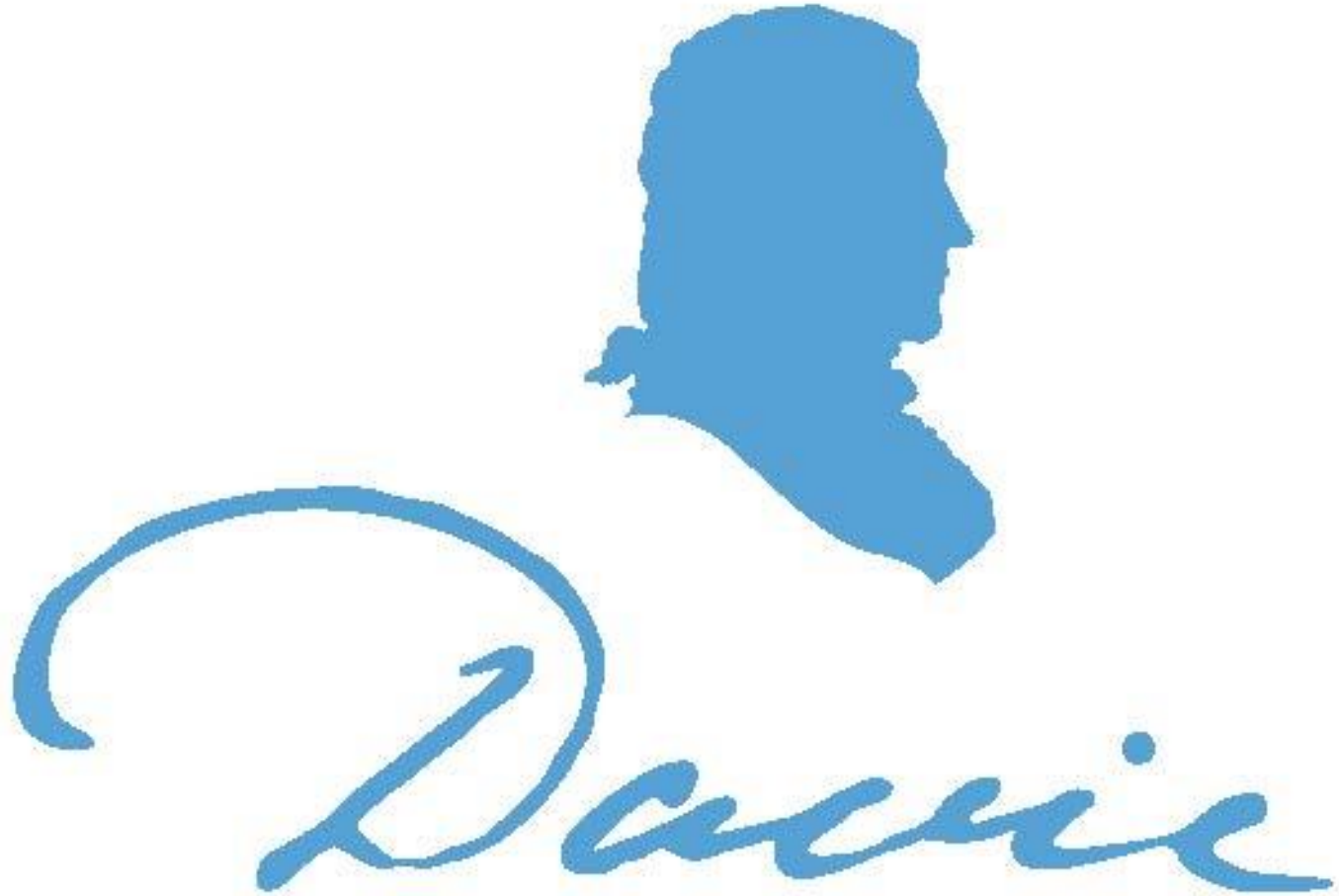




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CHAMPIONS FOR CHANGE



**Welcome to  
Davie 201 - Direct Marketing Efforts  
“The Basics”**





# Agenda

## Part 1

- Communication Preferences
- Address Processing and Name Format Options

*Break*

## Part 2

- Anatomy of a Direct Marketing Effort
- Universe, Exclusions, Packages, Selections, Segments and Seeds

*Break*

## Part 3

- Create a Direct Marketing Effort
- Miscellaneous – planning calendar, marketing effort detail report and removing spouses





# Discussion Points

- Marketing Efforts philosophy
- Marketing Effort components
  - Appeal
  - Template
  - Segments (Universe and Exclusions)
  - Package
  - Export/Analysis





# Marketing Effort Facts

- Shows on constituent's records under Communications tab
- Marketing templates are the foundation of the marketing efforts
- Assigns finder numbers and source codes to help track solicitation responses and help with data entry accuracy
- Magically combines spouses/partners and lets you decide what constituent comes first
- Automatically removes duplicates
- Automatically excludes people from efforts who should not receive them
- Provide ready made reports





# Naming Conventions in Davie



**[site abbreviation] [FYXX] [description] [thing being named]**  
**[Who] [When] [Why] [What]**

## Direct Marketing Effort Examples:

**CAS FY14 LYBUNT Mail Package**  
**CAF FY14 Bell Ringers Appeal**  
**KFBS FY14 Spring Mailing Segment**  
**ALL FYXX UNC Alumni Selection**





**Let's get started!**





*Davie*

## Training Login and Password

**Login:** ad\annual#.gst

(Replace the # with the number assigned to you.)

**Password:** Learn2016!







# Communication Preferences

Solicit Codes &  
Mail Preferences





# Solicit Codes/Mail Preferences

- Solicit Codes are for UNC overall and by site for events, communications, and solicitations
- Mail Preferences are based on specific types of communications by sites/business units
- They work together to record granular constituent preferences
- Use the Preferences Change Request on the constituent's Communication Preferences tab
- Need to use Communication Preferences when creating communications





# Solicit Codes

UNC Overall Solicit Codes	Site Solicit Codes
<ul style="list-style-type: none"><li>No Email Communications</li></ul>	<ul style="list-style-type: none"><li>No Email Communications</li></ul>
<ul style="list-style-type: none"><li>No Email Events</li></ul>	<ul style="list-style-type: none"><li>No Email Events</li></ul>
<ul style="list-style-type: none"><li>No Email Solicitations</li></ul>	<ul style="list-style-type: none"><li>No Email Solicitations</li></ul>
<ul style="list-style-type: none"><li>No Mail Communications</li></ul>	<ul style="list-style-type: none"><li>No Mail Communications</li></ul>
<ul style="list-style-type: none"><li>No Mail Events</li></ul>	<ul style="list-style-type: none"><li>No Mail Events</li></ul>
<ul style="list-style-type: none"><li>No Mail Solicitations</li></ul>	<ul style="list-style-type: none"><li>No Mail Solicitations</li></ul>
<ul style="list-style-type: none"><li>No Phone Communications</li></ul>	<ul style="list-style-type: none"><li>UNC Only</li></ul>
<ul style="list-style-type: none"><li>No Phone Solicitations</li></ul>	<ul style="list-style-type: none"><li>UNC Only</li></ul>





# Mail Preferences

- Tied to mail or email type: Appeal, General Correspondence, Event, etc.
- Contains, site, business unit, and field linking it to the type of communication
- Opt-out or opt-in
- Automatically applied opt-out!





# How to Apply...

- Preferences Change Request on Communications Preferences tab

The screenshot displays the Blackbaud CRM interface. The main window shows the 'Paul Fulton - Communications' page with the 'Preferences' tab selected. A modal window titled 'Blackbaud' is open, allowing for a 'Preferences Change Request'. The modal contains the following information:

- Constituent:** Paul Fulton
- Constituent requested to NOT receive:**  Email,  Mail,  Phone calls
- Of what nature?:**  General communications/news,  Appeals/solicitations,  Event invitations
- Specific communication:** [Dropdown menu]
- From which site(s)/department(s)/unit(s) or UNC overall:** [Dropdown menu]
- Constituent requested to receive a specific communication:**  Email,  Mail
- Of what nature?:**  General communications/news,  Appeals/solicitations,  Event invitations
- Specific communication:** [Dropdown menu]
- From which site(s)/department(s)/unit(s) or UNC overall:** [Dropdown menu]

Buttons for 'Save' and 'Cancel' are located at the bottom of the modal.





# Name Formats





# Name Formats

- Names for mailing purposes – addressee/salutations
- Strings name parts together to display them in different ways
  - Formal – Michael Reardon, Ph.D.
  - Informal – Mike Reardon
- Name Format Options used in Marketing efforts
  - Combines couple names
  - In Name Format Options, your alumni or donor can appear first in couple names (on hold)
  - If someone doesn't have a name format, you can select alternatives





# Name Format Defaults

## Name Format Options

Name Format Options | Name Formats | Text Fields

Name format options (0) Add | Filters |

Name	Description	Default	Site
------	-------------	---------	------

Name format defaults (11) Edit |

Name format type	Name format
Individual Informal Salutation	Bill
Individual Informal Addressee	William H. Smith Jr.
Individual Formal Salutation	Mr. Smith
Individual Formal Addressee with Prof Suffix	William Henry Smith , Sr.
Individual Formal Addressee	Dr. William Henry Smith Jr.
Joint Informal Addressee	William Henry Smith Jr. and Margaret Anne Adams MD
Joint Formal Stacked Addressee	Dr. William Henry Smith Jr. ; Prof. Margaret Anne Adams MD
Joint Formal Salutation	Mr. Smith and Mrs. Adams
Joint Formal Addressee	Dr. William Henry Smith Jr. and Prof. Margaret Anne Adams MD
Joint Informal Salutation	Bill and Meg
Joint Formal Addressee with Prof Suffix	William Henry Smith , Sr. and Margaret Anne Adams , CPA







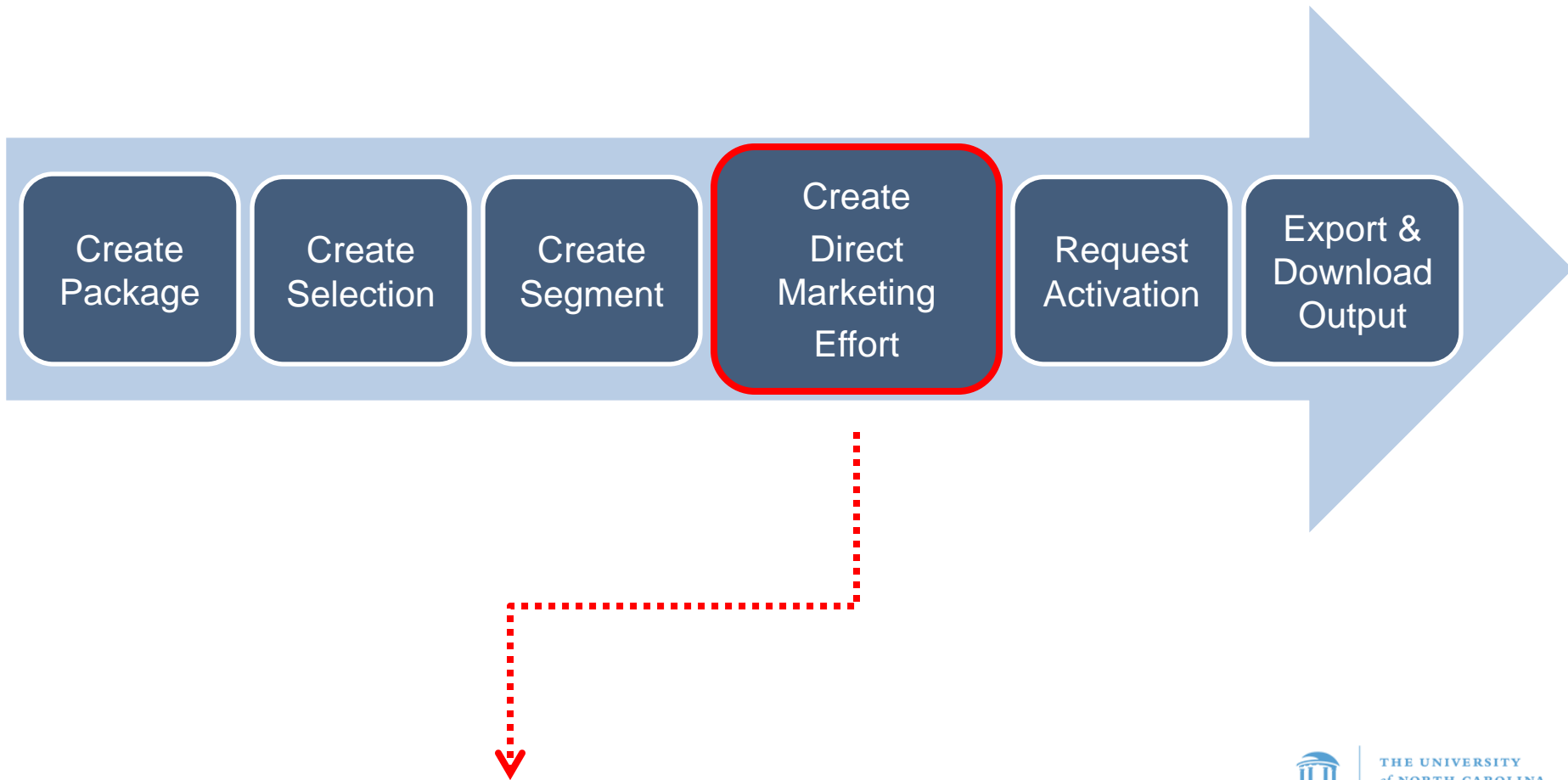
Break



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# Direct Marketing Overview





# Direct Marketing Effort

Create  
Direct  
Marketing  
Effort

Add a direct  
marketing effort

- Choose correct Marketing template
- Type Name and Description
- Choose Appeal
- Select Site
- Launch Date

Add  
component(s)

- Select segment
- Select package
- Construct source code parts
- Add Universe
- Add Exclusions
- Verify Effort Settings

Calculate  
segment count(s)

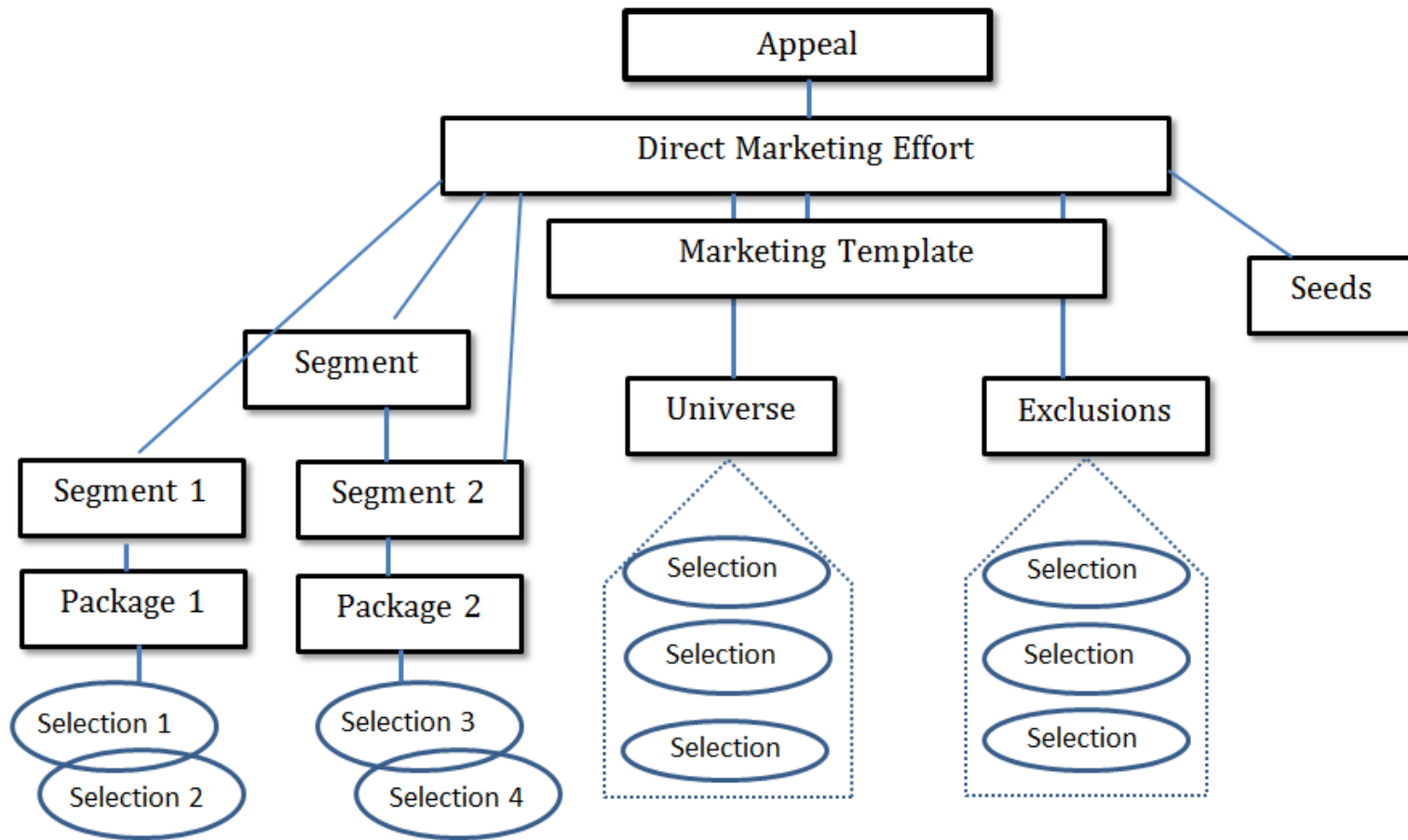
- Processes Universe and Exclusions to finalize export
- Auto assigns finder numbers
- Combine spouses
- Provides effort counts

Test export

- Are export definition fields sufficient?
- Spot check constituents

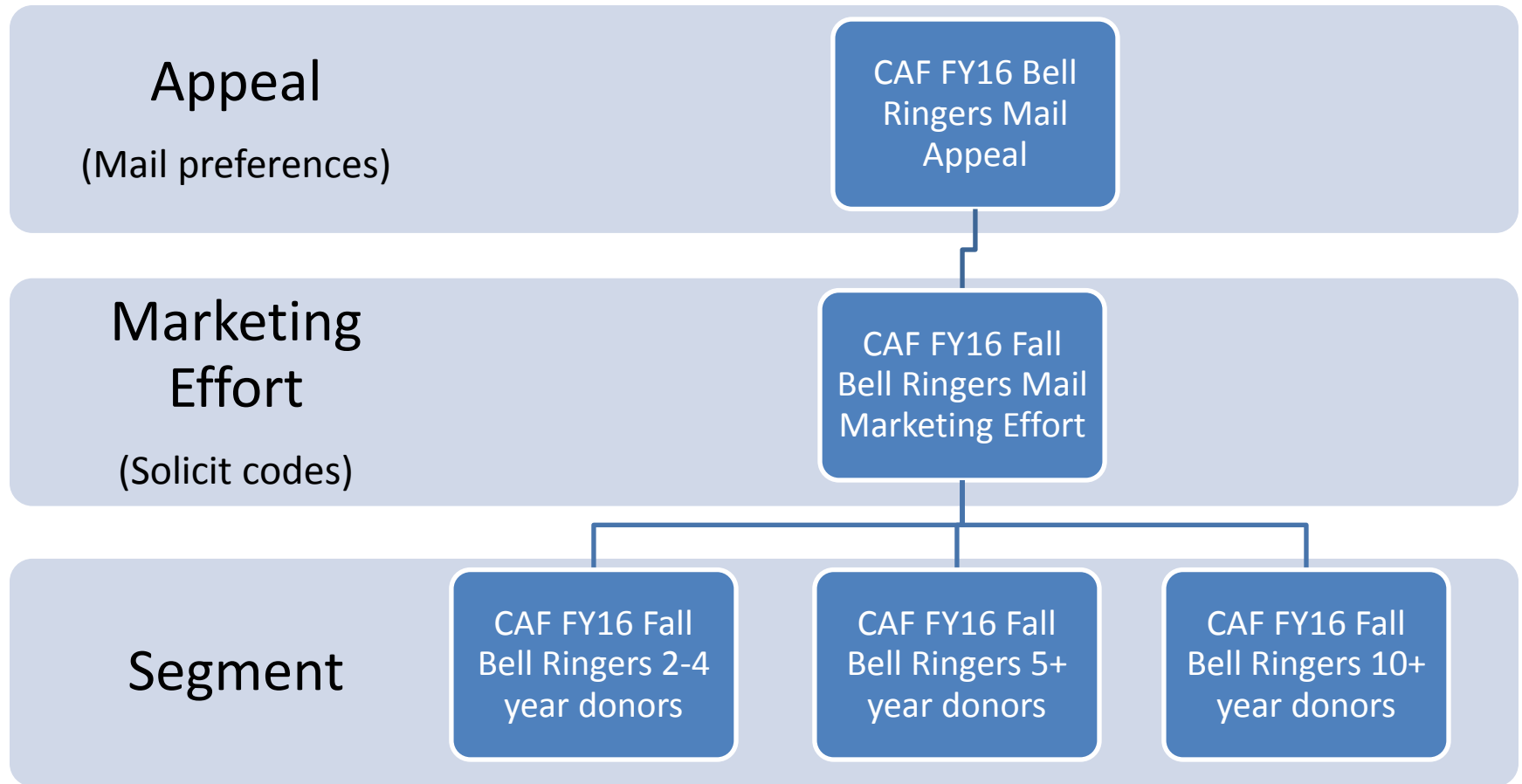


# Anatomy of a Direct Marketing Effort





# Appeal Structure





# Source Code Layout

Description	Example	Definition
Constituent Site	CAS	Three- or four-character code representing the UNC-CH site.
Appeal	AQ	Two-character code indicating the appeal category
Fiscal year of solicitation	14	Two-digit code representing the current fiscal year of the marketing effort
Package	0W1	Three-character auto-generated code representing the package
Segment	A01	Three-character auto-generated code representing the constituent segment of the marketing effort





# Marketing Effort Activated/Results/Analysis

- Finder Numbers
  - Assigned to each recipient and defines their specific segment for tracking/reporting
  - Eliminates need to enter name, address, CID, source code; allows for quicker, more accurate revenue processing
  - Example 12345678901234567 (17 digits or less)
- Marketing Effort
  - KPIs
  - Marketing revenue
- Appeal
  - Appeal profile
  - Appeal performance





Break



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# Activity





# Misc.

- **Planning Calendar**
  - Shows planned marketing efforts (based on launch date)
- **Marketing Effort Segment Detail Report**
  - Shows direct, indirect, and unresolved
  - Does not show pledge payments on previously made pledges
- **Excluding Spouses with Do Not Solicit Codes**



# Sample Remittance Piece

Your Carolina Annual Fund participation in the last five academic years is listed below. For a complete history of your gifts to Carolina, please visit [giving.unc.edu/gift/history](http://giving.unc.edu/gift/history).

2011-2012  
<M\_2012>

2010-2011  
<M\_2011>

2009-2010  
<M\_2010>

2008-2009  
<M\_2009>

2007-2008  
<M\_2008>

Please renew your support in academic year 2012-2013 by completing this form and sending it to Carolina in the enclosed envelope or by giving online at [annualfund.unc.edu/gift](http://annualfund.unc.edu/gift). Make checks payable to UNC-Chapel Hill or see other payment options on the back of this form.

Yes! I'll renew my commitment with a gift of  \$«First\_Ask»  \$«Second\_Ask»  \$«Third\_Ask»  Other \$ \_\_\_\_\_  
to support:  Chancellor's Unrestricted Fund (000001)  Other \_\_\_\_\_ (designation).

«XXFinder NumberXX»

«XSource CodeX»

«Constituent ID 1»

«Constituent ID 2»

«Title 1» «Name 1»

«Title 2» «Name 2»

«Address Line 1»

«Address Line 2»

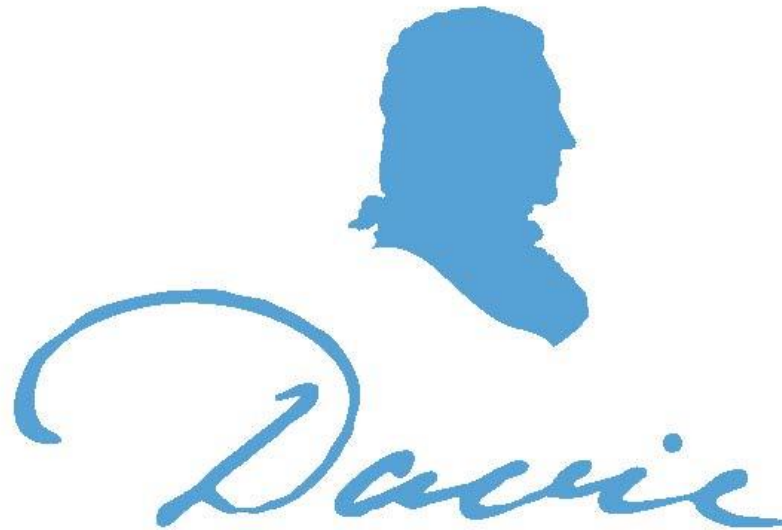
«City», «ST» «Zip»-«Zip4»

**Must have!!!**





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To access Davie go to the Davie Portal and click on the Learning Environment  
[Davie.unc.edu](http://Davie.unc.edu)  
Please remember to complete our evaluation.

**THANK YOU!**



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