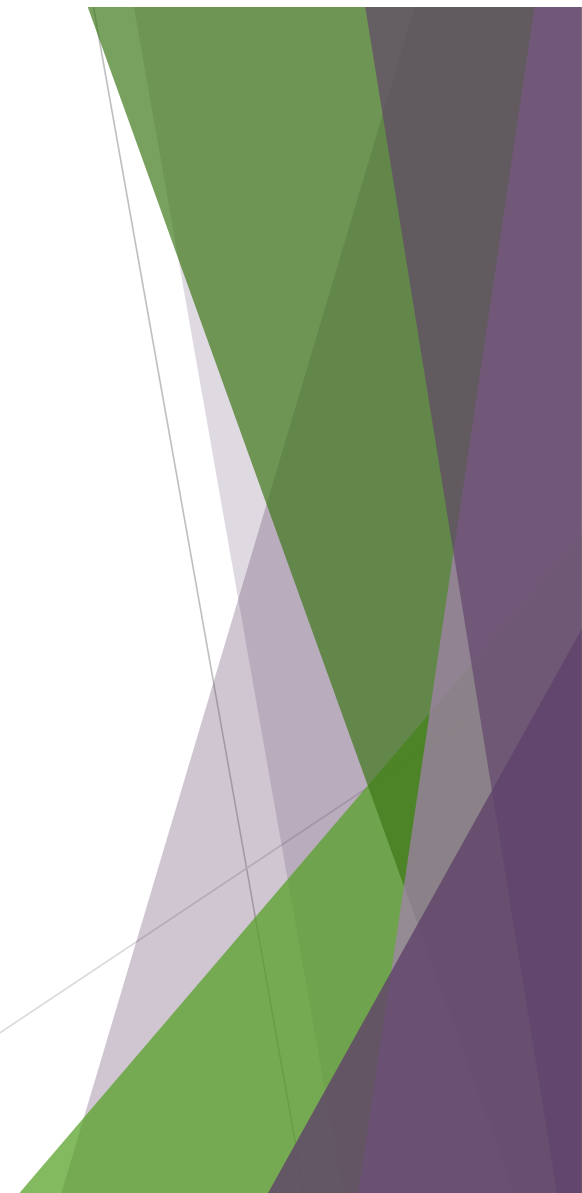
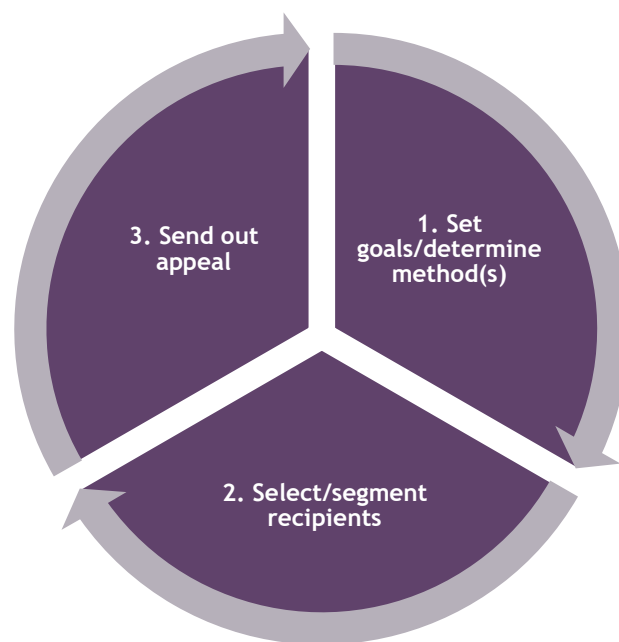


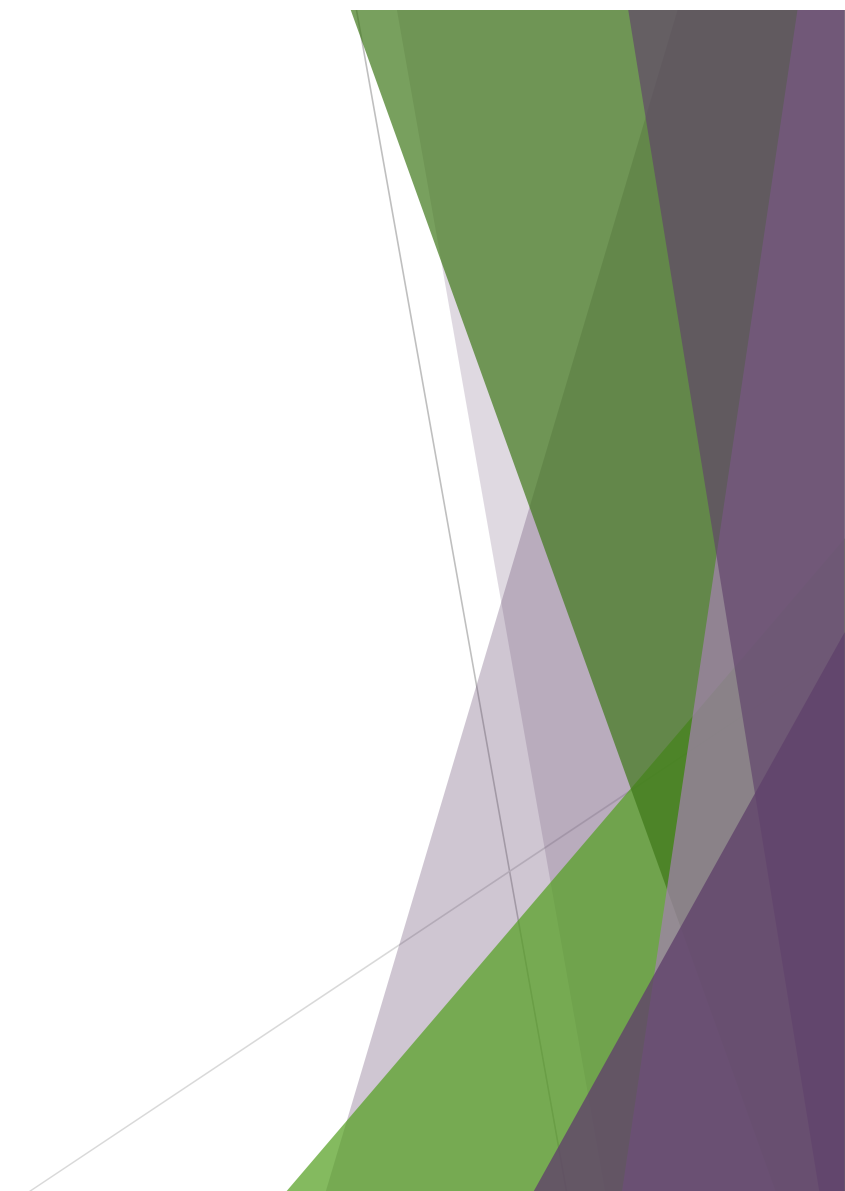
Appeal Segmentation

Raiser's Edge

Appeal Process Overview



Step 1



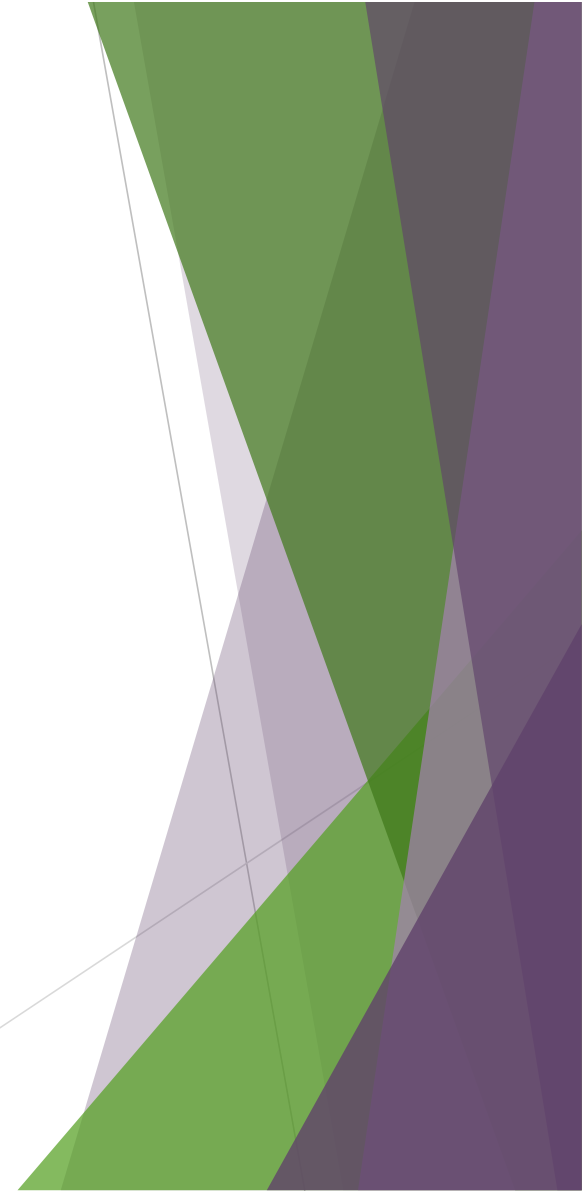
Set Appeal Goal and Method(s)

- ▶ 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



Key Milestones

- ▶ Drop – date
- ▶ Merge of List/Marketing Material
- ▶ Final List Prepared
- ▶ Design/Content Completed
- ▶ Strategy Meeting(s)
 - ▶ Analysis of prior appeals
 - ▶ Determine Audience/Budget/Goals



Complete RE Prep Work

- ▶ Update historical appeals with Appeal Type (for easy comparison reporting)
- ▶ Create appeal in RE
 - ▶ Default campaign and fund
 - ▶ Use package for segmentation
 - ▶ Can use Actions to assign tasks related to the appeal



The screenshot shows a software window titled "New Appeal" with a menu bar (File, Edit, View, Appeal, Favorites, Tools, Help) and a toolbar. The "General" tab is active, displaying the following fields:

- Appeal ID: SPRING2017
- Description: 2017 Spring Appeal
- Start date: 3/1/2017
- End date: 5/31/2017
- Overall goal: \$10,000.00
- Default gift amount: (empty)
- Appeal category: Annual
- Default Benefits: No benefits assigned
- No. solicited: (empty)
- Notes: This is our big spring appeal that reaches out to out past, current and potential donors.

At the bottom of the window, there is a status bar with the text "Press F7 to zoom" on the left and the date "6/20/2017" on the right.

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](#) ⓘ

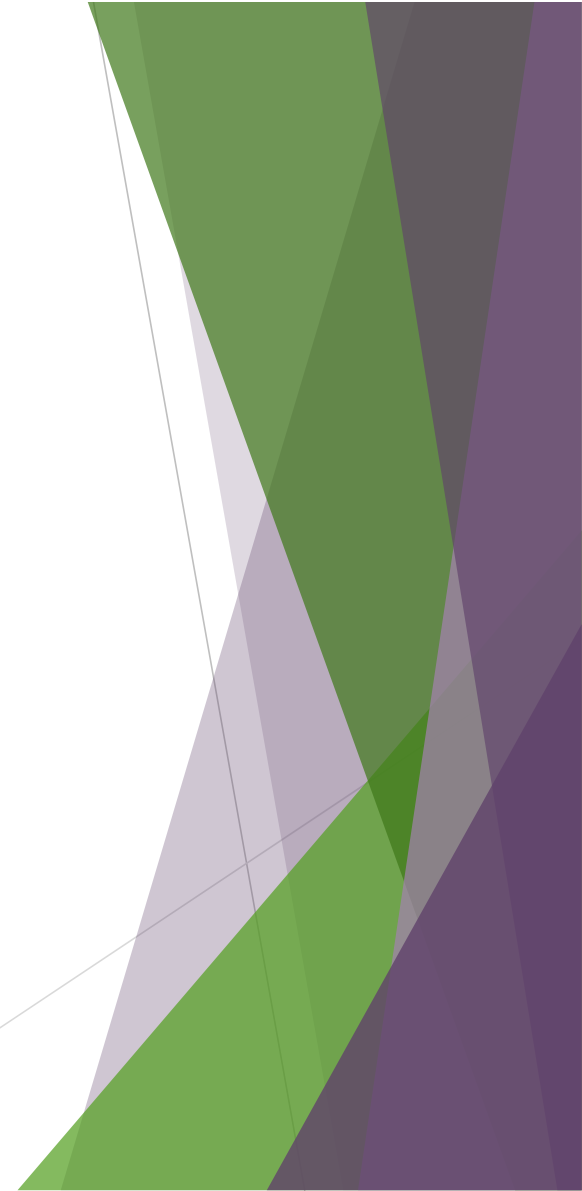
View: ▾

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 RE
- ▶ The message really addresses something relevant to the people in the group
 - ▶ Ex: Natural Disasters
- ▶ 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***



Exclusions

This constituent

Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

Requests no email

Education Business Bank

Birth date: 3/14/1961 Age: 56

Deceased? Date:

Marital status: Married

Spouse: Wendy Hernandez

Solicit code: Do not phone on weekends; Do not call after 9:00 PM

Solicit Code

| Available: | | Selected: |
|---------------------------|----|---------------------------|
| Do not phone | | Do not phone on weekends |
| Do not phone at work | | Do not call after 9:00 PM |
| Do not solicit | | Do not mail |
| No mail - out of business | > | One solicitation annually |
| No mail temporarily | >> | |
| Removed by request | < | |
| Autumn mailing only | << | |
| Summer mailing only | | |
| Spring mailing only | | |
| End of year mailing only | | |

OK Cancel



Why use RE 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
- ▶ Targeted solicitations based on data you know about your donors is more engaging



RE segmenting preparation

- ▶ Update your lapsed donor criteria – how many months is considered a lapsed donor?
- ▶ Build and save your segment criteria
- ▶ Data Clean-Up
- ▶ Solicit Codes



Data Clean-Up

- ▶ NCOA process
- ▶ Update returned mail for invalid addresses
- ▶ Mark Inactive
- ▶ Takeaway: Clean-up data BEFORE exporting. If you clean up the data in Excel, Word etc. you are not capitalizing on your time, because those changes are not being reflected in the database and will need to be fixed again.



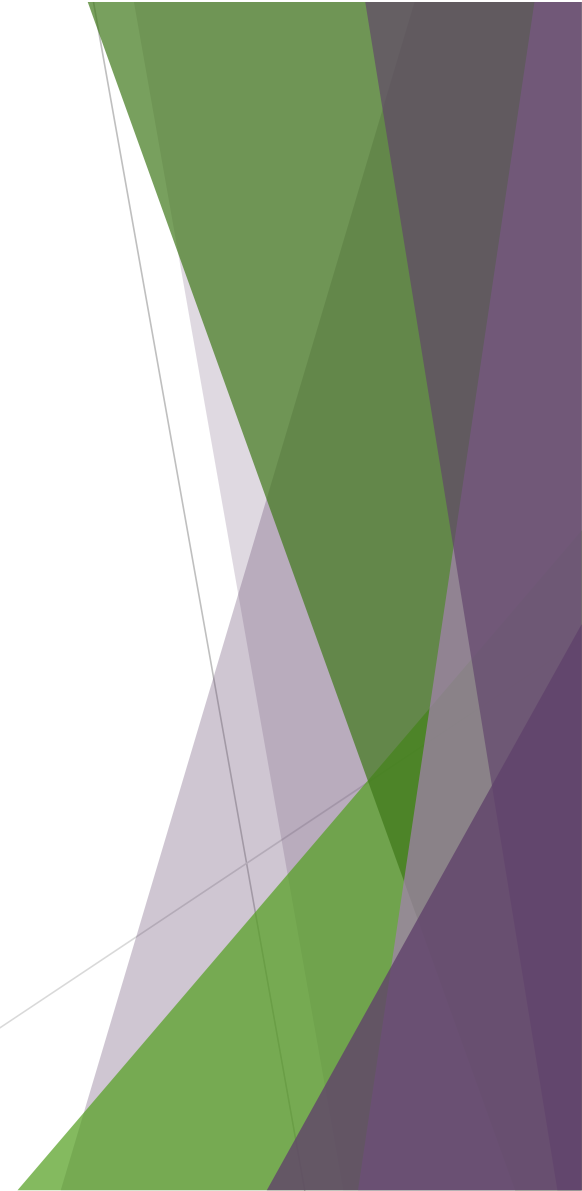
RE segmenting tips

- ▶ Make sure your query segments are dynamic
- ▶ Use query list to one-off add/remove constituent
- ▶ Merge queries to remove duplicates
- ▶ Keep in mind your medium when considering Householding (householding for mail, but not e-mail)

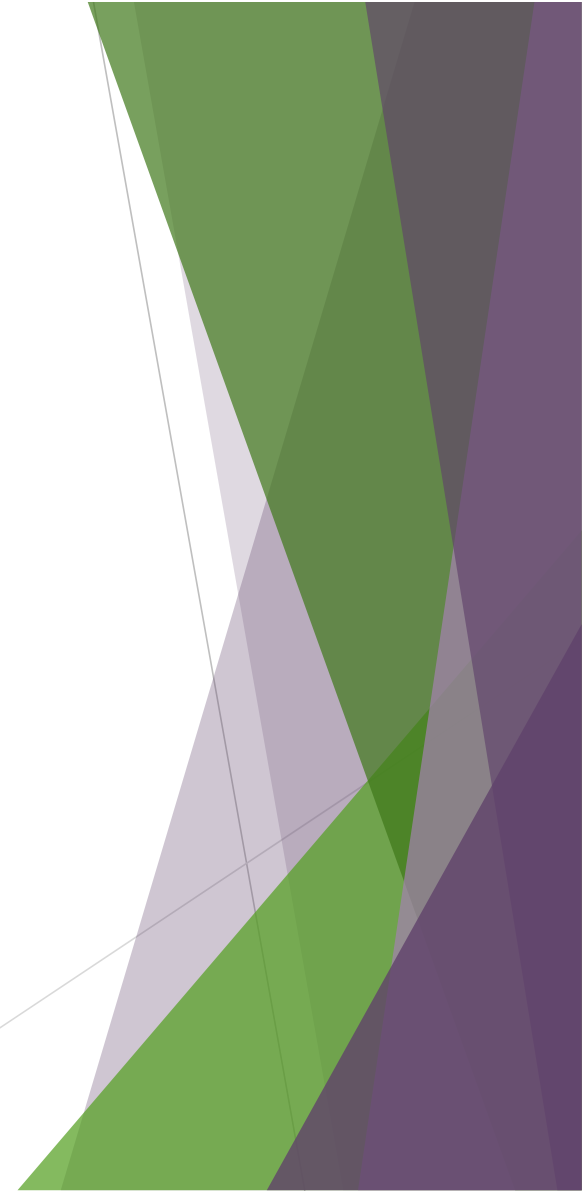


Strategies for DeDuping across Segments

- ▶ Using mutually exclusive criteria
- ▶ Query List
- ▶ Mail Segment feature
- ▶ Merge Queries
- ▶ Export instead of Query
- ▶ Suppress Duplicate Rows in Query



Step 3



Generate E-Mail

- ▶ Connect/Upload list(s) to e-marketing tool
- ▶ Update RE constituent records with appeal information
- ▶ Donation landing page specific to each appeal for accuracy of appeal/donation correlation



Generate Segmented Merged Letters in RE

- ▶ Create the letter templates FIRST so you have a document to merge into
- ▶ Start merge from the appeal segment
- ▶ Segmented merged letters are only available for certain types of mail functions, such as Quick Letters



| Input Query | Appeal | Package | Output Query |
|-------------------|------------|----------|--------------|
| Donors - Current | SPRING2017 | Current | |
| Donors - Past | SPRING2017 | Past | |
| Prospects Segment | SPRING2017 | Prospect | |
| | | | |
| | | | |

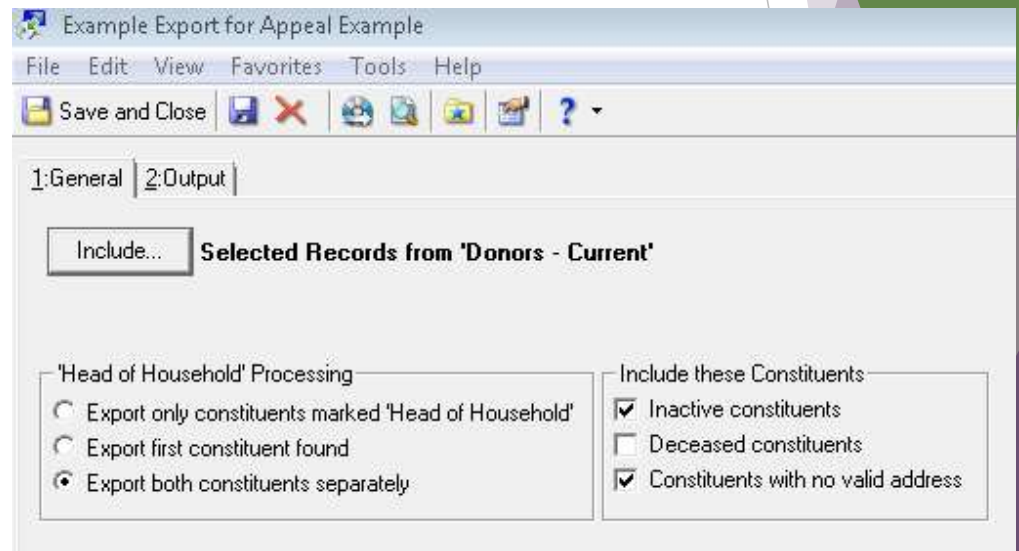
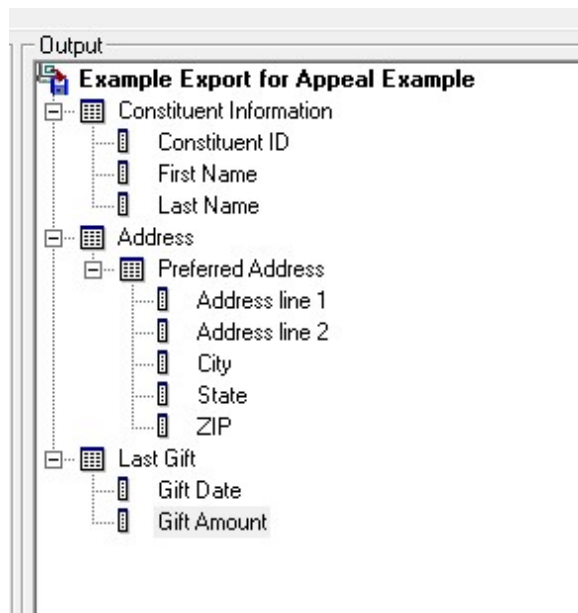
Generate Merged Letters into Your Design Template

- ▶ 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.
- ▶ If you want to merge in their previous donation from a specific appeal, add that to your export template.



Send Spreadsheet to Mail House

- ▶ Determine fields needed and set up Export
- ▶ Choose Query to run in the export, repeating for each segment.



Adding Appeals to Constituent Records

- ▶ If you skip this step, many reports are useless
- ▶ Ways to quickly add appeal records:
 - ▶ Mail -> Segment
 - ▶ Globally add Appeal
 - ▶ Import



Resources

- ▶ NCOA/AddressFinder:
<https://kb.blackbaud.com/articles/Article/40683>
- ▶ Appeal segmentation overview:
<https://kb.blackbaud.com/articles/Article/52570>
- ▶ Mail Merge:
<https://kb.blackbaud.com/articles/Article/75163>



Resources

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

Filters

- Key Indicator equals Individual
- AND Inactive? equals No
- AND Last Gift Date greater than or equal to 3/31/2017

