

## What's New in Acquisition List Plan Strategies?

By Denise Inglisa Hubbard



It's been said you can mail any offer, but if the list is not right, the results will be poor. It's about the right message to the right audience, regardless of marketing channel. (While I will use words like lists and direct mail, these concepts work for data and nearly any prospecting channel.)

Over the years, acquisition planning has evolved with the technology that supports it. An important constant that remains is each list owner must review and approve how their list is being used. While the strategies here are used regularly and are considered acceptable practices, approval must first be received from the list owner. DMAW's Standards of Conduct for Nonprofit List Rentals & Exchanges outlines standards for use of third party data. The full document can be found at: [www.dma.org/list-standards](http://www.dma.org/list-standards).

### PLANNING FOR THE FUTURE

Historically, mail planning included response rate, average gift and expenses. Occasionally, overall post acquisition retention rates were shared, but never on a specific list basis due to reporting challenges. Thanks to technology, plans can include post acquisition performance metrics. Subsequent donor value and retention statistics aid delivery of a more robust and

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“ Thanks to technology, plans can include post acquisition performance metrics. Subsequent donor value and retention statistics aid delivery of a more robust and strategic mail plan. ”

### In This Issue: Fresh Insights on Acquisition

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## Direct Mail and Digital Ideas to Bring in New Donors

By Meredith Piemme, Avi Kaplan & Seth Merritt



Many nonprofits are looking to mail smarter, especially in our current climate of uncertainty coupled with rising print and postage costs. In some cases, that may mean mailing less, either through careful list segmentation or potentially culling lapsed or expired donors.

However, in other instances, “smarter” means they are searching for something fresh and different to help grow their donor file—enter the acquisition package. Which begs the question: What is working for today's direct mail acquisitions? Here are a few options worth a test.

### 1. GET FESTIVE

An ornament package offers unique donor engagement with a crafty insert, sporting dual die-cut and foil-stamped snowflake ornaments. The prospective donor is asked

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# President's Perspective

## New ways to reach you: Fresh insights on acquisition

By Mikaela King



As the saying goes, "necessity is the mother of invention." Postage and paper costs rise, new permission messaging requirements are voted into law and inbox competition gets more cutthroat. These near-certainties in our business continue to make contacting our target audiences tougher and tougher, especially in acquisition.

This reminds me of a book I recently read, "The Obstacle Is the Way," by Ryan Holiday. Based on the teachings of the ancient Stoic philosophers, the book's central theme is that, while we may view an obstacle in our path as blocking our way, it actually creates a new path—a new opportunity to chart a better course. It tests your original plan and leads you to refine it or abandon it for a more effective approach. It forces you to be creative, to be innovative.

Many of the tools we now take for granted in direct marketing—advanced targeting, personalization, modeling, inline packages, SEO, digital retargeting, "big data"—are innovations dreamt up in response to the same pressures and opportunities we face today. And we can be sure to face the same pressures into the future. The obstacle is the way, and innovation is the solution.

Innovation comes from you. The digital marketer trying to find a way to improve deliverability, who creates a better way to increase relevance and response. The printer who comes up with a new technique to add personalization to another package component at low cost. The change agent who first thought to use hyper-localized geotargeting to deliver more relevant smartphone offers when a potential customer steps into a store.

Sometimes, innovation is iterative; sometimes, it's a revolution. Innovation creates a better, more relevant user experience for our new and existing constituents—and a more effective product or process for marketers.

Knowing as we do that change is the only constant in our world, we can start to see change not as an impediment to our work, but as a tool to make it even better. It's a springboard to innovations we otherwise might never have considered. Being adaptable in the face of change—and seeing obstacles as opportunities to innovate—is what moves the profession of marketing, and, indeed, our world, toward a better future.

I hope you're looking forward to learning about latest innovative tools and approaches in this new issue of DMAW Marketing AdVents. We, as marketers, are inventive, creative; and we're getting stuff done.

So when you're faced with your next roadblock or marketing challenge, remember: You have a community of innovators around you and...the obstacle is the way.

Regards,  
Mikaela  
miking@ns.org

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# Calendar of Events

THUR MAR 15

12PM - 2PM  
SEIU, Washington, D.C.  
**Lunch & Learn - Rapid Response!**  
You have a mission; you have a plan; then a crisis occurs! What do you do? How fast can you respond? Learn how and what to do at this session.



THUR MAR 22



5:30PM - 7:00PM  
**Fado's Irish Pub, Washington, D.C. Spring Happy Hour!**  
It may not be St. Patrick's Day, but we can celebrate the spring! Enjoy drinks and hors d'oeuvres with friends and colleagues!

TUES APR 24

1:00PM - 2:00PM  
**Webinar - Donor Advised Funds** by Jack Doyle, President, Amergent

Deadline for registration is 24 hours before the event, space permitting. Cancellations must be received 48 hours in advance. No-shows will be billed. Register at dmaw.org or call 703-689-3629.

WED APR 25

8:30AM - 4:30PM  
**NAPCO, Philadelphia, Pa. DM 101 Philadelphia**  
We're taking our show on the road! For those in the Philadelphia and New York areas join us for The Basics of Direct Marketing presented by the Best! Learn the basics of Direct Marketing covering topics such, lists, creative, caging, production and more!

WED MAY 2



9:00AM - 5:00PM  
**City Club, Washington, D.C. Data Strategy Forum (formerly List Bazaar)**  
If you are a list broker, manager, compiler, co-op or owner - you can't miss Data Strategy Forum! It's all about you!

TUES MAY 15

Breakfast - Wake Up & Learn!  
8AM - 10AM  
**Old Ebbitt Grill, Washington, D.C.**  
Industry Trends with Carol Rhine, Target Analytics



TUES JULY 31 - THUR AUG 2

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## Remembering Marie Dullea-Prentice

By Joe Manes



"The nicest person in direct mail."

This was how Bob Tigner of ADRFCO described Marie Dullea-Prentice when I started working with her in 2004. Since she passed away unexpectedly on Jan. 29, 2017, the tributes that have poured forth from her colleagues in our industry demonstrate that this was a widely held opinion.

Though she never considered herself a good networker, the comments people posted on Facebook in the days after her death—"a kind spirit" ... "a wonderful and generous person" ... "a

of Marie. Her compassion made her one of the savviest and most effective fundraisers you will ever meet, but she was also tough. For her, the work was personal as well as professional—she and her husband John envisioned a better world for their daughter Josie.

So from women's issues and international aid, to government accountability and the environment, Marie did everything she could to ensure that the causes and organizations with whom she worked had the funds they needed to succeed.

In a business where all eyes are on the numbers, it was an honor to work with someone who never forgot that people donate not because they have to, but because they care. Marie cared, too. ■



Marie Dullea-Prentice

“THE CONNECTION MARIE HAD WITH PEOPLE WAS AUTHENTIC. ONE OF HER LASTING LEGACIES CAN BE FOUND IN THE MANY PEOPLE WHO REMEMBER MARIE NOT ONLY AS A FRIEND, BUT A MENTOR.”

Joe Manes is the senior vice president of ABD Direct.

reservoir of empathy and humanity"—tell the story of a woman who touched the lives of the people she worked within a very personal way.

The connection Marie had with people was authentic. One of her lasting legacies can be found in the many people—especially with a group of women whom she fondly referred to as "my girls," who remember Marie not only as a friend, but a mentor. She was generous with her time, always willing to listen and offer advice.

While supposedly it was Al Capone who said, "Don't mistake my kindness for weakness," the same could be said



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**What's New in Acquisition List Plan Strategies?**

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strategic mail plan. On a list specific basis we can compute return on investment at a given interval after the initial drop. Planners now find the right mix of acquisition lists that will pay back over time. It is not uncommon for acquisition results for a list to look lackluster. However, add in subsequent giving and the list may now have a higher ranking and stay in the plan. Without these metrics, the list might have been discarded and those future gifts lost.

Where list specific subsequent donor behavior is not available, aggregated results based on list type or market prove helpful and informative. Using aggregated data provides directional guidance to know which lists are better providers of long-term committed donors.

**CROSS CHANNEL RESULTS**

With the use of multiple channels to accept donations, matching the action back to the original source list is proving powerful. Many organizations see results improve when they match web gifts to the lists mailed. Donors go online to complete their gift without regard to the fact it was a piece of mail that prompted that action. Not accounting for those gifts can lead to erroneous planning decisions.

Depending on the type of organization and time of year, we have seen as much as a 25-percent-plus lift in results, when web match-back performance is included. Certain types of lists (models/high-dollar exchanges/commercial files) consistently provide larger lifts. While we cannot know for sure whether the direct mail piece drove the web gift, factoring in web match-backs does provide a strong directional sense of the synergy between channels. Plans incorporating that detail can calculate a secondary cost to acquire to include web giving. It is a game changer as mail plans are no longer viewed in a vacuum.

**HIGHER INITIAL GIFTS ARE A FUTURE PREDICTOR**

Subsequent giving statistics tell us that an initially higher average gift is a key predictor of strong future giving. As a means to drive up average gifts, more organizations now seek to reciprocally exchange their higher dollar donors.

While most lists have a top gift amount of \$99.99, these high dollar exchanges start at \$100 and go as high as \$249.99 to \$499.99. Finding these high-dollar exchange relation-

ships takes work and research, as they are not readily promoted or on the open market like their lower dollar counterparts. They require separate exchange ledgers. However, the increases in average gifts and the ability to secure donors who will give higher gifts in the future make it worthwhile.

**MODELING AND COOPERATIVE DATABASES**

Cooperative databases (co-ops) started in the catalog industry and now cover all business types—publishing, fundraising, etc. Co-ops are large multi-buyer databases created by contributors' transactions. Using these buying/donation behaviors, co-ops are able to model for respondents to a particular organization. Many organizations are using multiple techniques or services from a single co-op. Mailers continue to use core lists in their markets. However, the co-ops have brought sizable mailing universes and value to the mix. Innovations in co-op solutions now represent from 40 percent to, on occasion, 100 percent of third-party names being mailed.

Analytical models from co-ops continue to grow beyond

prospecting lists. Modeling techniques started with look-alike models, then targeting a particular metric, to "machine learning" as the latest technique. From these evolving methodologies, co-ops are providing a multitude of tools to refine targeting and aid participants in what seems like never ending ways.

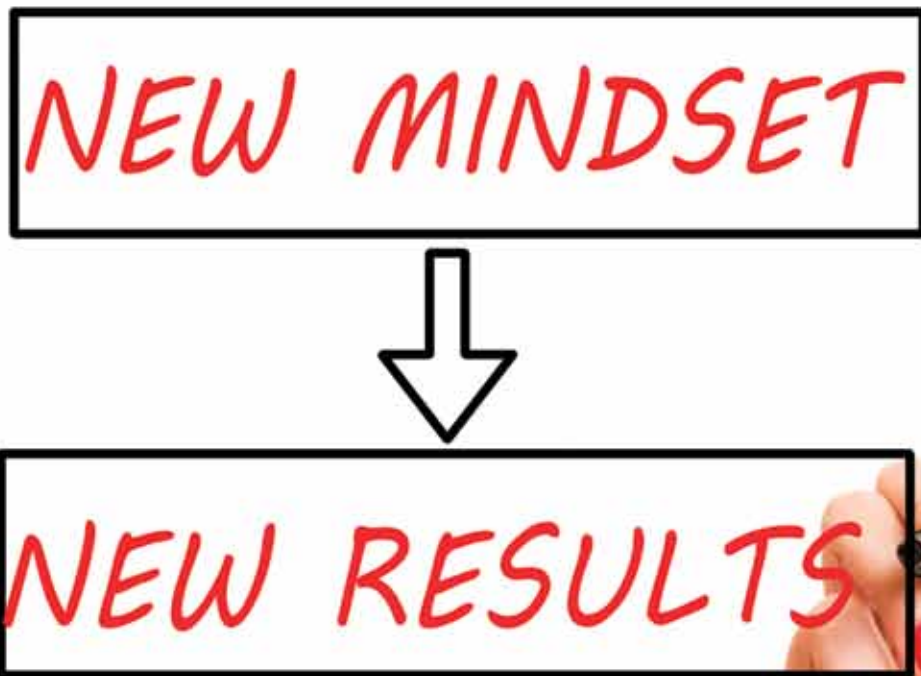
Moving beyond cold acquisition names, the co-ops model to find successful pockets within deep lapsed names that otherwise may not have been mailed using more traditional RFM (recency, frequency, monetary) criteria. In addition to lapsed names, they are able to improve performance from warm house names.

Co-ops have moved from being exclusively a pre-merge list selection to be selected after the merge purge process. Models are used to select the next most responsive names not in the merge to aid organizations in reaching a responsive mailing volume goal. Costs associated with this process are the same as if selected pre-merge purge. However, post merge files allows the organization to use nearly 100 percent of the names provided making the list cost per thousand into the mail attractive.

Taking that concept one step further, co-ops can review the merge output using their models to suggest names that should not be mailed due to likelihood of non-response. They then provide names deemed better performing from their database to fill the gap left by those names to be dropped to maintain overall mail volume. The end result can be a better performing campaign.

As mentioned earlier, higher acquisition gifts tend to produce better long-term donors. Co-ops can help inform organizations which names within their acquisition should be mailed a higher gift array due to the ability and likelihood to give more. This helps to drive up the average gift for the mailing.

Working with a wide variety of markets, co-ops are able use their models to apply to other co-op participant files. An organization can have their co-op model applied to a co-op participant buyer/subscriber file to find those names that should and will work for their mailings. This is particularly useful as traditional selection capabilities are not targeted enough. Models allow for development of new, responsive, non-traditional list sources.



**“ HIGHER ACQUISITION GIFTS TEND TO PRODUCE BETTER LONG-TERM DONORS. CO-OPS CAN HELP INFORM ORGANIZATIONS WHICH NAMES WITHIN THEIR ACQUISITION SHOULD BE MAILED A HIGH GIFT ARRAY.”**

**NEW FRONTIERS**

While large organizations have digital departments messaging to constituents and prospects, small to mid-size organizations are starting to test digital (ads, social media, etc.) in conjunction with cold direct mail acquisitions. The challenge with multichannel acquisition efforts is obtaining list owner approval and volume.

Digital requires volume to digitize, to serve ads and ultimately get results. Sufficient volume is needed at the start to have measurable results at the end. The good news is volume needs continue to shrink as match rates improve. Digital will continue as the new frontier as the process, tracking and reporting are fine-tuned. As it changes, so too will our mail planning as we further layer in those metrics on a list basis.

The only thing we planners can fully plan on is change and evolution. We need to continue to test new and developing tools available to us. All the while, remaining mindful to the terms in which we engage and use third-party lists. ■

**Denise Inglis Hubbard is VP at Names in the News, Inc. a list management and brokerage firm specializing in acquisition fundraising serving the nonprofit sector. Denise served on the committee responsible for drafting the Standards of Conduct for Nonprofit List Rentals & Exchanges and is a DMAW Board member. Reach Denise at denisehubbard@nincal.com.**



“ IN DIGITAL ACQUISITION, THE HIGHEST ROI IS GENERALLY SEEN WHEN AIMING FOR LEAD GENERATION.”

**Direct Mail and Digital Ideas**

Continued from page 1

to write a special message on one ornament, which is then sent back to the organization to be placed on a Christmas tree; the second ornament on the insert is for the donor to keep. This package also utilizes full-color variable data imprinting on the letter, allowing for strategic personalization.

**2. THE BLIND OUTER ENVELOPE**

Who would have thought a blind OE would continue to generate so much buzz? We tested just that, along with powerful color photography—a simple and compelling letter and a large fold-out map showing key program implementation with quantifiable statistics and a chart outlining how funds are used. This last piece is supported by the first insert in the package, a buck slip with a list of several top charity rankings for the organization. Thereby, earning the donor’s trust before getting to rest of the package.

**3. PREMIUM PACKAGING**

Though there is much discussion around the inclusion of upfront premiums, a client of ours tested an outstanding and well-performing upfront premium package in 2017. This thoughtfully designed lumpy mailer includes a personal letter from a current staff member, informational insert and reply; but what sets it apart is the tote bag and outer mailer. The extra dimension of the mail piece is sure to garner attention from the recipient (an astonishing 1/2 inch thick)! The mailer is also outfitted with strong teasers as well as a call to action on the back: “Support us by using this tote bag and spreading the word.” The mailer and tote,

together with the personal appeal and right ask string, has made for a successful test.

This is not to say that tried-and-true packages are not performing. Along with these tests, we are still observing a heavy rotation of the 9-by-12 wrapping paper package, bookmark packages, postcard packages and an array of perf-out membership cards. Full-color OEs, closed-face, window and double-windowed envelopes are still in circulation.

Now, digital acquisition is a whole other ball game! With the digital world growing and donors constantly interacting online, it only makes sense to target your audience there, too, right? From a digital perspective, here are our top strategies for focusing in on acquisition.

**1. OPTIMIZE USER EXPERIENCE ON YOUR WEBSITE**

This strategy is all about deepening engagement with the people whose attention you’ve already captured. If I’m on your website for the first time, put your best foot forward to invite me to sign up to your communications or even donate.

- **Assess the state of your organic list growth.** According to the “2017 M + R Benchmark Study,” on average, 1.1 percent of website visitors joined a nonprofit’s email list. If your website’s conversion rate is lower than 1 percent, make a pitch for visitors to sign up for your email newsletters.

- **Leverage your landing pages.** Monitor traffic patterns, identify organic landing pages and optimize for conversion.

- **Repackage your content.** Is there high-interest content you are currently providing that could be packaged

into a resource document behind a registration page?

- **Optimize sign-up forms.** Test your email sign up forms, and try different locations on the page.

- **Deploy lightboxes.** Adding a lightbox across your site is a great way to make the case for subscribing or giving to more of your engaged visitors.

- **Optimize for mobile visitors.** Ensure that your website is mobile responsive and creates a positive user experience for users on all types of devices and screen sizes.

**2. REMARKETING**

- **Retarget site visitors.** It’s okay to politely remind your visitors that the fuzzy feeling they are really looking for is only a click away. Segmentation is critical to making this tactic effective.

- **Abandoned Shopping Cart Recovery.** Cartstack (abandoned cart recovery) and similar technologies can recover revenue that might be inadvertently lost if a donor is interrupted during a donation transaction.

- **Digital append on your direct mail list.** Think about how to add your direct mail subscribers to your email list. Be thoughtful about how you warm these addresses up, monitor their engagement and be prepared to segment them out if they don’t respond.

- **Win Back your inactive subscribers.** Before you give up entirely, re-engage your inactive subscribers by developing a win-back campaign, leveraging your most popular content and low-impact calls-to-action.

**3. ACQUISITION ADVERTISING**

In digital acquisition, the highest ROI is generally seen

when aiming for lead generation, rather than adding new donors straight to your file.

- **Email is still the coin of the realm.** According to the “2017 Blackbaud Luminate Online Benchmark Report,” the annual revenue per usable email address was more than \$13.

- **Look-alike audiences.** Using a Facebook custom audience uploaded with your current email list, allows you to target users with interests, demographics and other characteristics similar to your current subscribers.

- **Messenger bots (@Mssg):** @Mssg is a platform that has found success engaging nonprofit audiences through these types of conversations initiated with advertising and facilitated with messenger bots.

- **Paid search advertising.** The much-vaunted Google Ad Grants program has seen major changes in recent months, making it imperative for most organizations to use a regular paid AdWords account.

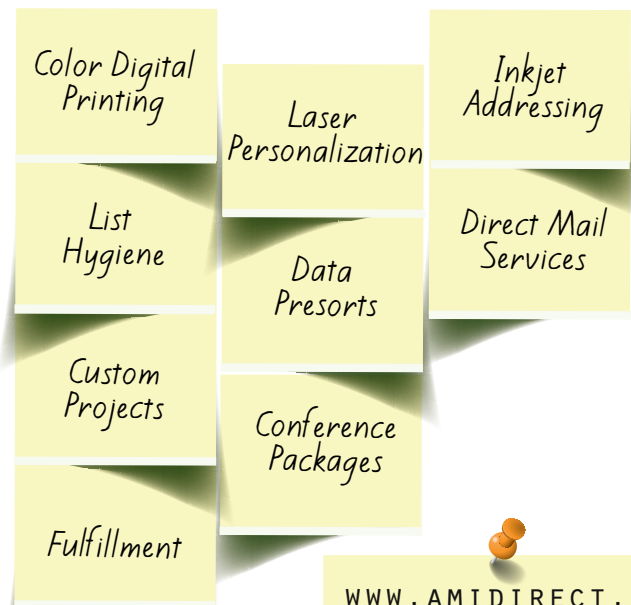
While the strategies for acquisition in direct mail may differ from digital marketing, it is imperative to implement integrated multichannel campaigns. Reach out to the team at Production Solutions today to find out more on which acquisition tactics can help you engage more donors and ultimately earn more for your cause! ■

Meredith Piemme is a business development associate with Production Solutions. She can be reached at [mpiemme@psmail.com](mailto:mpiemme@psmail.com). Avi Kaplan is the senior producer and director of project management, and has 10 years of experience producing digital campaigns, websites and leading engagement strategies for nonprofits and social causes. Seth Merritt is a senior digital account manager and has over 15 years of experience in helping causes use technology to connect with supporters and succeed. Learn more at [www.productionsolutions.com](http://www.productionsolutions.com)



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OUT OF THE TRENCHES: YOUR DIRECT MARKETING COLLEAGUES TAKE A BIG-PICTURE LOOK AT THINGS

# 10 Commandments of Copy & Design: Capturing Your Donor's Attention—and Keeping It!

By Stephen Godbout



Stephen Godbout recently attended a DMAW Lunch and Learn featuring Tom Gaffny and Steve Fleshman. Here are his takeaways.

## COMMANDMENT NO. 1: IT'S NOT ALL ABOUT YOU!

Sorry. But it's not. As Tom Gaffny explains, "99.99999999 percent of your audience is not standing by their mailbox anxiously waiting for your fund-

raising package to arrive." In addition: The average donor now receives over 50,000 marketing messages a month. And that creates your challenge: You have about three seconds to capture someone's attention and get them to open your carrier, even less to click on your email.

Then, if you're lucky, you're going to get about five minutes with your package and much less with your email before someone decides to donate ... or toss you in the trash. That's why you must make it about them—

not you. One great way is to use stories to put the donor on the front lines of your charitable work.

## COMMANDMENTS NOS. 2, 3 & 4: MAKE IT PERSONAL, EASY-TO-READ AND ALL ABOUT THE DONOR

The one thing people like reading about the most is themselves. And the most important word in any direct marketing piece aside from "FREE" is "YOU." Steve Fleshman shared a treasure trove of testing results from his

“THE ONE THING PEOPLE LIKE READING ABOUT THE MOST IS THEMSELVES. AND THE MOST IMPORTANT WORD IN ANY DIRECT MARKETING PIECE ASIDE FROM ‘FREE’ IS ‘YOU.’”

time in the commercial world.

Among them, personalize everything possible and make it look real—like it came from a friend. Or a friendly, like-minded organization anyway.

If you've got only three seconds to get them to read your message and, a mere five minutes after that, you want to economize your words. You need to say as much as possible as soon as possible. And while your English teacher will be very disappointed in you, and you may have to go to bat against stubborn signers, you've got to reach them at an eighth- or ninth-grade level if you want the largest number of people to respond.

Mention how important and special that first gift from them was and how much you've valued their continued support. For example, "On Dec. 2, 2010, you took a bold action that has forever changed the world. You decided to give ... and because you took that action ... we were able to accomplish ..." Give your donor the credit and explain how "your work would not be possible without people like you."

## COMMANDMENT NO. 5: MARRY GREAT COPY WITH GREAT PICTURES

It's all about scale, says Steve. Use powerful, large imagery on your carrier, small when it's warranted, as well as on the letter, inserts and other relative components. And combine the copy and image to work together in unison—thus: having the greatest impact and eliciting the most responses.

## COMMANDMENT NO. 6: WHACK THEM OVER THE HEAD WITH AN INTERRUPTING THOUGHT—UP FRONT

"Up front" is the key term here. This doesn't mean suddenly in the middle of your letter or email change the subject. It means make the lead, teaser or subject line memorable, attention grabbing and impossible to ignore. One example Tom gave was a lead that began, "I saw God the other day." The letter, which uses dialogue as a technique you might want to test, goes on to explain the boy saying that line, saw God in the faces of all the other children the donor helps.

## COMMANDMENT NO. 7 AND NO. 8: ASK EARLY AND OFTEN ON THE MOST IMPORTANT ELEMENTS OF DIRECT MARKETING MESSAGES

So, what is the most important piece of any direct marketing message? The carrier, the teaser, the letter, the lead, the ask, the P.S., the reply device, and likewise in emails, the subject line, the call-to-action?

**They all are.** But, most importantly is the ask. You are in the fundraising business, so ask early. The higher up your ask, the more likely people are to respond. It's okay to even lead with an ask in cases where that makes sense. Have at least one ask on page one of any letter and above the fold on any email. And when designing emails, think mobile. You may have just the size of your phone screen to get the donor to act.

Remember what Tom calls the "consequences of inaction" rule. "None of our work would be possible without the financial help of people like you." Don't be afraid to tell them what unfortunate things could happen if they don't respond immediately. It's also important to make the ask reasonable to the impact the donor can make. Some examples given: "You can't cure

cancer. But you can help rescue one child who is fighting it." Or, "You can't end world hunger. But you can feed a child."

## COMMANDMENT NO. 9: REMEMBER ARETHA—R.E.S.P.E.C.T.

Approach every message with an air of humility about you. Respect your donor. Respect their value in your organization's ability to do its work. And tell them how much you value them.

Along these lines, "slick is your enemy," as Steve explained. If you can afford to send out a sleek marketing piece, why do you need the donor's \$25? Again, make your mail and email look real. Add something that makes it look like it doesn't come from a machine. Test purposeful mistakes or ink smears.

Speak to the person you are writing to, and do it in the same way you speak. That preposition at the end of the sentence is not a concern when people are dying, or wildlife and wildlands are in danger and in need of immediate help.

## COMMANDMENT NO. 10: KEEP IN MIND PAGE GRAVITY AND WHAT TOM CALLS THE 90/10 RULE

"Page Gravity" is how we read. From left to right. On a letter think of an imaginary line from top left to bottom right, and that is how your reader's eye is going to skim your letter. Reader's will also use a backwards C pattern, so load up the right column of emails and inserts and put your most important margin notes on the right side of the letter.

Keep in mind which parts of a package drive the most action. The carrier. The lead. The P.S. The reply device. In emails, the subject line, call-to-action. They represent about 10 percent of all the words in your a direct marketing package or email. But they are responsible for generating 90 percent of the desired action, which is getting the donor to respond with a contribution. ■

Stephen Godbout is a copywriter and creative director with 16 years of direct marketing experience. He can be reached at [stephen@copybygod.com](mailto:stephen@copybygod.com)



GREATER ENGAGEMENT: WORDS OF WISDOM ON EVERYTHING AND ANYTHING THAT DRAWS IN YOUR SUPPORTERS AND DEEPENS RELATIONSHIPS

# Your Second Gift Rate Is Talking—Are You Listening?

By TJ Hillinger



All seasoned marketers know the importance of securing that second gift as a clear measure of retention. This is the rate of new joins giving a second gift in the first 12 months, reviewed in three-month increments. We've made analyzing the second-gift rate an essential part of our client dashboards, because it can give us an early read on donor commitment and influence programmatic changes.

Our stats tell us that the sooner a donor gives a second gift, the more likely that donor is to stay with the organization, and that affects how we market to that donor.

## THE SECRET'S IN THE DATA

Now, for the analytics behind that phenomenon, we use correlation—the measure of how closely two variables are related—to determine how second gifts relate to other metrics. The values range from -1 to 1.0, with the magnitude, indicating the strength of the relationship. A correlation with a magnitude greater than 0.7 is typically considered strong.



We examined the correlation between second-gift givers from a particular cohort of new joins and the number of those new joins retained in the following 12-month period to see how strongly they are related. Our clients have an average value of 0.9, indicating a very strong positive correlation between these two values, as represented in the chart below.

The correlation between the number of new donors who gave a second gift within three, six, nine or 12 months of

joining and the number of those new joins who were retained the following year ranges from 0.875 to 0.984. There is a strong positive correlation between the number of donors who give a second gift and the number of those new joins that will be retained the following year.

## WHAT DOES THAT LOOK LIKE IN FUNDRAISING TERMS?

As an example, we can see that for one client, when the three-month second gifts went up in a particular year, the first-year retention of those new joins in the next year also went up. Likewise, when second-gift rates went down, so did first-year retention.

In the table, we can see that the second-gift rate increased in 2017. Although we can't predict exactly what first-year retention will be in 2018, we can be optimistic that first-year retention will increase next year, which is a key priority for this organization.

## SO WHAT CAN I DO WITH THIS INFORMATION?

We use second-gift rates as an added indicator of file health: If they are trending down, that tells us something about the quality of new joins. It can indicate issues with re-solicitation strategy or the program in general, suggesting it might be time to make a change. It can lend insight into the impact of positive strategic changes.

Second-gift rates can also enhance the accuracy of long-range forecasting.

It can tell you a lot about your donors' loyalty and long-term value, which can inform your marketing and cultivation strategies going forward. ■

TJ Hillinger is the vice president and director of analytical services at Avalon Consulting. She can be reached at [tjh@avalon-consulting.net](mailto:tjh@avalon-consulting.net)

FY	New Joins	SecGiftGivers3Mo	SecGiftRate3Mo	First Year Donors	Fy Retention
2010	1,550	173	11.16%	323	36.09%
2011	1,463	134	9.16%	615	39.68%
2012	1,643	136	8.28%	497	33.97%
2013	1,745	178	10.20%	569	34.63%
2014	1,069	86	8.04%	647	37.08%
2015	1,858	206	11.09%	389	36.39%
2016	1,666	96	5.76%	732	39.40%
2017	2,019	68	8.79%	419	25.15%
					>25.15%

## Marketing AdVents

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## News Notes

● **Salsa Labs**, a tech company providing powerful fundraising, advocacy, marketing and CRM software to nonprofit organizations, announced the release of Salsa Engage. According to a press release, Salsa Engage has marketing automation capabilities that will enable nonprofits to precisely configure email messages, message timings and the trigger that enrolls a supporter in a marketing automation series. "This automation is a game-changer for all nonprofits, especially those with limited resources. Salsa Engage replaces time-consuming, repetitive tasks by humans with personalized, relevant interactions delivered at the right time to the right supporters," Donna Myers, chief operating officer of Salsa Labs said.

● New Hampshire-based direct response company **Concord Direct** has acquired Strength in Members (SIM), a digital marketing agency based in Boulder, Colo. For the past two years, the two companies have collaborated to help organizations launch and improve their digital lead acquisition, strategy, program development, email creative and production, and search and social advertising, as reported in a press release. Concord Direct president Tim Cook said that "as digital increasingly becomes part

of the marketing channel mix for our clients, it has become increasingly important to seamlessly integrate digital into the overall strategy than maintain it within a silo."

● **Newport ONE** has announced that Debbie Young has joined the company as the senior digital strategist. In her role, Debbie will use her expertise in online user experience and email and digital fundraising programs to aid the company's nonprofit clients develop more sophisticated digital fundraising programs. She will also help organizations enhance their direct marketing campaigns and advocacy efforts. In addition, Megan Klingensmith has joined the company as an account manager. In her role, she will leverage her creative and analytical strengths to help nonprofit clients capitalize on opportunities for growth. "We're thrilled to add Debbie and Megan to our team of innovative and client focused professionals. With their experience and skills, we'll continue our track record of multichannel and integrated fundraising success and be able to provide additional support and service for our clients to help them exceed their fundraising goals," Craig DePole, president of Newport ONE, said in a press release.

Is something exciting happening in your company or organization?

**Tell us about it!**

Email the editor, Nhu Te, at [dmawadvents@dmaw.org](mailto:dmawadvents@dmaw.org)



# Educational Foundation

## You Know Even More Than You Think You Know

By Nancy Rathbun Scott



What if you had a friend who asked you to help one of their children, a student considering a career in direct

marketing? Would you offer tips about writing a killer resume? Maybe advice about nailing a job interview? You might even have a lead or two to share. Surely those things would be helpful. But wait: You know a lot more than that.

Through the DMAW Educational Foundation (EF) Mentor-for-a-Day program, you could steer that student toward spending a day at a local direct marketing firm, learning firsthand what people in direct marketing actu-

ally do. Better yet, you'd have a path to help your young friend explore an internship with a local direct marketing firm.

Even many long-time DMAW members don't understand the variety and depth of the practical programs the EF offers—practical programs that support us in our business, in our region.

For example, the annual Professors Institute brings Mid-Atlantic marketing professors to Washington, D.C., for an intensive two-day crash course on the state of the art in direct marketing. Professors use what they learn from direct marketing practitioners to develop stronger curricula for their students.

Likewise, each fall and spring semester, DMAW/EF hosts the Mid-Atlantic Collegiate MAXI Competition. Participating undergraduate and graduate students are invited to apply the direct/interactive marketing principles they learn in classes to a real world scenario ... and participation is growing.

Last spring, teams from the University of Maryland, George Mason University, Christopher Newport University and Radford University created compelling marketing campaigns to boost donations to the American Red Cross. In the fall, students from Johns Hopkins University, Christopher Newport University, Salisbury University and Kings College proposed campaigns to increase attendance and membership at The Philadelphia Museum of Art. The winning case team members received substantial cash prizes, along with personal commendation certificates. The

American Red Cross and The Philadelphia Museum of Art got a boatload of fresh ideas. The 2018 spring MAXI Case Competition to be held Apr. 20 promises to be another winner.

To support all these programs, the foundation must raise its own annual budget. Foundation funds come from a variety of sources: DMAW, part of the proceeds from the Best of Direct

**“Through the DMAW Educational Foundation Mentor-for-a-Day program, you could steer that student toward spending a day at a local direct marketing firm, learning firsthand what people in direct marketing actually do. Better yet, you'd have a path to help your young friend explore an internship with a local direct marketing firm.”**

holiday gala, the Silent Auction held at each year's Bridge Conference, annual fund donations from individuals and the support of the foundation's Leadership Circle members.

So there ... now that you know more ways to help your friends' sons or daughters. How about helping the EF? Volunteers and donors are always welcome. Check out our website, dmawef.org and, if you'd like to get involved, please contact the foundation's president, Rick Powell at 410-290-0667. ■

### Did You Know?

The DMAW/EF, a separate nonprofit organization from DMAW, relies heavily on contributions from DMAW members to fund its work.

**Please donate today!**



### Invest In Your Company's Direct Marketing Future.

#### The Person You Hire Matters. Link Up!

- Influence what tomorrow's hires are thinking today.
- Help professors design 2018-worthy classroom projects.
- Share the latest direct marketing trends with professors in the Mid-Atlantic region.
- Connect with young talent looking for internships and jobs.

#### Link Up to ... The DMAW Educational Foundation

Find out what's in it for all of us. Get involved, donate, learn more @ [www.dmawef.org](http://www.dmawef.org)

# Member Spotlight

Before Roger Hiyama became immersed in the direct marketing world, he grew up working in the golf business. In fact, he attended college on a Chick Evans golf caddie scholarship.

But he eventually got his start in direct marketing right after college when he joined Wiland & Associates, which a friend from his President's Leadership Class introduced him to. After Wiland, he worked at Saturn Corporation, where he focused on database marketing services and database management. He also worked at an email marketing start-up called Shop2u.com, as well as several direct marketing agency services (Merkle Moore DM Group and Russ Reid). But in November 2015, he returned back to Wiland.

Roger says, "I'm doing what I love and working with great friends!" He loves working with data; particularly, using data science and analytics to drive marketing strategy. Additionally, he notes that the nonprofit sector provides a great sense of community and responsibility.

**Location:** Alexandria, Va.

**Education:** Studied political science and economics at the University of Colorado Boulder.

**DMAW Member Since:** 1983

**Who do you consider your mentors?**

Phil Wiland, Fielding Yost (Saturn), David Williams (Merkle)



**ROGER HIYAMA**  
Senior VP of Client Services  
Wiland  
[rhiyama@wiland.com](mailto:rhiyama@wiland.com)

and Keith Wardell (Shop2u)—all great innovative entrepreneurs and respected leaders!

**What advice would you offer a novice who wants to move up in direct marketing?**

Find at least one mentor who will help shepherd your growth and career path. Build a network of industry colleagues. Become an expert at something!

**What is the most helpful step you took to advance your direct marketing career?**

In 2003, I joined Merkle and was able to utilize my past data experience to truly integrate with their full-service agency capabilities. Using data to drive strategy that manifests itself in targeting the right audiences with the right offer at the right time (and nowadays, the right channel).

**Tell us about your volunteer experiences with DMAW.**

I currently serve as a member of the DMAW Board of Directors. Over the years, I have served on the membership and sponsorship committees. I was very active in

the 90s and am a past DMAW Volunteer of the Year award recipient. It's fun and rewarding to be involved!

**Describe yourself in three words.**

Honest, trusted, analytic.

**Describe your life in six words.**

Father, husband, faith, teacher, mentor, golf.

### Roger's Favorites



**Restaurant** MOMO SUSHI in Alexandria.



**Films** "Caddy Shack" and "It's a Wonderful Life."



**Books** All of David Baldacci's novels.



**Music** Michael McDonald and Earth, Wind & Fire



**Websites** nationals.com and denverbroncos.com



**Leisure Interests** Reading, golf, puzzles, beach, spectator sports.



**Quote** "Always tell the truth, and you never have to remember what you said." — Roland F. "Mac" McGuigan



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# Technology Update

THE LATEST INFORMATION ON THE TOOLS THAT MAKE YOUR JOB EASIER

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By XXXXX XXXXXXXX

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## Sidebar

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## PULL QUOTE

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## Factbox

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