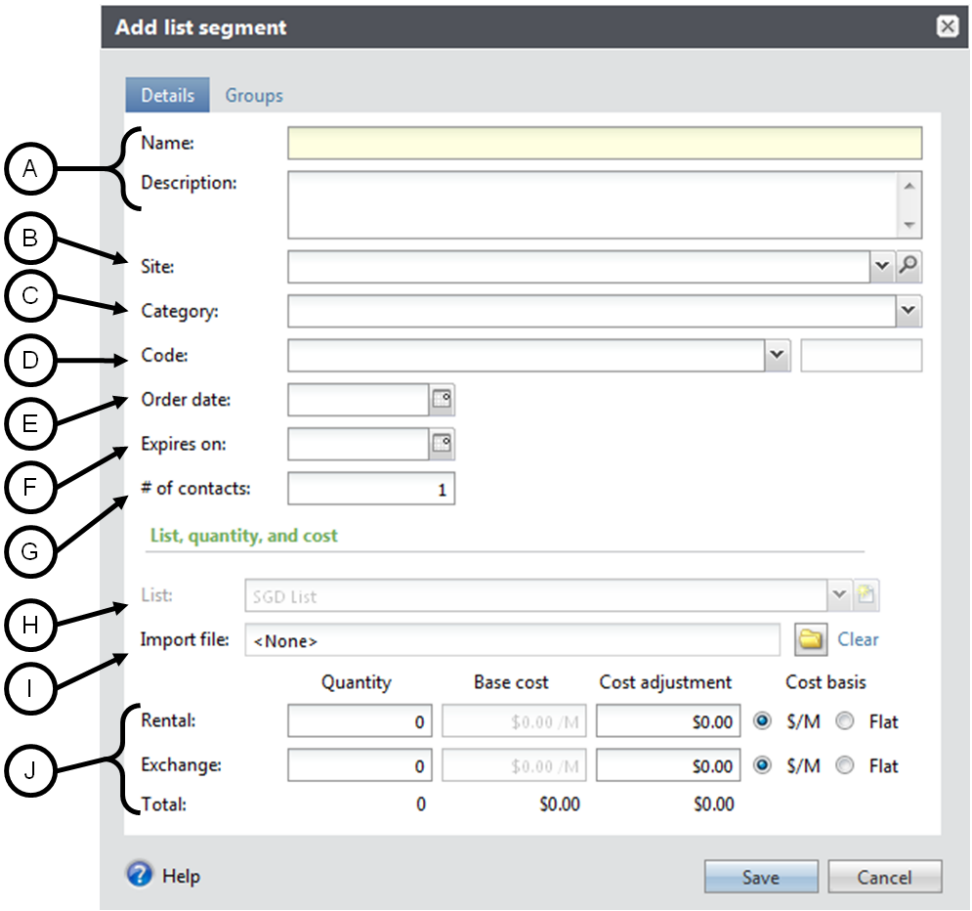
Add List Segments

On the Segments tab of a list record, you add segments to help you track the costs and record counts for imported and vendor-managed lists used on direct marketing efforts.



A. Enter a name and description to help identify the segment. Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Acquisition List Segment)

B. Select your site. (required)

C. Select a category to group related lists for comparison and reporting. (if applicable)

D. Select "Segment Code" so the system can automatically generate a code for the source code.

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E. Enter the date you purchased the list.

F. Enter the date after which members of the list cannot be contacted.

G. Enter the number of times you can contact each member of the list before the expiration date.

H. Select your list.

I. To import the list, select the *.csv file with the list data. When you click the folder icon, the Select list file window displays and the Open window display.

   - On the Open window, you browse out to the location of your finder file.
   - On the Select list file window, you specify the layout of the list file. (You will find additional information about the Select list file window in the following section of this lesson.)

   Note: If your organization purchases an acquisition list and sends it directly to a strategy vendor for segmentation, leave the **Import file** field blank.

J. If you select an import file:

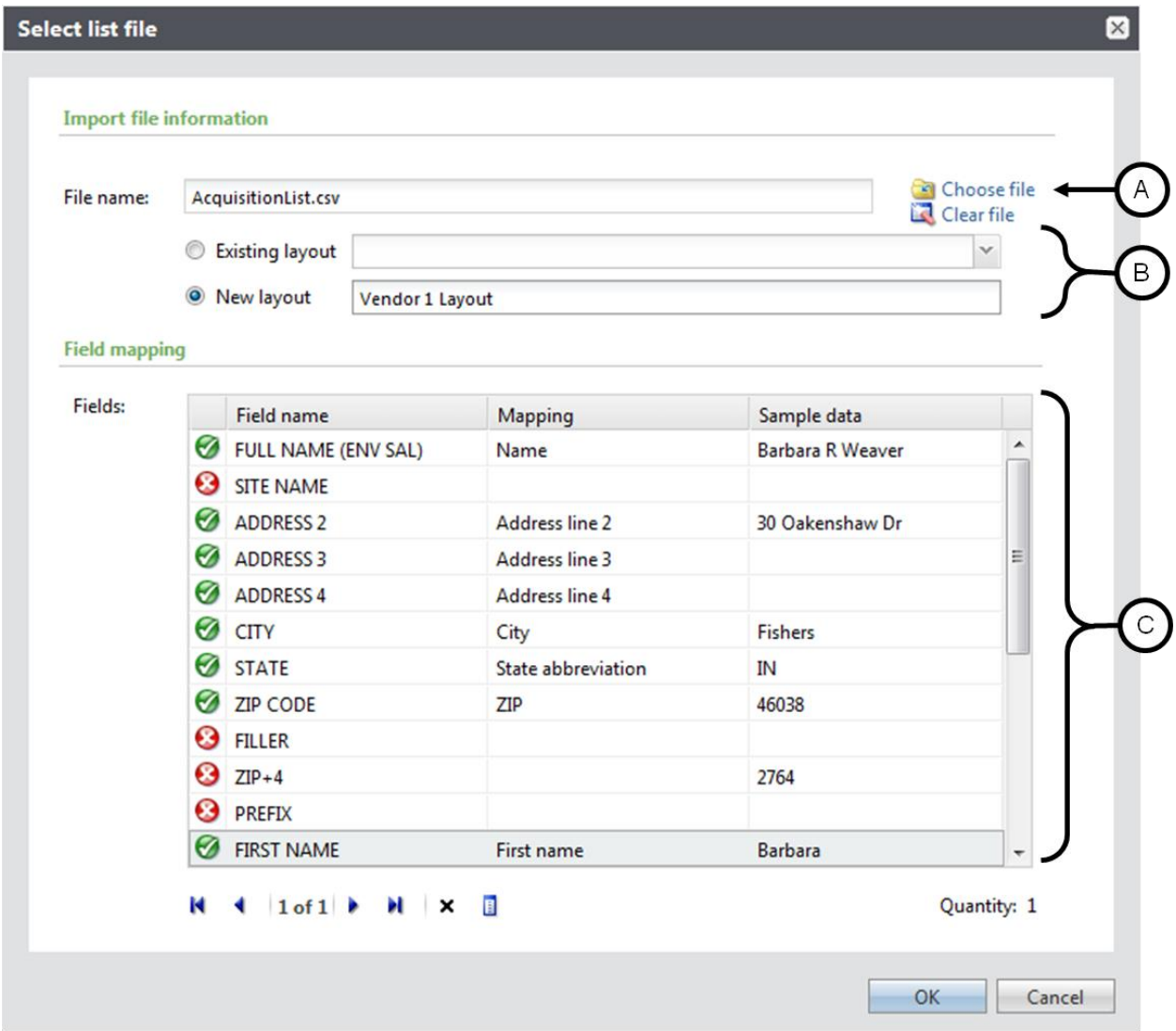
   - The **Quantity** column displays the number of records in the list. If some records in the list are an exchange, enter the amount on the **Exchange** row.
   - In the **Base cost** column, enter the cost to rent the list and the cost to exchange the list.
   - In the **Cost adjustment** column, enter any additional costs to create the lists.
   - In the **Cost basis** column, select whether the costs are per thousand records, or a flat fee.

NOTES

Import Acquisition Lists

When you create an imported list segment, you can import the *.csv file with the list data into the program.

If your organization purchases an acquisition list and sends it directly to a strategy vendor for segmentation, you will not import a data list at this time.



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A. Search for and select the acquisition list file. This file will be copied into the database as part of the import process.

B. If you have imported other lists, the layouts for those lists are available in the **Existing layout** dropdown. Otherwise, select **New Layout** and enter a name for the layout. Use the ***Davie*** Naming Convention (in this case, [site][fiscal year] [description] Acquisition List Layout)

C. If you create a new layout, you must map fields in the list to fields in the record source against which you are importing the records. The program attempts to map any recognizable fields in the list to known fields in your record data source (name and address for example).

The **Fields** grid contains three columns.

- **Field Name** – The name of the field in the list.
- **Mapping** – Dropdown fields that include all available values from the target record source.
- **Sample Data** - the first line of each file as it pertains to the selected file layout. This helps you determine the correct file layout to prevent importing files against the wrong file format.
- All fields must be mapped or specified as "Do not import" before you can successfully import the list. For any row with the red "x" icon, you either map the field to a source or user defined field, or specify that it not be imported.
- All rows must display the green checkmark before the file can be successfully imported.
- The arrow buttons at the bottom of the grid allow you to cycle through the rows in the file you import.
- When you right-click on a row and select **Do not Import**, the information for the field is not brought into the program — no column is created for it in the imported table.

Associate List Segment with Marketing Efforts

Once you add segments to an acquisition list record, you can associate the list segments with marketing efforts.

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Since you have not yet created a marketing effort on which to add a list segment, you will learn to add list segments to marketing efforts later in this lesson.

Segmentation

Segments help you target specific groups of donors to increase the effectiveness of your marketing efforts. Segments are used to group donors on the basis of a wide variety of different characteristics, such as recent giving history and wealth. You may want to base segments on previous marketing campaigns, past giving (such as recency of last gift, frequency of gifts, and the amount of prior gifts, biographical traits such as age or gender).

After you create the marketing effort, you can specify different packages (marketing pieces such as mail or email) and apply them to particular segments of your constituents.

Segments are made up of selections. When creating a standard segment, you specify one or more selections to be used to filter your source records and determine which ones belong in the segment. After you create segments, you can add them to direct marketing efforts. For example, the Selection of Female constituents in the following graphic can be used in another segment as well.

Records must be in each selection in your segment to be part of that segment. For example, the selections in the graphic below would come together to create one segment of records that are female donors who live in New York who gave between $100-$499 and have given in the past 6 months. Any other records included in the individual selections that do not meet all of these criteria will not be in your segment.

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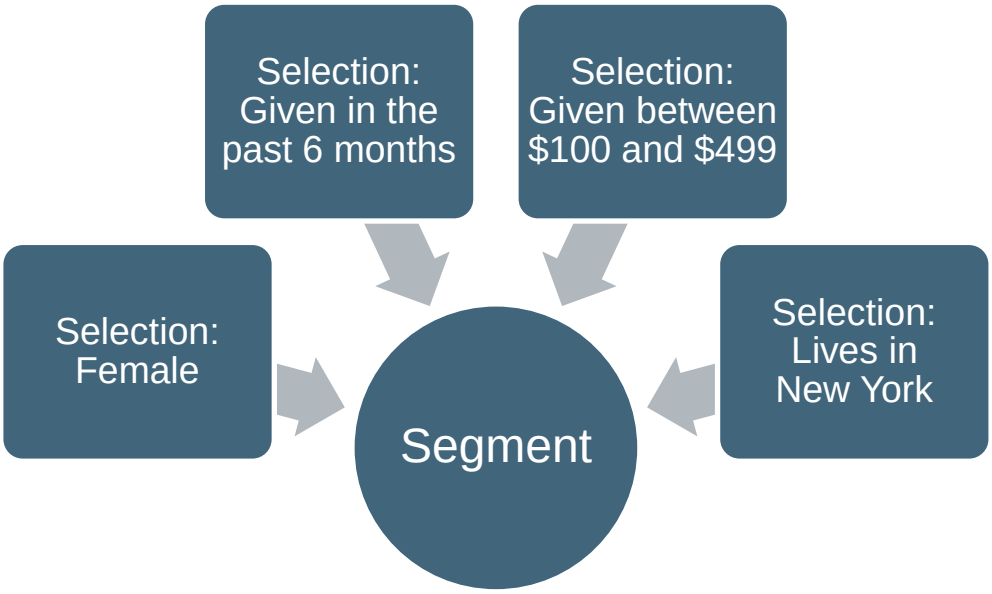


There are several types of segments, each serving a different purpose:

- **Constituent segments** are based on one or more selections of constituents.
- **List segments** are based on imported acquisition lists.
- **Membership segments** group constituents for membership efforts.
- **Sponsorship segments** group constituents based on sponsorship information.
- **Public media segments** help you target prospects you do not know with customized content based on their characteristics.

Selections

Selections are the low-level building blocks that are used to create your direct marketing segments. When creating constituent or membership segments, you specify one or more selections to be used to filter your source records and determine which ones belong in the segment. Selections can be reused in multiple segments.

You should create the selections you will need before you begin adding segments.

NOTES

Some examples of constituent selections include:

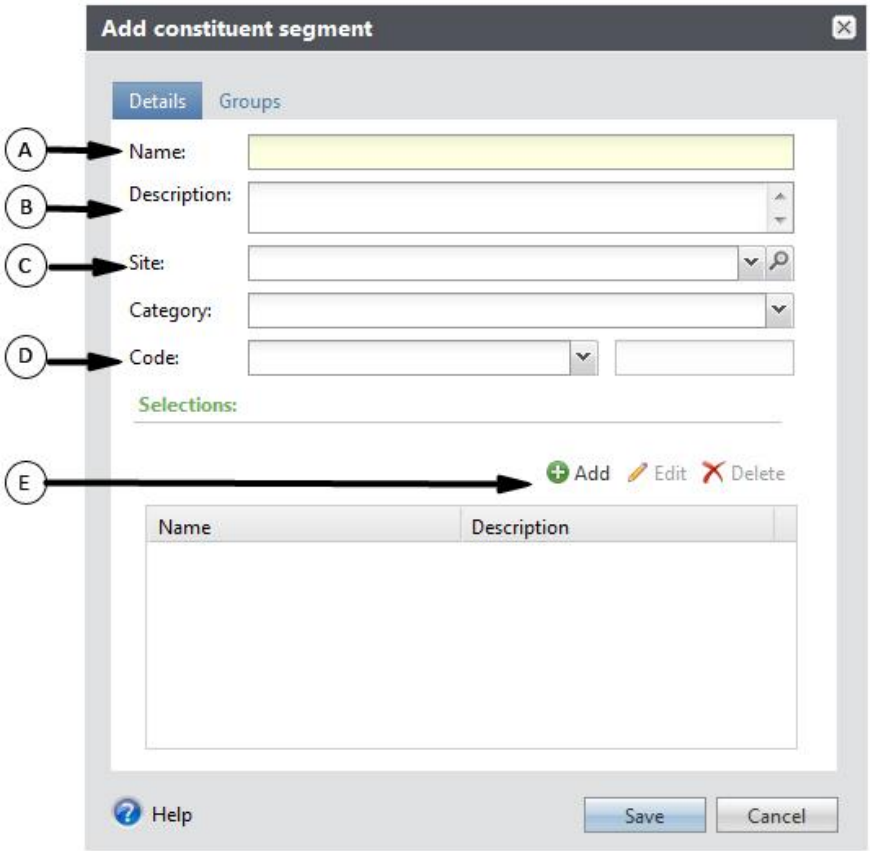
- FY13 Donors
- Alumni from a specific school
- Young Alumni
- Recognition program members

Selections created through the marketing and communications area of ***Davie*** are automatically created as static selections. Only static selections can be used to create segments.

Add Constituent Segments

You can create constituent segments based on one or more selections of constituents. You can create selections in advance or when you add a segment.

NOTES



A. Enter a name and description to help identify the segment. Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Segment)

B. Add a description for your segment.

C. Select your site. (required)

D. Select the Segment code so the system will automatically generate the code for your source code.

E. Select ADD to add your selections to the segment.

NOTES

Add List Segments

You can add list segments to use with imported and vendor-managed acquisition lists. These segments help you track the costs and record counts for imported and vendor-managed acquisition lists used on direct marketing efforts. See the section on Acquisition Lists for more information.

Segment Search

When performing analysis on your segments, you can search for individual segments by criteria such as name and description.

Segment Record

When you add a segment for direct marketing efforts, the program automatically creates a record of the segment. Similarly, when you add a public media segment for passive marketing efforts, the program automatically creates a record of the segment.

From this record, you can manage all aspects of the segment, such as key performance indicators (KPIs) to track the effectiveness of the segment, or efforts and list members associated with the segment.

The following table provides a summary of the tabs on a segment record.

Tab Name	Information
KPIs	On the KPIs tab, you can add and manage key performance indicators (KPIs) used to track the effectiveness of the segment.
Marketing Efforts	The Marketing Efforts tab displays all activated marketing efforts that use the selected segment, and in a separate grid, displays all inactive efforts that use the selected segment.
Current members	The Current members tab displays all constituents currently included in the selected segment.

NOTES

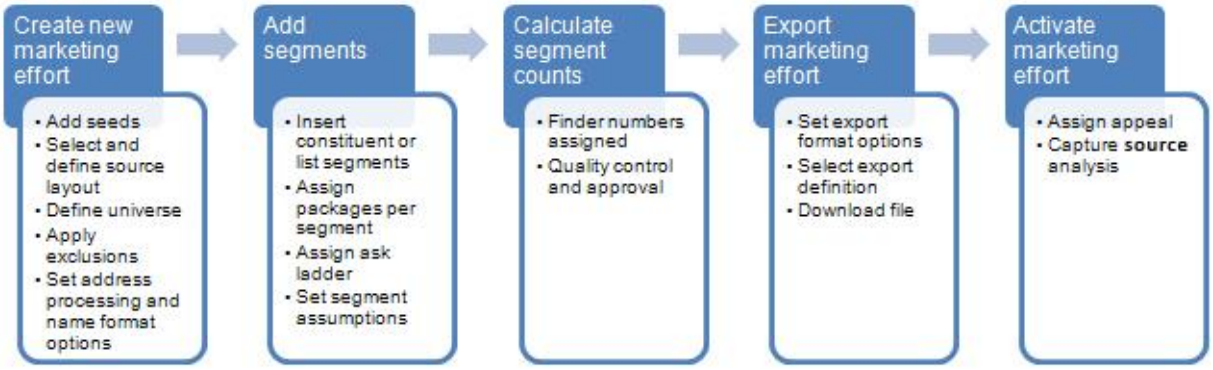
NOTES

Create a Marketing Effort

Marketing efforts enable you to segment donors on the basis of a wide variety of characteristics.

For direct marketing efforts, such as through mailings, you can segment donors on criteria such as recent giving history and wealth. For public media marketing efforts, such as through broadcast and online advertisements, you can segment recipients on criteria such as marketing locations and media outlets.

The following graphic illustrates the process for building marketing efforts in ***Davie***:



Add a Direct Marketing Effort

Use direct marketing efforts to target segmented donors with mail and email packages based on criteria such as recent giving history and wealth.

The Add marketing effort window has multiple tabs on which you enter information about the marketing effort. The following table provides a description of what type of information you enter on each of the tabs.

NOTES

Tab Name	Information
General	On this tab, you define basic information about the marketing effort such as name and description. • Use the ***Davie*** Naming Convention (in this case, [site abbreviation] FY[XX] [description] Marketing Effort) • Add a description to explain your marketing effort. • Add your site. (required) • Add the DROP DATE of your effort.
Source code	On this tab, you specify your source code layout then you must: • select the correct appeal format • enter the fiscal year value for the fiscal year in which you are doing the effort.
Universe	On this tab, you specify what records should be explicitly included in the marketing effort. A universe can be used to limit the overall audience for a mailing. • Include "All qualifying constituents" (**Do not select "Qualifying households."** This option sends information via the household record, not members of the household. Typically, you would also not send to organizations.) • Add the selection(s) that makes up your universe. (For example: all alumni from your school or all donors for the previous fiscal year.) • Adding selections to your Universe is not required.
Exclusions	On this tab, you specify which records should be explicitly excluded from the marketing effort. These exclusions are based on selections or prior marketing efforts. For example, when doing a marketing effort to LYBUNTS, you could exclude a selection of current fiscal year donors.

NOTES

Tab Name	Information
Contact rules	On this tab, you enter information about any exclusions for this marketing effort based on contact rules. Always include the following on this tab: • "*UNC" codes that apply to your effort. Solicitations are asks for money. Communications are news items like newsletters or magazines. • Your sites applicable solicit code(s) • Excludes deceased constituents (pre-configured) • Excludes inactive constituents (pre-configured)
Address processing	On this tab, you define the address and name formats to use for the marketing effort. These address and name formats can also be set at the segment level. The recommended options are: • Address processing option: ALL FYXX Primary Address, Seasonal, or Mail Preference Address Processing Option • Name format options: - ALL FYXX Joint Formal Stacked by Gender and Title Name Format Option *(always includes BOTH members of a household)* - ALL FYXX Informal Salutation and Formal Addressee Name Format Option *(always includes BOTH members of a household)* - ALL FYXX Joint Formal Name Format Option *(always includes BOTH members of a household)* - ALL FYXX Informal Name Format Option *(always includes BOTH members of a household)*
Activation	On this tab, you will: • Select the appeal that was created for you. (required) • Check "Refresh segment selections and filters" if desired. • Select a default export definition if you do not add these to your packages. (It is recommended they be added at the package level.) • You can choose to export the effort after it is activated. It does not have to be checked on this tab.

NOTES

Tab Name	Information
Business units	The business unit will be assigned at the appeal level. **Do not** override the appeal business units. This will cause problems with your reporting and mail preferences.
KPIs	On this tab, you mark the KPIs you want to track for the marketing effort.

The Marketing Effort Record

On a marketing effort record, you can manage all aspects of the marketing effort, including editing universe or exclusion criteria, setting budget amounts, and more.

Segments Tab

The main reason to use segmentation is that different groups of donors or prospects will have different responses to different packages in your marketing efforts. Typically you would have a different segment (and package) for each variation of your letter or email in a marketing effort.

When you target specific groups, you can increase the effectiveness of your efforts. You can specify different packages and apply them to particular segments within an effort.

On the Segments tab of a marketing effort record, you can add individual segments.

The order of segments in the grid is important because ***records can only be included in one segment***. Segments are mutually exclusive. When you activate a marketing effort, segments are processed from top to bottom***. If a record meets the criteria for multiple segments, only the first of those segments will include the record. In other words, your segments will be "de-duped" automatically based on your segment hierarchy.***

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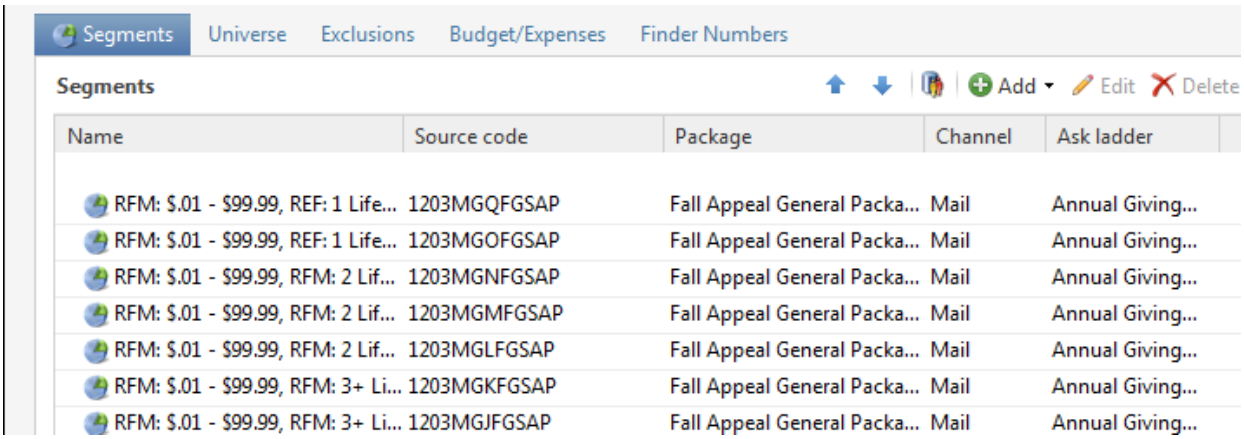
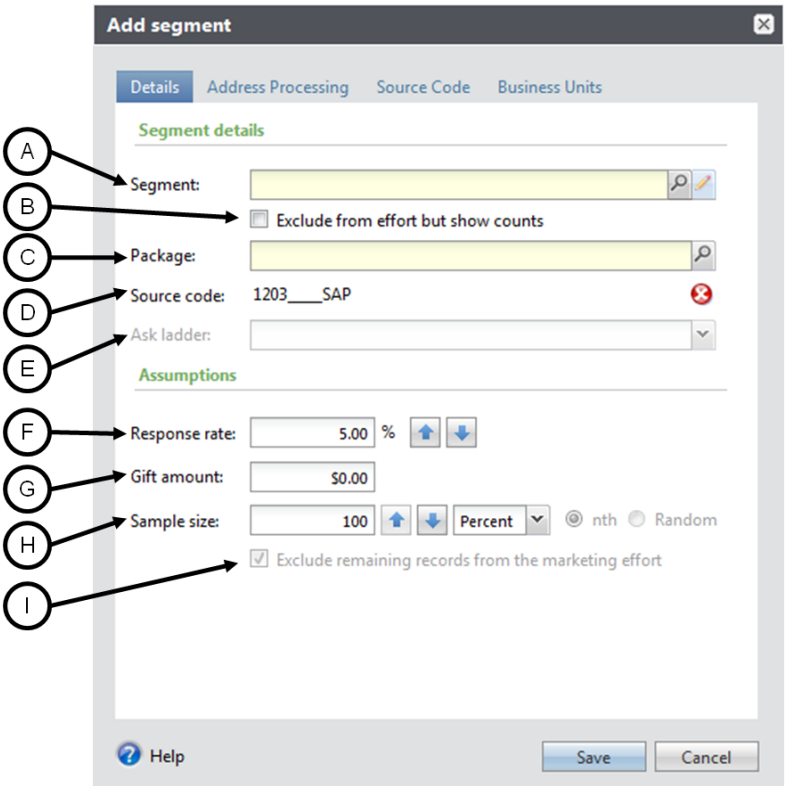


After the marketing effort is activated, the Segments tab changes to show actual gift counts and performance measures, and most functions on the tab are locked against editing.

Add Constituent Segments to a Marketing Effort



NOTES

A. Search for and select a segment to use in the marketing effort. When you select a segment, the source code part value on the segment defaults into the appropriate position in the source code field.

B. Mark this checkbox to exclude the segment from the marketing effort. Segment exclusions (also known as "remainder" or "no mail" segments) allow you to quality check your marketing efforts and ensure that all donors are accounted for even if they do not receive the effort. Segment exclusions also allow you to group remainders from a segment so they are not included in other segments.

C. Search for and select the package to associate with this segment. When you select a package, the source code part value from the package defaults into the appropriate position in the source code field below.

D. This field displays the full source code. If there are code parts missing values, select the source code tab to complete the source code.

E. Select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort. (Ask Ladders are not required.)

F. Enter an expected response rate for the segment.

G. Enter the expected gift amount from respondents.

H. Enter a sample size and select “Percent” or “Records.” Then select whether to add records at random or every n^{th} value. This is used for test segments or for n^{th}ing an audience to a specific number of records in order to control marketing effort volumes.
The sample size is typically 100%. However, you can adjust sample size to ensure segments are equally sized, hold down costs, or account for limits on marketing effort materials. When you enter in sample size less than 100%, it will reduce your segment count.

I. If you enter a sample size less than 100 percent or select “Records” in the Sample size field, you can select **Exclude remaining records from the marketing effort** to exclude any records that are not included in the sample from other segments below the current segment in the Segments grid. (Segments are processed for a marketing effort in order from top to bottom.)

NOTES

Add Test Segments to a Marketing Effort

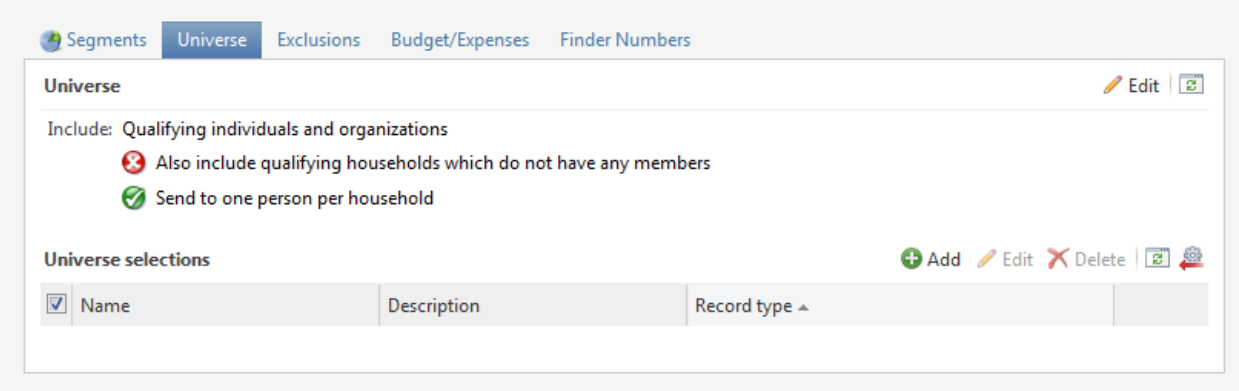
Test segments allow you to test different packages or ask ladders on the same audience. Test segments take a sample portion of the parent segment's records and assign a different package or ask ladder to the test segments. You can assign the same test segment to multiple segments in a marketing effort.

The fields and options on the Add test segment window are similar to those on the Add segment window.

The sample size amount defaults to 5%, but should be set to represent how the parent segment is being split for testing. If you are splitting the parent segment into two parts for testing, the sample size would be set to 50% on the test segment. The test segment size can also be set to an actual number or a fraction.

Universe Tab

The Universe tab on a marketing effort record lists the records that should be explicitly included in the marketing effort.



You specify universe selections when you create the marketing effort, but if you need to add or edit the universe selections you specified, you can do so on the Universe tab.

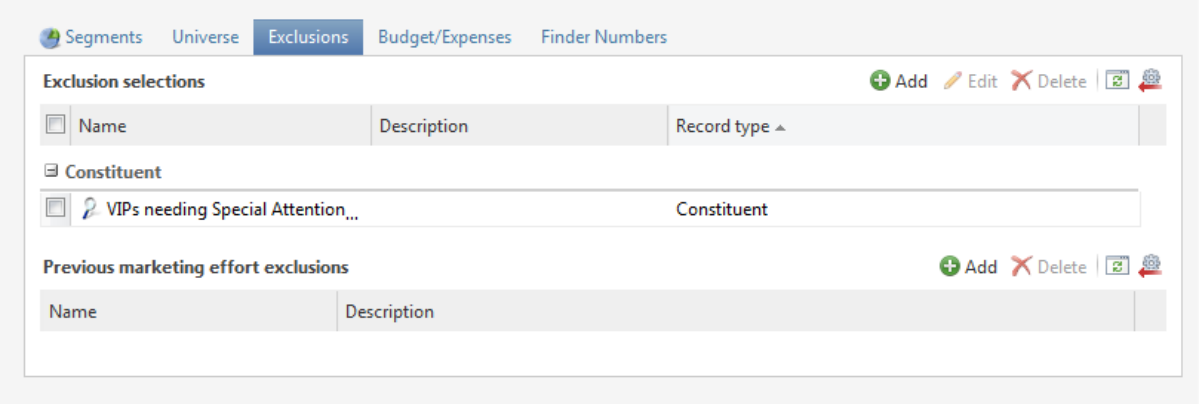
By specifying groups of records for the universe, when you create segments for the marketing effort, they are limited to the available Records sources used in the universe selections you specify here. ***No matter what selections you choose for each segment, they are always limited to only those donors that exist in the***

NOTES

universe selections you specify here. This can be very helpful so you can reuse broad selections in your efforts, but ***Universe selections are NOT required.***

Exclusions Tab

The Exclusions tab on a marketing effort record lists the records that should be explicitly excluded from the marketing effort.



You specify exclusions selections when you create the marketing effort, but if you need to add or edit the exclusion selections you specified, you can do so on the Exclusions tab.

This is a great place to add exclusions like current fiscal year donors and other marketing efforts that have been done recently so the recipients are not over-contacted.

Budget/Expenses Tab

On the Budget/Expenses tab, you can enter the amount budgeted for a marketing effort to see at a glance whether it exceeds the budget. This is not at all required as a business rule, but if not done the KPI, ROI and other areas in ***Davie*** will not be able to show you analysis data.

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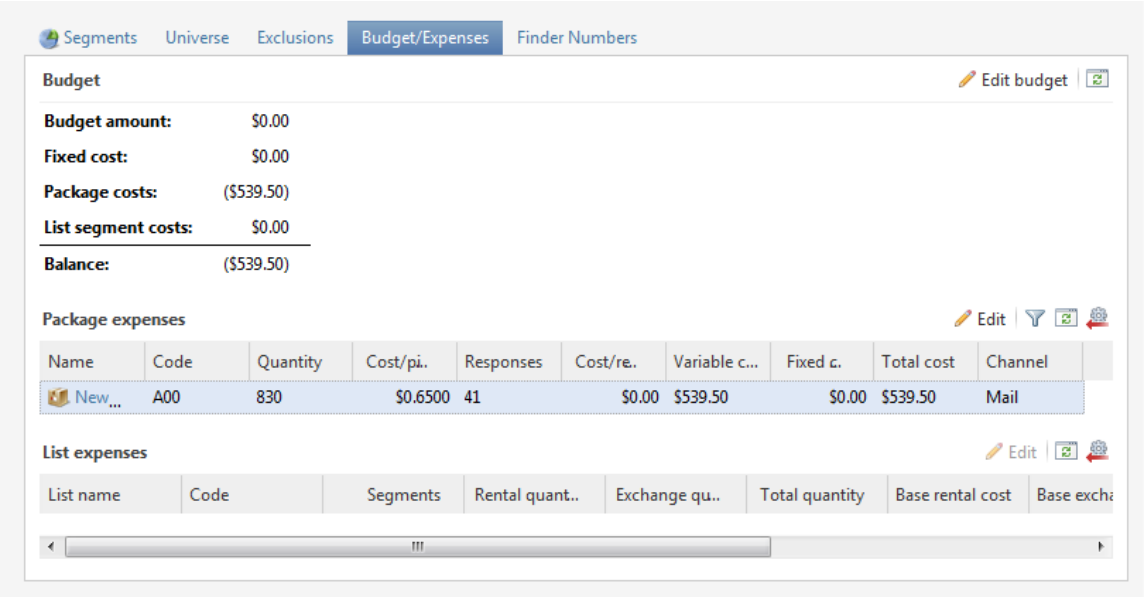


If you did not budget enough money to mail all members of a marketing effort, you can address this in several ways.

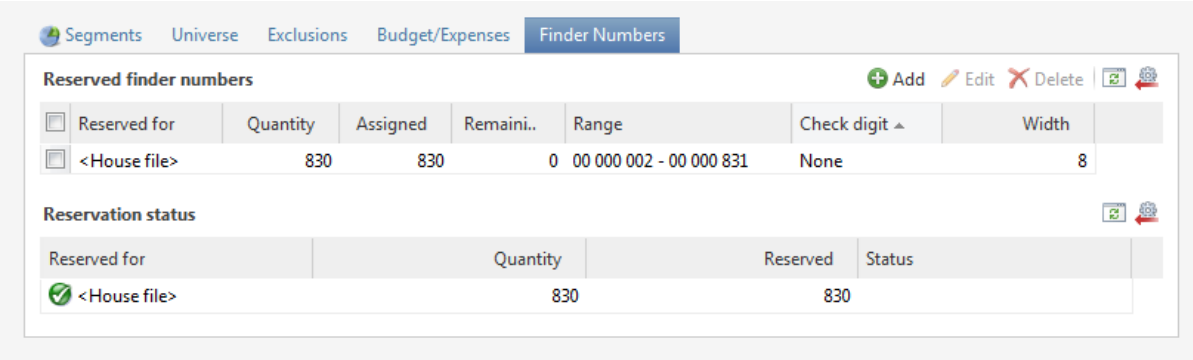
- Increase the budget amount, although this may not always be possible.
- For a direct marketing effort, change the filters for the marketing effort on the Exclusions tab. For example, you can choose to exclude members of a previous marketing effort. You can reduce costs by excluding people from a Summer Appeal if they were included in the Spring Appeal.
- Change the packages. Some packages may be more expensive than others. To bring costs under control, you can use a less expensive package for a segment or segments.
- For a direct marketing effort, decrease the quantity per segment. To do this, edit the segment and adjust the sample size. When you reduce the sample size, you reduce the total quantity, which decreases the overall variable cost for the segment.
- Remove segments entirely. You can exclude entire segments and use them at a later date when funds become available.

NOTES

Finder Numbers Tab

On the Finder numbers tab, you can view the finder numbers reserved or assigned for a direct marketing effort.

As part of the Calculate segment counts process, the program assigns and stores a finder number for each potential donor in a direct marketing effort. The finder number identifies the marketing effort and the donor. ***Finder numbers are reassigned every time a marketing effort is re-calculated. Keep this in mind when activating your effort! Do not re-calculate your effort if you have already used the finder numbers before activation.***



The reserved finder numbers range for "<House file>" encompasses records that are currently constituents in your database as well as any potential donors from acquisition lists for which you imported the data list.

Any acquisition list for which you did not import the data list has a separate set of reserved finder numbers. In this case, you send the list of finder numbers to the vendor to match each potential donor with the appropriate finder number.

Select Seeds for the Marketing Effort

You can associate one or more seeds with a direct marketing effort. Every seed associated with a marketing effort receives one of each package contained in the marketing effort.

Because you know seeds will not give based on that marketing effort, they are not included and do not affect any calculations or ROI numbers for the marketing effort. The effort does not appear on their record in ***Davie*** if one exists.

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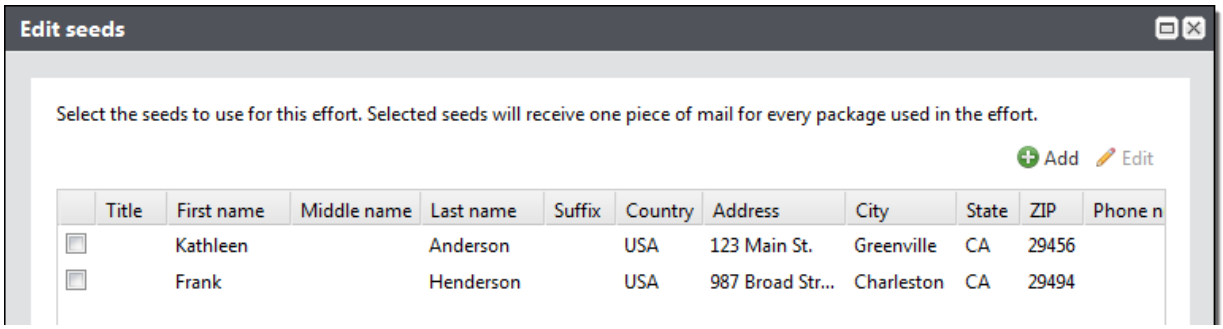
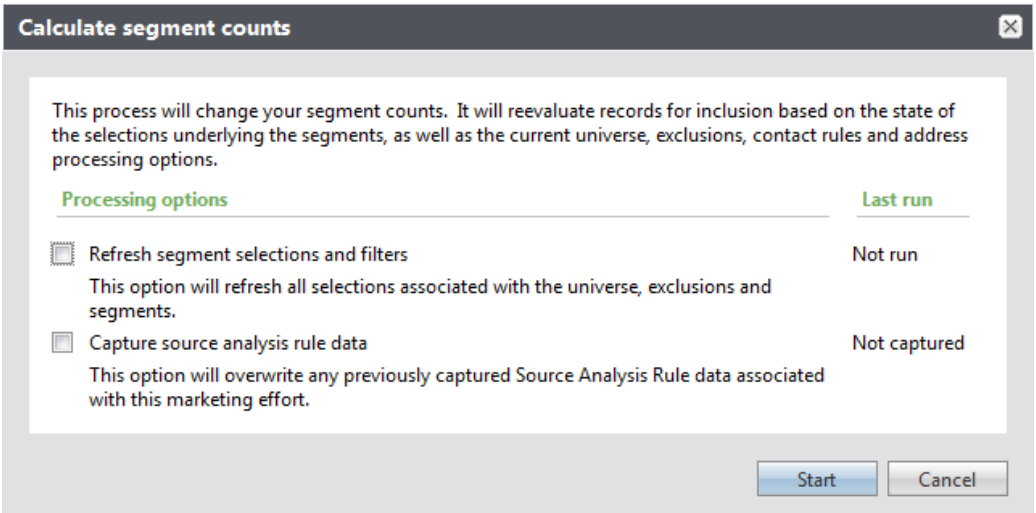


Calculate Segment Counts

To calculate various counts for the marketing effort and its segments, such as the total number of records, total expenses, and expected revenue, run the Calculate segment counts process.

This process also assigns finder numbers to each record included in the marketing effort. When you run Calculate segment counts, you can choose to refresh all the selections associated with the marketing effort and to update the source analysis rule data. Source analysis rule data (point-in-time analysis information) is not being used at this time. We recommend **not** checking that box in order to make the calculation process more quickly.

Finder numbers are reassigned every time a marketing effort is re-calculated. Keep this in mind when activating your effort! Do not re-calculate your effort if you have already used the finder numbers before activation.

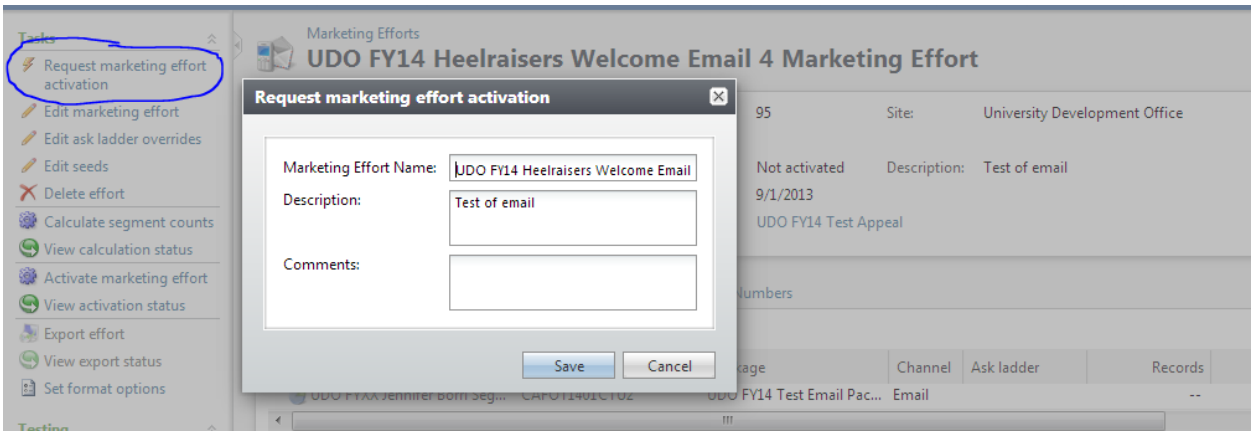


NOTES

Activate the Marketing Effort

The activation of the marketing effort begins the official process of sending the marketing effort to each constituent in the segment. It records the marketing effort and appeal on every constituent record in the segments. This is very hard to undo; therefore, the marketing effort should not be activated until all items are verified and ready to be received by the constituents. You can select the same appeal for multiple marketing efforts.

Because of the system resources used in activating a marketing effort, this is done by a system administrator after business hours. To request this be done, use the Request marketing effort activation task on the explorer bar. The marketing effort will be activated within 1-2 business days of your request.



KPIs Tab

The KPIs tab displays on a marketing effort record once you activate the marketing effort.

On this tab, you can add additional KPIs for the marketing effort, or edit and delete any KPIs already associated with the marketing effort.

When you activate the marketing effort, the program generates KPI values automatically. Each time you refresh the marketing effort, the program automatically updates the KPI values for the marketing effort.

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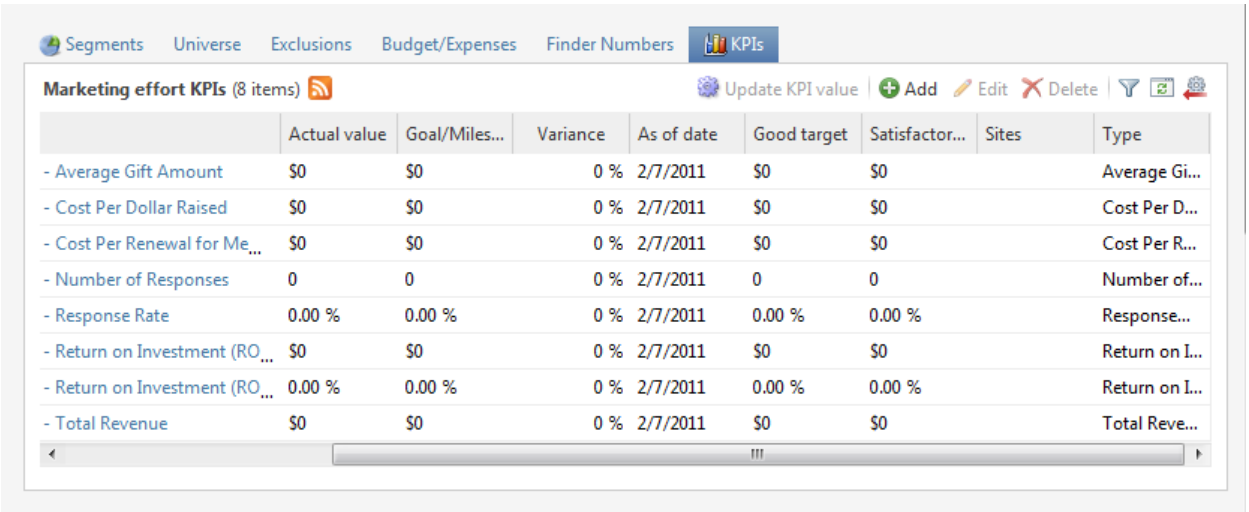


	Actual value	Goal/Miles...	Variance	As of date	Good target	Satisfactor...	Sites	Type
- Average Gift Amount	$0	$0	0 %	2/7/2011	$0	$0		Average Gi...
- Cost Per Dollar Raised	$0	$0	0 %	2/7/2011	$0	$0		Cost Per D...
- Cost Per Renewal for Me...	$0	$0	0 %	2/7/2011	$0	$0		Cost Per R...
- Number of Responses	0	0	0 %	2/7/2011	0	0		Number of...
- Response Rate	0.00 %	0.00 %	0 %	2/7/2011	0.00 %	0.00 %		Response...
- Return on Investment (RO...	$0	$0	0 %	2/7/2011	$0	$0		Return on I...
- Return on Investment (RO...	0.00 %	0.00 %	0 %	2/7/2011	0.00 %	0.00 %		Return on I...
- Total Revenue	$0	$0	0 %	2/7/2011	$0	$0		Total Reve...

NOTES

Export Marketing Efforts

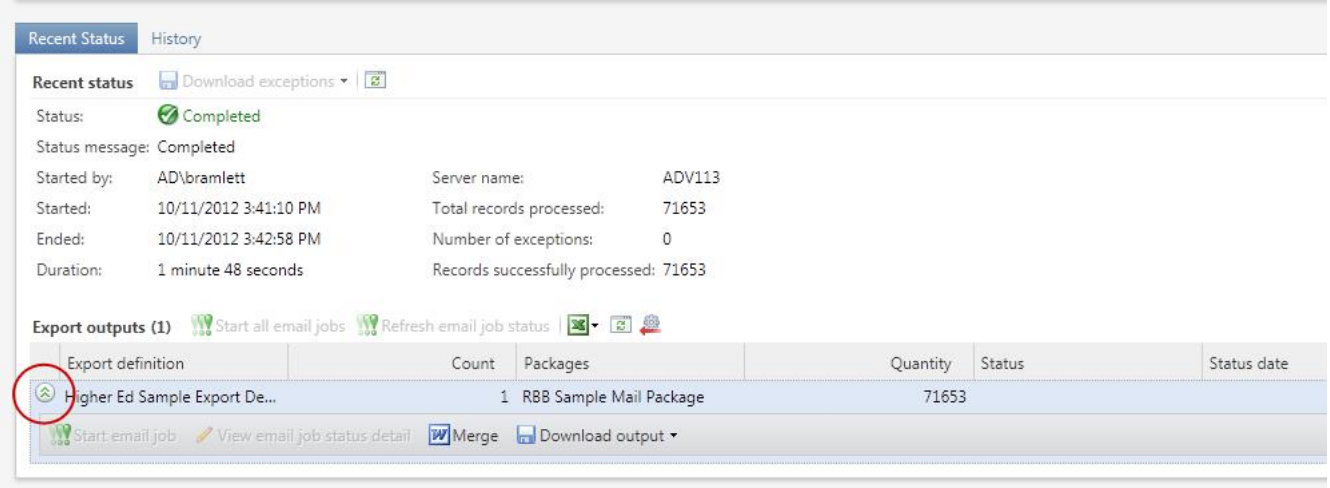
You can create an output file of marketing effort information to send to a mail processing vendor or import into another program like Excel.

Marketing Effort Export Process

When you create an export, it is saved as a process that you can run whenever necessary. On the process record, you can download the output file created by it from your database.

Download Output Files

Once you run an export process, the export status page displays. On the export status page, you can download output files from the database for use in another application like Excel or to send to a marketing effort processing house. You must first select the poplar to the left of the Export definition on the status screen.



You have three options for downloading output files: Single file, Multiple files, and Grouped Files.

Download a Single Output File

The single file download creates one output file containing all data.

Download Multiple Output Files

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The multiple files download splits output into multiple files based on the unique values of a selected field.

For example, if you split by “Package code,” a separate output file is created for each package code included in the export.

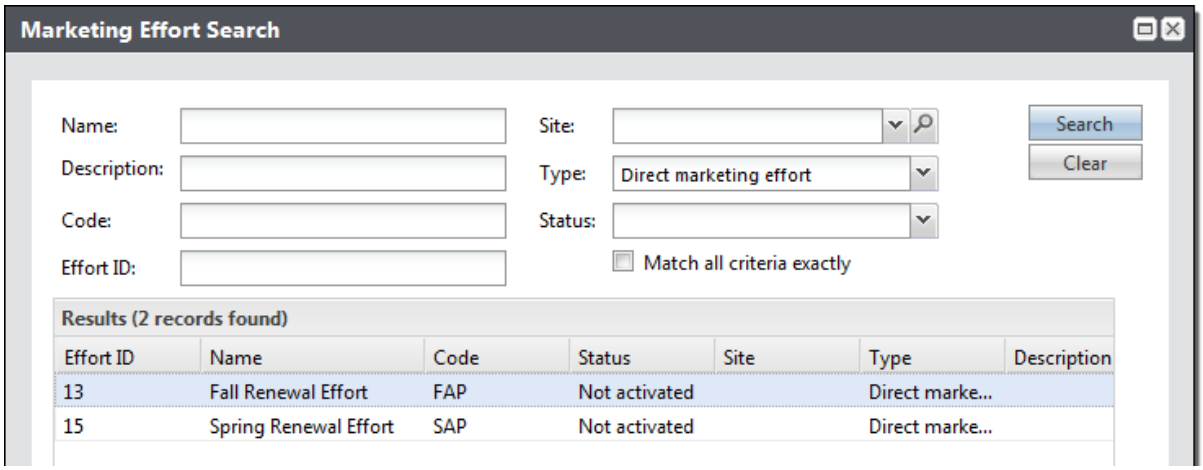
Download Grouped Files

The grouped files download creates output files including data grouped by field values as specified. This will typically not be used unless you have a custom export definition created for you.

For example, you can create a set of files broken out by region. To do this, include the State field in your export definition and then select to group by State for the output download. Create a group for each region and add the appropriate states to each group— for example, include FL, GA, SC, and NC in the Southeast region group and CT, MA, NH, and VT in the Northeast region group. This setup produces a file for each region and each file includes data for only the states included in its region.

Search for a Marketing Effort

Use the Marketing Effort Search screen to locate and open a specific effort that you have already created, such as to edit information, run a report, or select an effort to exclude from another effort.

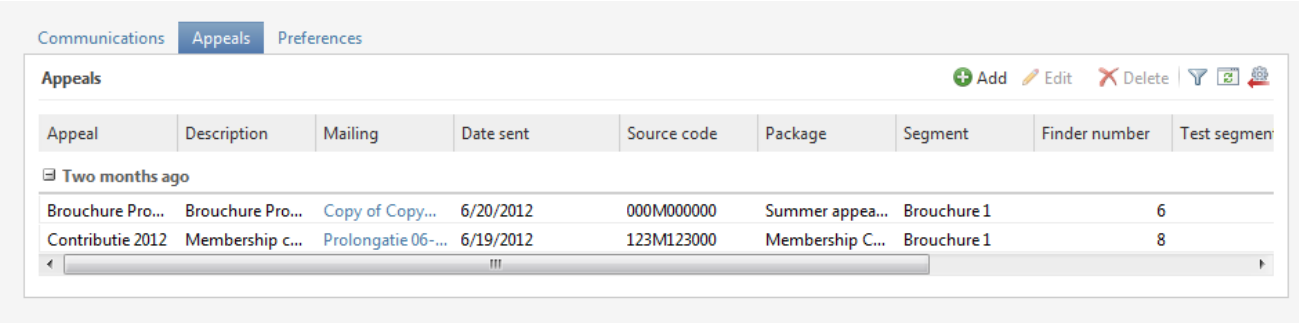


NOTES

View Marketing Efforts on Constituent Records

A constituent's Communications page provides a snapshot of your organization's communication with the constituent. The Appeals tab of the Communications page lists the appeal mailings your organization sends the constituent.

When you activate a marketing effort, the appeal displays on the Appeals tab of the constituents included in the marketing effort.



The Appeals grid displays information about each appeal, such as its date, mailing, and package. To access the marketing effort record, click the name of the mailing in the Mailing column.

NOTES

Perform Analysis

Appeal reports help you evaluate the performance of your efforts to communicate with your constituents to raise funds. You can generate and view several reports to determine and compare the effectiveness of your appeals, appeal mailings, and communication plans.

You can access related reports on the explorer bar of the Marketing Effort page or via the Analysis functional area under Marketing Reports.

Appeal Performance Report

The Appeal Performance report provides information about the effectiveness of your appeals. When you generate the report, you can select to view information about a single appeal or multiple appeals. You can filter the appeals and revenue information included in the report by various criteria, such as the appeal's category or the date of the revenue transactions.

Appeal Profile Report

The Appeal Profile report shows information about an appeal such as designations, benefits, associated mailings, and revenue information.

Marketing Revenue Report

The Marketing revenue report displays the revenue that a marketing effort generates for your organization. You can use the report to display revenue from a single marketing effort or multiple efforts associated with a single appeal or marketing plan.

NOTES

Summary

- Source codes allow for the optimal measurement of your direct marketing efforts. They help establish the specific combination of list, package, segment, etc. that results in a particular gift.
- A finder number is a sequential number assigned to each name on a mailing list, and printed on each reply form along with UNC ID(s) and source code. The finder number is used to speed the data entry of responses to an appeal by eliminating the need to enter a name and address. UNC ID(s) and source code are still needed in case the legal donor is not represented by the finder number when mailing to spouses/partners.
- Seeds are usually internal people at your organization who can be included in a marketing effort for the purpose of verifying that the mail house is doing its job correctly in sending out the mailing pieces. Because you know seeds will not give based on that mailing, they are not included in counts and they do not affect any calculations or ROI numbers for the mailing.
- An ask ladder is a set of fixed or calculated ask amounts included on a response device that is based on an "entry amount" value from the constituent's giving history, such as the most recent or largest gift amount. You assign ask ladders to segments in a mailing to ensure each segment member receives the appropriate ask ladder on his or her marketing effort.
- The Vendors area of ***Davie*** shows all the vendors that provide products and services to UNC.
- Creatives are the content used in packages you include with public media and other marketing efforts such as broadcast advertisements, billboards, print literature, and online banner ads. The Creatives page provides a permanent place to store creative content.
- Packages enable you to group items delivered to a marketing effort recipient, such as an appeal letter or event tickets. ***Davie*** allows you to manage all aspects of your packages, including creatives, documents, materials, and expenses, in one main repository.
- Segments help you target specific groups to increase the effectiveness of your efforts. After you create a marketing effort, you can specify different packages and apply them to particular segments.
- Selections are the low-level building blocks that are used to create your direct marketing segments.
- Marketing efforts enable you to segment donors on the basis of a wide variety of different characteristics. To increase the effectiveness of your fundraising, you can target your best prospects with customized content and send different packages to different segments.

NOTES

- Acquisition lists are files with names and addresses of potential donors that you rent or purchase from vendors. These are used to market to constituents who do not have records in ***Davie***.
- The steps in the process for importing an acquisition list into the program are:
    - Establish duplicate criteria (If segmenting in-house)
    - Add list
    - Add list segments
    - Import list (If segmenting in-house)
    - Associate list with a marketing effort
- A constituent's Communications page provides a snapshot of UNC's communication with the constituent. The Appeals tab of the Communications page lists the appeal mailings your organization sends the constituent.
- When your organization receives a donation in response to a marketing effort, you match the payment to the particular marketing effort in order to track and report on the mailing's performance. Finder numbers are the link between marketing efforts and the resulting constituent donations.
- Appeal reports help you evaluate the performance of your efforts to communicate with your constituents to raise funds.
- The Marketing revenue report displays the revenue that a marketing effort generates for your organization.

NOTES

Appendix: Glossary/Terminology

Click here to go to the online Glossary for Davie.

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