



Contents

Segmenting Your Donors.....	2
Reporting Segments	2
Members with Donation Amounts Report by Segment.....	2
Profile Report by Segment	3
Corporate Contacts Profile Report.....	3
Q-Xpress Selections by Segment	4
Donor by Corporate Qualities	4
Donor Selections \ Donor By Quality	4
Using the Import to Qualify Organizations.....	4
Maintaining the Segments	5
Segmenting Private Donors	5
Closing Comments.....	5



Segmenting Your Donors

In our last session we discussed how @EASE manages your gift data. In this session we take advantage of this feature to further understand who supports a charity by dividing supporters into logical groups or segments.

Segmenting can be accomplished in stages:

- Create a list of all corporate records using Q-Xpress
- Use the Filter option in Q-Xpress view to find organizations with a common term.
- Make global assignments by Quality.
- Remove all assigned records.
- Export the remaining records which will be placed in an CSV format where segments can be determined and the list imported.

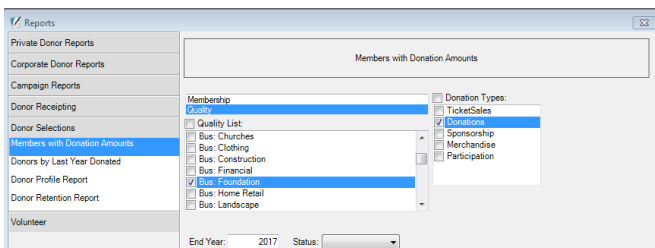
What is the benefit of segmenting?

1. You know who is supporting you by segment – business/industry, service club etc.
2. You know who is not supporting you within specific segments.
3. Identify fund raising opportunities within groups.
4. Identify new ways to connect with groups from an educational position
5. View giving trends
6. Determine if there is a lack of potential donors / supporters by segment.

Reporting Segments

Members with Donation Amounts Report by Segment

This report can be printed using a Quality assigned to a group of donor records. It shows a fiscal gift total and a gift count. To receive accurate totals by fiscal year U2M must be up to date as the values come from the Donor Summary.



In the sample report below, the total shown is only for the period reported. Donations are requested showing the total gift count and the average.

Qualities Bus: Foundation
 Donation Type = Donations

Donor No	Donor Name	Status	2017	2016	2015	2014	2013	Total	Average			
C007078	Comedy Central Foundation	Active	25,000	1	100,000	4		125,000	5	25,000		
C007073	Edmonton Music Foundation	Active	100,000	1	100,000	1		200,000	2	100,000		
C007069	Flowers by LaPue Foundation	Active		10,000	1	19,510	4	10,000	1	39,510	6	6,585
C007042	The Multart Foundation	Active	50,000	1	150,000	3	100,000	7	300,000	11	27,273	
Count:	4	Total:	175,000	360,000	119,510	10,000		664,510				



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- Only records with amounts in the selected range print.
- It highlights organizations in a segment which are not supporting.
- Non supporting organizations can be evaluated.

Profile Report by Segment

The Profile Report by segment allows you to assemble a great deal of information quickly. Decide what information to display and within seconds the information will appear.

Donor Profile Report

Donor Number	Donor Name	First Year	Last Year	Donations
C007073	Edmonton Music Foundation PO Box 588 Stn MJ Edmonton AB T2G 2E5 Business (780) 558-2558 Toll Free (877) 558-9999 Email info@edmontonmusicfdn.org	2016	2017	200,000.00

Membership:	Description	Date	Title
	Emis Donors	Feb 15, 2015	

Recognition:	Description	Date

Qualities:	Bus: Foundation

Donor Interests:	Relationship	Donor Number	Name	Relationship

Donations:	Campaign	Donor	Receipt #	Receipt Date	Amount	Registration Amount	Payment Method	Receipt Breakout
	2015X1PLG	C007073		Jan 31, 2017	\$100,000.00	\$0.00	Cheque	C/C Pledge
	2015X1PLG	C007073		Jan 31, 2016	\$100,000.00	\$0.00	Cheque	C/C Pledge

Pledge Details:	Campaign	Description	Pledged	Paid To Date	Outstanding
	2015X1PLG	2016 CC Foundation 500K+ Pledge	400,000.00	200,000.00	200,000.00

Donations by Year:	2017	2016	2015	2014	2013	Total	Average
	100,000	100,000				200,000	100,000.00

Corporate Contacts Profile Report

Who works for organizations within these different groups? Are the names listed still active? Do we have adequate contact information? The Corporate Contacts Profile Report shows all employees by corporate segment which have been recorded. This gives an opportunity to check names to ensure no changes have been made or determine where contact information is required.

Corporate Contacts Profile

C00479 ABC Foundation	
Primary Address: 202-345 11550 NW Edmonton AB T6N 7L8	Business (780) 477-7500 Email: sonara@abcfoundation.com ER: accting@abcfoundation.com
Employee: Sharon Batsch - Board Chair Private Donor: P000056	Primary Address: PRIME Mailing Address: Business (780) 477-7500 Email: sonara@abcfoundation.com
Qualities: (Invite to Conference, Invite to Lend an Ear, Pos: Community Investment, Pos: Executive Director)	
Employee: Martine Hamilton (Corporate Key Contact)	Primary Address: PRIME Mailing Address: Business (780) 477-7500 Email: sonara@abcfoundation.com
Employee: Bob Smith - Past President	Primary Address: PRIME Mailing Address: Business (780) 477-7500 Email: sonara@abcfoundation.com ER: accting@abcfoundation.com
Qualities: Pos: Community Investment	
C007030 ABC Foundations and Concrete	
Primary Address: P6 Blvd Edmonton AB T2J 3R6	Home: eese@batschgroup.com
Employee: Alice Amb (Corporate Key Contact)	Primary Address: PRIME Mailing Address: Home: eese@batschgroup.com



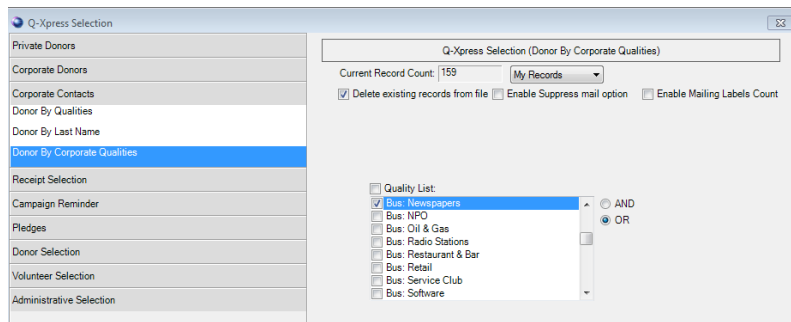
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Q-Xpress Selections by Segment

Donor by Corporate Qualities

Example: A big opening is coming up and the charity wants to invite all media.

This selection includes all contacts which work for organizations in selected segments.



Type	Fundraising	Go To	Go To	Sort Field	Status	Once A Year	Opt-In	Newsletter	To Whom	To Whom2	Title	Department
T	C003473		Yorkton This Week	Active			<input checked="" type="checkbox"/>		Neil Thom		Editor	
T	C003477		Edmonton Journal	Active			<input checked="" type="checkbox"/>		Ms Valerie Hughes		Editor	
T	C003477		Edmonton Journal	Active			<input checked="" type="checkbox"/>		Matt Berezanski		Reporter	

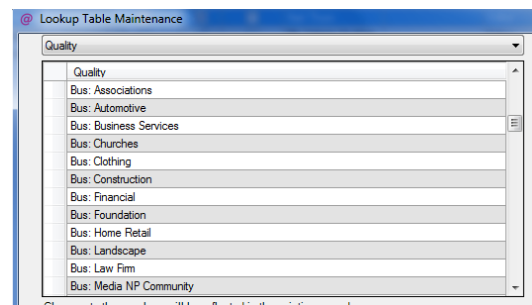
Once the list is vetted, this is ready for an email, letter or phone call.

Donor Selections \ Donor By Quality

A quick pull of records by Quality shows a list by segment with all contact information, the key corporate contact for an organization and First and Last Year Donated. This offers a valuable check by segment.

Using the Import to Qualify Organizations

Once all easily identifiable segments have been assigned a Quality, the remaining records can be exported to be used in a CSV format. The only columns needed in the CSV file are the fundraising number, the name of the organization and the city field. A further column called Quality is added.



Get staff together and share list! It's a great team building experience!

Use quality types already defined and add new ones to a common list. Prior to importing, the list of any new Quality values needs to be added to the table.

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Note the prefix of Bus: on the table above. This ensures all potential values display together for easy access.

Once the CSV is imported the records are listed as Match Level 1 because of the Fundraising Number. Run the Import and move to the Quality screen to assign values to an alphabetized quality description list. The Import is completed and your corporate file is fully segmented.

Maintaining the Segments

When new organizations are added, including a segment value takes on a few seconds. This is easy to manage when new and existing staff know it is a required step when adding new records.

Segmenting Private Donors

Private donors can be segmented. This requires more information but some easy segments might use a Membership of Elite Donor or Committed Donor which would identify donors by total gifts over a period of time or who has given over a series of years.

In our next session we will talk about Content which adds to what we know about private and corporate supporters in different segments.

Closing Comments

@EASE is designed to manage all organizations and individuals who impact a fund development program. This includes not only current donors but prospects, advocates, media, government, volunteers and any other relevant parties.

Maintaining segmentation provides new staff with a quick overview of who is supporting the charity. It helps to ensure organizations recorded are part of a sustainable program.

Data which is full of clutter and uninterested supporters, gives an impression of value which is simply not the case.