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User's Guide

# @EASE and Direct Mail Campaigns

How to Bytes

Version 5.0

**Batsch Group Inc**

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# Introduction

This How To manual is designed to help you build and run a direct mail campaign.

We will not tell you how to build your **Ask List**, but once you have decided on your target audience, we will show you how @EASE can help you assess your campaign.

Choosing who to target will take some thoughtful analysis of your existing donors. We recommend that you document how you decided who to include on your Ask List.



## CHAPTER 1

# How To Run and Assess a Direct Mail Campaign

Running a direct mail campaign can be easy. It involves asking the right group of potential donors, with the right message, at the right time!

@EASE has some special tools that can make direct mail campaigns more successful by giving you feedback on the status of a current campaign and valuable insights for future campaigns.

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## Setting up the Campaign

We will cover any **Ask** that includes a broad range of donors selected from @EASE. This may be a direct mail, such as a Christmas mail out or it could be one of a series of newsletters that include donation requests.

The campaign type for direct mail might be DM and the campaign code could reflect the time of year your Ask is occurring.

ie      2005 DM DEC or 2005 DM XMS or 2005 DM FLL or  
          2005 DM DON ... if you only offer one Direct Mail a year.

A newsletter Ask is a little easier, as it will relate to the quarter the newsletter is sent.

ie      2005 NL Q01, 2005 NL Q02, 2005 NL Q03 or 2005 NL Q04

When identifying the campaign code by quarter, we recommend that you synchronize the code with the charity's fiscal year.

### Segmenting Your Ask Audience

Considerations for a direct mail might relate to the audience being selected, and the potential for different messages to appeal to different groups. There may be an interest in knowing whether different Ask Audiences are responding according to your expectation. If so, it is important to provide a vehicle to determine in which Ask group a donor resides.

This can be done when record selections are made. It is possible to globally assign a Demographic Code to different groups of donors. This information is available for analysis using the Demographic Report which shows by demographic group how many donations have been received and the total dollar value of these gifts.

A second method is to provide unique response pieces for each segment of the campaign. The expectation is that these pieces would be returned with the donation. The Mailing List field can be used to record different response groups. The Campaign Prospect Report shows you a donation count with total dollars for each Mailing List value.

Running a direct mail and getting good information returned takes time and thought. Planning how you want to report the progress of the campaign needs to take place **before** donor selection to ensure the proper information vehicles are in place.



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## Selecting Potential Donors for the Ask

Choosing who to ask is key to the success of your campaign. Some prospects are always good to include as you expand your support base. Prospects might logically come from other activities you have run where individuals and companies have participated but have not yet supported a direct mail.

Selecting the majority of your mailing from those who have supported you in the past is advisable. Methods to select these donors vary and it is necessary to be pragmatic.

Whatever your selection criteria, build your list and once you have included everyone, run **Q-Xpress Remove Duplicates** to get a unique list of donors by donor number.

### Methods of Selection:

- 1** Receipt Amount Payment Method Date: Choose donors who have supported direct mail in the past. This selection enables you to select by the dollar value of the donation.
- 2** Donor Selections - Donors by Year: Choose donors who have supported you through accumulated gifts over a given period of years.
- 3** Prospects: Donors who have supported special events like walks and gala events and have not have given through a direct mail approach.

### Using Q-Xpress Excludes to Trim your File

Once you have removed the duplicates, you may have other donor records that you want excluded. **Q-Xpress Exclusions** will also apply to the following:

- Once a year donors
- Deceased donors
- Do Not Solicit
- Invalid Mailing Address
- Status: Not for Fundraising, Inactive or Permanently Inactive
- You can remove donors who have given in the recent past by excluding by campaign.
- If you have updated Last Solicitation Date this can also be an effective way of removing donors from your list so that you do not overwhelm them with requests.

Do not choose too many exclusions at one time as it will create a traffic jam; so be reasonable.

### Segmenting your Selections

If you plan to use a **Demographic Code** to segment your donors, the selection process would be segmented as well. You might first choose Segment A: donors who have confirmed their support over several years at a given dollar value. Once this group has been selected and trimmed, we recommend that you assign a Quality to identify the group. It would be at this time that a demographic code is assigned to facilitate reporting once donations are mailed in.

Here is a sample of the assignments and exclusions that would be required.

**Group Selection A**

|          |                       |                       |
|----------|-----------------------|-----------------------|
| <b>A</b> | Quality:              | Direct Mail Segment A |
|          | Demographic:          | Segment A             |
|          | Exclusion by Segment: | None                  |

**Group Selection B**

|          |                       |                       |
|----------|-----------------------|-----------------------|
| <b>B</b> | Exclusion by Segment: | Segment A             |
|          | Quality:              | Direct Mail Segment B |
|          | Demographic:          | Segment B             |

**Group Selection C**

|          |                       |                         |
|----------|-----------------------|-------------------------|
| <b>C</b> | Exclusion by Segment: | Segment A and Segment B |
|          | Quality:              | Direct Mail Segment C   |
|          | Demographic:          | Segment C               |

Once the selection and segment assignment is complete, a new list is built that includes all quality segments giving the final Ask List for export.

We recommend that you take time and make all general exclusions like bad address etc as each group is selected.

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## Exporting the Ask List

You are now ready to export the **Ask List** to send to a mailing house or to create labels for an in-house mailing.

### Last Solicitation Date

The field **Last Solicitation Date** can be updated on donor records at export time. This field will update all records exported using the date entered in the Update Last Solicitation Date field. To prevent donor fatigue, update the Last Solicitation Date for all donors on the list. This is an exclusion field that can be used to subsequent mailings.

### Campaign Response File

**Create Campaign Response File** when checked, requires that you select the campaign you built for your direct mail. A **Campaign Response File** is a complete list of all donors on the Ask List that are exported (based on further criteria described in the following sections).

This Campaign Response File is updated during Update to Master. Once gifts are entered into the system, Update to Master is run to post donations. Running Update to Master updates the Campaign Response File by checking off who has responded. This @EASE feature produces some interesting data using the Donation Analysis Report and it enables the creation of **Reminder** mailings! We'll address this feature in a future chapter.

### Newsletter

Include only donors who want to receive the newsletter. Checking this box eliminates all donor records unless the Newsletter box found on the donor master record is checked. If you are not using the Newsletter field or it has no bearing on export file, leave this option blank!

### Share Data and Only Once

There are two final exclusions that come as part of the Export window.

1. **Share Data:** *'Donors who do not want their data shared'* When this box is left unchecked, all donors on the list that have a Share Data box left unchecked on their master record will be omitted.
2. **Only Once:** *'Donors who are Once a Year'* When this box is left unchecked, all donors on the list that have Only Once checked on their master record will be omitted.

\*\*\* Please Note: Only those records exported from the Ask List will be included in the Campaign Response File and have their Last Solicitation Date Updated.

Once the export is complete @EASE is ready to record gifts and provide some interesting feedback!

**Please Note:** The Share Data and Once a Year check boxes need to be checked if all names on the list are to be exported. This comment excludes reference to the Newsletter box which if checked will create further exclusions.

### Sort by

You can choose from a series of export sort sequences. Select whichever suits your situation.

Select the type of export file you want to create.

### Ascii Merge File

### Mail Merge File

Create an Ascii output file for use with WordPerfect.

Create a Mail Merge output file for use with any MicroSoft product.

**Q-Xpress Export**

Update Last Solicitation Date  
Date: Nov 04, 2005

Create Campaign Response File  
Campaign: 2005DMDON 2005 Direct Mail Donations

Include Only Donors who want to receive the Newsletter

Include Donors who Do Not want their Data Shared

Include Donors who want to be contacted only Once a Year

Sort by: By Postal/Zip Code

Create Ascii Merge File  
Create Mail Merge File

OK Cancel



## CHAPTER 2

# Direct Mail Reports

@EASE offers several reports that help determine how the current direct mail is working. Once the current campaign has completed there are reports that compare past direct mail offerings with the results of the latest one.

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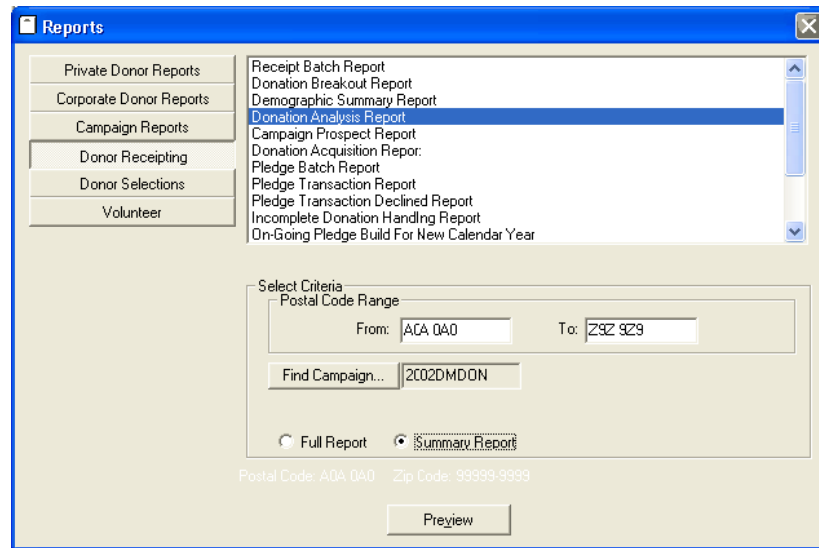
## Donation Analysis Report

The Donation Analysis Report run in Summary mode, shows which postal zones are responding to the Ask. Summary mode implies that tallying of donation counts and dollars is by the first three characters in a Canadian postal code or the first five characters in a US zip code. The Full mode uses the full postal code and creates volumes of information. We suggest you start with Summary mode and should you wish to examine a particular area more specifically, then use the Full mode.

The Donation Analysis Report lists the following information by postal zones that have responded:

- 1 A count of the number of requests sent out
- 2 The number of donor responses
- 3 A count of donations by dollar range

#### 4 Total dollars and of those total dollars, total corporate dollars



The Donation Analysis Report has value during a campaign as well as once the campaign is completed.

During the campaign, sending a reminder mailing can be very effective. The Donation Analysis Report shows which areas are responding best, allowing you to choose which postal zones to include in the reminder.

If a particular postal range requires more in depth study, run the Donation Analysis Report in Full mode to show what has occurred in each postal / zip code.

#### After the Campaign

When the direct mail wraps up, this report shows which areas responded well and which did not, either by a complete absence of responses or by low response rate or low individual donations.

This is where fundraising expertise takes over to assess what could be done differently. The following might be reasons for a poor response:

- Poor socio-economic area
- Poorly formed message
- Bad timing
- Too many competing requests



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## Demographic Summary Report

The Demographic Summary Report lists total dollars and a count of donations for each reporting Demographic Code.

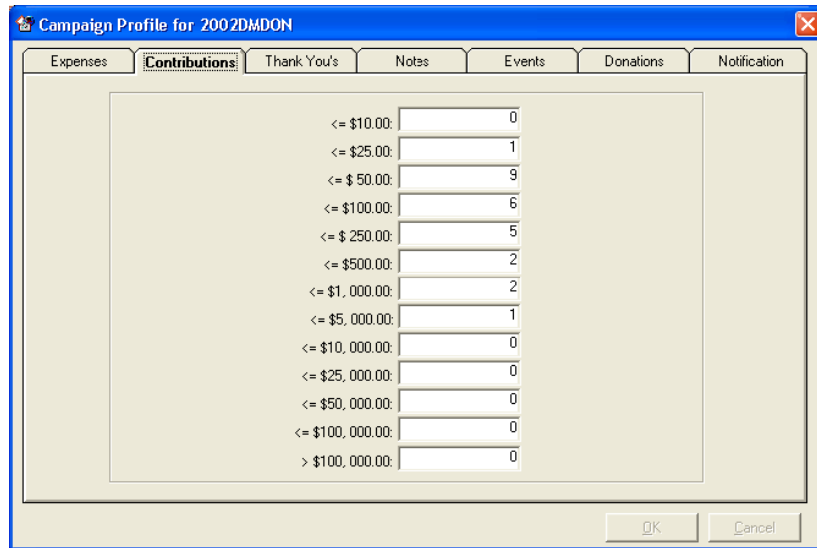
You may have used the Demographic Code to make giving assumptions for Private Donors. This report will show if the assumptions made were valid.

The screenshot shows a software window titled "Reports" with a blue title bar and a close button. On the left is a vertical navigation pane with categories: "Private Donor Reports", "Corporate Donor Reports", "Campaign Reports", "Donor Receipting", "Donor Selections", and "Volunteer". The "Campaign Reports" category is expanded, showing a list of reports: "Receipt Batch Report", "Donation Breakout Report", "Demographic Summary Report" (highlighted in blue), "Donation Analysis Report", "Campaign Prospect Report", "Donation Acquisition Report", "Pledge Batch Report", "Pledge Transaction Report", "Pledge Transaction Declined Report", "Incomplete Donation Handling Report", and "On-Going Pledge Build For New Calendar Year". Below the list is a "Select Criteria" section with "Receipt Date From:" set to "Jan 1, 2002" and "To:" set to "Dec 31, 2002". There is a "Find Campaign..." button followed by a text box containing "2002DMDON". At the bottom of the "Select Criteria" section are two radio buttons: "Donor's demographic code" (selected) and "Acquisition Number Donor's demographic code". A "Preview" button is located at the bottom center of the window.

## Campaign Contribution Analysis

The Campaign Contribution Analysis uses the donation count accumulated to the Contributions tab found in the direct mail's Campaign Profile.

The tally of donations by dollar range is updated when Update to Master is run.



The screenshot shows a software window titled "Campaign Profile for 2002DMDON" with a tabbed interface. The "Contributions" tab is active, displaying a list of donation ranges and their corresponding counts. The ranges are listed on the left, and the counts are shown in input fields on the right. The counts are: 0 for <= \$10.00, 1 for <= \$25.00, 9 for <= \$50.00, 6 for <= \$100.00, 5 for <= \$250.00, 2 for <= \$500.00, 2 for <= \$1,000.00, 1 for <= \$5,000.00, 0 for <= \$10,000.00, 0 for <= \$25,000.00, 0 for <= \$50,000.00, 0 for <= \$100,000.00, and 0 for > \$100,000.00. The window also has "Expenses", "Thank You's", "Notes", "Events", "Donations", and "Notification" tabs. At the bottom right, there are "OK" and "Cancel" buttons.

|                  |   |
|------------------|---|
| <= \$10.00:      | 0 |
| <= \$25.00:      | 1 |
| <= \$50.00:      | 9 |
| <= \$100.00:     | 6 |
| <= \$250.00:     | 5 |
| <= \$500.00:     | 2 |
| <= \$1,000.00:   | 2 |
| <= \$5,000.00:   | 1 |
| <= \$10,000.00:  | 0 |
| <= \$25,000.00:  | 0 |
| <= \$50,000.00:  | 0 |
| <= \$100,000.00: | 0 |
| > \$100,000.00:  | 0 |

The Campaign Contribution Analysis report compares campaigns of a similar type offered over a period of time.





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## CHAPTER 3

# Creating a Reminder Mailing

Reminder mailings can be very successful. Individuals may need to be prompted so they do not forget to donate.

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## Building a Reminder File for Export

Using the **Q-Xpress Campaign Reminder** selection implies that a Campaign Response File was built when the direct mail **Ask List** was exported.

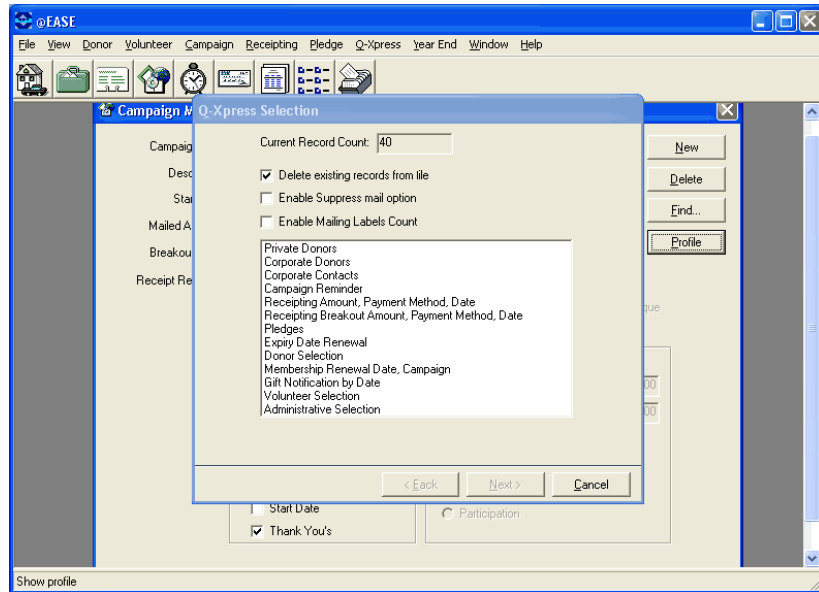
The first step in building a direct mail reminder is determining how many to remind, followed by assessing who to include.

The **Donation Analysis Report** provides the basis for deciding which postal zones to include.

If only a specific number of reminders will be mailed, it is preferable to select those areas that meet the following requirements.

- 1 A positive response
- 2 There are a number of donors who still need to respond
- 3 The gift size is in a good dollar range.

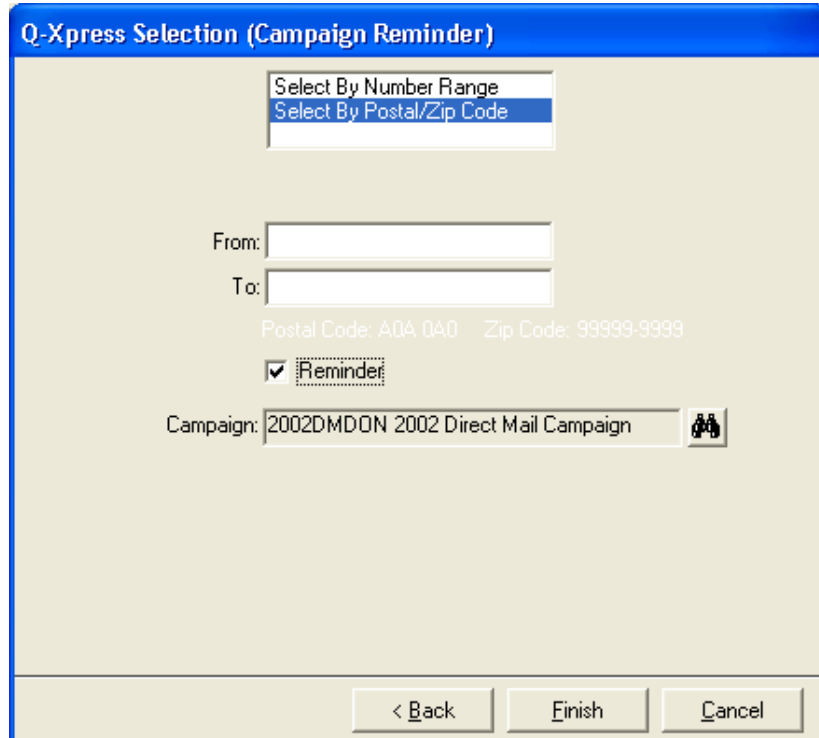
### Building the Reminder File



Update to Master should be completed for all direct mail gifts **before** building a Reminder file. It is during Update to Master that the Campaign Response File is updated. This ensures that no donors who have already donated are selected for the Reminder file.

### Reminder Check Box

Please Note the check box for **Reminder** in the screen shot below.



You can run specification lists to see how many records you are adding to the reminder file before making final selections.

Remember to remove the check from **Delete existing records from the file** between selections.

Selections can be made by postal zone or by donor number.

**Once** when you have decided which postal zones you want to include, **check the Reminder** box. At this point you re-select the postal codes / donor numbers to give your final choices.

A checked Reminder box will update the Reminder field on the Response file to True for all records selected.





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