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Blackbaud

Successful Mailings in The Raiser's Edge

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Bill Connors, CFRE
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Agenda

- ◆ Introduction
- ◆ Preparation
- ◆ Query
- ◆ Mail
- ◆ Export
- ◆ Follow-up
- ◆ Q&A



Introduction

- ◆ We will use an example to talk about
 - When Query should and should not be used
 - When Mail should and should not be used
 - When Export should and should not be used

- ◆ This scenario gives us an opportunity to talk through a variety of situations and recommendations for mailings, including simpler ones

- ◆ We will not be doing a mail merge, but will prepare the data for one

- ◆ You have to know the process from beginning to end to make some early decisions, so be patient until we get through everything

- ◆ This is not an introductory training on Query, Mail or Export—some basic understanding of these functions is expected

Scenario

What we need are donors who have given a direct mail gift, full gift history, gift type, name and address, salutation field (if you have one) id number (We can send this back to you after we've sent the mailing so you can see which donors were chosen for a particular appeal.)

Margo's note further describes the type of file to send and the format for the gift history information.

The other thing you'll need to do is to pull out anyone whom you **don't want** to mail to — that would be people that specifically requested to not receive direct mail, or those who asked for mail only once or twice a year, board members, advisory council, VIP's, sustainers (monthly donors), staff, volunteers, deceased, bad addresses.

I know that Domenic recoded the VIP category, and I'm not sure if those are people you'll want to include in regular special appeals — you might want to check on that.

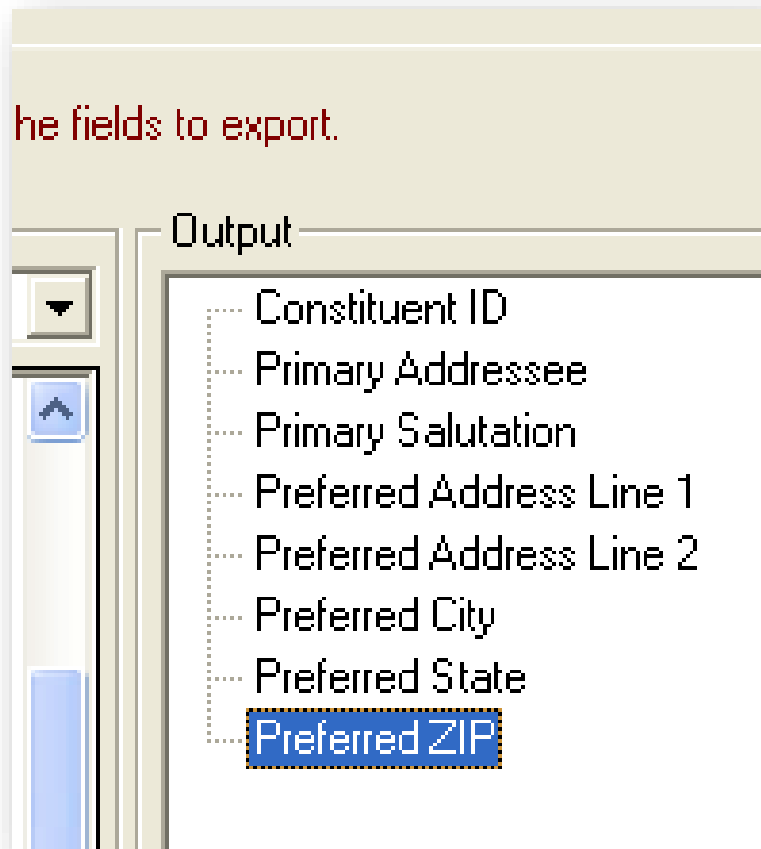
I know in the past we have mailed to family foundations. Aside from the family foundations, we probably shouldn't be getting any corporate donors.

First...

- ◆ Let's get clear right away...do NOT use Query as your first and final tool for mailings!
 - Do not export data from the Results tab to Excel to send to a mail house or to merge with letters or labels. No, no, no!

- ◆ Why? Query does not, and is not designed to:
 - Do head of household processing
 - Always remove duplicates
 - Remind you of criteria to exclude
 - Exclude those with no valid addresses but not marked as such
 - Put individual and contact addressees and salutations in the same fields
 - Do addressee/salutation processing
 - Do contact processing
 - Distinguish between record criteria and field criteria

Do Not Do This



- ◆ What about contacts?
- ◆ What about add/sal processing?
- ◆ What about address processing?
- ◆ Where are the rest of the address lines?
- ◆ Where is Position and Org Name?

Do This Instead

- ◆ In English, write out in as much detail as possible the answers to the following questions:
 1. Who should receive the mailing? What criteria must they meet, with respect to RE fields and setup, to qualify for the mailing?
 2. Who should be excluded from the mailing even if they meet the above criteria?
 3. What exactly is the needed output from your organization?

- ◆ These answers will tell us what tools to use in The Raiser's Edge and in what order

Inclusion Criteria

- ◆ Think “records”; RE makes very clear distinctions in selecting Records, Addresses, and Name versions (Add/Sals)
- ◆ Individuals?
 - What about constituent partners?
- ◆ Organizations
 - What if there is no contact?
 - Which contact(s)?
 - More than one contact if multiple qualify?
 - What if the contact is also a qualifying individual constituent?
- ◆ Giving history; consider Matching Gift and Soft Credits as well as the more obvious Gift Amount, Gift Date, Gift Type and CFAP
 - Watch Gift Amount vs. Total Amount of Gifts
- ◆ Membership, Volunteer, Event history
- ◆ Constituent codes and Attributes
- ◆ Be clear about AND and OR

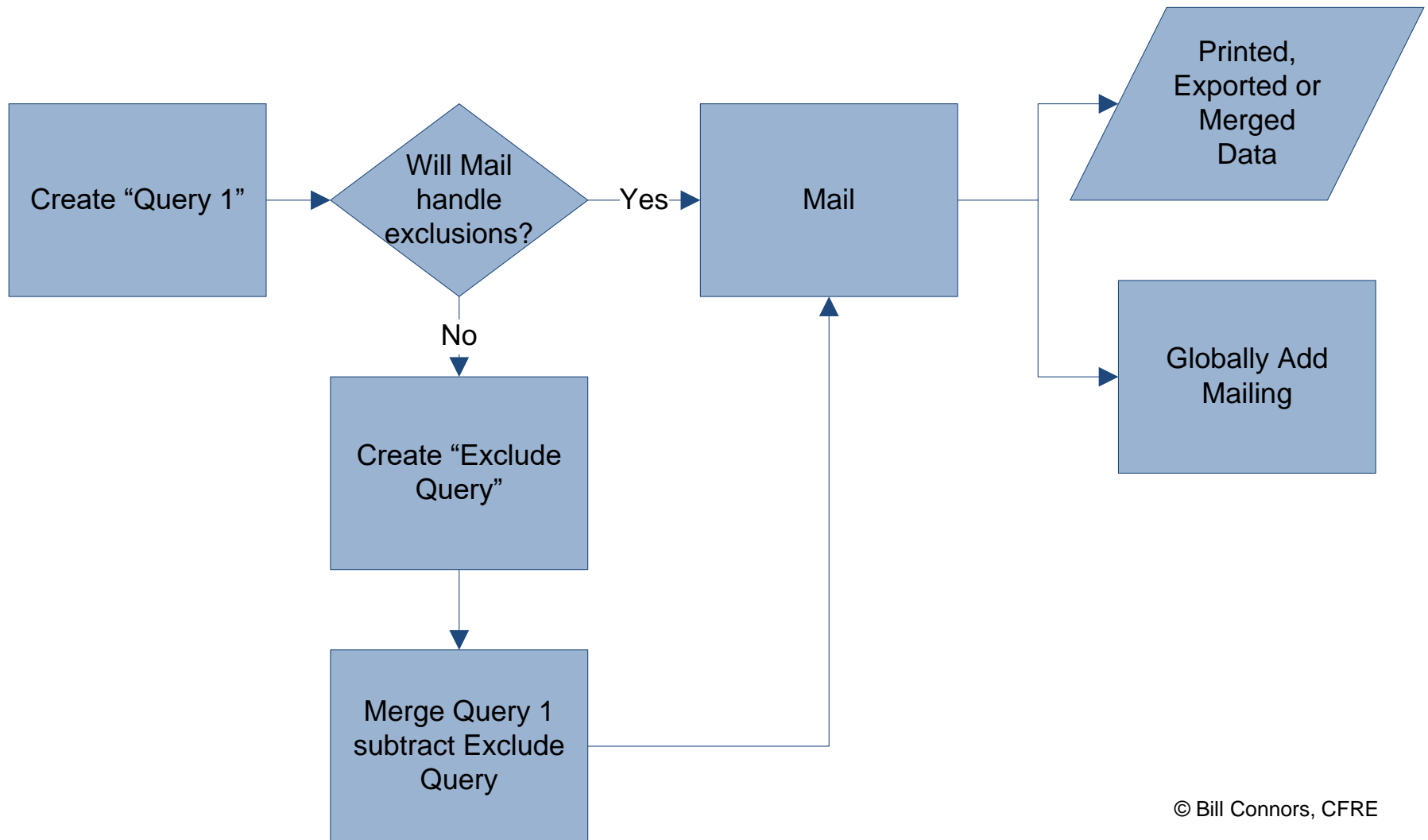
Exclusion Criteria

- ◆ You only need to think about who to exclude *if* they first meet the Inclusion Criteria; you do not need to exclude records who do not meet the Inclusion Criteria (though it is good to note in your documentation groups you are purposely leaving out—and why)
- ◆ Inactive, Deceased and Has no valid address (can't get)
- ◆ Solicit codes (don't want)
- ◆ Attributes
- ◆ Constituent Codes (too important, not appropriate)
- ◆ Giving History (already gave)
- ◆ Major donors (too important for this mailing)

Output Needed

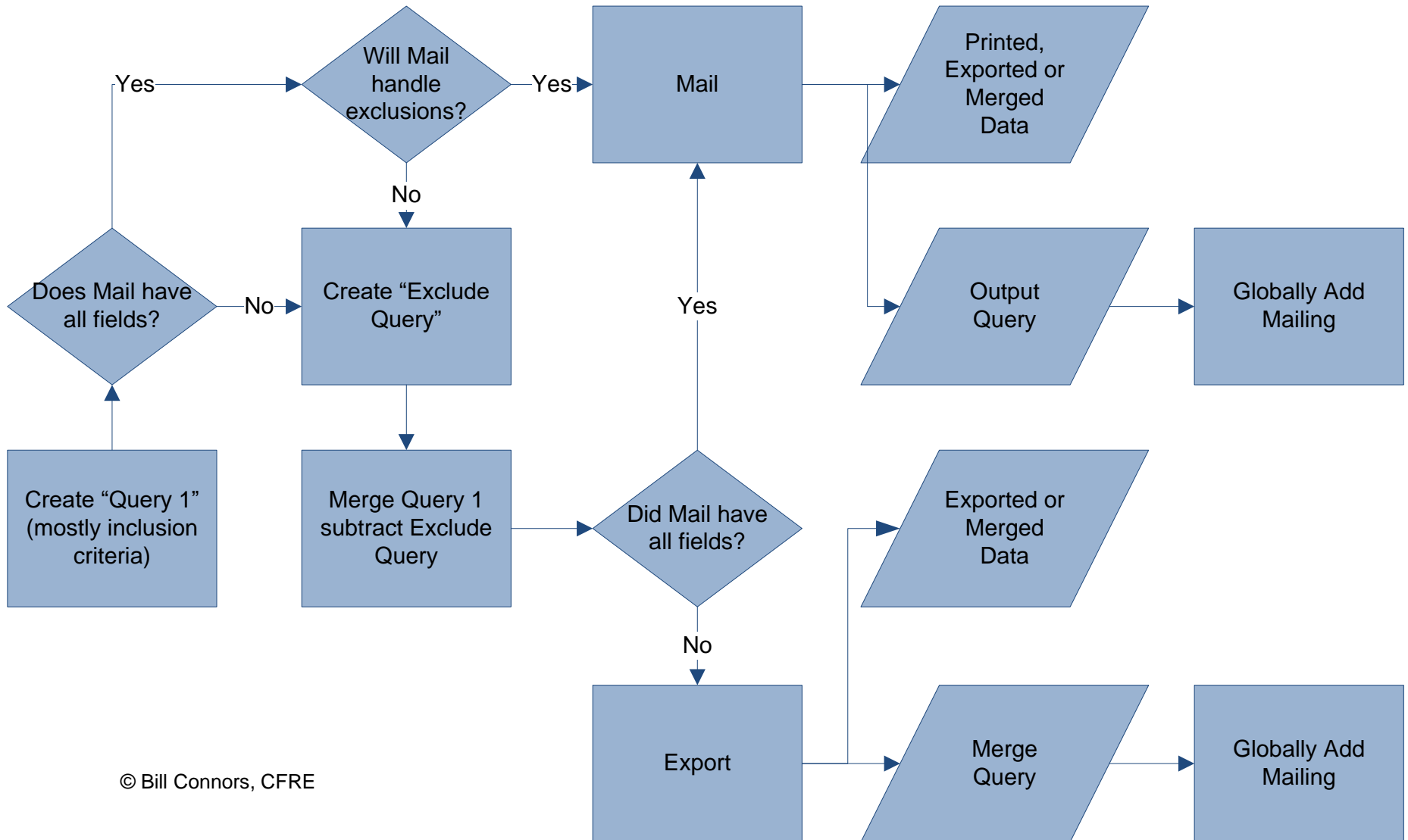
- ◆ Export file, mail merged letter, labels, or envelopes?
- ◆ Exactly what fields are needed from The Raiser's Edge
 - ID
 - Addressee
 - Salutation
 - Address
 - Giving data?
- ◆ What data should be in each field
 - Which addressee, for individuals, contacts, organizations with no contacts
 - Salutation needed? Which one?
 - What date will the mailing be sent? (for Seasonal Addresses)
 - Any reason not to use the Preferred Address?
 - Do we have time to clean up bad address information?

Typical Process Flow



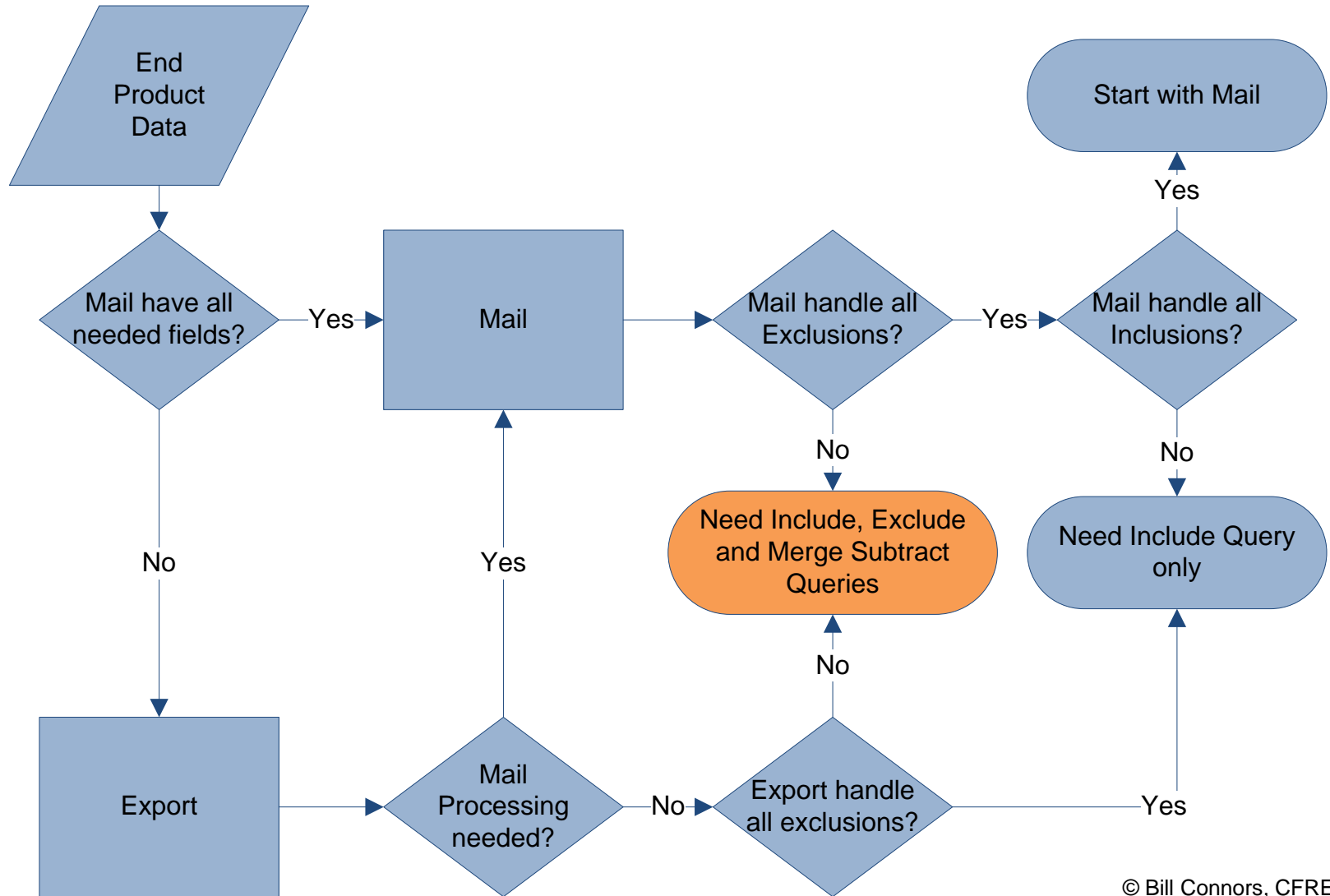
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More Sophisticated Process Flow



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Decision-Making Process



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Implementation Process

- ◆ Typical
 1. Write Include query
 2. Write Exclude query
 3. Merge these queries in a Merge Subtract query
 4. Use the Merge Subtract query in Mail to generate the output

- ◆ More sophisticated
 1. Write Include query
 2. Write Exclude query
 3. Merge these queries in a Merge Subtract query
 4. Use the Merge Subtract query in Mail to generate an output query that Mail has further filtered
 5. Use the Mail output query in Export

Include Query

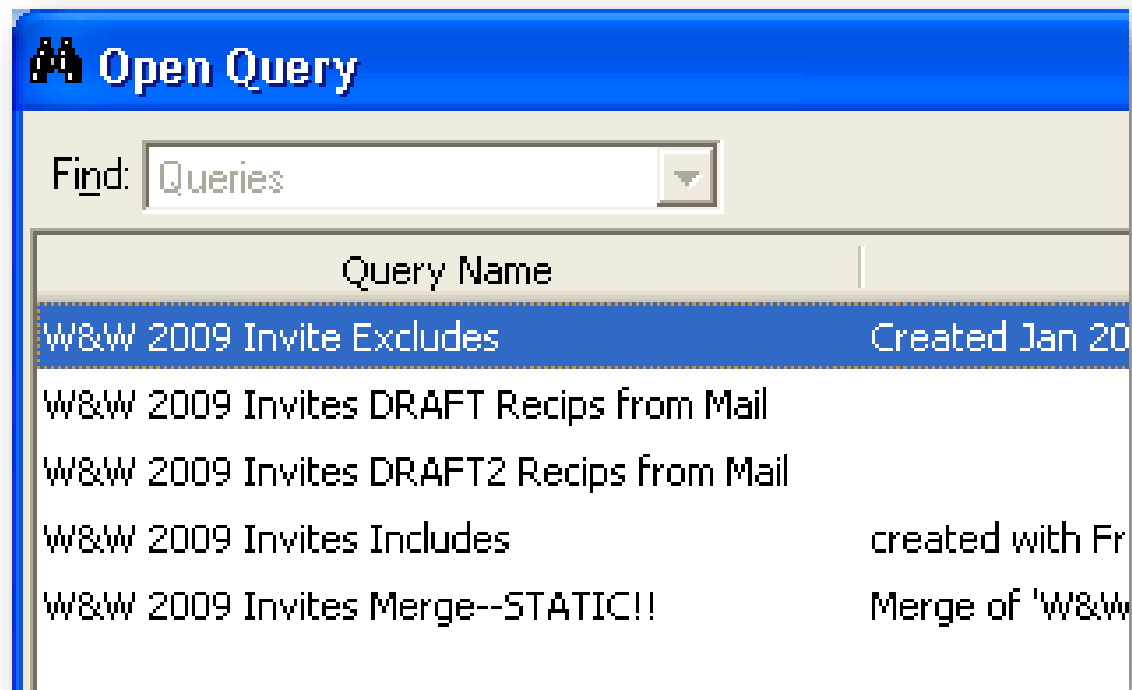
- ◆ Watch Query type
- ◆ Query format should be Dynamic
- ◆ There are usually many OR statements
- ◆ Watch uses of AND and parenthesis
- ◆ There should probably be no “Not” operators used
- ◆ With Gift criteria, pay attention to Query Options for Matching Gift and Soft Credit parameters
- ◆ One last line for Constituent Attribute “Mail to Send” equals?
- ◆ Output and Sort tabs are unimportant except to check the validity of the Criteria
- ◆ Pay no attention to duplicates in the Results—they do not matter
- ◆ Include in the name of the query a date reference to the mailing
- ◆ Plan to name the Include, Exclude, Merge and Mail output queries all the same name, appending “Includes” to this query’s name

Example Include Query Criteria

Filters

- Constituent Specific Attributes Approach Inclusions Description one of E - Wine & Wishes--Send Invitations, E - Send
- OR Constituent Specific Attributes Event Description one of Croquet Invitational 2004, Wine and Wishes 2004 Resta
- OR Constituency Code one of Advisory Council, Board Member, Board Prospect, VIP, MAWFA Leadership
- OR Appeal Description one of E54 Monterey Bay Event, E54 Monterey Bay Gala 2005, E55 Wine & Wishes 2002-20
- OR (Gift Amount greater than or equal to \$400.00
- AND Gift Date between 1/1/2003 AND 12/31/2007
- AND Gift Type one of Cash, Pay-Cash, MG Pay-Cash, Stock/Property, Stock/Property (Sold), Pay-Stock/Property, F
- OR Total Amount of Gifts_1 greater than or equal to \$100.00
 - Gift Date greater than or equal to 1/1/2008
 - AND Gift Type one of Cash, Pay-Cash, MG Pay-Cash, Stock/Property, Stock/Property (Sold), Pay-Stock/Proper
- OR Event Name one of Monterey Bay Gala 2005
- OR (Event Name one of Croquet Invitational 2004, Wine & Wishes 2004
- AND Participation one of Corporate Sponsor, Registrant, Attendee

Example of Query Names



Exclude Query

- ◆ Only create if Mail cannot handle all exclusions
- ◆ Query type must be exactly the same as Include query
- ◆ Query format should also be Dynamic
- ◆ Be careful with “Not” operators – the “negative” intent of this query will be handled through the Merge query, so state in the “positive” those who should be excluded
- ◆ There are usually many OR statements
- ◆ Watch uses of AND and parenthesis
- ◆ Do not use exclude criteria more easily handled in Mail
- ◆ With Gift criteria, pay attention to Query Options for Matching Gift and Soft Credit parameters
- ◆ Output and Sort tabs are unimportant except to check the Criteria
- ◆ Pay no attention to duplicates in the Results—they do not matter
- ◆ Add “Excludes” to this query’s name

Example Exclude Query Criteria

Filters

- (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory Council
..... AND Constituency Date To blank)
- OR (Constituency Code one of Advisory Council, Board Member, MAW Employee, VIP, Young Professional Advisory Council
..... AND Constituency Date To greater than 10/3/2008)
- OR (Gift Type equals Recurring Gift
..... AND Gift Status one of Active, Held)
- OR Constituent Specific Attributes Approach Restrictions Description one of Do Not Contact - All types, Do Not Contact - All types
- OR (Preferred Country not blank
..... AND Preferred Country does not equal United States)

Merge Query

- ◆ Only necessary if an Exclude query was necessary
- ◆ The Includes query is the Primary query
- ◆ The Excludes query is the Secondary query
- ◆ The Merge operator is Subtract
- ◆ Output does not matter except to validate results
- ◆ Sort order only matters if the needed sort order is other than Alphabetical or ZIP Code order or Export will be used
- ◆ Add “Merge Results—STATIC!” to this query's name

- ◆ Remember, this is a static query and must be refreshed each time it is updated or needs to be re-used
 - Done on the Results tab by pressing F5 or selecting Records, Refresh
 - You do not need to create a new merge query each time

Why Use Mail?

- ◆ Mail is preferable over Query because
 - No duplicates
 - Wizard-like interface helps avoid forgetting about important points
 - Head of household processing
 - Contact processing, contact addressee/salutation processing
 - If no Exclude and Merge query are necessary, entire process is dynamic
- ◆ Mail is preferable over Export because
 - More extensive Wizard-like interface helps avoid forgetting about important points
 - Contact and individual records use the same fields
 - Contacts can be excluded if receiving already as an individual
- ◆ Mail is preferable over both Query and Export because
 - Can exclude records without valid addresses but not marked as such
 - Individual and contact addressees and salutations in the same field
 - In some functions Mail has the ability to globally add appeal

Explore the Options in Mail

- ◆ If Mail can provide all the data needed for the project, Export is not needed
- ◆ If Mail cannot provide all the data needed for the project and Export is necessary, Mail may still be necessary as an intermediate step between Query and Export to use the functions in Mail that Export does not have
- ◆ In Mail, pick the right tool for the specific need

Picking the Right Tool in Mail

- ◆ Some tools have very specific purposes and are limited to those:
 - Donor Acknowledgement Letters
 - Honor/Memorial Acknowledgement Letters
 - Membership Cards
 - Name Tags
 - Place Cards
 - Reminders for pledges and recurring gifts
 - Renewal Notices
 - Volunteer Follow-up Letters
 - The four reports for Label Truncation, Membership Card Truncation, Receipt, Reminders

Make the Tools Flexible

- ◆ These functions are not so tightly tied down:
 - Appeal Cards
 - Cards
 - Envelopes
 - Follow-up Letters
 - Labels
 - Phonathon Forms
 - Receipts (if you are not doing real receipts)

- ◆ And then there is Quick Letters

Functions to Consider in Mail

- ◆ Print directly (e.g., Labels, Envelopes)
- ◆ Export data for a mail house
- ◆ Mail merge with a Word document of your creation
- ◆ Head of Household processing
- ◆ Segment tab (e.g., missing from Appeal Cards)
- ◆ What fields are available (e.g., Gift, more name formats than two)
- ◆ What format those fields are in (e.g., Address Block)
- ◆ Can the appeal be automatically added to the constituents without a separate global add?

Mail, General Tab

- ◆ Include: select the Merge Subtract query and not the Includes
- ◆ Use Head of Household processing
 - Remember the name version (addressee) is a separate question asked later, but remember your answer to this question as it impacts that decision
 - Everyone with a partner who is a constituent has a Head of Household
 - Assuming both records are set up properly, the only practical effects of this decision are which record gets the appeal/action added to it and whose Constituent ID is printed on the mailing and reply device
- ◆ Inactive constituents should be excluded *if* your organization has a defined policy and procedure for this field that is maintained
- ◆ Deceased can be excluded, but what is your policy for handling surviving partners?
- ◆ Has no valid address should be excluded, but what is your procedure for maintaining the accuracy of this field?
- ◆ If using Export as the final step, be sure to select Create output query

Mail, Fields to Include

- ◆ If using Export as the final step, include only Address Line 1

- ◆ Remove the redundant address fields that are defaulted for you
 - If doing a mail merge, keep Address Block and remove all others
 - If sending to a mail house, remove Address Block and Address Lines (single field) and probably CART as well
 - If sending to a mail house, keep all Address Lines 1-5
 - Keep Country; don't ever say or assume, "We don't have any..."

- ◆ Addressee: be sure to click the Options button
 - For Individual, probably select From individual and then leave default of Primary Addressee
 - For Organization, obviously leave Include Constituent ID unchecked
 - For Contact, select From Individual and then an option such as Main Constituent Only Addressee otherwise use Primary Addressee

Mail, Fields to Include continued

- ◆ Constituent ID: be sure to include this field as much as possible
 - Include it in your export file for uniquely identifying constituents, in case there are any questions and especially if you are getting a file back of the appeal and package sent to each constituent
 - Try to get it printed on the outside of the mailing for quicker processing of returned mail
 - Try to get it printed on the reply device for quicker processing of gifts

- ◆ Organization Name and Position: do not remove these fields—they should be part of every address generated from The Raiser's Edge for individuals who prefer to get their mail at their Business address (cf. comment above about saying “We don't have...”) and for contacts at organizations

- ◆ Salutation: if the mailing is a letter, be certain to include this field and to click on the Options button as well, completed similarly to Addressee

Mail, Filters

- ◆ Dates Last Changed: perhaps has a value, but I have never used
- ◆ Solicit Codes: always use
 - This field should be used for “do not contact” values: (1) not just about solicitations and (2) for the “do not’s”, not for the mail *to* send (use Attributes for that)
 - Select all values from the list that are applicable to this mailing, from the general Do Not Mail and Do Not Solicit to the specific No Direct Mail, No Newsletter
 - Remember that “Send Only X” solicit codes are a way of saying “do not send any mailing that is not X” and select all of the “Send Only’s” that are *not* of the type of mailing you are doing
 - Solicit codes should be documented on the constituent’s Notes tab
- ◆ Constituent Codes: used for inclusion purposes only, not exclusion, and only includes those for whom the code is current; rarely used

Mail, Attributes

- ◆ Include or Exclude Records
 - Include can be used instead of a query occasionally
 - Exclude is helpful if you have not fully implemented Solicit Codes
 - Does *not* show inactive table values, so perhaps add to Exclude query

- ◆ Add, Update or Delete: very rarely used; I have only used when acknowledging gifts with more than one letter, such as universities with multiple letters for large gifts or tribute letters without the Tribute module
 - Gift Attribute of “Second Acknowledgement Sent” with a data type of Yes/No
 - If run with Donor Acknowledgement letters, the second letter needs to be run first and when The Raiser's Edge prompts, answer No to mark the letters as acknowledged
 - At the top of the Attributes tab Exclude those with this attribute = Yes
 - At the bottom of the tab, select to Add the attribute with a Description of Yes and each time update the attribute's Date to today's date

Mail, Individual Address

- ◆ Step 1: Seasonal Addresses
 - Always include
 - Generally use Last Day of Next Week

- ◆ Step 2: Addresses to Consider—always use the Preferred Address

- ◆ Step 3: Address Attributes
 - For people who want different kinds of mail sent to different addresses
 - Try to avoid

- ◆ Step 4: What happens if no address is found
 - If time allows, select “Print with no address”
 - If time doesn't allow correct, select “Remove record from run”
 - “Print specific address” perhaps only available if running NCOA first

Mail, Organization Address

- ◆ Step 1: Always mail to contacts
- ◆ Step 2: Contact Types
 - Contact Information
 - Consider “Include Selected Contact Types Only” and “Print one for each contact found” at the same time
 - List contact types in logical order: if the mailing matches a contact type, Primary contact should *not* be listed first
 - Contact Attributes: a late addition to RE 7, not sure why, except they are more accessible at data entry than Address attributes; however, only use if Contact Type functionality is not sufficient and the same situation does not exist for Individuals
 - If contact also receives the mailing as an individual...think this through
 - Contact Types
 - Contact Address Attributes: try to avoid
- ◆ Step 3: What if no contact is found
 - Select “Print the organization name with no address” if there is time to fix
 - If there is not time to fix, the other two options are valid for consideration

Mail, Segment

- ◆ Use this when you have different mailing pieces within one mailing and you need your list segmented and the segments unduplicated

- ◆ Depending on next steps you can either
 - Create output queries
 - Add Appeal and Package to the Fields to Include

- ◆ Typically the appeal is the same for all segments, only the package varies

- ◆ Be careful! Only add the appeal and package and update the number solicited the final time.

Mail, Format

- ◆ Output Options: the Post Office would prefer, but we generally do not want to do these; leave without checkmarks

- ◆ Sort
 - Generally an alphabetical sort is sufficient
 - If an input query is present, Query is an option
 - If Segment has been selected, Segment is an option

Exporting

- ◆ Store data files in a secure location where they can be deleted easily and regularly
- ◆ Don't email data files—insist on uploading via secure FTP

Export Hints

- ◆ Almost always a merge subtract query is necessary
- ◆ Be certain to include the Constituent ID
- ◆ When selecting Addressee and Salutation
 - Don't forget to click on Format button to ensure the right one is selected
 - For organizations, Leave blank should be selected
- ◆ Pull the address from Address Processing, not Preferred Address
 - Select Address Block
 - For Individuals, Step 4, and Organizations, Step 3, select "Export with no address"
- ◆ Get the Contact Add/Sals from Address Processing, Contacts, Add/Sals
 - Again, be sure to select the Format button to get the correct version
- ◆ Include the Sort Key or Sort Name since it is so easy
- ◆ Remember trick: where you start on the Output tree determines whether you can define new parameters for field in a category already selected

Using the Output to Prepare the Mailing

- ◆ Don't use query counts, even counts from Static queries, to order mailing materials—run through the entire process
- ◆ Don't let users fix data in Excel—fix it in RE and re-run the export!
- ◆ Sort by each column to identify duplicates and mistakes
- ◆ Duplicates
 - Actual duplicate records; focus on *these*, not the Duplicate Constituent Report
 - Spouses/partners not linked for Head of Household processing to work
 - Contacts not linked for de-dupe option to work
 - Contacts not set up as RE intended
- ◆ Missing Addresses—constituent not marked for Has no valid addresses

Drafts vs. Final

- ◆ Options to vary between setup, test runs and the final run
 - Update dates in the input queries
 - Create output query
 - Step 1 for Individual addresses: update the seasonal as of date
 - Step 4 for Individual addresses
 - Step 3 for Organization addresses
 - Adding the Appeal and Package and Updating the number solicited *or* Do separate Global Add of Appeal or Action

- ◆ Documentation
 - Output procedures, not just data entry procedures, need documentation
 - See the handouts for Bill's session at this conference called *Creating Effective Policies and Procedures for The Raiser's Edge* in the Monday, 4:00 pm, timeslot
 - See the example PDF file provided with this presentation for this session

Data Entry Take-aways

- ◆ Duplicates need to be eliminated
- ◆ Linking: spouses/partners and contacts/individual constituents
- ◆ Add/Sals: individuals and contacts
- ◆ Contact Types
- ◆ Inactive, Deceased and Has no valid addresses
- ◆ Solicit Code and Special Mailing Type attributes

Using Again Next Time

- ◆ When using this process again in the future
 - Use Save As to keep the previous version for comparison
 - Be sure to validate each criteria line in the queries (e.g., update dates)
 - Be sure to validate each criteria in Mail (e.g., new Solicit Codes?)
 - And be sure to validate criteria in Export parameters (e.g., new CFAs?)

Questions and Contact Information

- ◆ Questions and additional thoughts?
- ◆ Contact information for Bill Connors, CFRE
 - Phone: 415.861.5454
 - Email: bill@billconnors.com

