COMMON GROUND™ BEST PRACTICES GUIDE

A complimentary resource exclusively for Convio Common Ground clients

Segmentation and Direct Marketing Best Practices

Written by Heller Consulting

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HELLER CONSULTING
your fundraising technology team

convio MOVE PEOPLE™

Contents

About the Author

This guide was written by Heller Consulting, a Convio Solution Provider authorized to provide services around the Common Ground system. It is part of an ongoing effort by Heller Consulting and Convio to get information about nonprofit technology and fundraising and marketing best practices into the nonprofit sector's hands. Heller Consulting brings efficient business practices and effective use of technology to nonprofit fundraisers, supporting greater success with less effort. Since 1996, the company has served more than 700 nonprofits of every type and size. For more information, please visit www.teamheller.com.

I. Introduction

Version 2.5 of the Convio Common Ground CRM system includes exciting and powerful features to help you make the most of your direct marketing efforts. These features include new query and segmentation tools to more easily group and prioritize your audiences, and new fields to better track your campaigns and drive analysis of your results.

This guide is designed to help you understand and leverage good segmentation practice and create or manage a direct marketing program. We'll talk about why segmentation is important and what it can do for your direct marketing program.

We'll walk you through the creation of a segmentation plan for an upcoming campaign and describe how the new features of Common Ground can best be employed. Other topics include synchronizing segmentation data with Convio Online Marketing or exporting it for a mailing list, handling returns, and creating meaningful reports to analyze the results of your efforts.

If this guide raises any questions for you about how your organization can make the best use of Common Ground, a great place to find answers is the Common Ground community at http://community.customer.convio.com/community/commonground.

II. Segmentation and You

A. The Direct Marketing Life Cycle

Direct marketing is one of the most popular approaches nonprofits employ for reaching out to their constituencies. "Direct marketing" is an umbrella term for all types of email/mail/phone communications, not just fundraising communications. Here are some examples of what direct marketing encompasses:

- Fundraising appeals
- Newsletters
- Event invitations
- Other publications (i.e. Annual Report)
- Advocacy alerts
- Acknowledgements

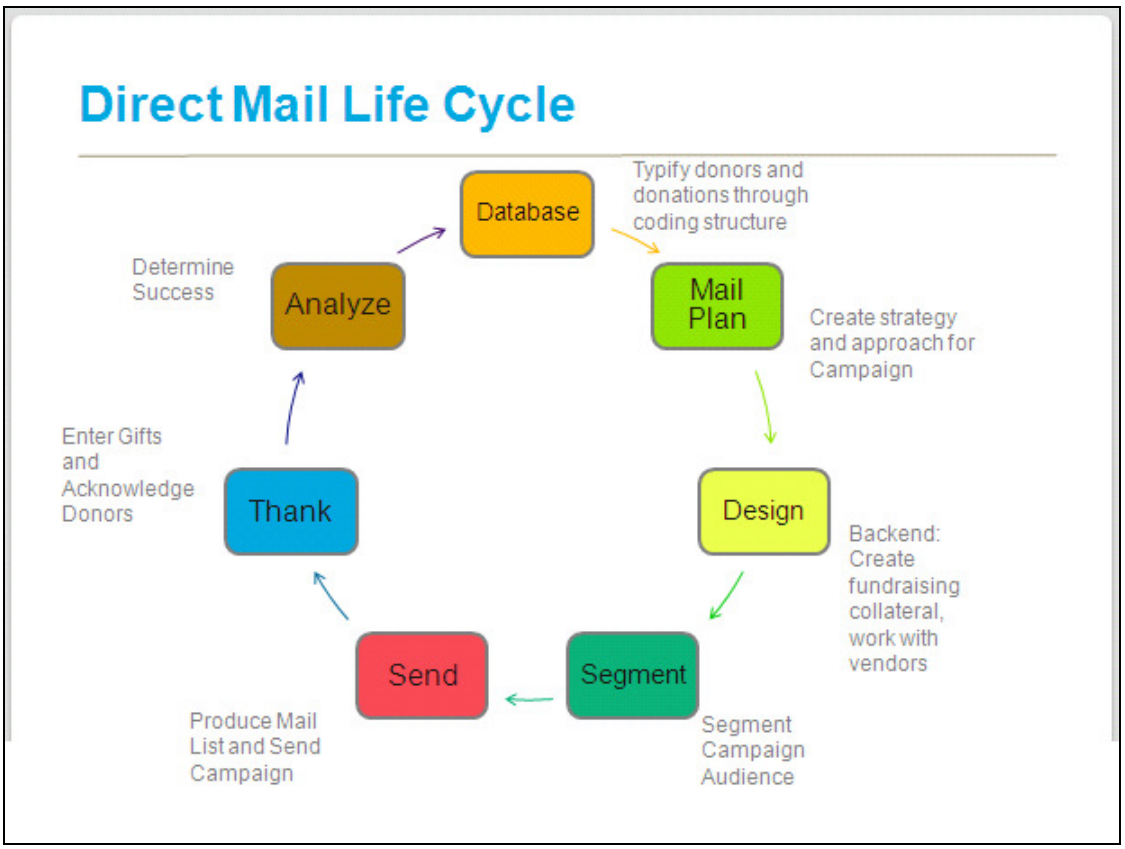
Direct marketing has traditionally been a relatively low-cost way for nonprofits to reach high numbers of supporters. It supports the development of a progressively deeper relationship with a supporter, in which giving ideally becomes a reciprocal relationship between the donor and the nonprofit as they partner to further the mission of their

shared cause. Direct marketing is often a stepping stone to other supporter strategies, particularly planned giving and major gifts.

These days, communications that integrate both email and snail mail, or postal mail, components are becoming more and more common. It's becoming increasingly important to target communications to the right supporters via the channel that they prefer and that is more likely to increase results — whether that result is a gift, a request for more information, a click-through to a website, a sign-up to an email list, an advocacy action, or a volunteer commitment.

Direct marketing communications typically follow a similar life cycle no matter if the piece is a fundraising appeal or a non-solicitation communication. The following example is for a direct mail appeal. The cycle begins and ends with the central donor database. As you can see, the cycle begins with planning, moves through execution, and finishes with analysis. The data collected from one communication (whether or not a supporter responded and what that response was) should be used in the production of the next communication.

In this guide, we focus on the "Segment," "Send" and "Analyze" areas of this life cycle. For more information on setting up financial codes or best practices for acknowledging gifts, please see the "Acknowledgement and Stewardship" and "Financial Coding" best practices guides, available in the Common Ground community.



B. Common Ground Direct Marketing Terms

In this guide, we use a variety of direct marketing terms, and it's worthwhile to take a moment to define them as they pertain to Common Ground.

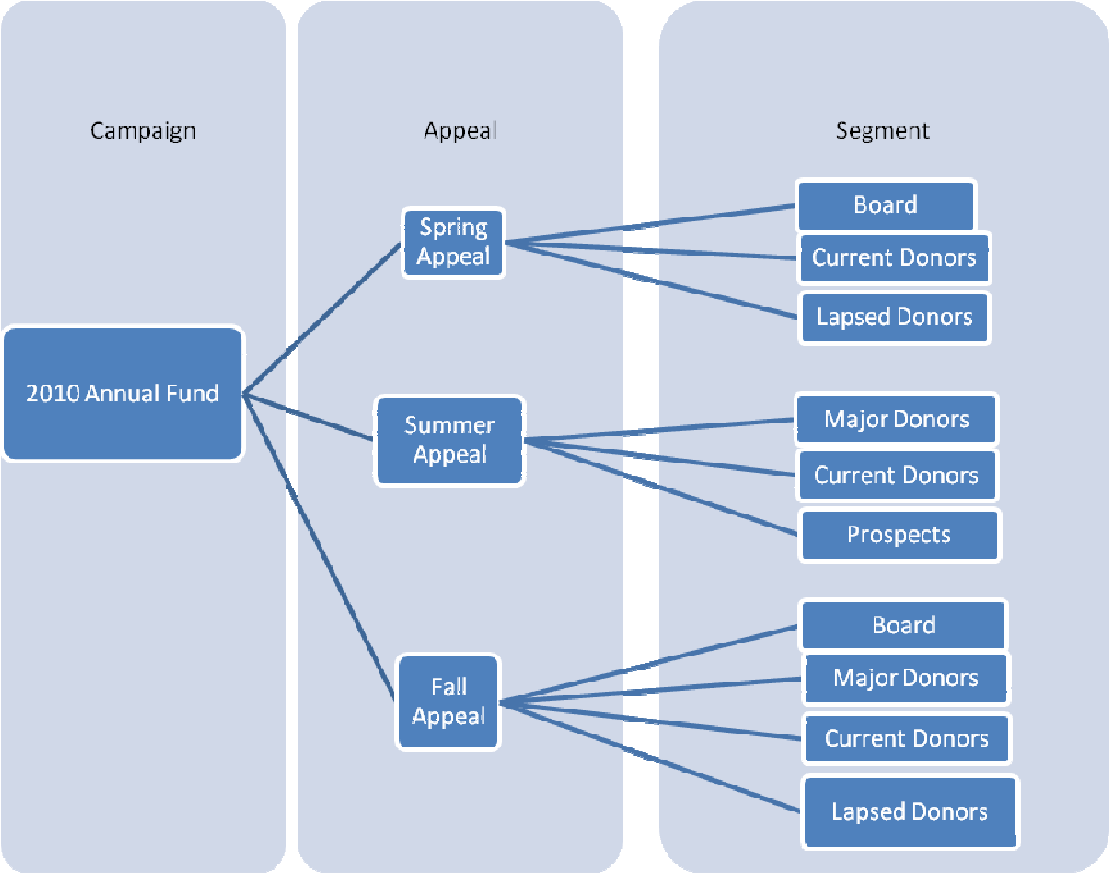
One Common Ground concept that is important to begin with is the concept of the Campaign Hierarchy. Campaigns are the primary code used on the donation to record the fundraising approach that brought the gift in. Campaign Hierarchies are the mechanism by which a long list of Campaigns can be "rolled up" into more manageable lists for analysis.

A hierarchy is created by designating one Campaign as a Parent Campaign and at least one (usually more than one) Campaign as a Child Campaign, which are referred to in Common Ground as Appeals. These hierarchies can extend for multiple "generations" to allow detailed reporting granularity as needed, or roll-up reporting for summaries. Note that each Campaign can have only one Parent Campaign, although a Parent Campaign can have many Child Campaigns.

For direct marketing purposes, Campaign Hierarchies are essential. Imagine an organization called Ocean Sea Alliance. They plan on meeting their 2010 Annual Fund goal through a series of three mailings: one in the spring, one in late summer and one in late fall. Each of these mailings will be targeted to different groups of people (called Segments in Common Ground). Ocean Sea Alliance expects to be able to report on the performance of each of the following levels:

- How the 2010 Annual Fund is doing overall
- How each mailing performed
- How each targeted group (or segment) performed in each mailing

The organization can accomplish this by creating a Campaign for each item and linking them together in a hierarchy. The hierarchy would look something like the following:



Sample campaign hierarchy

To get the most out of Common Ground's segmentation and direct marketing features, pull your organization's direct marketing approaches together into "trees" or something similar that will help make clear what the Campaign/Appeal/Segment hierarchies should be. Common Ground makes it easy to set up the hierarchies that your organization will need for your specific reporting needs, as we will see further in this guide.

As a final note, during gift entry only the most detailed level of Campaign or Segment is used. The gifts are automatically rolled up into summary totals as needed in reporting.

C. What Segmentation Can Do For You

If your organization has a small program that mails several times per year to all contactable constituents (a couple of appeals and a newsletter perhaps), it may be time to look into segmenting your data to glean information about who your supporters are, to take the management of your program to the next level, and to relate more personally with your constituents to maximize giving/participation.

Good segmentation allows you to reach out to the right people at the right time with the right request. The end result: Raise more money and increase participation!

If your organization already employs a segmentation strategy, you can use Common Ground tools to make the most of your plan.

There are many advantages to segmenting your data for direct marketing communications:

- Understand your constituencies better.
- Discover trends that help you improve your approaches.
- Gather knowledge to make intelligent decisions about who to target for different communications.
- Discover potential groups with whom you may not have been communicating.
- Use your budget wisely to communicate with those who are most likely to respond and engage with your organization and do so in a way that makes their response more likely.

Note that segmentation does not have to be complicated. It works better when your plan is clear and makes sense to you. Your organization probably already thinks about your constituencies as different groups (board members, major donors, current donors, lapsed donors, prospects, people with certain interests, people who have opted in or out of email, to name just a few), but perhaps haven't carried that over to creating segments and measuring performance of each group. As you'll discover in the next section, the level to which you take your segmentation should be determined by the level of detail you need to see in your analysis.

Segmentation of fundraising appeals is often organized around three axes: *recency* of last gift, *frequency* of giving, and *monetary* level of contribution (collectively referred to as RFM). Different combinations of these criteria can quickly cause an appeal to grow up to ten or more segments. (We've seen mail plans for 300 segments!) As a first step, consider using just one of these categories to avoid making your system overly complex for your needs.

D. Creating a Segmentation Plan

If your organization hasn't yet dipped its toe into segmentation, the first thing to do is develop your plan for an upcoming mail/email/integrated campaign. If you're experienced with segmentation, you may find this process helpful for organizing your approach to your next campaign.

See the Appendix for a sample Campaign Planning Worksheet. You may find it easier to use the sample as the basis for your own worksheet in a spreadsheet application such as Microsoft Excel®.

Step One
The first step is to define the universe of constituents you want to include in your campaign. In addition to thinking about which constituents you want to contact, it is extremely important at this early stage to think about *exclusions* and *channels* that will be used. *Exclusions* (also called suppressions) are the criteria that would keep someone *out* of your campaign. *Channels* are typically email, mail and phone. It's important to know at the beginning which channels will be used in this campaign so the segments can be created correctly.

In this guide, our example will be a fundraising appeal. Our target audience is donors in the last 24 months who have given (cumulatively during that time) between $1 and $4,999, and non-donors who have been added to the system in the last 12 months. We will email the appeal to whom we can, and mail the rest. We do not want to include donors of $5,000+ (they are handled separately by the major gifts department), board members, deceased, opt-outs (do not mail, do not email, do not solicit), Organizations, or donors who have given in the last four weeks.

NOTE: As you'll see in the next section, Common Ground provides some easy-to-use checkboxes to handle the most common segment exclusions. Take notice at this point if any of your exclusions are more complex than those provided by the basic checkboxes — this will impact how the segments will be produced.

Common Ground-Provided Exclusion Checkboxes	Sample Additional Exclusions
Deceased Email opt-out Mail opt-out	Address lines blank Major donors Board members Organizations No solicit Recent donors

Step Two

Next, break your universe into smaller groups and describe them. These are the groups whose performance you want to track and analyze. They can be simple or complex, depending on what you think you will gain from increasing the level of detail. This is one area where organizations can unintentionally make things hard on themselves — by slicing their segments too small to be significant in the analysis. Doing so creates extra work in the production of the campaign and makes reports confusing. Try to stay focused on key characteristics that are meaningful to your organization. These are commonly based on financial, demographic, geographic or participatory criteria.

Common Ground makes it easy to define segments based on any data that is included on the contact record as well as certain associated records such as donations, relationships and classifications.

Segmentation Criteria	Explanation
Donation Quantity	The number of donations the donor has/has not given in a specified period (optionally restrict to specified Campaigns)
Total Donation Amount	Contact has/has not donated a specific cumulative amount received in a specified period (optionally restrict to specified Campaigns)
Single Donation Amount	Contact has/has not given a donation of the specified amount in a specified period (optionally restrict to specified Campaigns)
Campaign Membership	Contact is/is not a member of specified Campaign(s)
Contact Classification	Contact has/doesn't have specified Classification code(s)
Event Attendance	Contact has/has not participated in any event or in specified event(s)
Volunteer	Contact has/has not held any volunteer job or specified job(s)
Relationship	Contact has/doesn't have a relationship of specified type(s) with another Contact who has a specified Classification Type.
By Contact Field	Many other fields on the Contact record are accessible for segmentation

Step Three
Next, order the segments from highest priority to lowest priority. Do this by asking yourself the following question: If a constituent qualified for two segments, which one would be more important for them to be in? Don't worry if your criteria overlap or are not mutually exclusive. The tools in Common Ground will enforce that the audiences in the segments are unique and mutually exclusive. Remember that your exclusions (if greater than the Common Ground-provided checkboxes) should stay at the top as the highest priority criteria.

If necessary, get more specific about what criteria will be used to create each segment. For example, if your plan has included a segment for "Current Donors" up to this point, make a note of what that means, such as "anyone who has given a cash gift in the last 18 months." You may need to split this group into further segments for "those who will receive email" and "those who will receive mail" for an integrated campaign.

Below is the completed sample segmentation grid for our fictional fundraising appeal.

Segment	Segment Description	Segment Criteria	Segment Code	Notes
1	Exclusions / Non Solicits	Deceased, inactive, no valid address, opt-outs, organizations, donors in last 4 weeks, etc.	EXCL	All constituents you don't want to mail to. Strictly speaking, not a segment, but important to record on this grid.
2	Recent High Donor	0-12 months, $1,000-$4,999	10SPR2	
3	Lapsed High Donor	13-24 months, $1,000-$4,999	10SPR3	
4	Recent Mid Donor	0-12 months, $100-$999	10SPR4	
5	Lapsed Mid Donor	13-24 months, $100-$999	10SPR5	
6	Recent Low Donor	0-12 months, $1-$99	10SPR6	
7	Lapsed Low Donor	13-24 months, $1-$99	10SPR7	
8	Non-Donors	No gifts. Added to system in last 12 months.	10SPR8	

E. Considerations for Outsourcing Segmentation

For most Common Ground clients, the production of files for direct marketing campaigns can be done within Common Ground. The tools in Common Ground (available in version 2.5 and higher) are designed to accommodate up to 25 segments and up to 75,000 audience members per Campaign.

There are some conditions under which it may make sense to export raw data and create the segment groups outside of Common Ground:

- If your program routinely uses more than 25 segments, and campaigns include more than 75,000 audience members
- If your organization works with a direct marketing firm that requires specific segmentation that would be difficult to achieve with the query/reporting tools in Common Ground
- If setting up the segments creates an onerous burden on staff resources, or there is no in-house expertise to execute the direct marketing plan
- If your data must be merged/purged against another data set before the campaign is sent

In these situations, be sure to export all the data from Common Ground that will be needed to create the segments outside of the system. This data may be extracted at the Account or Contact level, depending on how the criteria are defined. In addition to the usual addressee, salutation and address fields, this often includes some summary giving information or demographic characteristics. The data extraction may be facilitated by the new Contact roll-up fields available in version 2.5 that differentiate between hard credit giving, soft credit giving, and combined hard-and-soft-credit giving.

Above all, be sure the Contact ID is included so that the records can be globally updated with the Campaign Membership when segmentation is complete. Templates for Campaign Membership updates are available in the Common Ground community.

If segments are created outside of the system, it is still important to create segment codes on the Campaign record, although it is not necessary to go through the process of defining the segments and populating Campaign Membership as discussed in Section III-C.

III. Common Ground Direct Marketing Tools

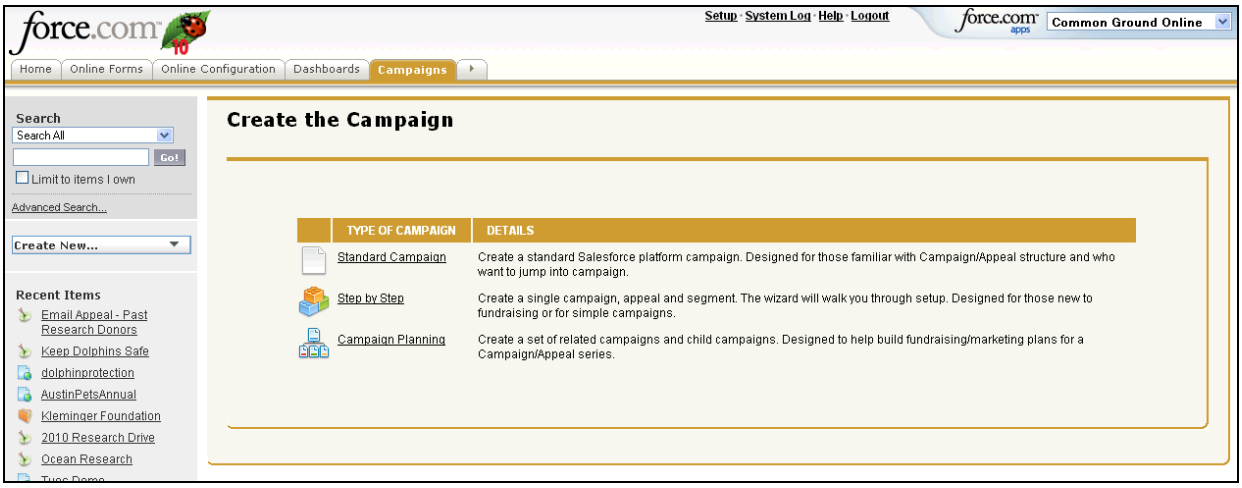
A. Setting Up a Campaign

Now that you're armed with your segmentation plan, it's time to set up Common Ground to handle your next direct marketing initiative.

There are three options for setting up a Campaign. One of them is to set up a Campaign the way it has always been done (Standard Campaign). You can continue to use this method if it works well for your organization. The other two methods are new with version 2.5 and are more suited to an organized approach to direct marketing:

- **Step by Step —** This setup works best for setting up one direct marketing campaign at a time, such as a single mail appeal.
- **Campaign Planning —** This is designed for a larger-scale setup of a number of Appeals that will fit together into a hierarchy.

Version 2.5 of Common Ground includes an improved user interface for setting up Campaigns as well as new fields you can use to track more detail about your direct marketing campaigns and drive your analysis.



There are three options for setting up a campaign in Convio Common Ground

B. Campaign Fields

Successful use of Campaigns for segmentation and direct marketing requires an understanding of the intentions and best practices for Campaign fields. In this section, you'll learn how the relevant key Campaign fields are designed to be used.

Campaign Type — Campaign Type is best thought of as an overall Campaign category in an environment in which Common Ground is being used for more than fundraising needs. This happens quite often, since Campaigns and Campaign Membership can be used to organize and record a wide variety of approaches and communications with constituents. For example, you may use a Campaign to organize an Annual Report mailing or record who received a monthly e-newsletter update. This is a high-level field in which sample values might be Fundraising, Advocacy, Communications, or Education.

Strategic Program — The Strategic Program is conceptually one level down in more detail than the Campaign Type. This field organizes your Campaigns according to your initiatives. For example, if your organization uses the Campaign Type of Fundraising, some of your Strategic Programs could be Direct Marketing, Major Gifts, Events, and Planned Giving. If the Campaign Type were Communications, the Strategic Programs might be Marketing, Outreach, Periodicals, and Publications.

Channel — Channel refers to the method by which the appeal is made or the information that is disseminated. Typically the values for this field might be something like Direct Mail, Email, Phone, or Integrated.

Default Designation — The Default Designation is the Designation that should automatically be applied to donations that are credited to this Campaign. This Designation can be changed if necessary after the donation is saved. (Designation is the allocation or "fund" to which the donation is applied.)

Status — The Campaign Status refers to whether or not the Campaign is currently active, or what its status might otherwise be. This field is helpful for including only active Campaigns in reporting. Values for this field include In Process, Planned, Completed or Canceled.

Is An Appeal — This checkbox indicates whether this Campaign is an Appeal of another Campaign. You would use this checkbox to show that a Campaign is a Child Campaign of a larger Parent Campaign. This impacts the Campaign Hierarchy section of the Campaign record.

Lock Segments — When segment creation is complete and the segments are in the correct order, check this box to keep the segments from being edited further. This is typically one of the last things that is done before exporting the list.

Start Date and End Date — For Campaigns that will have a specific start date and end date, it can be helpful to note them here. It is not necessary to note start and end dates for general fundraising activities that are in constant use (such as a Campaign for Honor/Memorial).

Expected Revenue — For Campaigns that have a fundraising goal, enter it here. This helps calculate progress to goal in the reports.

Expected Response — For Campaigns that have a target response rate, enter the target response rate here. For example, a 0.5-1% response rate on an acquisition appeal is generally considered successful. An average direct mail piece might have a 5% response rate, and a successful one might have a 10% response rate or more.

Budgeted Cost — Enter the amount expected to be invested in this Campaign. Some examples of costs are design, printing and postage.

Actual Cost — To obtain popular, useful metrics like “cost per dollar raised” and “cost per piece,” enter the amount that was actually spent on the Campaign.

Another exciting feature is the ability to link segments directly to their Campaign. Whether your Campaign is for fundraising, advocacy, or outreach, it’s a big advantage to be able to link all segments together under the umbrella of the Campaign.

By clicking on the New Segment button on the Campaign record, you will open a new record for a segment of this Campaign. Give each segment a name and a code, which will speed up gift data entry and reporting.

If your organization needs to create the segment lists outside of the system (for example, for any of the reasons mentioned on page 11), then this is as far as you need to go in terms of setting up segments for your Campaign. Otherwise, continue reading for tips on how to use the Segment Definition tool.

C. Segment Definitions and Priority

Common Ground provides a query-like tool that revolutionizes the list-building process. Creating Segment Definitions is easier and more precise than creating and exporting multiple reports to try to fill the same need.

To access the Segment Definition tool, save (but do not close) a Segment record. After saving, a new section will appear called Criteria Filters. Click the Edit Segment Definition button.

9 Tips for Creating Good Segment Definitions

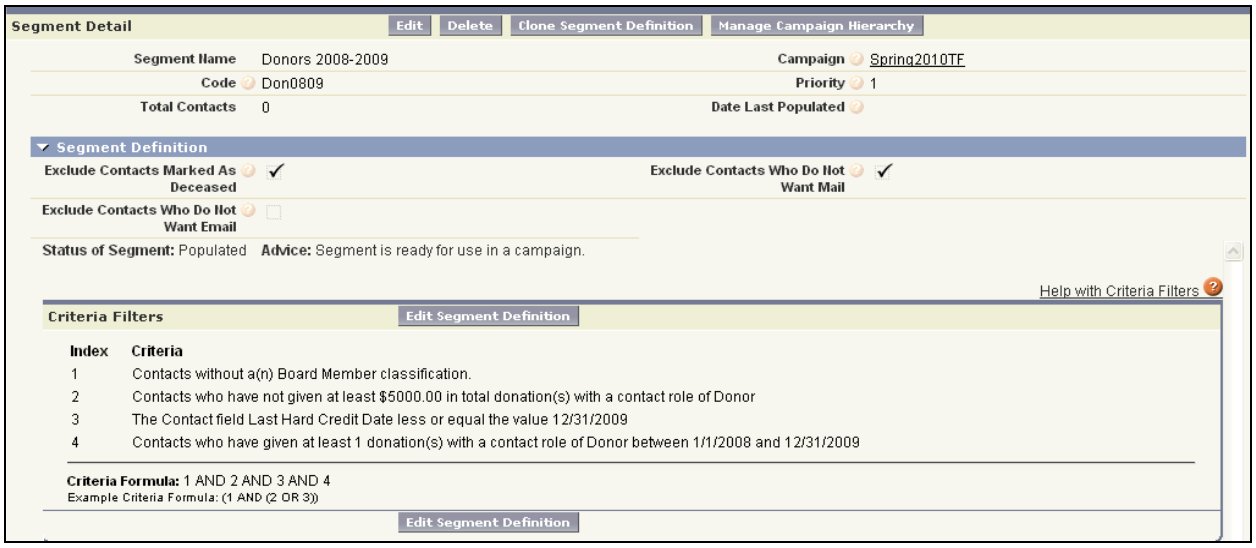
1. Note that there are easy checkboxes on the segment record to exclude deceased contacts and those who have opted out of email or mail communications. Depending on whether your appeal is being delivered through email or mail (if applicable), you may need to uncheck one or both of these boxes.

2. Use AND, OR and parentheses (Criteria Formula) to get the logic right when your definition uses multiple criteria. For example, if your segment is intended to be "donors in San Francisco who have given $25+ this year," create one criterion for the city requirement and one criterion for the giving requirement. Then, type "1 AND 2" in the Criteria Formula field.

    - Use AND when records must have all the criteria to qualify.
    - Use OR when a record could have any of the criteria to qualify.
    - Use parentheses to tell Common Ground to process two criteria together before moving on to another. This is called "order of operations."

3. If necessary, include any additional exclusion criteria as part of each segment. Recall from the segmentation plan-building process (page 8) that if your exclusions are more advanced than the basic checkboxes, then they are listed at the top of the grid. Each of these criteria should be part of each segment description.

    In the following example, board members, donors of $5,000+ and donors since 1/1/2010 are excluded from the group of donors who gave at least one gift in 2008 or 2009. The Criteria Formula states that a Contact must meet all criteria in order to be included (1 AND 2 AND 3 AND 4). In any subsequent segments, criteria 1, 2 and 3 would all also need to be present to make sure these groups are completely excluded from the Campaign.



Example segment definition

4. If your Campaign is an integrated campaign that uses multiple channels, one popular approach is to create separate segments that are e-mail only, phone-only and/or mail-only (as applicable). This way you can report on the performance of each segment and also of the Campaign as a whole. For example, the email segment may be characterized by "Has an email address and hasn't opted out of email" while a mail segment may be characterized by "Doesn't have an email address and hasn't opted out of mail." These definitions would be added to any other demographic or financial criteria for the segment.

5. Keep your segment descriptions to areas of the system that the definition tool can access:
    - **Donation Quantity** — One gift (or more) to a particular combination of Campaign, Designation and other Donation fields during a specified date range.
    - **Total Donation Amount** — Summary total giving (hard credit received Single Donation, Pledge Installment or Recurring Gift installment) to a particular combination of Campaign, Designation and other Donation fields during a specified date range.
    - **Single Donation Amount** — One gift to a particular combination of Campaign, Designation and other Donation fields during a specified date range.
    - **Campaign Membership** — Contact is a member of specified Campaign.
    - **Contact Classification** — Contact has (or doesn't have) specified Classification Type.
    - **Event Attendance** — Contact has attended a specified event, or has attended any event during the specified date range.
    - **Volunteer Activity** — Contact has held a specified job, or has volunteered for any job in the specified date range.
    - **Relationships** — Contact has (or doesn't have) a relationship with another Contact who has a particular Classification.
    - **Contact Field** — Specify criteria for other selected fields on the Contact record. This area is a potential treasure trove for other demographic criteria. For example, this is the area you would use to include criteria such as:
        - Age
        - Gender
        - First Gift Date or Amount
        - Last Gift Date or Amount
        - State or ZIP code
        - Open Major Gift flag
        - Lifetime or YTD giving totals
        - Any custom fields your organization may have set up

    If your segment descriptions do not fit comfortably into these parameters, please log a support case for assistance.

6. To identify non-donors, use the Lifetime Combined Amount field on the Contact record with a value of “0” (zero) or the Donation Quantity filter to say “Contact has not given at least one donation with a contact role of Donor”.

7. In order to query on “one of” (for example, if the Contact could have any of several Classification Types), select all the criteria separately and use the OR operator to link them together.

8. It is not necessary to try to exclude criteria from other segments in your definition. The priority feature will place each contact in the highest-priority segment for which they qualify.

9. After the criteria are defined, populate the segment by clicking the Update Segment button. This will cause Common Ground to execute the query and tell you how many records meet the criteria in the Total Contacts field. This step also populates the Campaign Membership.

Segment Priority
When you’re finished creating the segments for your Campaign, the segments will be listed in the Segment section of the Campaign record. The Priority column shows which segment is highest priority down to the lowest priority.

If there are concerns about possible intersections or overlap of segments and you want to make sure Common Ground considers the segments in the correct order, use the Segment Priorities feature to re-order the segments. Use the up-and-down arrows to move the segments around. The system will automatically recalculate the total number of Contacts in each segment and reassign Campaign Membership as the segments are re-ordered.

If you manually overwrite the segment priority numbers, be sure to click the Update Priority button to automatically recalculate the number of Contacts in each segment and re-assign Campaign Memberships.

D. Locking Down Segments

When satisfied with the segment definitions and priority, lock the segments so no user accidentally changes any criteria or priority, or recalculates segment counts.

To lock segments, check the Lock Segments button on the Campaign record (located in the Campaign Details area at the top of the Campaign screen).

Note: This checkbox is reversible in the event that changes do need to be made before production. Simply uncheck the box to make the segments editable again. However, it is NOT recommended to uncheck this box after the Campaign has gone into production.

IV. Working with Data Files

A. Exporting Files for Mailing/Emailing

Now that the Campaign has been set up and populated, the next step is to extract the data needed for the mailing or email list.

The Appeal Member Export report (located in the Direct Marketing Reports area) is a good choice for exporting the Contacts out of the system. Simply select the applicable Campaign and export the file to Excel.

Once you have exported the report to Excel, you may need to do some additional work before using the file. For example, for an integrated Campaign, you may need to split email segments and mail segments into two different spreadsheets.

V. Handling Returns

A. Using Batch for High Volume

Direct mail and e-appeals typically generate a higher-than-usual volume of donations for at least a couple of weeks after they drop. Since these gifts are primarily straightforward Single Donations, it makes the most sense to process them quickly in a Batch. Gift batches are ideal for processing a high volume of similar gifts.

The easiest way to set up a new Gift Batch is to clone an existing batch that already has the necessary fields. Alternatively, if your organization is new to batching, it only requires a few selections to choose the required fields and put them in a convenient order. For gifts received through direct marketing efforts, be sure to include the Segment code. Save the batch layout, and then continue on to entering gifts.

Using Segment codes makes batch gift entry even faster. By entering the Segment code into the batch row, the Campaign and Designation will be automatically completed. The same is true for gifts entered one at a time.

B. Undeliverables/Opt-Outs

Besides donations, the other most common types of returns are pieces that were undeliverable or messages from constituents to opt out of future communications. It is extremely important to respect a constituent's wish be removed from future lists. Plus, undeliverable emails and addresses should be promptly flagged or removed from your system to minimize inefficiencies and waste.

Part of your Campaign planning should be to allocate staff resources to managing non-financial returns. These returns typically spike in the first couple of weeks after the

appeal drops, in conjunction with the increase in donations. Be sure that staff members who perform this function are well-trained in your organization's procedures. All updates and opt-outs from one direct marketing communication should be processed before the next communication is released.

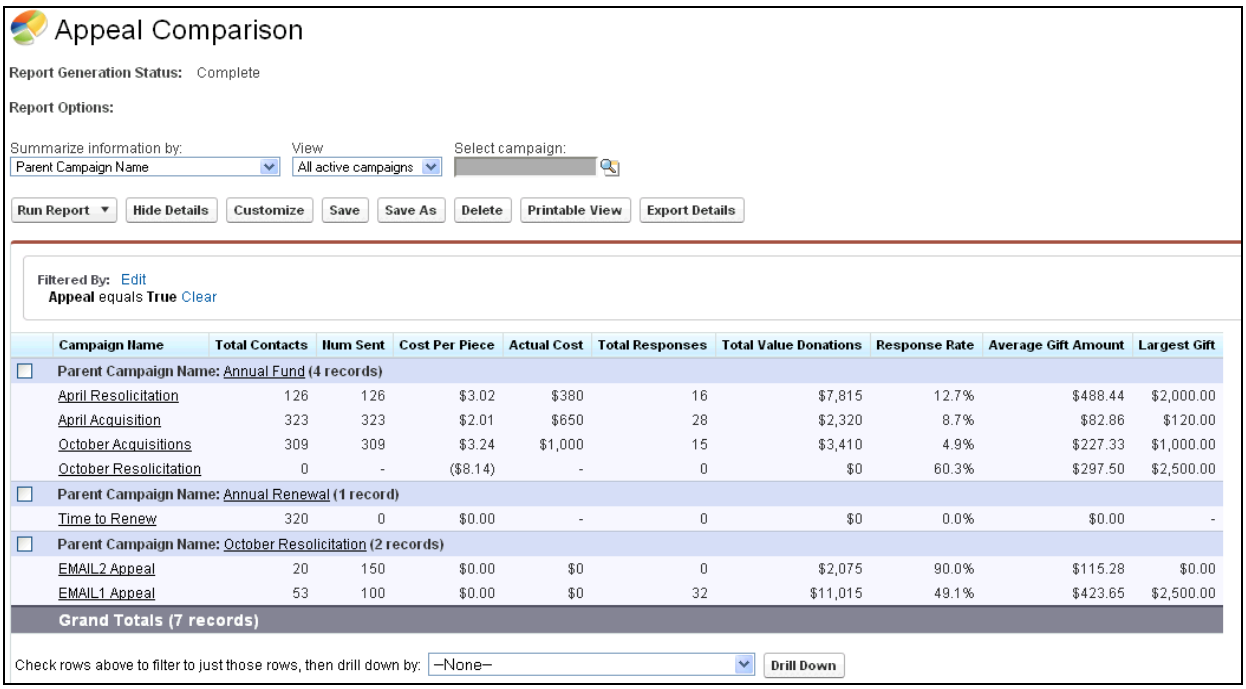
VI. Creating Meaningful Reports

A. New Reports Available

Common Ground has new reports specifically to analyze direct marketing results. The goal of these reports is to provide the types of necessary information that has historically typically been provided by a direct marketing consulting firm or vendor. There are other customizable reports available in the Direct Marketing Reports section on the Reports tab.

Appeal Comparison Report
The Appeal Comparison Report is a performance summary of Appeals. This report is often the basis for the evaluation of the success of Appeals. By default, all active Appeals are included. Appeals are grouped by the Parent Campaign, and metrics such as cost per piece, response rate and average gift amount are included in addition to total number solicited and total amount raised.

If you don't see any data in the Cost Per Piece or Response Rate columns, check to be sure that the Actual Cost and Total Contacts fields on the Appeal have been filled in.



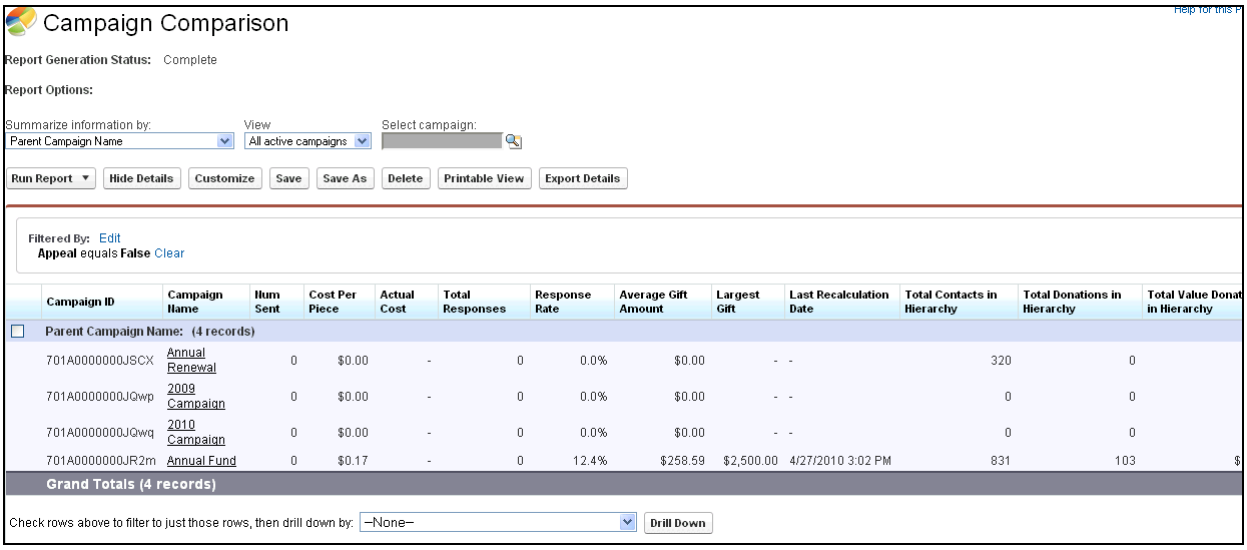
Campaign Name	Total Contacts	Num Sent	Cost Per Piece	Actual Cost	Total Responses	Total Value Donations	Response Rate	Average Gift Amount	Largest Gift
Parent Campaign Name: Annual Fund (4 records)									
April Resolicitation	126	126	$3.02	$380	16	$7,815	12.7%	$488.44	$2,000.00
April Acquisition	323	323	$2.01	$650	28	$2,320	8.7%	$82.86	$120.00
October Acquisitions	309	309	$3.24	$1,000	15	$3,410	4.9%	$227.33	$1,000.00
October Resolicitation	0	-	($8.14)	-	0	$0	60.3%	$297.50	$2,500.00
Parent Campaign Name: Annual Renewal (1 record)									
Time to Renew	320	0	$0.00	-	0	$0	0.0%	$0.00	-
Parent Campaign Name: October Resolicitation (2 records)									
EMAIL2 Appeal	20	150	$0.00	$0	0	$2,075	90.0%	$115.28	$0.00
EMAIL1 Appeal	53	100	$0.00	$0	32	$11,015	49.1%	$423.65	$2,500.00
Grand Totals (7 records)									

Appeal comparison report

Campaign Comparison Report

The Campaign Comparison Report is a performance summary of Campaigns, which may include a number of Appeals. By default, all active Campaigns are included. In addition to total number of responses and total amount raised, this report includes calculations such as average gift amount, cost per piece, and response rate.

If you don't see any data in the Cost Per Piece or Response Rate columns, check to be sure that the Actual Cost and Total Contacts fields on the associated Appeal(s) have been filled in.



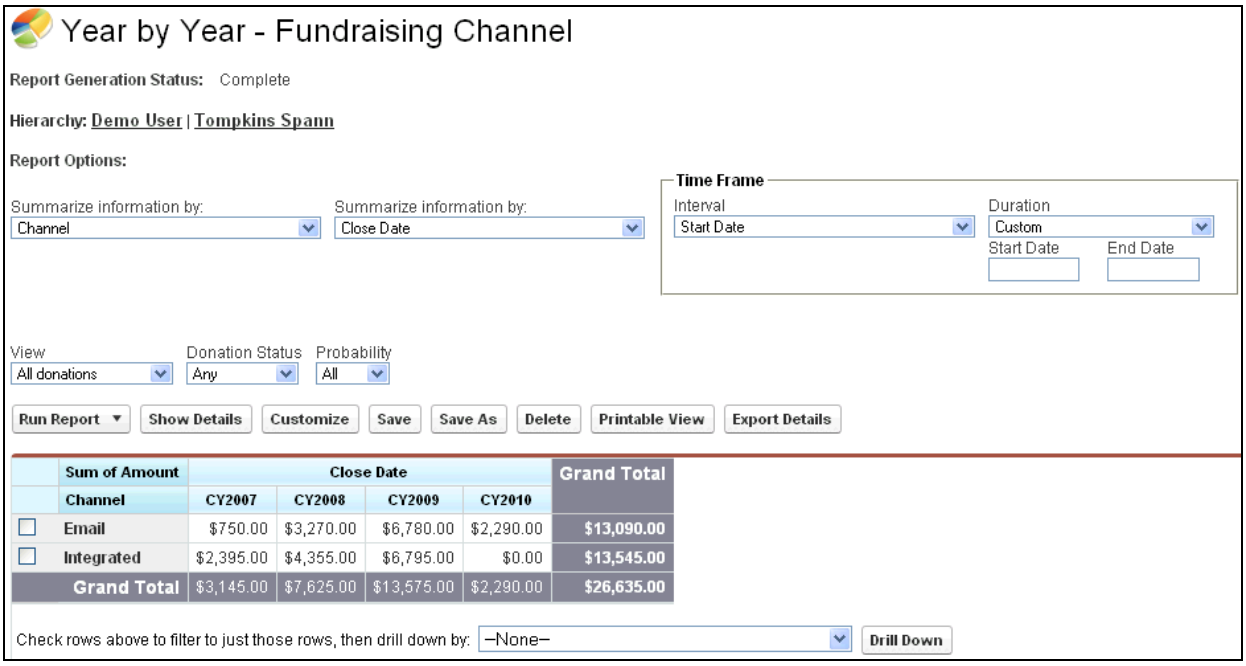
Campaign ID	Campaign Name	Num Sent	Cost Per Piece	Actual Cost	Total Responses	Response Rate	Average Gift Amount	Largest Gift	Last Recalculation Date	Total Contacts in Hierarchy	Total Donations in Hierarchy	Total Value Donat in Hierarchy
Parent Campaign Name: (4 records)												
701A0000000JSCX	Annual Renewal	0	$0.00	-	0	0.0%	$0.00	-	-	320	0	
701A0000000JQwp	2009 Campaign	0	$0.00	-	0	0.0%	$0.00	-	-	0	0	
701A0000000JQwq	2010 Campaign	0	$0.00	-	0	0.0%	$0.00	-	-	0	0	
701A0000000JR2m	Annual Fund	0	$0.17	-	0	12.4%	$258.59	$2,500.00	4/27/2010 3:02 PM	831	103	$
Grand Totals (4 records)												

Campaign comparison report

Year-by-Year – Fundraising Channel

This report gives a summary of total amount raised by the Fundraising Channel field by Calendar Year. The Fundraising Channel field is a field on the Campaign record that is designed to track whether a Campaign is mailed, emailed, integrated, or through another method (such as phone).

If this report does not give you the expected results, check to see that the Fundraising Channel field is populated on all your Campaigns.



Sum of Amount	Close Date				Grand Total
Channel	CY2007	CY2008	CY2009	CY2010	
Email	$750.00	$3,270.00	$6,780.00	$2,290.00	$13,090.00
Integrated	$2,395.00	$4,355.00	$6,795.00	$0.00	$13,545.00
Grand Total	$3,145.00	$7,625.00	$13,575.00	$2,290.00	$26,635.00

Year-by-year — fundraising channel report

VII. Appendix I: Segment Samples

This sample Appeal, Time to Renew, has three segments: VIP donors, non-VIP donors, and non-donors. Note that by placing the VIP donor segment first, Contacts in that segment are automatically excluded from the non-VIP donor segments.

Campaign Hierarchy — Campaign Hierarchy Help

Campaign Name	Contacts	Responses	Donations	Value Donations	Won Donations	Value Won Donations
Time to Renew (View Parent)	320	0	0	$0	0	$0
Hierarchy Total	**320**	**0**	**0**	**$0**	**0**	**$0**

Segments — New Segment | Change Segment Priorities — Segments Help

Action	Segment Name	Total Contacts	Code	State	Priority
Edit | Del	VIP Donors	6		Populated	1
Edit | Del	Non VIP donors	14		Populated	2
Edit | Del	Non Donors	300		Populated	3

Time to renew sample appeal

This is a good example of how to use the Segment Priority feature as a de facto exclusion. In other words, it is not necessary to try to exclude VIP donors from the non-VIP donor segment. The placement in the segment hierarchy will do the work of excluding the VIP donors from the non-VIP segment.

Here are the details of how each segment is constructed:

Segment 1: VIP Donors — To be included, Contacts can be $500+ donors OR have a relationship to a Board Member.

Segment Detail — Edit | Delete | Clone Segment Definition | Manage Campaign Hierarchy

Segment Name	VIP Donors	Campaign	Time to Renew
Code		Priority	1
Total Contacts	6	Date Last Populated	4/28/2010 3:10 PM

Segment Definition

Exclude Contacts Marked As Deceased ✓ — Exclude Contacts Who Do Not Want Mail ✓

Exclude Contacts Who Do Not Want Email ✓

Status of Segment: Populated **Advice:** Segment is ready for use in a campaign.

Help with Criteria Filters

Criteria Filters — Edit Segment Definition

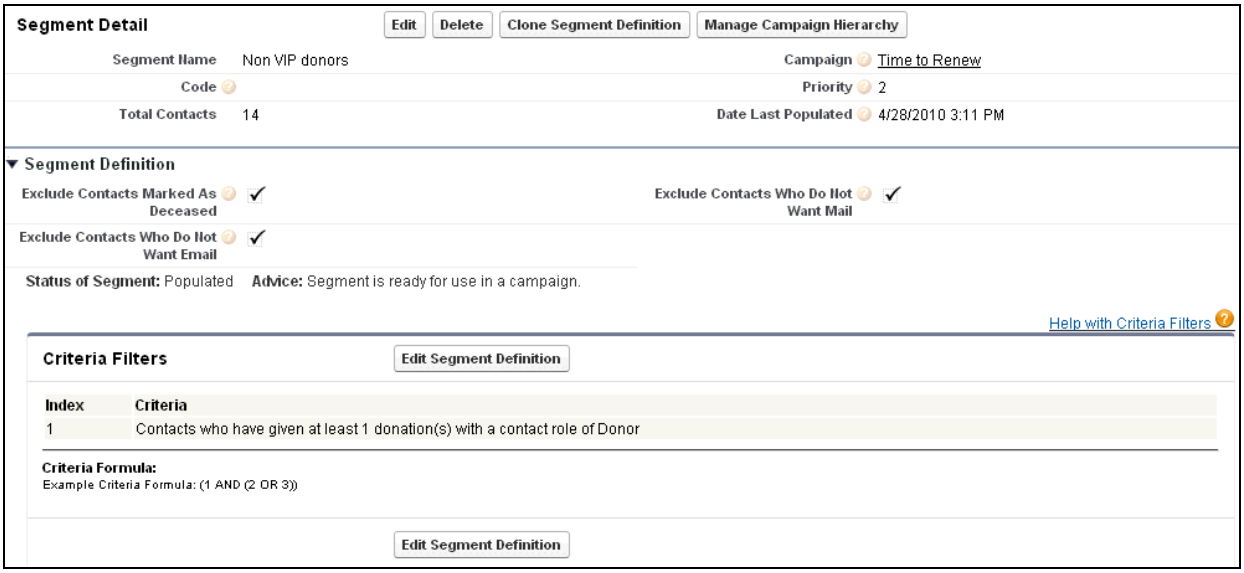
Index	Criteria
1	Contacts who have given at least $500.00 in total donation(s) with a contact role of Donor
2	Contacts with any relationship with a Contact who has a Board Member classification

Criteria Formula: 1 or 2
Example Criteria Formula: (1 AND (2 OR 3))

Edit Segment Definition

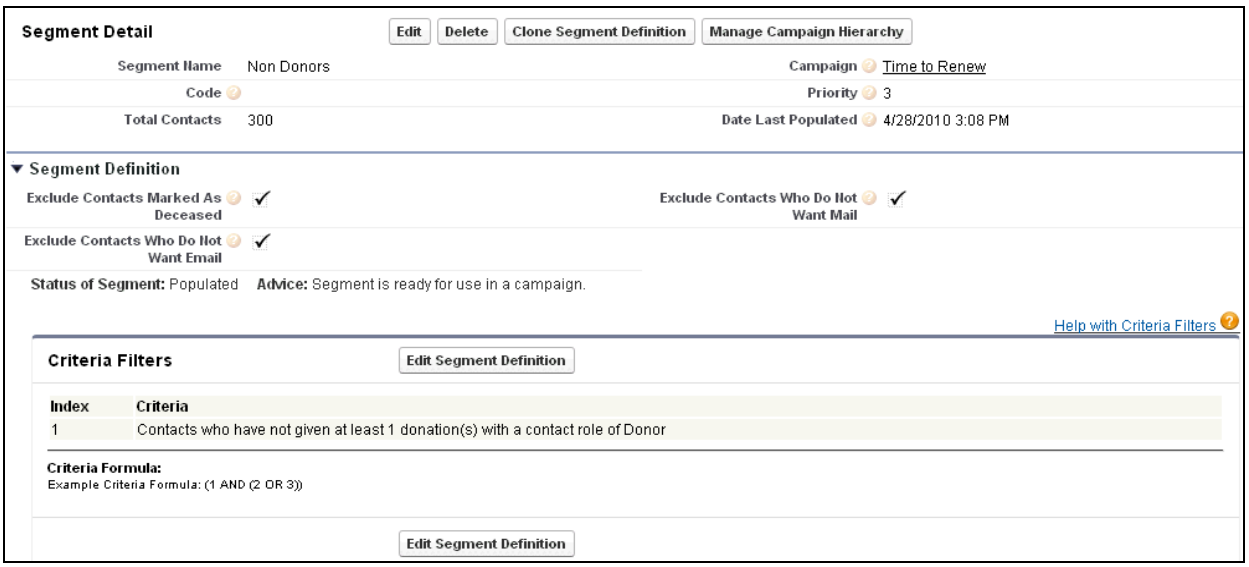
Sample segment construction — Segment 1

Segment 2: Non-VIP Donors — This segment simply contains all Contacts who have given at least one donation.



Sample segment construction — Segment 2

Segment 3: Non-Donors — Note that the criterion for the segment is the inverse of the criterion used for the Non-VIP Donor segment. This is the most reliable way to ensure your results are consistent.



Sample segment construction — Segment 3

VIII. Appendix II: Campaign Planning Worksheet

Segment	Segment Description	Notes	Segment / Package Code	Package Description	Segment Criteria	Count