

Marketing Efforts How To revised 2/10/16

	Instructions	Notes
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/ to request appeal codes. The request form can be found on the Davie portal.	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 <ul style="list-style-type: none"> - Name the package [Site Abbreviation] FY[XX] [Description] Mail Package - Enter a description for your letter - 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. 	The instructions are for a mail package, but all packages are very similar
3	Create your Selection(s) (Query class is required. Complete Query Request Form found on Davie Portal if you need to request selections 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 Selections , then Add a Selection .	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) (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 <ul style="list-style-type: none"> - Name it [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 an add your selection(s) 	Each audience should have a dedicated segment or be a selection in the universe
5	Add a Direct Marketing Effort	

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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 [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	
5a Add segments (with packages) to the Direct Marketing Effort	
a On the Segments tab, select the Add button and select Constituent Segment - Add your segment - Add your package	List segments are for rented or purchased lists of constituents NOT in Davie. Once your segment is added, you have created your Source Code.
b 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 Save	
c Add additional segments as needed.	
d If you have more than one segment, set your segment hierarchy by highlighting the segment name and using the up and down arrow keys to re-position your segments.	If a constituent or couple falls in multiple segments, they will only show up in the first one in the list upon calculation and activation.
e 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 .	The Universe includes all the people who might get your effort, minus exceptions and those who are not in your segments. You can add multiple selections to the Universe and anyone in any of the selections will be part of the Universe. Universe is not required.
f On the Exclusions tab, select the Add button in the Selections to Exclusion area to add your exclusion selections. You can also add previously activated marketing efforts as exclusions	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.
g On the Effort Settings tab, additional information regarding what may impact the effort is here.	
h On the Source Code tab	Do nothing, this information has already been chosen when the segments were added to the effort.

Instructions	Notes
i On the Export tab _verify the export definition is populated for the effort type The Currency, date and time options are just for informational purposes	
j On the Activation tab _verify that the options will refresh on both calculation and activation	Will show not run if the effort has not been calculated
k On the Address Processing tab - verify that the Address processing option: " ALL FYXX Primary Address, Seasonal, or Mail Preference Address Processing Option " is selected for mailed marketing efforts OR Use Primary address, primary addressee, and primary saluation for email efforts. Name Format option is found here	There is also a business, home and student option for addresses. Note that some name format options will show BOTH active members of a joint name format even if one spouse was excluded or not included in the effort.
l On the Seeds tab, add any seeds to the effort - Search for the Seed. To create, select Add to create the seed in the search dialog - Select Save .	Seeds can be added to this list from the Marketing & Communications main page. Seeds will get every segment in the effort.
m On the KPI tab, do nothing - for informational purposes	
n On the Finder Numbers tab, the finder numbers reserved for this effort will display	
o On the Budget tab, this data has to be manually entered.	
7 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 check under the Address Processing tab. Click Start . - WAIT for the calculation to tell you when it is completed.	Do not proceed until the calculation finishes.
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	

Instructions	Notes
e Review your effort to make sure it is correct. Go back and make changes if it is not. Add exclusion selections to remove anyone who should not receive the effort.	
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 - Enter the description of your mailing if desired and any comments you have. - Your request will be scheduled to complete in 1-2 business days.	Activation is the point of no return. Only activate after you have calculated, exported, reviewed and edited your effort if necessary. Activation is what puts your effort on the constituents' records.
g When you get the email that your effort has been activated, you MUST RETURN TO THE MARKETING EFFORT TO EXPORT . Re-run the export process and download as you did in step 7c.	Do not use the export you used to review the effort. Only the export after activation will have the correct, updated constituents, contact info and finder numbers
<p>Important reminders about your output:</p> <ul style="list-style-type: none"> * Spouse fields in the export definition include ALL active and inactive spouses on constituent records included in your criteria. <ul style="list-style-type: none"> * 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 allows you to "marry" spouses in an effort by including or excluding spouse names from the addressee or salutation name in your output. <ul style="list-style-type: none"> * 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) 	