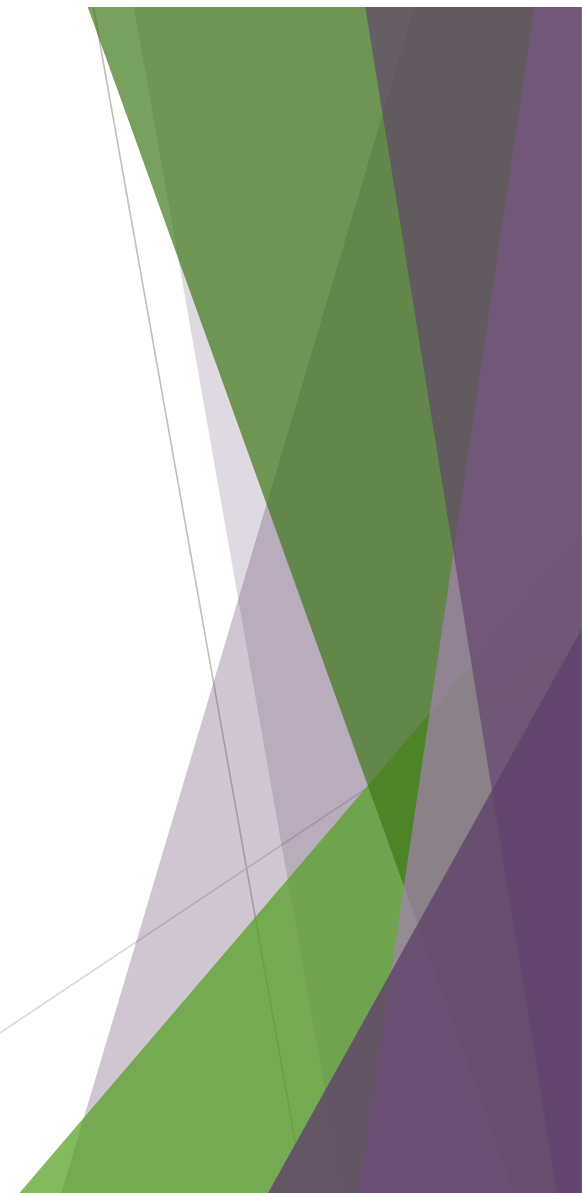
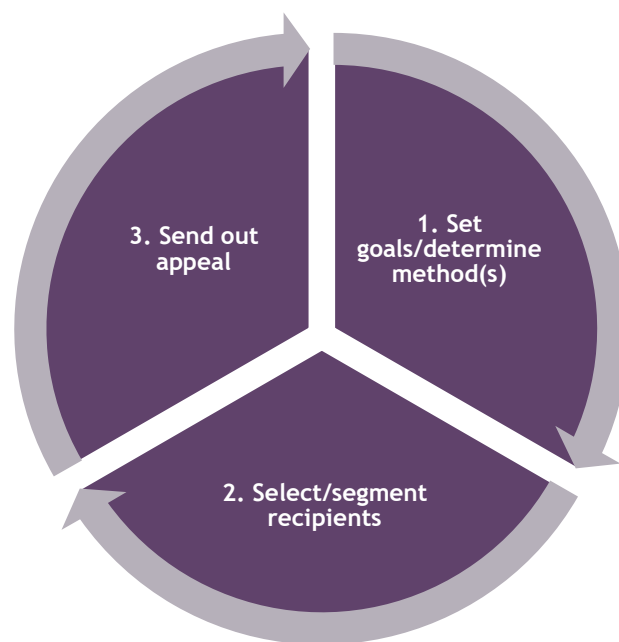


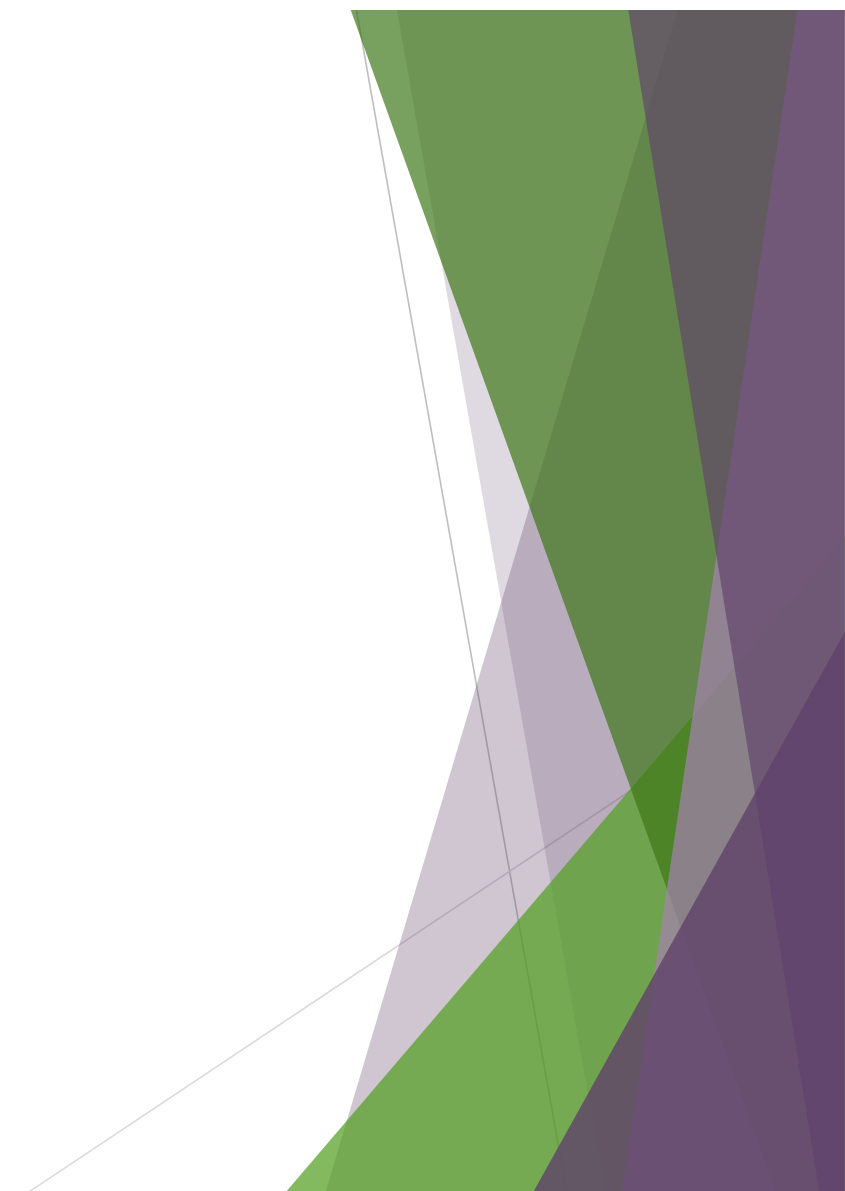
Appeal Segmentation

Little Green Light

Appeal Process Overview



Step 1



Set Appeal Goal and Method(s)

- ▶ Determine fundraising goal
- ▶ Determine the budget
 - Set the methods (printed and/or email) according to both time and budget
- ▶ Determine the date
 - Work backwards from the date to set key milestones



Complete LGL Prep Work

- ▶ Update historical appeals with Appeal Type (for easy comparison reporting)
- ▶ Create appeal in LGL

Edit appeal: 'Spring 2017'

Campaign -- unassigned --	Appeal type Spring	
Name Spring 2017	Code 	Date 2017-05-01
Target/Goal \$50000	Projection \$50000	Is active? <input checked="" type="checkbox"/>
Description This is the big appeal to reach out to all of our past, current, and potential supporters.		

or



Research Past Appeals

Advanced Search

Show gifts where Saved Searches: ----- My searches ----- ▾

All of the following are true

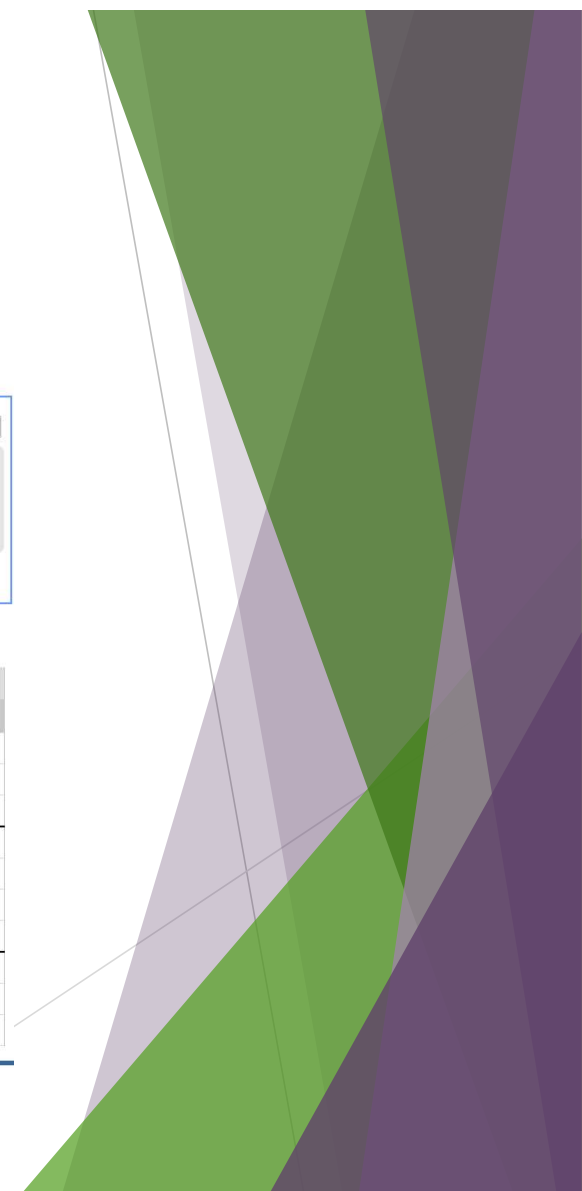
Date ▾ All dates ▾ 📅 to 📅

[Add more criteria](#) · [Advanced options](#) ⓘ

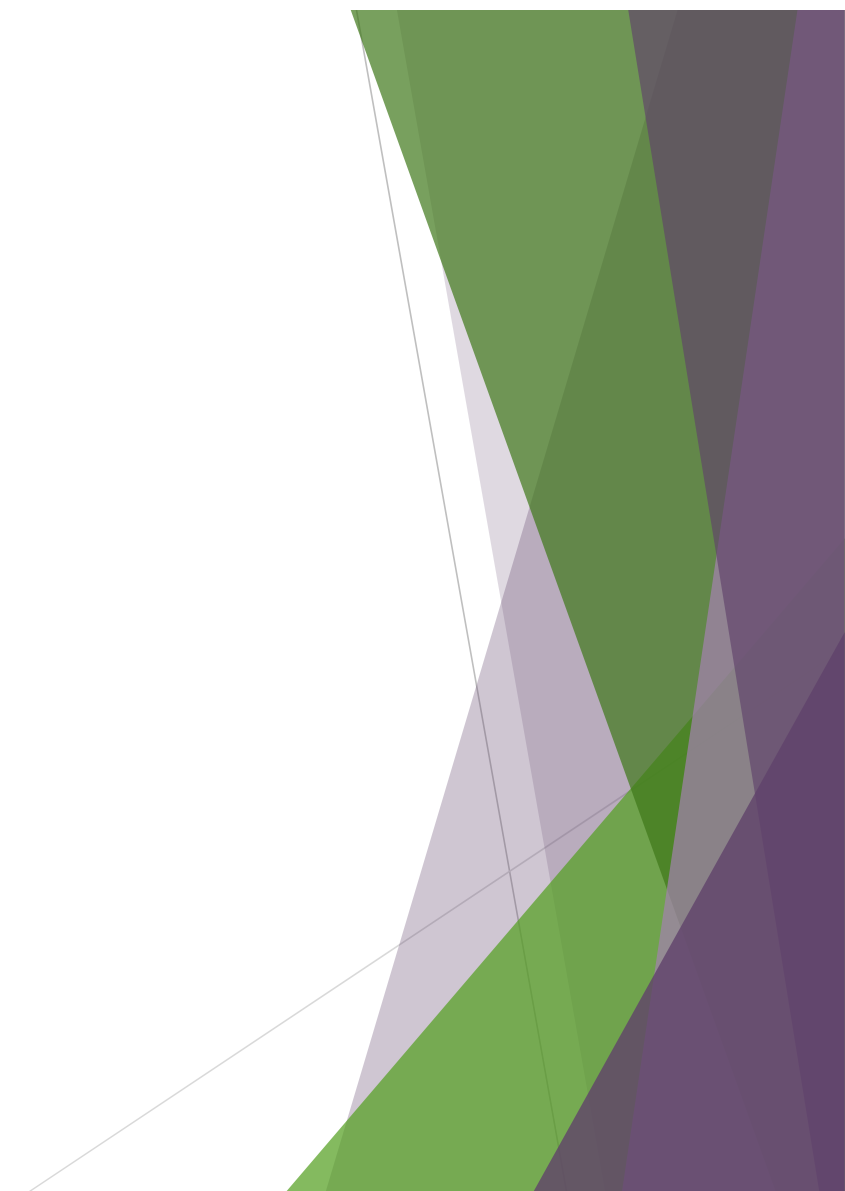
View: Giving by appeal ▾

Results 1 - 8 of 8

Appeal	Total Raised	Gifts	Pledges	In Kind	Soft credits	Other Income
Totals	\$1,547,441.22	\$262,241.22	\$1,540,200 (\$1,285,200)	\$0	\$541	\$0
Unassigned	\$533,266	\$3,066	\$530,200 (\$530,200)	\$0	\$341	\$0
Foundation Grants 2016	\$1,000,000	\$250,000	\$1,000,000 (\$750,000)	\$0	\$0	\$0
End of Year						
End of Year 2013	\$1,200	\$1,200	\$0	\$0	\$0	\$0
End of Year 2014	\$1,302	\$1,302	\$0	\$0	\$0	\$0
End of Year 2015	\$1,700	\$1,700	\$0	\$0	\$100	\$0
Spring						
Spring 2014	\$1,500	\$1,500	\$0	\$0	\$0	\$0
Spring 2015	\$8,373.22	\$3,373.22	\$10,000 (\$5,000)	\$0	\$100	\$0
Spring 2016	\$100	\$100	\$0	\$0	\$0	\$0



Step 2



What is an appeal segment?

- ▶ Subset of your entire appeal recipient list
- ▶ Has an identity separate from other segments
 - ▶ Different people
 - ▶ Different type of ask (program vs. general operating)
- ▶ Any group that you may not otherwise be able to query easily, and you want to see their appeal results at a glance



Why Segment Appeals?

- ▶ Maximize the revenue you raise from each person
 - Ask for the right amount
 - Ask at the right time
 - Ask with the right method
 - Ask on behalf of the right need
- ▶ See easy results by segment to share with stakeholders



Approaches to Segmenting

- ▶ Constituency - how people are connected to your organization (board members, donors, volunteers, prospects)
- ▶ Level of engagement (event attendance, level of giving in previous years, number of volunteer hours)



How many segments?

- ▶ Only as many as will contribute to your outcome
 - Don't need separate segments for people who donated 5 years ago vs. 3 years ago
- ▶ Don't split hairs!
 - Don't need a segment that represents people who attended your last 3 events, donated more than \$100, AND supported a specific program



Keep in Mind

Do not attempt to “recapture” your lapsed donors.

Your donors are not wild animals on the loose. No one wants to be captured. This is internal industry jargon that really needs to become extinct.

Instead, when we refer to our lapsed donors let’s talk about reengaging them in our mission or earning their continued support.

- <https://smartannualgiving.com/the-lapsed-donor-plan/>



Reasonable segmenting strategy:

- ▶ Data to delineate segments is readily available in LGL
- ▶ The message really addresses something relevant to the people in the group
- ▶ Treating them differently is likely to affect whether or how much they give



Reasonable segmenting strategy:

- ▶ Current donors (last 12-18 months)
- ▶ Volunteers (anyone with volunteer activity in the last year)
- ▶ Lapsed donors (sometime, but not in last 18 months)
- ▶ Prospects (never given)



Who do you exclude?

- ▶ Recurring donors?
- ▶ Anyone who has already given this year?
- ▶ People who have asked not to be solicited
- ▶ Deceased people
- ▶ ***Don't mail to people who don't have addresses and don't email to people who don't have email addresses***



Why use LGL Appeal Segments

- ▶ Set up criteria for each segment **AHEAD OF TIME** and keep refreshing
- ▶ Generate a merged letter OR excel spreadsheet for each segment separately – use for in-house or mail house printing
- ▶ **Let LGL manage de-duplication**



LGL segmenting preparation

- ▶ Turn on Smarty Streets integration
- ▶ Update your lapsed donor setting – how many months is considered a lapsed donor?
- ▶ Build and save your segment criteria in Advanced Search on the Constituents tab
- ▶ Build and save your exclusion criteria in Advanced Search on the Constituents tab

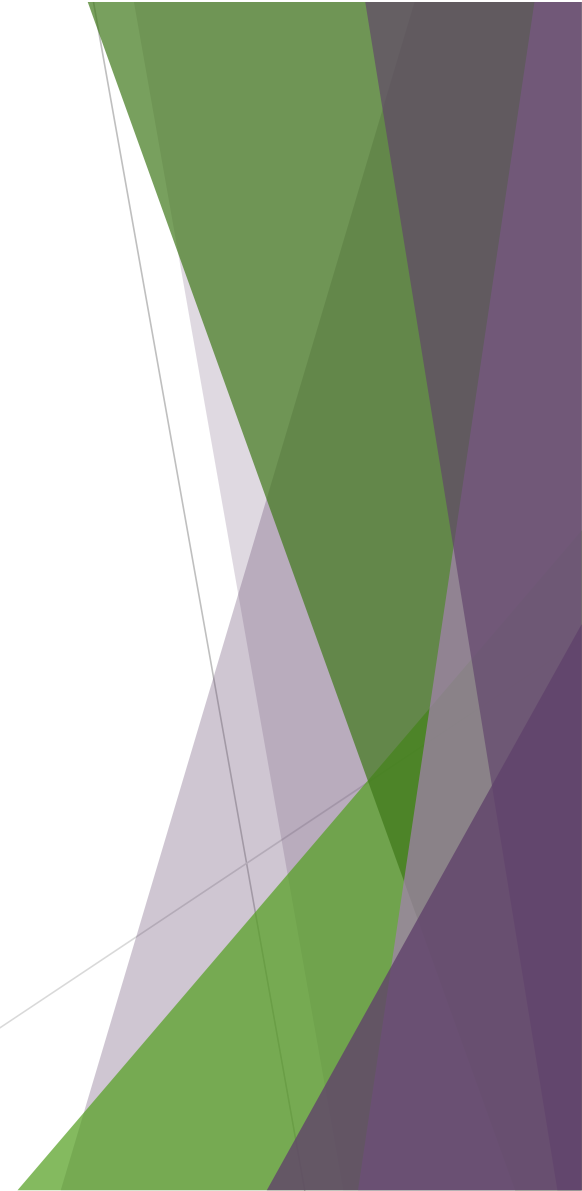


LGL segmenting tips

- ▶ Make sure your segments have the “automatic refresh” checkbox checked.
- ▶ Use Bulk Add/Bulk Exclusions rather than Individual Add/Remove to have effective refresh – Individual inclusions/exclusions will ALWAYS stick to that segment even if they meet the bulk criteria
- ▶ If your goal is to have everyone in a segment, search All Constituents tab inside the appeal for people without segments and remove them before you finalize.



Step 3



Generate Merged Letters

- ▶ Create the letter template FIRST so you have a document to merge into
- ▶ Start merge from the appeal segment



Position	Segment Code	Segment Name	Ask Amount
1 ▼		Current donors People who have given in the last 18 months, but not this calendar year.	\$0
2 ▲ ▼		Volunteers	



Generate Merged Letters

- ▶ Create the letter template FIRST so you have a document to merge into
- ▶ Merge field reference is your friend!
- ▶ Consider including the date and amount of last donation OR a table with their gifts from a certain date range. *See Gift Summary section on Page 4*
- ▶ If you want to merge in their previous donation from a specific appeal, set up a Smart Field and select the appeal. Smart Fields are mergeable.



Send Spreadsheet to Mailhouse

- ▶ Determine fields needed
- ▶ Choose Export Segments from Appeal Segment

Constituents/Recipients Giving **Appeal Segments** Appeal Mailings Appeal Ack. Settings MailChimp

[+ Add segment](#) [Segment Summary Export](#) [Segment Detailed Exports](#)

Position	Segment Code	Segment Name	Ask Amount
1 ▼		Current donors People who have given in the last 18 months, but not this calendar year.	\$0
2 ▲ ▼		Volunteers	

⚙ Actions

- Edit segment
- Add constituents
- Export constituents
- Add mailing
- Delete segment



Resources

Update lapsed donor setting: W4Sight LLC

Home ▾ | Constituents ▾ | Fundraising ▾ | Activity ▾ | Mailings ▾ | Forms ▾ | Settings ▾

Subscription settings | Menu Items | Integration Settings | Integration Queue

General	
Contact information	
Look & feel	
Gift settings >	
Data services	

Set basic preferences and defaults for new gift entry

Currency	Select your currency. Note that only one currency can be used within your account. \$ - USD ▾
Pledge Reminders	Automatically receive emails on the day(s) when pledge installments are "due". This is helpful if you want to remind a donor, but is not intended to be a reminder for the donor. <input type="checkbox"/> Send pledge reminders?
Gift notifications	<input type="checkbox"/> Allow the ability to send notifications of new gifts to selected team members?
Giving Status	Giving Status tags for Active Donor, Lapsed Donor and Non Donor are automatically calculated by Lapsed Donor (months): 18 ▾ Note: It can take up to 1 hour for this change to update all the Giving Status tags in your account.



Resources

- ▶ Smarty Streets setting:
<http://help.littlegreenlight.com/article/173-clean-your-addresses-with-smartystreets-in-igl>
- ▶ Appeal segmentation overview:
<http://help.littlegreenlight.com/article/162-adding-segments-to-your-appeal>
- ▶ Advanced search: <http://help.littlegreenlight.com/article/93-complex-constituent-searches>
- ▶ Set acknowledgement letters for each segment:
<http://help.littlegreenlight.com/article/455-can-i-add-a-default-acknowledgment-template-to-an-appeal-or-an-appeal-segment>



Resources

- ▶ Create Smart Field for last donation to a specific appeal:
<http://help.littlegreenlight.com/article/129-reports-use-smart-fields-to-enhance-constituent-report-building-and-mailings>
- ▶ Create a letter template for your appeal:
<http://help.littlegreenlight.com/article/135-letter-templates>
- ▶ How to create a mailing:
<http://help.littlegreenlight.com/article/381-creating-a-mailing-in-4-simple-steps>



Resources

- ▶ Saved search for Individual active donors who haven't given in the last quarter.

- Advanced Search

Show constituents where

All of the following are true

- ✕ Constituent Type ▼ Individual ▼
- ✕ Giving Status ▼ includes any ▼ *Active Donor* Edit
- ✕ Address is verified? ▼ Yes ▼

[Add more criteria](#) • [Advanced options](#) ?

and not ▼

- ✕ Gift types ▼ include any ▼ *Gift, Pledge, In Kind, Soft...* Edit **Status:** Any ▼
- ✕ Last gift dates ▼ This quarter ▼ this quarter 📅 to this quarter 📅

[Add more criteria](#) • [Advanced options](#) ? • ✕ Remove query

