

Tips for Using Your Retention Dynamics to Set Accurate Budget Goals

By Stephanie Ceruolo



There are usually two sides to budgeting: expense and income. Sometimes both numbers are inflexible—your organization tells you how much revenue it needs, how much operational fund-

ing it can provide, and you try to balance the two. The process is often short-sighted and doesn't leave much opportunity for thinking in the long-term: Where will this program be in five years?

Marketing and fundraising managers are good at observing and anticipating, knowing what growth factors to rely on, where some cost can be cut and making certain not to over-promise. And, in general, budgeting for next year based on the patterns of

previous years makes a great deal of sense. But there are also dynamics operating inside your database that are really the determining factors for revenue forecasting, and many managers don't pay much attention to them. The most

Continued on page 5



“ There are also dynamics operating inside your database that are really the determining factors for revenue forecasting, and many managers don't pay much attention to them. The most important factor is active customer or donor retention.

In This Issue: Pandora's Box

FEATURES

- Set Accurate Budget Goals **1**
- What to Look for in a CRM System **1**

COLUMNS

- Technology Update **6**
- Greater Engagement **10**
- Out of the Trenches **12**
- DMAW/EF **14**

DEPARTMENTS

- President's Perspective **2**
- DMAW Calendar **3**
- Quick Takes **4**
- News Notes **13**
- Member Spotlight **15**

What to Look for in a CRM System

By Eric Burger



Did you know that the average return on investment for CRM is \$8.71 for every dollar spent, according to a study performed by Nucleus Research?

There is no denying that a customer relationship management (CRM) system can be a valuable asset for large organizations and small business alike. When used correctly, a CRM system can deliver organizations with valuable insights that can equate to both long-term and short-term gains. Businesses today still see the value in investing in a CRM solution and the

market is set to reach over \$40 billion dollars by the end of this year, according to Gartner. Choosing the right CRM system that aligns with your business goals and offers your organization feature sets to drive business forward is crucial.

In order to choose the right solution for your organization's needs, there are several key variables to look out for. Let's discuss a few in detail.

FIND A CRM SYSTEM YOUR TEAM CAN USE

Investing in a CRM solution itself will not provide your organization with the

Continued on page 8

President's Perspective

What's in Your Pandora's Box?

By Mikaela King



The Greek myth of Pandora's Box originated in "Hesiod: Works and Days" from approximately 700 B.C. Similar to the modern saying, "...to open up a can of worms," it actually has a lot of interesting and useful nuances that the modern version has lost.

In this myth, Pandora—the first human woman created by the gods—was entrusted by Zeus with a box, which she was directed not to open. Similar to the story of Adam and Eve, her curiosity tempted her to open it, and she released its contents, both blessings and evils,

to the world. Once Pandora claps the lid back on after realizing what she's done, only one thing is left in the box: hope.

Thus Pandora's Box has been interpreted to refer to "any source of great and unexpected troubles" or "a present, which seems valuable, but which in reality is a curse." However, the true gem from this story comes from Erasmus' "Adagia," in illustrating the Latin proverb, "Malo accepto stultus sapit," meaning, "From experiencing trouble, a fool is made wise." Similar to Eve, Pandora gave the world wisdom.

What in the world does this have to do with being a direct marketer, you say? Well, three things:

1. You're not alone. Pandora famously opened that box, so you can take comfort that you're not the only one releasing evils upon the world the next time you go down a strategic planning rabbit hole, launch a complex RFP, ask about CRM integration or start your next five-year budget forecast!

2. At the bottom of all that mess resides hope. It's always there to pull you back from the brink, to give you the broader picture, to connect you to progress towards the future.

3. Ultimately, all our most valuable lessons are learned the hard way, aren't they? "From experiencing trouble, a fool is made wise." Wisdom is hard won, and that's never been more true of marketing wisdom today.

This issue of DMAW's Marketing AdVents takes you through the Pandora's Box of marketing—all our "sources of great and unexpected troubles," those fraught issues you would like to avoid and those that keep you up at night. I, for one, have been a part of several strategic planning projects that would later be seen as "a present, which seems valuable, but which in reality is a curse."

What's in your Pandora's Box? It's different for each of us, and we become wiser as we go. We're highlighting several common topics in this issue, but I want to hear from you about what else ails you, and hopefully we can address that in a future issue of AdVents.

Collectively, our community of seasoned experts, early-career fresh perspectives and innovators can tackle our current-day direct marketing Pandora's Box. Let's share our hard-won knowledge with each other, as we do here in AdVents, on the DMAW's Facebook and LinkedIn groups and on Twitter, and together we can crowdsource solutions to our current-day challenges, share our wisdom and bring out that hope sitting at the bottom of the box.

Regards,
Mikaela
miking@ns.org

DMAW Executive Committee & Board of Directors 2018

Executive Committee

President—Mikaela King,
National Geographic Society
202-807-3197, miking@ngs.org

Vice President/President Elect—Marie Kosanovich,
Lautman Maska Neill & Company, 202-296-9660,
mkosanovich@lautmandc.com

Treasurer—Teresa Weaver, O'Brien Garrett,
202-467-0048, tweaver@obriengarrett.com

Secretary—Melissa Ford, Mal Warwick Donordigital,
202-332-3124, melissa@malwarwick.com

Immediate Past President—Eric Rardin, Care2
703-473-2825, ericr@care2team.com

Board of Directors

Dennis Ashcraft, Colortree Group
804-358-4245, dashcraft@colortree.com

Kate Carr, Silver Marketing
301-951-3505, kcarr@silvermarketing.com

Steven DelVecchio, AARP Foundation
202-434-6223, sdelvecchio@aarp.org

Meg Ferguson, Production Solutions
703-734-4566, mferguson@psmail.com

Roger Hiyama, Wiland
703-403-3403, rhiyama@wiland.com

Denise Hubbard, Names in the News
410-392-0313, denisehubbard@nincal.com

Karin Kirchoff, K2D Strategies
703-812-8260, kkirchoff@k2dstrategies.com

Stacie Mruk, The Nature Conservancy
703-841-3924, smruk@tnc.org

Jamie Natelson, Integrated Direct Marketing, LLC
202-261-6587, jnatelson@idm-dc.com

DeDi Oxenberg, CDR Fundraising Group
301-858-1500, doxenberg@cdrfg.com

Polly Papsadore, PMG
443-539-2603, polly@pmgdirect.net

Alan Rich, Nova Label Co.
301-386-4433, alan@novalabel.com

Rebecca Shapalis, Avalon Consulting Group
202-429-6080, ext. 110, rebeccas@avalonconsulting.net

Karen Somerville, Consultant
kcsomerville@gmail.com

Pete Taylor, RWT Production
571-243-1237, ptaylor@rwtproduction.com

Jeff Thomas, ProList
301-924-4545, ext. 1022, jthomas@prolist.com

Laura Zylstra, Habitat for Humanity of Washington DC, 202-882-4600, zfccorp@yahoo.com

DMAW Executive Director

Donna Tschiffely, donna@dmaw.org,
703-689-DMAW, fax 703-481-DMAW

Postmaster: Send address changes to DMAW Marketing AdVents, 11709 Bowman Green Drive, Reston, VA 20190-3501; email info@dmaw.org • www.dmaw.org

DMAW Marketing AdVents: (ISSN 0896-4742) is published monthly by the Direct Marketing Association of Washington, Inc., 11709 Bowman Green Drive, Reston, VA 20190-3501. Periodicals postage paid at Herndon, VA and at additional mailing offices.



Calendar of Events

THURMAY
10

1:00PM - 2:00PM
Webinar - Is Your Organization GDPR Compliant? If not, what you need to know!



TUESMAY
15

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

THURJUN
7



Digital Day Forum
8:30AM - 4:30PM
District Architecture Center, Washington, D.C.

TUESJUN
19

Production Strategies Forum
9am to 4pm
AARP, Washington D.C.
Save the date and look for details soon!



TUESJULY
31-
THUR AUG
2

2018 Bridge to Integrated Marketing & Fundraising Conference
The Art & Science of Fundraising & Marketing Discover the Best Mix!



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.

Quick Takes

Every month DMAW asks people in our industry for their 'quick take' on a topic

What advice would you give to a new employee who made a mistake?



KARIN

Mistakes are normal—and I've often said making a mistake isn't a big deal—it is an opportunity to improve. In fact, I am a big believer that if you aren't making mistakes, you aren't trying that hard to be good!

Now, if you make the same mistake again and again...that is a different problem. BUT, when you do make one, there are a few rules you should follow:

1. Own it.
2. Figure out what happened.
3. Offer a solution (or two!)
4. Ask how you could have done differently/better.
5. Stay late/arrive early.
6. And apologize.

Note: This is the same advice I give my 6-year-old and 11-year-old kids!

— Karin Kirchoff,
Founder and President,
K2D Strategies
e: kkirchoff@K2Dstrategies.com
p: 703-812-8260



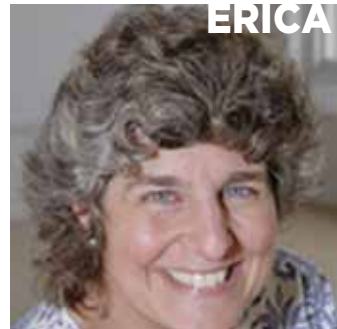
ROBIN

Own it! We never know what we don't know, until a mistake pops up to shine a light! If you are new at your job, and this happens to you (which chances are it will!), don't be afraid to own it!

We are all human and we all make mistakes from time to time.

Learning how to admit you did something wrong or forgot to do something you know you should have, including using the words, "I'm sorry," will go a long way toward building trust and confidence with your colleagues and your supervisor.

— Robin Perry,
Vice President,
Lautman Maska Neill & Company
e: rperry@lautmandc.com
p: 202.296.9660 x 218



ERICA

I used to manage a direct marketing department with eight people working for me, and management was definitely one of walking around and making sure that the door was open.

First of all, I would like it if the employee tells me that he or she made a mistake before I find out from other sources. I'd then tell him/her that mistakes are part of learning, so it's not a showstopper. Everybody makes mistakes.

I would then ask what he/she learned from this? And I'd ask if there is a way we may be able to fix it?

Where would he/she go to find the information to prevent this mistake from happening again. I'd also set up a regular meeting to make sure that we can talk through the projects being worked on so we can prevent future mistakes from happening.

It's less about the mistake and more about what the learning and takeaway is from that mistake.

— Erica Waasdorp,
President,
A Direct Solution
e: ewaasdorp@comcast.net
p: 508-428-4753



JEFF

As soon as you realize that you have made a mistake own it. Let your supervisor know about it.

We all make mistakes; however, we should be striving for excellence (versus unrealistic perfection). The key is not to make the same mistake repeatedly, and not to repeatedly make mistakes.

If you can, offer a solution for your error. Be willing to email, call and visit with colleagues and clients who may have been impacted by your error.

Be sure that your supervisor not only sees you correcting the mistake but going the extra mile to make up for the error. Not only be open to feedback from your supervisor but ask for it on a regular basis.

You can turn an error into a positive by showing that you are honest, caring and hardworking. This may be an opportunity to seek not only one-time but ongoing feedback from those around you and even create some very positive opportunities with mentors.

— Jeff Jowdy,
President,
Lighthouse Counsel
e: jeff@lighthousecounsel.com

Set Accurate Budget Goals

Continued from page 1

important factor is active customer or donor retention. For ease, I am going to continue on with using "donor" and fundraising terms.

DONOR RETENTION

You've no doubt heard a lot about retention, but you may not actually know the real numbers in your own program.

In every direct response program, we begin each fiscal year with a set number of active, zero to 12-month donors, those individuals who made one or more gifts to you during the previous fiscal. (A quick check of the rolling 12-month donor count at any point in the year is nearly identical to the fiscal year count.) These donors should form the core of your planning. This active donor pool is made up of donors from each of three major groups:

1. Consecutive year donors who gave two years in a row
2. Lapsed donors who reactivated during the current year
3. New donors who you acquired in the current year

As the new fundraising year unfolds, you'll send a number of appeals to these active donors, and each appeal will generate a number of responses. Many of the previous year's donors will renew, but many will not. In nearly every sizable direct response program, something like 40 percent or even more of those active donors you started out with will not renew. This number can vary, but it's more likely worse than 40 percent than better. And that retention number stays pretty consistent from year to year. What's the impact of this attrition?

In broad terms, you'll need to replace that 40 percent of donors in one of two ways:

1. By renewing lapses who skipped last year (or even many years)
2. By acquiring new donors.

But first you need to know your retention number.

IMPORTANT NUMBERS TO KNOW

How many donors did you have in the last fiscal year? It's not the overall number of donations from last year. That would be the number of gifts

you received, which is always greater than the number of individual donors. Every program has a sizable group of multiple-gift-per-year donors, perhaps 20 percent to 30 percent of all donors. The number of gifts per donor per year can run from a low of 1.2 to more than two for some organizations because those multiple donors give more often or less often depending on the nature of your organization. In general, religious groups have the highest donor frequency.

MOVING THE NEEDLE, EVEN A LITTLE, ON DONOR RETENTION HAS A MAJOR IMPACT ON REVENUE, AS DOES INCREASING THE NUMBER OF GIFTS PER DONOR EACH YEAR.

You can base your planning on a solid foundation by learning vital dynamics that are operating within your program. Here's a fairly simple top-level view of some numbers you need to know:

- The number of individuals who make a gift each year
- The average number of gifts per active donor each year
- The average contribution amount
- Retention of zero-to-12 donors from one year to the next

The first three factors define how much you will raise each year. It's the number of individual donors multiplied by average number of contributions and multiplied by average gift amount.

That equals total revenue, or the income side of your budget. There are different cost/income ratios at work in each of these three audiences (consecutive year donors, reactivated donors and newly-acquired donors).

Looking at the expenditures by the same audiences will help with the expense side of the budget. It will help you have a conversation about why you need the expense money that you do in your budget. Nearly all your profit in the new fiscal year will come from those active donors who

renew. They have the highest response rates and will generate gross income for you at the lowest cost. In your efforts to reactivate lapsed donors, you might make a small net profit, but you should think of reactivation as a break-even exercise.

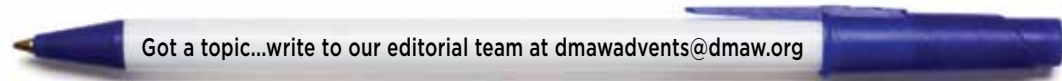
So, if improving the profit in the short-term is a goal, focus your expenses on this group of donors. If a healthy file positioned to sustained growth is the focus, make sure that you invest enough in acquisition to keep feeding

the pipeline of two-plus-year consecutive donors.

Moving the needle, even a little, on donor retention has a major impact on revenue, as does increasing the number of gifts per donor each year. You can increase these two factors by boosting response rates. That means using more impactful appeals that generate more gifts and asking more frequently. To achieve growth, focus on a few challenges: How can I keep more donors in my zero-to-12 active group? How can I increase the number of multiple contributions next year? How can I renew more lapses and acquire more new donors? How can I move the average contribution up a little?

These aren't easy things to achieve. But small successes in each of these efforts will move you forward this year and bring you into the next budget year with a larger base to build on. ■

Stephanie Ceruolo is senior vice president and general manager of Infogroup Nonprofit Solutions. She is responsible for the overall management, strategic planning and growth of this Infogroup division, dedicated to fundraising organizations. She is a Tri-Chair of the 2018 Bridge to Integrated Fundraising and Marketing Conference Sponsorship Committee. Her email is stephanie.ceruolo@infogroup.com.



TECHNOLOGY UPDATE: THE LATEST INFORMATION ON THE TOOLS THAT MAKE YOUR JOB EASIER

How to Maintain the Integrity of Your Fundraising Donor Management System

By Robin Cabral



A donor management system or nonprofit CRM for your nonprofit's fundraising is the foundation of the program. I cannot stress enough

how important this is to your efforts. It will allow your process to be donor-centered, efficient and strategic, while providing the ability to make comparisons that impact the future.

Selecting the right donor management system depends on the size and needs of your organization. But, keep in mind that the functionality is essential. Microsoft Excel is not a donor management system; it is a spreadsheet tool. Investing in a donor management system tailored for fundraising is highly recommended. There are many great industry products on the market at a fair and affordable price.

Also, be sure to budget for costs associated with software training and updates. In the long run, it is not a savings to ignore these costs.

WHAT'S NEXT?

Once you've agreed this is important, and you've instituted a donor management system, what is next? Well, while it is critical to have one, it is not enough to enter data into the system. As well all know, sometimes too well, "garbage in is only garbage out."

Your first step should be to establish a structure and process for your data entry. I have long been an advocate for creating a data entry procedure manual to ensure the consistency and integrity of your data. As you begin to document this process and decide on how to manage your information, it is critical to evaluate your

data and determine what it is you are trying to achieve.

As part of this process, you should establish a plan to clean and scrub the donor management system on a regular basis. Industry best practices indicate that you should "scrub" your donor management system at a minimum of annually. Organizations with a broad base of support through direct mail solicitations should especially consider a process for cleaning data more frequently.

DONOR MANAGEMENT SYSTEM GUIDELINES

Following are guidelines for the key areas that a fundraising data entry manual should address:

- **Determine** who will enter data into the donor management system. Donor management system administrators should be development staff

employees. Restrict access for others to control the process. However, consider allowing limited access for those who have direct contact with donors, specifically as it relates to updating fundraising notes.

- **Develop** a form for non-data entry staff to request reports, data adjustments, donor lists and clean-up projects.

- **Document** ways to enter new accounts into the donor management system. Consistency is key. Establish rules to:

- Enter names
- Abbreviate data
- Enter primary addresses, mainly according to postal regulations for ease of mailing
- Manage salutations (formal versus informal), including envelope salutations (personal, businesses, organizations, etc.)
- Enter new gifts and check for possible duplicates
- Document in-kind and other contributions in your donor management system, including anonymous gift coding
- **Outline** funds, campaigns and appeals to be used so all donor management system administrators are using consistent references and labels.

“A USEFUL DONOR MANAGEMENT SYSTEM PROCEDURE MANUAL IS CRUCIAL. MANAGING YOUR PROSPECT AND DONOR DATA WELL ALLOWS YOUR FOCUS TO BE WHERE IT SHOULD—ON YOUR CAMPAIGNING EFFORTS.”

- **Consider** importing data where possible. Leverage controls within your software, if available, to prevent and identify errors.

- **Determine** ways to track and manage constituent contact preferences (e.g. requests no mail, no email, no solicitation, etc.)

- **Document** how to manage acknowledgments (e.g., sending out acknowledgment letters, which letters to use for a specific appeal, and tracking acknowledgments in the donor management system once sent to donors).

- **Utilize** resources to ensure constituent contact information is up-to-date and accurate. The U.S. Postal Service requires address verification through the National Change of Address database.

- **Purge** old contacts from your donor management system. Industry best practices consider five years a good time measure to delete lapsed contacts.

- **Segmentation** is critical. Identify significant givers within the donor management system and ensure that you prioritize the updating of this data.

- **Clearly communicate** the importance of clean data to your staff.

- **Create and schedule** frequently-used queries and reports for planning, but also to review data quality and track maintenance. This review will help to ensure that each record includes all vital information and that you are adhering to developed standards. Duplicate record reports will identify duplicate accounts. Monthly transaction reports will help to ensure that you have documented the all-important funds, campaigns and approaches correctly.

- **Periodically check** your queries and reports to delete those that are no longer needed, useful or relevant.

- **Review** security groups and user accounts bi-annually to ensure that the list is up-to-date.

A useful donor management system procedure manual is crucial. Managing your prospect and donor data well allows your focus to be where it should—on your campaigning efforts. Accurate reports produced from this data can improve your outreach efforts immensely. It can help to recognize donors and their giving patterns, allowing you to become more strategic in your endeavors through segmentation and greater personalization.

The more customized the donor's experience, the more loyal and engaged they are likely to be. A documented process not only allows your existing program to run most efficiently, but it also addresses unforeseen circumstances such as staffing turnover. Maintaining a clean, scrubbed fundraising development donor management system is a key success factor for nonprofits.

For a sample copy of a fundraising data entry manual, please email me at rcabral@developmentconsultingsolutions.com ■

Robin Cabral is "Hire a CFRE!" the only outsourced development professional with close to 25 years experience providing value-added consulting services with razor-sharp monthly result objectives and benchmarked deliverables. She works with mid-sized nonprofits that want to position themselves to build capacity and generate more fundraising prospects, better donor relationships and bigger fundraising dollars. She specializes in providing outsourced, interim development services and assisting smaller organizations in their first campaigns: annual, capital, and endowment.





What to Look for in a CRM System

Continued from page 1

value it is intended to. Your team must actually use the tool to reap its benefits. When used correctly, a CRM system has been shown to increase revenue by 41 percent per salesperson, not to mention the value-added provided throughout the rest of the organization, according to Salesforce.

Believe it or not, a study by HubSpot found that 22 percent of salespeople do not know what CRM is. In order to gain this value, your organization must correctly implement and train team members on how to effectively use the platform. According to a report by Salesforce, 43 percent of businesses that utilize CRM fail to use half of the system correctly. The average cost of the average CRM solution can range between \$25 and \$300 per seat, depending on features and the solution. Make sure your organization has a plan to convert all of these

seats to value before implementing a solution.

FIND A SOLUTION THAT INTEGRATES WITH YOUR TOOLS

Many business tools today integrate with CRM solutions to provide additional functionality and insights. If your team is using a suite of tools to conduct business make sure that you understand which CRM systems your tools integrate with and which ones they do not. Doing so may help you substantially narrow down your list of viable options and develop a few more reasons why your organization should invest in a system overall.

Most business tools will provide specific site pages to specify which CRM systems they integrate with and which systems will require additional programming to connect.

INVEST IN A SYSTEM WITH AUTOMATION CAPABILITIES

A CRM solution should make the process of capturing lead information,

vetting it, communicating with prospects and reporting trends as easy as possible. Organizations should look for a system that offers data import/export, automates lead lists, follow-ups, and forecasting for the future. Again, make sure that your organization has a plan for how these automation features will be used and the knows the problem that the system will solve.

LOOK FOR A SYSTEM PROVIDING MOBILE TOOLS

Many organizations today have sales teams that are located all over the world or teams that travel to conduct business. If you are one of these organizations, it is best to look for a cloud-based CRM system that can be accessed and utilized from anywhere. Most CRM systems today provide users with access to mobile tools. Blackbaud, a leading CRM provider in the nonprofit space, provides users with mobile apps such as their on-the-go fundraising tool as part of

The Raiser's Edge mobile app. These mobile tools provide users with increased functionality and solve additional problems.

Make sure that vetting mobile capabilities and mobile functionality is part of your organization vetting process when deciding on the best CRM system for your needs. Companies with a mobile CRM are 43 percent more likely to achieve sales quotas.

TEST, TEST AND TEST AGAIN

Once your organization has narrowed down the list of potential systems, it is time to test, test and test some more. Testing will allow your team to see the tool in action and also verify that your organization has the bandwidth and knowledge to use the platform correctly. When testing a CRM system, it is important to look out for a few issues. Here are some common problems:

- Duplication of data
- Population of incorrect fields
- Missing data
- Data sorting issues
- Incorrect access levels
- Data mismatch

The above issues need to be corrected prior to investing in a CRM system. Most CRM providers will help your organization implement the solution and verify that data is accurately being reported.

“ INVESTING IN A CRM SOLUTION ITSELF WILL NOT PROVIDE YOUR ORGANIZATION WITH THE VALUE IT IS INTENDED TO. YOUR TEAM MUST ACTUALLY USE THE TOOL TO REAP ITS BENEFITS.”

FINAL THOUGHTS

A CRM system can be a powerful tool for your organization if it is implemented and used correctly. Make sure you find a system that your team has the ability to learn and use, integrates with your existing business tools or tools you plan on investing in, offers automation and mobile functionality and allows your team to test before making a final decision. ■

Eric Burger is the marketing communications manager for VolunteerHub, an organization that provides volunteer management solutions for nonprofits across the globe. Eric has worked in the B2B software industry for the past two years and has over five years of experience in digital marketing.



PEOPLE YOU CAN TRUST...DEDICATED TO SERVICE

AN INDUSTRY VETERAN
SERVING A DIVERSE
GROUP OF CLIENTS
FOR MORE THAN
37 YEARS.

LET US PARTNER IN YOUR SUCCESS
TOGETHER WE CAN MAKE IT HAPPEN

Color Digital Printing	Laser Personalization	Inkjet Addressing
List Hygiene	Data Presorts	Direct Mail Services
Custom Projects	Conference Packages	
Fulfillment		

WWW.AMIDIRECT.COM
703-370-0382

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

Speak Your Donor's Love Language (and Join the Donor Experience Movement)

By Taylor Shanklin



If you've ever read "The 5 Love Languages" by Gary Chapman, you'll know that we, as individuals, display our love and affection for others in unique ways. We also prefer to receive love in a unique, individual way. Whether it is through words of affirmation, acts of service, receiving gifts, quality time or physical touch, understanding the love language of your companions is the key to having those relationships last.

Your donors are no different. They have love languages, too, and they may not be very different than the five love languages of personal relationships. Some donors may need to hear "thank you" more than others.

Some donors may need to be more involved through acts of service, such as volunteerism and grassroots advocacy. Some donors may be motivated by a gift that makes them feel special, whether that is a physical premium or a reporting of direct impact. Some may care more about how you are communicating with them and if you meet them in their preferred channel. And, some may be more inspired by in-person events, such as walks, galas or a coffee meeting.

As an industry, we need to embrace the love languages of our donors in order to build stronger, lasting relationships with these companions of our cause. Just like a personal companion, your donor is your companion, and companionship takes time, understanding and leaning in.

Here are four steps you can take to speak to donors in their love language.

1. COMMIT TO STAYING COMMITTED TO THE DONOR EXPERIENCE

It begins, first, with a commitment to join the donor experience movement. The movement is to say "no" to bad donor experience and to stay committed to making donor experience a priority within your organization. It is harder to make new friends than to hold on to the ones you have. So we need to stop putting stewardship, donor experience and the donor journey on the back burner.

2. UNDERSTAND YOUR DONORS MOTIVATIONS, PREFERENCES, BEHAVIORS

You cannot speak someone's love lan-

“AS AN INDUSTRY, WE NEED TO EMBRACE THE LOVE LANGUAGES OF OUR DONORS IN ORDER TO BUILD STRONGER, LASTING RELATIONSHIPS WITH THESE COMPANIONS OF OUR CAUSE. JUST LIKE A PERSONAL COMPANION, YOUR DONOR IS YOUR COMPANION, AND COMPANIONSHIP TAKES TIME, UNDERSTANDING AND LEANING IN.”

guage if you do not know them. If they are just a name next to a dollar sign in some spreadsheet, how can you truly speak to them? Joe Smith who gave \$50 two years in a row may be very different than Sally Long who gave \$100 via a monthly sustainer program.

If you really want to understand the language that Joe speaks and the language that Sally speaks, and you want to have them receive love back from you in their unique languages, then it's time to do some real analysis on your donor file. It begins with looking at the data that you have, finding your data gaps and then determining if you can fill in some of those gaps through additional data sources. From there, you will want to dig into demographic and behavioral information on your donors to uncover insight into their motivations, preferences and love language.

3. SEGMENT LIKE YOU'VE NEVER SEGMENTED BEFORE

Once you have an understanding of your file, you can then begin to segment individuals into groups based on the motivations, preferences and love languages you uncovered. This is where you go beyond the "past-gala-attendee" vs. "new-gala-attendee" type of segmentation.

And instead, look at in this way: people who have attended a gala, have children, selected they prefer email communications, deselected your premium offer and have given \$500 in the past two years. To paint an example, these individuals may be more inspired by quality time and physical touch than the individuals who do

not attend your events, give online and select to receive a premium each time. This is simply one imagined (but likely) scenario that shows how donors can love us in different ways and that we should love them back in their language.

4. MAP AN EXPERIENCE BASED ON THEIR LANGUAGE (OR SEGMENT)

Creating a donor journey map is the action plan on when, where and how

you will speak their love language to them. This requires getting people from various departments across your organization to get in a room together to map out a holistic experience.

The map should be based upon what you uncovered in your data analysis and should include a multichannel approach based on the behaviors, motivations and preferences you uncovered.

Relationships are a journey. They require attention to detail and commitment to lean in. Donor relationships are no different. Join the movement. Make the donor experience a priority and take your donors on the journey with you. ■

Taylor Shanklin is vice president of marketing at Pursuant. Built by fundraisers and marketers for fundraisers and marketers, she and the team at Pursuant exist to help nonprofits reach more donors and raise more money. As a data-driven full-service fundraising agency, they partner with organizations to unlock donor insights, in order to take fundraising beyond transactional and into transformational. Connect to learn more by finding Taylor at pursuant.com, on LinkedIn or by email to taylor.shanklin@pursuant.com.



The Art & Science of Fundraising & Marketing

Early Bird Rate Save 15%
Until June 15, 2018
bridgeconf.org/advent3

PROGRAM PARTNERS

Balance Your Analytic and Creative Self at #Bridge18!

Get inspired by 3 keynote presenters. Hear the best of right-brain and left-brain ideas in over 80 breakout sessions. Interact with more than 120 vendor partners. Experience new tools, innovations and insights. And most important, leave with **real ideas** that will take your fundraising and marketing to the next level.

JULY 31 thru AUGUST 2, 2018
Gaylord National Hotel & Convention Center
National Harbor, MD (adjacent to Washington, DC)
For education, hotel or volunteer info, go to: bridgeconf.org/advent3

2018 Annual
Bridge to Integrated Marketing & Fundraising Conference

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

Down and Dirty: 7 Steps to Conducting Effective Strategy Sessions

By Jeff Schreifels



Every week, Richard and I get emails and calls from frustrated major gift officers (MGOs) who are not sure if they are doing the right things

with the right people. Sometimes these calls are tough for me because I'm a "fixer," and I want to help immediately.

Many of the MGOs talk about the lack of support they have from their manager or colleagues. We get comments like these: "Everyone is so busy, no one has time to talk about donors." "We all feel so pressured to make budget that we never step back and look at the bigger picture." "I have a donor that I'm not sure what the next step should be, and I have no one else around here to ask."

I recently wrote a blog post called, "It Takes a Village." I stressed that you need outside help, encouragement, strategy... and a bit of reassurance from your colleagues. By purposely bringing others into your work, Richard and I believe you'll end up being much more effective.

Today, I want to give you a "down and dirty," practical guide to how to conduct those meetings, so that you will end up having a more effective strategy as you relate to your donors.

1. Every month, block two consecutive hours to hold a "Major Donor Strategy Session." If you have a team of more than two MGOs, I recommend creating two separate meetings of two hours each. (After two hours, the meetings become ineffective.) For example, if you have five MGOs on your team, you could hold a session in the morning and another in the afternoon—and you'll get it all done in one day.

2. Get commitment from leadership. If you are a manager, you can implement this immediately. If you're an MGO, convince your manager that

it is vitally important that you involve others in brainstorming and creating strategy that will help you engage with your donors.

3. Invite your list. Every MGO on the team should be invited to participate in the meeting. Also, the development director should always be present. There should be one person from program, one person from finance and one from leadership. They don't have to be the same person every time, but one from each department should be represented. If you're a small shop, inviting a board member would be helpful.



Outside perspective is needed in this type of meeting, and it also gives those invited a sense of ownership in major gifts. Everyone in this meeting should have their ideas be given equal weight. In other words, just because your finance person isn't a professional fundraiser doesn't mean her ideas of what you could do with a donor aren't important.

4. Each MGO should come prepared to discuss three to five donors that you need counsel on. Each MGO needs to come prepared with all the relevant background information on her donors. What steps have you already taken, and what is the overall revenue goal and current strategy? Then you need to be clear on what your barrier or problem is.

5. Allow each MGO to lead his

particular strategy session. The development director can act as a facilitator, but leave it to the MGO to run the session for his particular donors.

6. The MGO should be clear on what he or she needs. When discussing a donor, the MGO has to be clear on what barrier he or she is up against, and what he or she specifically needs help with. This will help the assembled team focus correctly.

7. Take action steps. Every MGO with every donor has to articulate and record the action steps that came from the strategy session. Once completed, the outcomes need to be communicated

to the assembled team. If this is not done, you will lose the interest of the folks who are not directly responsible for fundraising in your organization.

Just like a donor, you have to report back the outcome of the strategies they helped you to develop.

Again, make sure no session goes over two hours in length. You may find that you only get through two donors. That's

fine. The important thing is that you received ideas, counsel and strategy on those two donors, and you have agreement on the path forward.

These strategy sessions are incredibly important for an MGO. Many times you feel you are alone out there. This gives you the opportunity to get input from your colleagues and to feel a shared collegiality with your peers. And you get new donor strategy that you probably would have never thought of on your own.

I know that these strategy sessions work. You not only create great strategy, but everyone leaves inspired.

Start your strategy sessions now. ■

Jeff has more than 25 years of nonprofit fundraising experience and is senior partner of the Veritus Group.

Marketing AdVents

FAST-ACTION DIRECTORY

DMAW Headquarters email: info@dmaw.org

DMAW Headquarters phone:
703-689-DMAW (3629)

Articles: Submit to Nhu Te, Editor,
215-238-5431 Email: dmawadvents@dmaw.org

AdVents Advertising: Terri Jones, 703-471-4902
Email: tjones@dmaw.org

Inserts: Require prior approval, must be related to DMAW events and meet USPS requirements. Contact DMAW HQs for more information.

Job Exchange: Submit via email to Ann Walsh, ann@dmaw.org, to receive a reply confirming cost. Payment required prior to posting online. Deadline for print version is the 15th of the month preceding publication. All ads posted to website within 24 hours. Costs: Members - \$100 for first 50 words and \$1 for each additional word. Not-Yet-Members - \$200 for first 50 words and \$1 for each additional word.

News Notes: Submit items of professional interest or significant personal news about members to Editor Nhu Te.

Deadline for Articles and News Notes: 15th of the second month preceding issue date (e.g., deadline for May issue is March 15).

Subscriptions: Marketing AdVents is a member benefit of the Direct Marketing Association of Washington, Inc. A variety of individual and corporate memberships are available. Contact DMAW 703-689-DMAW (3629) for details.

Publisher: Direct Marketing Association of Washington, 11709 Bowman Green Drive, Reston, VA 20190-3501 website www.dmaw.org.

Executive Director: Donna Tschiffely
703-689-3629, donna@dmaw.org

Editor: Nhu Te
215-238-5431, dmawadvents@dmaw.org

Advertising: Terri Jones
703-471-4902, tjones@dmaw.org

Design: Albert J. Gaspari
NAPCO Media, 215-238-5366

Marketing AdVents is published monthly by the Direct Marketing Association of Washington, Inc. to inform its 1,000+ members in the Mid-Atlantic region of current DMAW events and programs, present articles of professional interest, and provide marketing professionals the tools and education to excel in the direct marketing arena.

Mount Royal
Printing & Communications
6310 Blair Hill Lane
Baltimore, MD 21209
410-296-1117

NAPCO MEDIA
1500 Spring Garden St.,
12th Floor
Philadelphia, PA 19130
215-238-5300

News Notes

● Moore DM Group has expanded CDR Fundraising Group, which includes two additional offices in Los Angeles and Tulsa, and the hiring of Lisa Scott Benson as CEO of CDR, the company announced in a press release. Lisa replaces Geoffrey Peters, who will continue as president of Moore DM Group. Furthermore, Janet Tonner has been appointed as president of Direct Donor Television (DDTV), who will continue to serve as vice president of analytics for CDR. "With the hiring of Lisa, we cannot be more pleased with the senior team we have assembled to provide the full array of agency services to the nonprofit community. Lisa brings an excellent depth of multichannel experience in growing revenue for nonprofits," James Moore, chairman of the Moore DM Group, said in the release.

● The Lukens Company, a full-service direct response marketing agency serving the nonprofit sector, expanded its leadership team with four promotions and one new hire, according to a press release. Seth Colton has been promoted to executive vice president, where he will aid in developing new markets and products for the agency. Jennifer Parker has been promoted to vice president of account services, where

she will lead the agency's nonprofit division and play a key role in business development. Matt Seney has been promoted to vice president of agency services, where he will manage and develop the agency's growing roster of service departments—including digital services, web development, data and analytics, creative design, and polling and research. Additionally, the company has hired Sharon Kline as direct of finance.

● Prompt Direct, a provider of multichannel marketing solutions, has merged with Piscataway, a universal mailing services company based in New Jersey. According to a press release, this merger will serve out of the New Jersey headquarters and provide full-service marketing solutions, which will serve clients in various industries: retail, education, financial and nonprofit. "Stronger together providing our clients with more services and more capabilities to provide faster service at an affordable price. We understand the challenges ahead in the direct marketing arena, and we are confident that our joint talents and proficiencies will allow us to attack those opportunities head on and remain a market leader in this segment," Prompt Direct senior vice president Dennis Lacognata said in the release.

Is something exciting happening in your company or organization?

Tell us about it!

Email the editor, Nhu Te,
at dmawadvents@dmaw.org



DMAW Educational Foundation

By Kellie Ketterman

Collaboration Turns the Key to Success!



This past November, my team from Salisbury University and I competed in the Fall Collegiate MAXI Competition held at Chapman Cubine and

Hussey in Arlington, Va. Happily, we won gold. We collaborated and created a direct and integrated campaign titled, "#BeAPart for the Philadelphia Museum of Art."

The campaign centered on a collegiate and high school art competition with direct mail, telemarketing, email and social media marketing components. The key to our success with #BeAPart turned on collaboration, delegation and mediation when creative clashes occurred.

Four students in varying years at Salisbury University (SU) participated.

We had different marketing backgrounds, interests and experiences. In fact, one of my teammates was a finance and chemistry major! We naturally assumed different group roles, but we were all task-focused and wanted to create a winning campaign in the most efficient way.

Especially in the initial phases of our campaign when we were bouncing ideas off one another, we needed to collaborate effectively. With our advisor, Professor Paula Morris, we brainstormed ideas for our campaign title. We gave ourselves a set amount of time to write down all our ideas. We then read our ideas out loud and tweaked each to make them better. That's how we came up with our campaign slogan!

In order to create the sharpest campaign, we made decisions based on our individual talents. For instance, our resident finance/chemistry major, who loves numbers, worked on our budget. I created our graphics and advertisements because I had experience doing so in my summer internship. By delegating based on our individual talents, we facilitated the creation process and streamlined our work. We also were able to churn out our best because we were passionate about our assigned tasks.

While creative clashes occurred at times, both sides were committed to handling conflicts fairly. Each side stood their ground and explained why they believed a certain direction was optimal for the campaign. The key was to avoid a stubborn stance, while remaining open and accepting different ideas. After all, the other idea could turn out to be a winner! We also

learned to separate the professional project from our personal lives and personal friendships. In doing so, conflicts were limited and didn't last.

We also found that the project worked best when the group stood firm in holding group members accountable for submitting quality work on time. We learned that it's always useful to set deadlines for individual parts of the project, followed by a group review to ensure quality. We learned if the whole group was unsure of first copy or concept, there's no shame in asking for another copy or another concept!

"Creative collaboration is key when creating a direct marketing campaign as a college student. In college, we're especially lucky because students work with different people from diverse backgrounds and experiences."

The primary lesson? Creative collaboration is key when creating a direct marketing campaign as a college student. In college, we're especially lucky because students work with different people from diverse backgrounds and experiences. It's important to take advantage of this early in a professional career with a case competition like the DMAW/EF MAXI Competition! ■

Kellie Ketterman is a senior at SU with a dual major in marketing and media studies, and a marketing intern at Quiet Storm Surf Shop. She was a member of the gold-winning MAXI team from SU for Fall 2017. She is a member of Lambda Pi Eta, SU's Marketing Excellence Club, SU's Quidditch Team and president of SU's Manhunt Club. She also is a marketing manager, DJ and host of "The Sound" on WXSU 96.3, SU's student-run radio station. Reach her at kketterman1@gulls.salisbury.edu.



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

Member Spotlight

John V. Alberta has spent most of his career writing copy. His career began following Peace Corps Volunteer service in Bolivia as a communications specialist. He worked briefly out of the volunteer recruitment office in New York City when he learned of an opening in Washington, D.C., as a direct mail recruitment chief. With this job, he was given complete access to professional training and marketing education. What kept John in the direct marketing sector was the mix of the right brain/left brain approach and the mix of talents and instincts one needs. It has always kept him engaged.

Outside of direct marketing, he bought a shared overhead instant office company on McPherson Square, which survived about five years. In the late 1980s and early 1990s, he built a coin-operated entertainment company that came to operate more than 400 pieces of equipment in more than 75 bars, restaurants, hotels and retail locations in the D.C. metro area. He says these experiences were not much different than direct response advertising/marketing because the efforts took every part of his brain, muscles and moxie.

Location: Falls Church, Va.

Education: B.A. in English Literature from St. Francis University and M.A. in English Literature from Hofstra University



JOHN V. ALBERTELLA
Director of Direct Response Marketing
Judicial Watch
jalbertella@judicialwatch.org

DMAW Member Since: 1973

Who do you consider your mentors?

Bruce Muzzle, a former Wunderman, Ricotta & Kline executive and Jim Bullard, a former DMAW Man of the Year, who were John's bosses at Peace Corps National Recruitment. Also, Richard Viguerie and Harmon Pritchard at Aircraft Owners and Pilots Association.

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

Your packages are who you are. Move to the agency side of business, and work on the biggest brands as soon as you can.

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

Start, and never stop writing and testing copy.

Tell us about your volunteer experiences with DMAW.

Sadly, none. My volunteer efforts have been confined to civic affairs, once even holding public office for a term (but never again).

Describe yourself in three words.

Creative, resourceful, independent.

Describe your life in six words.

I wouldn't do it another way.

John's Favorites



Restaurant No favorites. I'm a good cook.



Film "Cinema Paradiso"



Book "The Last Lion: Winston Spencer Churchill: Defender of the Realm, 1940-1965" by William Manchester and Paul Reid



Music Mostly everything by Louis Jordan



Website Drudge



Leisure Interests Fly-fishing



Quote "Today, I begin a new life. Today, I stop smoking." — Cesare Pavese

WHAT WE DO BEST:
**PRINT.
MAIL.
INNOVATE.**

Japs-Olson Company is your direct mail production solution provider.
To receive our sample kit, contact Debbie Roth at
debbie.roth@japsolson.com or 952-912-1440.



JAPS-OLSON COMPANY
Commercial Print & Direct Mailers

