

DATA HYGIENE AND MERGE PURGE

DMAW DM101

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WHAT YOU'LL LEARN TODAY

DATA HYGIENE AND MERGE/PURGE

You'll leave with an understanding the Merge/Purge process and the tools available to control acquisition mailing costs and to increase responsiveness.



WE WILL COVER:

What is Merge/Purge?

List Types

Data Hygiene

Unduplication

Processing Flow



WHAT IS MERGE/PURGE?

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DEFINITION

Merge/purge is the process of merging multiple lists into one mail file, while removing unwanted and duplicate names.



APPEAL VS. ACQUISITION

	Appeal Mailings	Acquisition Mailings
Audience	Current donors/members	Prospective donors/members
Source	Mailer's database	Rented/exchanged lists
Data Elements	ID, donation history...	Name and address only



LIST TYPES

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LIST TYPES

Mail Files

Rented Lists

Exchange Lists

Lapsed/Inactive Names



LIST TYPES

Suppression files – Names and addresses to be deleted from the mailing

Commonly-used suppression files:

DMA Pander

Deceased

Prison

Active donors/members

Do Not Mail

Prior Mail Files



DATA HYGIENE

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Benefits of good data hygiene

Reduce undeliverable mail (UAA)

Comply with postal regulations

Qualify for postal discounts

Identify and remove duplicates

Efficiently manage postage and production costs

DATA HYGIENE

CASS Certified Software – required for automation discounts

Standardizes addresses

Corrects ZIPs, applies carrier route, ZIP+4, DPB

DPV – Delivery Point Validation verifies the existence of the address
(down to the apt/suite #)

LACS – Locatable Address Conversion System

- 911 address conversions

- Changes rural-style addresses to city-style addresses

- Corrects street names that have changed

DSF² - Delivery sequence file – measures the deliverability of a mail piece
& identifies if an address is seasonal, vacant, business, or residential.



USPS Move Update Standards

Applies to:

All Standard mail - Letters, flats, parcels and not flat-machinables

Automation-rate and presort-rate first-class mail

The addresses must be updated within 95 days of the mail date using **NCOALink**

Beginning February 2018, the USPS began using a new Move Update validation process.



NCOALink

FSP - 48 months - 160 million changes of address

LSP - 18 months - 60 million changes of address

Individual, Family and Business moves

Undeliverable/Nixie addresses are identified

Temporary moves included

PCOA – Proprietary Change of Address

14% of the US population moves every year

40% of them do not report address change to the USPS

But most do tell their magazine subscriptions, catalogs, utility providers...

PCOA uses these sources to extend the reach of NCOA by ~3%

Not required by the USPS but can significantly improve deliverability (to the right person), response rate, and your bottom line.



UNDUPLICATION

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UNDUPLICATION LEVELS

Who will receive a mail piece using the following levels?

Level	John Smith 123 Main St	Mary Smith 123 Main St	Bob Jones 123 Main St
Individual	X	X	X
Household	X		X
Residential	X		



UNDUPLICATION CRITERIA

Match Criteria

Tight – Allows for few variations

Medium – Allows for slight variations

Loose – Allows for many variations

LIST PRIORITIES

Which record should be retained after duplicates are identified?

Questions to consider when assigning list priorities:

List Ownership

List Cost/Exchange Agreements

List Type (Test, Retest, Continuation...)



MULTIBUYERS

Multibuyers are records that are found on more than one list. Therefore, they may be mailed again in subsequent mailings.

Identify and code 2X, 3X, 4X... multibuyers

Decide whether house names contribute to your multibuyers



MERGE/PURGE PROCESSING FLOW

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QUALITY CONTROL

Quality control checkpoints should be performed after **each** step of the processing. Expect your service provider to proactively investigate all data anomalies and present their findings to you. Some potential areas of concern are:

Significant variance between ordered and received quantities

Unusually high number of omits

Unusually high (or low) hits against another list or suppression file



INSTRUCTIONS AND LIST OF LISTS

Evaluate Specs

Instruction Review

Establish the job flow and procedures

Understand the data origins

List of Lists – the list of all lists to be included in the merge (including house, rentals, suppressions...)



LIST RECEIPT AND CONVERSION

Receipt of Lists

- List Identification

- List of lists is updated with date and qty received

- Clients and brokers have access to LOL

File Conversions

- Very important part of the process

- Evaluate incoming data structures

- Confirm quantities

- Lists should be converted w/in 24 hrs. of receipt



CUTOFF

Lists arriving **AFTER** cutoff are not included in the merge (including house and suppression files)

Any lists on the LOL that have not arrived by the cutoff are cancelled



DATA HYGIENE AND OMITTS

Data Hygiene

CASS Certification

NCOA

DPV – Delivery Point Validation

LACS – Locatable Address Conversion System

PCOA – Proprietary Change of Address

Deceased Processing

Apartment Append/Correction

Address Enhancement

Omits

States/SCFs

APO/FPO

US Territories

Business Addresses



UNDUPE AND SUPPRESS

Understanding your merge/purge reports and how to use them will help you with your marketing decisions.

Don't be afraid to ask for what you need.



MP Optimization – Remove records that are unlikely to respond; replace them with records that ARE likely to respond.

Ask String Optimization – You CAN customize ask strings on acquisition mailings!

POST-MERGE PROCESSING

Key Coding and Package Splits

Seeds

Formatting – U/L casing, punctuation

Title code assignment

Salutation build

Finder number/scanlines

Presorting for postal discounts



OUTPUT FILE PROCESSING

Output files for personalization

Format the mail files to be used by the printer/lettershop -
Make sure all data needed for personalization are part of the output files.

Other output files:

NCOA Return File

Deceased Return File

Finder Files



MERGE REVIEW

Turn off the autopilot on your merge! Review:

Current hygiene practices

Matching logic

List prioritization

Suppression files

Merge Optimization



**THANK YOU!
QUESTIONS?**

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