

Just Wrapped the CRM Implementation? The Next 6 Months Are Critical to Conversion Success!

By Maureen Wallbeoff



Jess, a database manager at a cause and cure organization, was thrilled—and exhausted, but mostly thrilled. She had spent the past nine months leading a major CRM conversion project. In addition to her primary job responsibilities, Jess worked with the implementation team to clean up the organization's data, and then configure and populate the new CRM. She also had to make a million little decisions and learn how to use the new system. Jess was relieved and proud when the implementation was wrapped.

Three months later, Jess felt frazzled and frustrated. Her team constantly complained about the new system, and she was fielding multiple requests for new customizations, workflows and reports. Although the conversion was over, dealing with the CRM was going to require more of her time and attention than she

expected. If you've implemented a new CRM or database recently, Jess's story probably sounds very familiar.

Even when the hard work of the main project is over, there's plenty to do in the following weeks and months. And that's what took Jess by surprise. She had expected the team to reach new levels of efficiency and the work to flow more smoothly. Her vision of life after the conversion was very different than the reality.

When I work with clients like Jess on a CRM project, one of the things we talk about is the critical post-conversion period. Once the new CRM is in place, you absolutely need a plan for the next six months, because all sorts of things will pop up that your organization needs to respond to.

While you may want to kick back and catch your breath, it's time to set your sights on important operational items, like user adoption

Continued on page 6

“

Moving into a new CRM requires you to help your team manage change. Some people like change and find it invigorating to learn new skills. Other people will dig in their heels and make it very clear how unhappy they are. You're likely to receive a mix of responses in your organization! Your job is to remove barriers and serve as a steady, trusted resource in these early days of user adoption.

”

In This Issue: Pandora's Box

FEATURES

CRM Implementation	1
Today's Pandora's Box World	1

COLUMNS

Technology Update	8
Out of the Trenches	10
Data and Technology Outlook	12
DMAW/EF	14

DEPARTMENTS

President's Perspective	2
Calendar of Events	3
Quick Takes	4
News Notes	13
Member Spotlight	15

Fundraising and Advocacy in Today's Pandora's Box World

By Mwosi Swenson



At the beginning of 2016, it seemed like we had everything figured out: Online fundraising was growing at a nice clip of about 15 percent per year, direct mail programs were

still generating the lion's share of the lower-dollar donor revenue, and we could easily activate online constituents to take action. Then the shock of the 2016 presidential election happened, and a lot of things changed.

First, the 2017 boom—also known as the Trump Bump—and then the 2018 contraction—also known as the Trump Slump.

Oh, and then December 2018 happened! As we're all fully aware, in 2017 new donors poured into many nonprofit organizations as a result of the outcome of the 2016 presidential election. Many of those donors came in online, and of those, an impressive proportion chose to give a sustaining gift.

Revenues ballooned, and donor counts soared. And then the furor died down. Those amazing metrics settled back to a level that many decided was "normal" in 2018. And for the first time that I can remember, online revenue in the month of December actually declined from the year before. It feels like many things are changing in our industry,

Continued on page 5

President's Perspective

Take Advantage of the Time You Have

By Marie Kosanovich



When you grow up having both parents as school teachers, everything becomes a learning opportunity. My dad wasn't the type of guy to play ball with us in the backyard. Instead, he'd call me over to talk to him while he was reading *The Wall Street Journal*, telling me all about the Rule of 72 before I barely knew my times tables. "You have to use time to your advantage," he'd tell me. Little did I know at the time, my dad was prophesying about my professional life.

I recently asked several of my coworkers, "What's the one thing about work that keeps you up at night?" The common theme that arose: not having enough time to get everything done. Time, or the perceived lack of enough time, is a real stress point for professionals today.

You always hear people say, "If only I had more time..." But having more time may not be at the crux of your problem. Instead, think about how you can use the time you have in a more productive way. You may know all these concepts, but a gentle reminder never hurts.

- **Prioritize.** Focus on what needs to be done today, rather than stressing about what needs to be done days or weeks from now.
- **Use those few minutes you have between meetings wisely.** Cross off smaller tasks on your list to get them out of your way.
- **Larger projects do not need to be done all at once.** Rather than thinking you need two hours of uninterrupted time, which may be hard to achieve, take them in small bites, creating natural stopping points—the task will be done before you know it.
- **Make sure your meetings are an efficient use of time.** Have an agenda, and think about the participants—who must attend versus who only needs to be "in the loop"—and invite accordingly. Then, and this is the important part, stick to a time frame. If you set 30 minutes for a meeting, stick to it.
- **Try not to avoid the items that you dread.** At times we find ourselves putting more effort into talking about what needs to be done than what it takes to do the task itself.
- **Avoiding a task that you think will take a long time.** Ask your colleagues if there's a more efficient method to getting it done. Whether or not you get one, tackle the project. Avoiding it doesn't change the investment of time!
- There are no awards for who is the busiest, so **don't be afraid to ask for help.**

The most important thing to keep in mind (and mind you, I write this trying to make sure I'm taking my own advice) is to take time for yourself. Even a brief five-minute mind stare can help you look at a task with a clearer mind. Take a moment to enjoy something that makes you smile. Those quick respites can make all the difference in your attitude and getting something accomplished. And remember, while the day-to-day can seem like a struggle right now, one day you'll look back at this fondly. Just give it time.

Best,
Marie Kosanovich
mkosanovich@lautmandc.com

DMAW Executive Committee & Board of Directors 2019

Executive Committee

- President—Marie Kosanovich, Lautman Maska Neill & Company, 202-296-9660, mkosanovich@lautmandc.com**
- Vice President/President Elect—Roger Hiyama, Wiland, 703-403-3403, rhiyama@wiland.com**
- Treasurer—Teresa Weaver, O'Brien Garrett, 202-467-0048, tweaver@obriengarrett.com**
- Secretary—Kate Carr, Silver Marketing, 301-951-3505, kcarr@silvermarketing.com**
- Immediate Past President—Mikaela King, National Geographic Society, 202-857-7588, miking@ngs.org**

Board of Directors

- Jim Chmielewski, Public Interest Communications 703-940-5093, jim@pic1.com**
- Steven DelVecchio, AARP Foundation 202-434-6223, sdelvecchio@aarp.org**
- Meg Ferguson, Production Solutions 703-734-4566, mferguson@psmail.com**
- Melissa Ford, MalWarwick Donordigital 202-332-3124, mford@mwdagency.com**
- Denise Hubbard, Names in the News 410-392-0313, denisehubbard@nincal.com**
- Karin Kirchoff, K2D Strategies 703-812-8260, kkirchoff@k2dstrategies.com**
- Tracy Lea, The Harrington Agency 202-543-7671, tlea@theharringtonagency.com**
- Stacie Mruk, The Nature Conservancy 703-841-3924, smruk@tnc.org**
- Jade Nguyen, The Lukens Company 703-845-8484, jnguyen@thelukenscompany.com**
- DeDi Oxenberg, CDR Fundraising Group 301-858-1500, doxenberg@cdrfg.com**
- Polly Papsadore, PMG 443-539-2603, polly@pmgdirect.net**
- Heather Philpot Pete, Infogroup Nonprofit Solutions 402-836-5865, heather.philpot@infogroup.com**
- 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, American Nurses Association 202 491-1114, kcfsomerville@gmail.com**
- Laura Zylstra, Deluxe 207-380-0432, laura.zylstra@deluxe.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

9

Data Strategy Forum
8:00am - 4:00pm
National Housing Center
Washington, DC

TUESMAY

14

Lunch and Learn
Industry Trends with Carol Rhine
12:00pm - 2:00pm
SEIU, Washington, DC



Photos: iStock/Getty Images

WEDMAY

22

DM 201 Philly
9:00am - 4:30pm
NAPCO, Philadelphia, PA



TUESJUNE

4

Digital Day Forum
8:00am - 4:00pm
City Club, Washington, DC

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 are you hopeful about?

JAYE



I am hopeful that the American Foundation for the Blind can expand beyond its traditional base of supporters of blindness and other disability organizations.

We can do this by focusing on our work to upend the status quo: to create a world of no limits for people who are blind or visually impaired, a world where all of us are judged not by a perceived disability, but by our humanity, talent and respect.

It is my hope that we will reach these new supporters by changing and challenging the public's perception, one individual at a time.

— **Jaye Lopez Van Soest**
 Director of Development
 American Foundation for the Blind
 jlopez@afb.org

GEORGE



The coming recession, falling donor retention, overhead issues and more.

True, nonprofits face problems. But as marketing guru Gary Halbert said, "You can solve any problem with a sales letter." (Or a fundraising appeal.)

An appeal can spark transformational giving that saves a small charity from ruin and grows a big charity even bigger.

There's real power in one concerned person reaching out to another about a cause in an appeal. It can move donors to do good. It's as true now as in Bruce Barton's day.

It will never change. And we can all feel hopeful about that.

— **George Crankovic**
 Direct Response Copywriter
 crankovic@yahoo.com

SCARLETT



I'm most hopeful for seeing more kindness in the world.

More kindness in the way we treat each other, and more kindness in the way we treat ourselves.

At the Air Force Enlisted Village, we have a philosophy known as "The Mom Rule." It's our guide to ensure that employees treat our residents with dignity and respect.

The beauty is, it goes both ways. It's also our guide to ensure that residents treat staff members well and that staff members treat each other well.

I'm hopeful for people treating each other with dignity and respect.

— **Scarlett Bauman**
 Director of Marketing
 Air Force Enlisted Village
 bauman@afev.us

STEVE



Springtime always gives me a sense of hope as Mother Nature goes through her process of rebirth.

It's a natural cycle. There's also a natural cycle in the nonprofit world. Many experienced a disappointing 2018. Some blame changing tax laws, an uncertain economy or the divisive political climate. But we've been through this before. In times of war. National disasters. Economic and political upheaval.

But nonprofits always rebound, because we connect with people based on shared values. And those values are strong.

So keep working for what you believe in. Keep communicating. As sure as the coming of spring, the pendulum will swing back in your favor.

— **Steve Maggio**
 President
 DaVinci Direct
 steve@davinci-direct.com

Today's Pandora's Box World

Continued from page 1

and at a dizzying pace. All that said, there have been other times when our world felt different—like during the 2007 to 2009 recession or after 9/11 and the anthrax scare in fall of 2001. The lessons that we learned in those turbulent times are lessons that apply today.

As we look toward the rest of 2019, there are a lot of things that we can anticipate, which will affect our efforts to raise money and engage our constituents—the upcoming presidential election, economic uncertainty, tax law changes, changing demographics of charitable donors and more.

And all of those things can affect the way that our donors react and how our programs perform. But in my opinion, it's the way that we fundraisers choose to react that will ultimately determine the outcome.

RIDE THE WAVE (BUT BE SURE IT'S YOUR WAVE)

It's easy to say, "Be nimble," but much harder to put it into practice. However, those organizations that can capitalize on the energy and activism of their constituents in response to current events as it relates to their specific cause can benefit greatly.

Do respond quickly and thoughtfully to those issues that affect your organization, but realize that donors who are more motivated by the moment than the organization they chose to give to are less likely to stick around. That means "stickier" engagements like monthly giving are important, and clearly connecting your mission as the solution to the issue is essential to maximize retention.

STICK TO WHAT WORKS

The beauty of direct response fundraising is that over the decades we've honed strategies and tactics that work, and will continue to work, to acquire donors, stem

attrition, promote activism and raise money. We're sometimes tempted to change tactics because other things around us are changing. That temptation can lead us down a treacherous path. This doesn't mean don't test new messaging, tactics or creative; just don't stray from the techniques that we know work.

STAY STRONG AND PERSEVERE

It's also tempting to pull back investment in times of uncertainty. The problem is, every direct response program needs to feed the engine that produces new constituents and donors.

Investment decisions should be: (1) based on solid analytics and forecasting, (2) viewed holistically for the entire direct response program, including online and offline channels, and (3) held as steady as

effectively invest in, engage and cultivate our constituents.

CONTINUE TO TEST

And test new stuff. Even though there are many things that haven't changed in what we do, there are plenty of new tools and tactics that can optimize our efforts to retain our donors and grow our files.

Peer-to-peer texting programs, cross-channel targeting and advanced modeling are just a few new tools that allow us to deepen our engagement with our constituents and hold tight to the donors we have.

MULTICHANNEL EFFORTS PAY OFF

We know that high-impact current events are a driving factor for individuals to give or engage, so being in front of your

constituents during these times is imperative. A fully integrated program of direct mail, email, social media, advertising, mobile and more allows you to engage with your donors in the channel they choose and when they are most interested.

Even during this time when the climate feels unstable and unpredictable, there is some good



Photo: iStock/Getty Images

news. In a review of 2018, we're seeing a few trends that are reaffirming. Although online revenue for some organizations was down in December 2018, direct mail held strong for many.

And as some programs saw a decrease in the number of donors, for many organizations, individual donor value increased—allowing for stable revenue from fewer individuals. This shows that the work we've all done to build strong and effective direct response programs pays off—whether in times of high engagement or times of instability.

USE ANALYTICS TO DRIVE STRATEGY

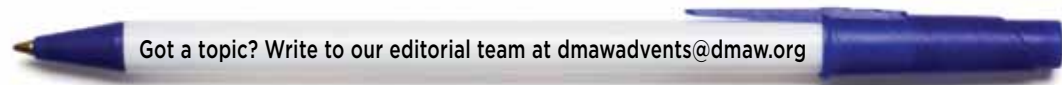
This seems glaringly obvious, but it's so important that I have to mention it here. Being elated by great results or downtrodden by poor performance can make us lose sight of the end game.

Understanding ROI, donor conversion rates, retention rates and other key metrics is critical in informing how to

possible so it doesn't wreak havoc on the number of donors and amount of program revenue in the future.

And we have to remember the long game: The lower-dollar donor programs that we run now are the feeder for major and legacy gifts in the future.

Mwosi Swenson is president and CEO of Mal Warwick Donordigital. She can be reached at mswenson@mwdagency.com.



Got a topic? Write to our editorial team at dmawadvents@dmaw.org

CRM Implementation

Continued from page 1

and standard operating procedures. No matter what system you've moved into, there are four key areas that you should be prepared to deal with immediately after the conversion is complete.

USER ADOPTION

Moving into a new CRM requires you to help your team manage change. Some people like change and find it invigorating to learn new skills. Other people will dig in their heels and make it very clear how unhappy they are. You're likely to receive a mix of responses in your organization! Your job is to remove barriers and serve as a steady, trusted resource in these early days of user adoption.



Photo: iStock/Getty Images

• **Prepare for productivity to drop dramatically for a few months.** Even if your legacy CRM was clunky, people were used to using it and could probably whip through most tasks quickly. It will take time and practice to use a new system, so be patient as the team gains expertise. Set expectations accordingly—inform those who need to know that typical deadlines may need to be lengthened for a while.

• **Identify a power user.** There's probably someone on your team who is quickly becoming comfortable with the new CRM. They may have figured out some shortcuts on their own or are already helping other people when they get stuck. Grab that person and make them the first line of defense (officially or unofficially). The power user can help extend your capacity

“I recommend creating reports in your CRM of the new records created each week and reviewing them weekly for the first six months. This will give you visibility into whether and how much the system is being used, and by whom. You should also spot-check the records themselves to verify that the data being entered is valid and complete. These activities will help you identify any gaps or trouble spots that may signal where additional training and/or encouragement is needed to keep your data quality high.”

— WATT HAMLETT, PRINCIPAL, WATT HAMLETT CONSULTING

to support the team, contact support when needed and train others to follow your operating procedures.

• **Actively solicit feedback.** Every two or three weeks, gather the team and talk openly about how it's going. Celebrate the positives. Provide some just-in-time training or refresher on using the new CRM.

of a CRM should begin right away—especially if you've moved into a unified system that is used by multiple teams. It's important to define the rules of the road and make sure they are being followed. You'll also need to monitor other systems and platforms if they integrate with the CRM.

• **Form a user's group.** Identify the right people from across your organization and meet regularly to address system issues and requests. Define roles and responsibilities within the group, and find a place to store all related documentation.

• **Make agreements about your priorities.** Is staff training the most important thing to deal with, or should a business process be ironed out first? And how will your user's group decide? Make a list of everything that needs attention, and prioritize. If you aren't sure where to begin, just pick something!

• **Monitor the full ecosystem.** The new CRM doesn't exist in isolation—it's probably connected with other systems you're using (an email marketing tool, online fundraising platform or an online store, etc.). If you want to ensure that data moves in and out of the CRM properly, you'll need to pay attention to those other systems, too.

BUSINESS PROCESS UPDATES

Did you have well-documented business processes for your legacy CRM? I won't be shocked if you didn't! Many nonprofit organizations fly by the seat of their pants when it comes to standard operating procedures, and that's a risky approach.

“Training and documentation are vital. A new CRM won't break bad habits, and if data hygiene and consistency of documentation have been problems in the past, you don't want to carry over those practices to your new platform. Now is the time to both train existing staff and develop training for new staff to keep your information as clean as possible.”

— CHRIS CALABRO, DIRECTOR OF TECHNOLOGY, PET PARTNERS

This is the best time you'll ever have to decrease the risk and tighten up things. Having agreed-upon ways to perform tasks will help your team do their jobs well, too.

• **Make time for documentation.** You can't expect people to follow procedures that aren't written down. Use tools like voice-to-text dictation and screen recording apps to create a manual. Write up checklists or step-by-step directions.

• **Communication is key.** It's likely that many of your legacy business processes will change, and you'll address and document these over time. How will your team know that a business process has changed? Pick a communication channel and use it consistently.

• **Plan on continual training.** Yes, staff turnover is a thing, and that means you'll need to train new people. But training is important for existing staff, too. A CRM is not a static environment—it's always changing, growing and evolving. Your team will need regular training to keep up.

POST-CONVERSION DEVELOPMENT

No CRM implementation includes building out everything that you might need the system to do. If we worked that way, those projects would never end. That means we all have a list of “must-have” items that didn't happen during the initial conversion. This list will change over time as new requests roll in from others in the organization, so you'll be re-prioritizing every few months.

• **Budget for additional development and training.** While there may be things on your list that you can handle on your own, other items will need to be done by a CRM specialist. It's not unusual for organizations to spend 20 to 35 percent of the implementation cost on additional development and training in the 12 months after the new CRM is live.

• **Resist the urge to customize everything.** It's so very tempting to customize the heck out of a powerful new CRM. And modern CRM products can be customized to an astonishing degree. But the initial six months after implementation are better spent getting familiar with the initial configuration. Give yourselves time to know the product well.

• **Focus on the data.** Here's the thing—you have a new CRM because you wanted to become a “data-driven organization.” In the first six months, it's critical that you focus

“At my former organization, the CRM we selected had a built-in live chat feature, which made it easy for me to get the support I needed. Recognize that changing CRMs isn't a magic pill to fix all your problems. Our new system is so much better than our old one, but it's not flawless—I'm uncovering new things I want our system to do. But customer responsiveness was one of the things I looked for when we were picking a CRM, and I'm happy to say that our new provider has already implemented one of my feature requests a month since we joined up.”

— LIBERTY FRANK, STEWARDSHIP & COMMUNICATIONS SPECIALIST, ANNE ARUNDEL COMMUNITY COLLEGE FOUNDATION

on using the data (and not on building super swanky things that only a few people will use).

Begin to run a set of baseline reports and distribute them regularly. The post-conversion period can make or break your overall investment in a CRM. Once your CRM is launched, take a few weeks off and come back to work refreshed and ready for this important post-conversion work!

Maureen Wallbeoff is a nonprofit digital strategist and technology coach. Maureen started her nonprofit career at Planned Parenthood of Connecticut, rising from counselor to e-business director over a 17-year tenure. In 2008, she joined Firefly Partners as an owner and VP. She is now a solo consultant, providing solutions and support to nonprofit staff who are struggling to solve their nagging technology problems. In addition, she has authored two guides on nonprofit engagement software, blogs at her website and answers questions about technology live on Facebook every Friday afternoon. She has led workshops around the country at AFP conferences, bbcon and Bridge, and is one of Idealware's expert trainers. She can be reached at maureen@meetmaureen.com.

THE 14TH ANNUAL BRIDGE TO INTEGRATED MARKETING & FUNDRAISING CONFERENCE



Bridgeconf.org/AdVents | 703.547.1907 | info@bridgeconf.org

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

How Technology Misuse and Abuse Can Harm Your Nonprofit

By Mark Becker



Technology can be a tremendous asset for nonprofits. It powers modern communications, fundraising and marketing, and generally can help a nonprofit team operate more efficiently and effectively. But there can be a darker side to technology.

TROLLING

Online trolls are those who like to stir up trouble by posting inflammatory content in an effort to denigrate an individual or organization and/or provoke a reaction. There may be a temptation to bad-mouth a competing or opposing organization, but the best policy is always to show respect. Even if you think you may score some political points by trolling another organization, it will only come back to hurt your organization by damaging your own reputation. And you run a risk of turning off supporters and even creating sympathy for the other organization. Similarly, if your organization is trolled, it's best to take the high road and respond with respect.

BOGUS DONATION ATTEMPTS

It's not uncommon for thieves to make a series of donations or attempted donations for a small amount—say \$5 or

less—to test if stolen credit card numbers are working, so they can use them elsewhere or resell them.

This can cause accounting issues for your organization by making it appear that you have raised more than you actually have. It also causes illegitimate charges to unsuspecting people and adds others to your email list who did not intend to donate.

You can help reduce these bogus donations by adding CAPTCHA tools that help block automated form completions. You also can increase the minimum donation amount—just be sure not to set it so high as to turn away legitimate donors.

BOGUS EMAIL FORM SUBMISSIONS

These days, bots can enter hundreds of email addresses into an organization's online form. Internet bots, also known as web robots or simply "bots," are software applications that run automated tasks (scripts) over the internet. These bots can comb sites to fill out forms in an attempt to send you spam and perform other malicious actions. This practice is not only annoying, but it also can create bogus constituent records that have to be cleaned up at some point (and may even cost your organization money if your database has a pay structure based on number of records). Implementing tools such as CAPTCHA and reCAPTCHA,

which help block automated form completions, can help prevent such bots from being able to submit your forms.

MISLEADING DONORS WITH DEFAULT CHECKBOXES

You've likely seen this before: You're filling out a form, and there's some sort of box that's prechecked that you must uncheck in order not to be contacted or added to the organization's email list. For nonprofits, this approach may take the form of defaulting a checkbox to "cover transaction fees," effectively charging the donor more than initially intended.

Another example: defaulting a checkbox to a "recurring" donation, putting the onus on donors to uncheck the box if they intend to make only a one-time donation.

These approaches may seem tempting as your nonprofit looks for ways to increase donations, but they may end up causing donors to lose trust in the organization, ultimately harming your organization's reputation and future fundraising potential.

FAILING TO RESPECT PRIVACY

Modern technology allows us to collect and use an enormous amount of data. That's one reason why data privacy laws continue to evolve. But organizations move beyond typical data privacy issues when they actively violate donors' privacy. Some examples include:

- Selling donor email lists to email marketers, including other nonprofits.
- Sharing personal information—even beyond basic contact information that the organization gathers via survey, quiz or fundraising campaign.
- Using donor-submitted content in other ways without their permission.

NOT DE-DUPLICATING THE DONOR DATABASE

Failing to de-duplicate the donor database on a regular basis means that a nonprofit may continue to send email

communications to donors even after they've opted out. For example, if a donor has five contact records in the database and



MODERN TECHNOLOGY ALLOWS US TO COLLECT AND USE AN ENORMOUS AMOUNT OF DATA. THAT'S ONE REASON WHY DATA PRIVACY LAWS CONTINUE TO EVOLVE. BUT ORGANIZATIONS MOVE BEYOND TYPICAL DATA PRIVACY ISSUES WHEN THEY ACTIVELY VIOLATE DONORS' PRIVACY.



has opted out once, they would have to opt out four more times to truly be removed from the "mail-to" list in the database.

Beyond annoying the donor by neglecting to respect his or her opt-out, the results of failing to de-dupe can tarnish the donor's view of your organization and harm the organization in multiple ways. Here are some example scenarios:

- Your development director is talking on the phone with the donor and quotes the donor's giving history for the year. The amount is incorrect—it represents only the amount associated with one contact record versus all five contact records.
- The organization sends year-end tax statements, and the donor receives five instead of one.
- Many duplicate records may result in the organization paying its database vendor for more records/storage than is needed.

USING MISLEADING OPT-OUT VERBIAGE

In the same vein as not de-duplicating the donor database is creating opt-out verbiage that leads a person to think they're opting out of all emails from an organization when in reality,

they're only opting out of a single email communication type, such as the organization's email newsletter. Eventually, the person will receive more emails from the nonprofit. The result: The person's view of the organization may be tarnished, ultimately harming the organization's relationship with that person. Whether intentional or due to a lack of knowledge about best practices, it's important for nonprofits to be aware of these possible misuses and abuses of technology that may harm their organizations.

Be sure to have safeguards in place to reduce the likelihood of harm caused by those outside your organization. Inside your organization, make your team aware of possible tech misuses, and implement rules and guidelines that ensure your organization treats your constituents and donors as you would want to be treated.

Mark Becker founded Cathexis Partners in 2008 to help nonprofit organizations get the most from their existing technology tools, implement new technology to address gaps, and find the best overall approach to using technology to support their missions. He previously served as director of IT consulting at a fundraising event production company focused on nonprofits.



Photo: iStock/Getty Images



PEOPLE YOU CAN TRUST...DEDICATED TO SERVICE

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



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

WWW.AMIDIRECT.COM
703-370-0382

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

To Define Meaningful Measurement Practices, Avoid These 7 Deadly Sins

By Bethany Maki



People are demonstrating an ever-fiercer desire to see their contributions making a tangible impact on the causes they care about. To deliver on

these expectations, nonprofits must start to form stronger connections across their organizations—across marketing channels, across teams and across the data points that gauge performance.

This means looking at success in a new light, with a focus on achieving a common language and understanding of what goals look like across different programs, tools and people.

When we talk about measurement, we're talking about a new, complex variety of metrics that can, and should, be tracked. We know what you're thinking—achieving standards of measurement is easier said than done. That's why we're digging into these seven deadly sins that might be holding you back.

1. NOT DEFINING MEASURES THAT REALLY MATTER

File growth, average gift. Meals delivered, patients supported. There are many standard metrics we all track. But can you draw a straight line between a metric you are tracking and your organization's goal?

Not just your fundraising goal or your program goal, but the bigger picture: What is the organization's goal—cure cancer, achieve equality? If you can't draw that line, you need to connect your KPIs to what you're trying to achieve as an organization. Doing this can also open the conversation around full-funnel measurement and attribution needs in your organization.

For example, are you measuring how what you invest in brand understanding affects donor acquisition?

2. NOT SETTING UP YOUR TECHNOLOGY INFRASTRUCTURE TO CAPTURE THE DATA YOU NEED

You have fundraising, CRM, reporting and other tools with all the bells and whistles, but are those tools doing what you need them to do? Better yet, do you know where to start in order to answer that question?

Like any other infrastructure, you should be looking at your technology with an outcomes-focused perspective. Put some definition around the measurement capabilities you're looking to attain, and

means you have to help people connect the dots between what you need and what they do.

Do not put in "orders" with your partners. This isn't "I need a new donation form." It's "We're launching a paid media program. I need to be able to measure which combination of media partners, audience targets and creative treatments combine to make us the most revenue. Can you help me design a way to measure that, given our technology options?" This also means you need to try to be minimally aware of



Photo: iStock/Getty Images

then ensure your technology is set up in a way that's capturing those metrics—and also providing the answers in the way that you need them.

If this is causing a red flag, remember a lot of times these challenges can be addressed by communicating to other teams—perhaps that's your IT team.

3. NOT BEING THE TRANSLATOR BETWEEN YOUR BUSINESS AND THE PEOPLE AND PRODUCTS

The people who you need to measure your efforts are not natives in your land. For example, very few IT professionals know fundraising data, nor should they. That

your partners' native language, too. You don't need to be able to, for example, administer an enterprise database, but you need to recognize the complexity of it.

4. NOT ADDRESSING ATTRIBUTION WITH THE WHOLE VILLAGE

Channel integration is likely something your organization has been working toward for some time. What doesn't help to achieve synergy and understanding across channels?

Are you having siloed discussions about what touchpoint influenced what behavior? Or are you continuing to view digital and direct mail as a "one versus the

other" conversation? Too often, there is still internal contention about one channel getting credit for the conversion versus another, when in reality, constituents are influenced by a multitude of touchpoints and experiences with a brand—maybe a mail piece plus a targeted Facebook campaign moved the needle together.

It's critical to agree, organizationally, about what attribution matters and how you enable it.

5. NOT KNOWING YOUR AUDIENCE Measurement doesn't mean one thing, and it doesn't mean the same thing to every person. When you're dealing with multiple stakeholders who have varying areas of expertise (and their own set of priorities and metrics they're held accountable for), knowing your audience is incredibly crucial to communicating performance in a meaningful way.

Metrics like lifetime value or cost to raise a dollar are not likely to resonate with a CMO as much as something like brand awareness metrics might—you have to put them in context together to tell the right story. Understand what KPIs are most relevant to the stakeholder you're speaking with to ensure that everyone is on the same page about what success looks like.

6. NOT DEFINING WHAT YOU'RE MEASURING THE SAME WAY YOUR NEIGHBOR IS

When you say donor, does it mean the same thing as when your colleague says it? Do you mean someone who made a gift in the last 12 months, and they mean someone who has given, period? When you say a constituent is engaged, do you mean they are clicking an email? Does your colleague mean they've attended an event?

Enterprise-level definitions of audiences and metrics are critical parts of getting your approach to measurement right. Beyond defining, having a data governance approach documented for people to follow as your business evolves will help keep your metrics clean over time.

7. NOT ACKNOWLEDGING WHEN ADDITIONAL INVESTMENT IS NEEDED

Measurement should tell you where to invest your time, energy and dollars to best move your mission forward. If you can't get clear metrics, sometimes the thing you



MEASUREMENT DOESN'T MEAN ONE THING, AND IT DOESN'T MEAN THE SAME THING TO EVERY PERSON. WHEN YOU'RE DEALING WITH MULTIPLE STAKEHOLDERS WHO HAVE VARYING AREAS OF EXPERTISE (AND THEIR OWN SET OF PRIORITIES AND METRICS THEY'RE HELD ACCOUNTABLE FOR), KNOWING YOUR AUDIENCE IS INCREDIBLY CRUCIAL TO COMMUNICATING PERFORMANCE IN A MEANINGFUL WAY.



need to invest in is measurement itself. That could be in the form of technology or people or something else like developing an attribution model.

The right approach to measurement takes people, process and technology, so don't budget for it as just a capital expense or a line of service in a vendor contract. Also, annually evaluate the investment need as technologies change and the nonprofit sector's skill sets evolve.

As VP of business solutions for ForwardPMX, Bethany Maki works to develop strategies to build optimized digital experiences for constituents that bring the most value to them and the organization. She coordinates the execution and measurement of tactics to support those strategies in SEO, SEM, display, social media, email and on-site content and technical development. Maki is a skilled digital marketer with more than 16 years of experience, both at local and national nonprofits and agencies. With a proven track record of online advocacy, peer-to-peer event and direct-response fundraising success, she has been privileged to serve some of the nation's top nonprofits. Maki is a thought leader in the nonprofit digital industry and is a frequent speaker at events and author of blogs and articles. She can be reached at bmaki@pmxagency.com.

DMAW
Direct Marketing Association of Washington

**DIGITAL
DAY**

JUNE 4

8:30-4:30PM

CITY CLUB | WASHINGTON, DC

Segmented to Death—A Most Curious Case

By Michael Ferragamo



CHAPTER 1—OUR INQUISITIVE HEROES

A piece of a nose here, some tattered hair there, crumpled coat bits, well, everywhere—all that and more lay strewn about an office floor. “My word,” cried the venerable Doctor Watsup. “What a scene.”

Watsup had been first to arrive, but then his estimable direct response colleague burst in right after, “Indeed, my dear Watsup,” replied Sheerluck. “But what can we observe from this chaos?”

The pair had been visiting Washington, DC, recently on holiday and had been called by some of the most important nonprofit organizations to investigate the chaotic scene.

Watsup was perplexed. “There are bits and pieces strewn everywhere. Worse, none of them are alike at all.”

“Indubitably, this case is most disturbing. It appears that the victim has been segmented to death,” Sheerluck said.

“Well, I mean, death might be a little bit dramatic here, don’t you think Sheerluck? After all, we’re looking at pieces of money, what appears to be a \$20 bill. A crying shame maybe...”

The detective quickly cut his colleague off. “It’s most certainly money, but what amount? There’s not a lot to go on, even for me. Let’s move on to another room.”

And so, the almost-famous duo meandered into a nearby office, finding a similar, but very different, scene from the one before.

“Sheerluck, the pieces here, there are many of them! And they all say \$20!”

“Yes, an astounding revelation. Quickly, Watsup, we have one more room to inspect—let’s make our way to the final office.”

Bursting into the next room, the pair found another pile of pieces of money. “Good Doctor, see here—an array of recent dates on the bills. We know lots about when these were printed. So much, in fact, that I have deduced who perpetrated this crime...” But the detective

could not finish his sentence before his archnemesis suddenly appeared: Professor Moneyarty.

“I see that you have learned much. But have you solved the mystery of the first room yet? What amount was the money worth? Answer me, Sheerluck!”

“Seriously, I have no idea. Was it \$20?” Moneyarty was confused. “Yeesh, fine. Let’s go hold those pieces up against samples of untorn money.”

Following those instructions, Sheerluck gasped, “There is not one type of money here, but three: \$10, \$20 and \$50!”

CHAPTER 2—NARRATOR’S TAKE

We are privileged to work in an industry filled with data, where we get to know



SEGMENTATION IS A TOOL THAT HELPS US AS FUNDRAISERS MANAGE LARGE AMOUNTS OF DATA BY POOLING DONORS TOGETHER BASED ON LAYERS OF THOSE CHARACTERISTICS.



a lot about donors based on recency, monetary value and frequency: When is the last time that they gave (even if never), how much have they contributed (even if nothing) and how often they give.

Segmentation is a tool that helps us as fundraisers manage large amounts of data by pooling donors together based on layers of those characteristics, so that we can make strategic decisions from how those audiences perform over time.

But it is also possible to make those groups too small to be useful. Thus, there are three important lessons we can take away from our intrepid, inquisitive heroes.

Segmentation is good. There are many benefits to segmentation because it can paint a vivid picture of the audience based on their common characteristics. For example, the heroes were able to learn a lot about the money from the last two rooms. And we can similarly learn a lot about our audiences by their reactions to our solicitations by their giving.

But sound decisions require data.

However, Sheerluck and Watsup were unable to learn much about the first room’s money because each “segment” was a single data point from different bills. The challenge was trying to use those observations without anything to compare them to. This led to Watsup’s incorrect assumption that there was only one type of bill in the room.

It is difficult to learn much from segments containing only a few donors each or trying to read segments that are receiving a small number of gifts. We might learn a little about a single donor (who may come and go), but not about the audience as a whole or the patterns that drive their giving.

Because segmentation is an investment. Consider segmentation as an investment into knowledge. If the audience size or the response to it is too small to provide you with more actionable knowledge, then it may be worthwhile looking at whether the cost (in terms of money and time) of making these segments would be better spent toward creating larger pools. Then, for example, those larger pools could be modeled against larger datasets to see whether there are like characteristics that we couldn’t otherwise see.

Had our heroes done this at first, they might have been able to find Moneyarty sooner!

CHAPTER 3—THE END. FOR NOW...

Michael Ferragamo is the analytics strategist and contracts counsel with Lautman Maska Neill & Company. Having a broad range of experience, he works to ensure that data and words provide top-priority stewardship of nonprofit organizations and their constituents. He can be reached at mferragamo@lautmandc.com.

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

● **PebblePost**, a leading digital-to-direct mail marketing platform, has appointed two new executives, according to a press release. Cathy Mulrow Peattie has been appointed to lead general counsel, privacy officer and secretary, and Bridget Gola has been appointed senior VP of performance measurement and analytics. The two join the leadership team during a period of growth and expansion. “I am thrilled to welcome Bridget and Cathy to the PebblePost team,” Lewis Gersh, CEO of PebblePost, said in the release. “Both of their roles will be pivotal as we accelerate adoption and deepen our digital-to-direct mail marketing platform’s capabilities in critical areas like measurement and analytics.”

● **The Association of Fundraising Professionals** announced a new partnership with Salesforce.org, according to an AFP press release. The partnership will support AFP’s mission to advance effective fundraising in nonprofits globally through the provision of education and training and the promulgation of the highest ethical standards in the profession. “Fundraisers are agents of social change, and Salesforce.org’s philosophy is that everyone who wants to change the world should have the technology to do so. We are proud to welcome Salesforce.org as an AFP Partner and are excited about their support of our mission to advance philanthropy



through ethical and effective fundraising,” Mike Geiger, MBA, CPA, president and CEO of AFP, said in the release.

● **MSP**, a full-service direct mail production and marketing company, has purchased David J. Thompson Mailing Corporation. This includes the acquisition of the corporation’s full-service lettershop facility in Bloomsberg, Pa., according to a press release. MSP saw an opportunity to continue the corporation’s legacy when David Thompson discussed plans to retire. “The David J. Thompson Mailing Corporation has been a valuable partner with MSP for many years. We share a similar history and a similar culture. It made sense to continue our relationship and place David’s legacy in good hands,” Richard E. Busheé III, president of MSP, said in the release. The two companies will come together under the MSP name.

● Direct mail marketing platform **PFL** has teamed up with sales engagement platform Outreach to help sales reps boost conversion rates and accelerate time-to-close personalized direct mail packages, according to a press release. “With the click of a button, our users will be able to send personalized direct mail and custom gifts—all seamlessly integrated to ensure relevant and timely follow-up,” Mark Kosoglow, VP of Sales at Outreach, 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

Mentoring in the Modern Age

By Elise Buck



Mentorship is such an important aspect of both our personal and professional lives.

It begins when we are kids—our mentors are our parents,

grandparents, uncles, aunts, teachers, professors, coaches and counselors. These are people who inspire us and who we emulate as we figure out who we are. And

Kay Lautman (1938 - 2012) was a pioneer in the field of direct response fundraising. She was also a mentor to many in the field—a woman who recognized the critical importance of strengthening our industry by nurturing new talent. The DMAW/EF Kay Lautman Mentorship Award—presented every year at the Best of Direct—recognizes an individual, nominated by their peers, who has acted as an outstanding mentor and guide in the career of a direct response fundraising professional.

If you know of someone who merits this award, please take a moment to nominate them—it's quick and easy. Visit: www.dmawef.org/kay-lautman-mentorship-award for the application.

they are the people who help to guide us as we navigate our way into adulthood.

The need for mentorship doesn't stop once we enter the workforce. Without mentors, I would not be where I am today. As far back as I can remember, when I first began my career, there were many professionals who took me under their wings. They offered me



(Pictured left to right) Tiffany Neill, partner, Lautman Maska Neill & Company; Elise Buck; Rick Powell, president, DMAW/EF; and Mikela King, past president, DMAW

guidance and advice on how to improve my communication and personal skills, showed me how to develop a network, educated me on the importance of volunteering and helped me to learn as much as I could about the industry.

All of the mentors I had the honor of knowing inspired me to want to give back. It was because of them I was able to take others under my wing and show them the ropes. My mentors taught me the importance of taking up-and-coming colleagues to networking events and on client calls, always making sure to introduce them in a positive light. Through my mentors, I learned the importance of asking thought-provoking questions and providing experience and knowledge when forks in the road presented themselves. I learned how to lead by example.

When I received a call late last year informing me that I had been chosen to receive the 2019 DMAW/EF Kay Lautman Mentorship Award, I was blown away. I always knew that mentoring is one of the most valuable and rewarding experiences, for both the mentor and the mentee. I knew that mentors help cultivate the next generation of leaders. I knew that by recognizing talent in others, mentors can enrich careers.

But now to be nominated by your peers, as being someone who embodies all that, was a deeply honoring, flattering

and joyous experience, and one that I will always treasure. And as I reflected, I realized that beyond feeling honored, I also felt humbled. I was fortunate enough to have worked with Kay Lautman back in the late 80s early 90s, and I know firsthand

The DMAW/EF is committed to educating young people about careers in direct marketing and supporting them as they get involved in the industry. Recognizing that mentorship is a key component to success, the DMAW/EF sponsors the Mentor a Student for a Day program, where selected students visit the offices of participating organizations for a day to learn more about potential careers in direct marketing. If you would like more information about this program or the DMAW/EF in general, please contact Amy Steinbicker at administrator@dmawef.org.

what a very special lady she was. To be given an award in her name, knowing the incredible example she set before all of us, is truly something I can't even put into words. Thanks, Kay!

Elise Buck is director of client services at MailSmart Logistics. She can be reached at elise@mailsmartlogistics.com.

Member Spotlight

Meg Ferguson's first role in the industry was production management for Easter Seals and National Law Enforcement Memorial Fund, and she worked with Julie Dixon, who gave her opportunities and exposure to many aspects of nonprofit fundraising. The rest is history.

What made her stay in the sector was that she loved doing something that is so heavily rooted in both science and art. Her job gives her a daily opportunity to be creative, while having data and tangible outcomes to rely on and to make informed decisions. She is grateful to work with truly incredible organizations that help make our communities, our country and the world better.

DMAW Member Since: 2008

Who do you consider your mentors?

I am very grateful to have had many incredible mentors at various points in my career. They include Julie Dixon, Elise Buck, Holly White, Greg Albright and Ben Harris. Each of them has been instrumental in giving me greater perspective, leading by their incredible example and inspiring me to think bolder, do more and be tenacious with my goals. I am blessed to work in the company of so many remarkable individuals.

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

Get involved by volunteering. You will meet so many amazing people through volunteering—your network will expand astronomically, and you're sure to make some lifelong friends, too.



MEG FERGUSON
 Business Development Director
 Production Solutions
mferguson@psmail.com

I would also recommend seeking out additional responsibilities and new opportunities, especially ones that cause you to stretch. The people in this industry are among the most generous with their time and talent—there is always someone to help and support you in your career development.

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

In 2015, I earned my CFRE accreditation. I felt I was at a bit of a disadvantage never having worked for a nonprofit directly, so I took preparation for the exam very seriously. I learned so much through the AFP seven-week study course and through poring over textbooks and practice exams. It was all very helpful in providing me with a broader scope of philanthropic fundraising and, perhaps more importantly, perspective on all that nonprofits

must manage and contend with daily.

Tell us about your volunteer experiences with DMAW.

I started volunteering by speaking to the production segment of the DM101 educational program in 2008. I've contributed to other sessions over the years, as well as served as a MAXI judge for several years. I became a member of the DMAW board in 2017 and am the current programs co-chair.

Describe yourself in three words.

Driven. Empathetic. Grateful.

Describe your life in six words.

Full. Funny. Educational. Active. Rewarding. Messy!

Meg's Favorites



Restaurant Boatyard, The Point Crab House and Grill, and Vida Taco Bar



Films "Glory," "Pride and Prejudice" and "National Lampoon's Christmas Vacation"



Books "Unbroken" and "The Nightingale"



Music Bon Iver, The Lumineers, Mumford & Sons, The Oh Hellos, Ben Howard and so many more



Leisure Interests Spectating my sons' sports, reading, running, hiking and binge-watching a variety of guilty-pleasure series.



Quote "To laugh often and much; to win the respect of intelligent people and the affection of children; to appreciate beauty; to find the best in others; to leave the world a bit better, whether by a healthy child, a garden patch or a redeemed social condition; to know even one life has breathed easier because you have lived. This is to have succeeded."
 — Ralph Waldo Emerson

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

