

Data Hygiene & Data Processing

FUNDAMENTALS OF DATA HYGIENE AND DATA PROCESSING

ROSS FATE & JOHN BELL, MMI DIRECT

MARCH 23, 2023

Hello and Welcome Everyone!



Your Instructors:

Ross Fate
Senior Account Director
MMI Direct



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Vice President
MMI Direct

What you'll learn today:

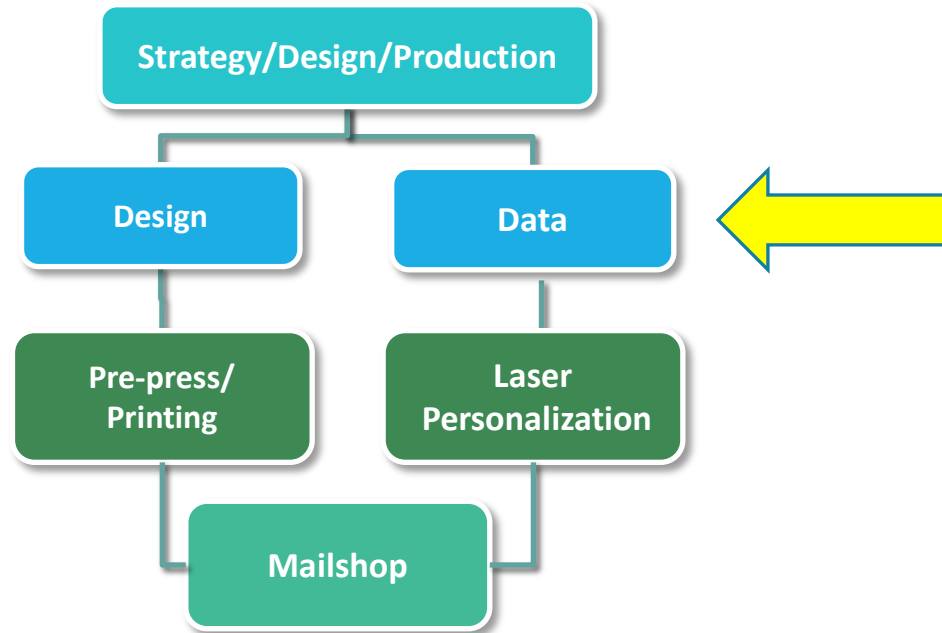
- Data Hygiene and Merge Purge processing
- Understanding the benefits of the information provided throughout the Data Hygiene and Merge Purge process and how to use this information to help you make good business decisions about your process.

Why is Data Hygiene So Important?

Clean and accurate direct mail data:

- ✓ Improves mail deliverability
- ✓ Gets your mail delivered faster
- ✓ Reduces your postage rates
- ✓ Reduces printing and mailing costs
- ✓ Improves your campaign and program performance

Where Data Fits into Your Project Workflow



Top Causes of Bad Data

Manual Data Entry into Your Databases:

Make sure input fields include standardization rules allowing only valid data types

Before:

Unit 500
900 South 7th Street
Philadelphia, PA 19121

After:

900 S 7TH ST APT 500
PHILADELPHIA PA 19122-4103

Rented Lists:

Responders to your acquisition mailings get added to your donor database. Data hygiene steps within your merge/purge processing ensure new donors join your file at the cleanest addresses possible.

Plus...

Data Collection Across Platforms



8 Levels of Data Hygiene



Tailor your data hygiene processes to your unique data set, strategy and program goals...

MMI DIRECT DATA HYGIENE CHECKLIST

1. **CASS Coding Accuracy Support System Certification** improves address accuracy.
2. **NCOA National Change of Address** keeps your direct mail list up-to-date with the 14% of Americans who move each year.
3. **PCOA Proprietary Change of Address** finds people who move who don't file a change of address notice with the USPS.
4. **Deceased Records Processing** Determine what makes sense for your organization and specific mailings.
5. **Prison Suppression** Unlikely to become donors or customers, these addresses are typically omitted from mailings.
6. **DMA Do Not Mail Preference (Pander) File** People who have directed the DMA to remove their names from direct mail lists should be omitted from acquisition mailings.
7. **Profanity Suppression** Screens out addresses containing inappropriate words or phrases.
8. **Donor File Dedupe** Identifies duplicate and potential duplicate records which can be consolidated or treated in the manner best determined by your organization.

Data Hygiene **Red Flags**

1. Review detailed reports to uncover anything that doesn't make sense
 2. Highlight suspected errors to investigate further
- **Weird things do happen!**
 - **We have stories!**



MMI Direct List Hygiene Report

File Code	Description	Segment	Input	Zip + 4	Zip +4 %	Zip Corr.	Zip Corr %	Moves With New Address	Moves Without New Address	Moves %	PCOA Moves With New Address	PCOA Moves %	Apt Number Appended / Corrected
L0414711	Lapsed	25-36 MONTHS, \$1-\$99.99	8,909	8,893	99.82	21	0.24	63	57	1.23	170	1.91%	41
L0414712	Lapsed	37-60 MONTHS, \$1-\$99.99	4,721	4,711	99.79	9	0.19	27	27	1.14	91	1.93%	18
L0414713	Lapsed	61-72 MONTHS, \$1-\$99.99	2,392	2,389	99.87	4	0.17	12	10	0.92	26	1.09%	12
L0414714	Lapsed	73-84 MONTHS, \$1-\$99.99	5,896	5,891	99.92	10	0.17	39	37	1.29	117	1.98%	27
L0414715	Lapsed	85-96 MONTHS, \$1-\$99.99	4,214	4,176	99.10	16	0.38	32	19	1.21	82	1.95%	39
L0414903	Lapsed	97-108 MONTHS, \$1-\$99.99	4,665	4,657	99.83	37	0.79	27	17	0.94	185	3.97%	23
L0414904	Lapsed	25-36 MONTHS, \$100-\$999.99	16,748	16,713	99.79	154	0.92	107	72	1.07	848	5.06%	77
L0414905	Lapsed	37-60 MONTHS, \$100-\$999.99	10,415	10,405	99.90	62	0.60	70	50	1.15	497	4.77%	48
L0414906	Lapsed	61-72 MONTHS, \$100-\$999.99	9,683	9,674	99.91	65	0.67	51	25	0.78	449	4.64%	42
L0414907	Lapsed	73-84 MONTHS, \$100-\$999.99	21,146	21,123	99.89	149	0.70	98	108	0.97	1,120	5.30%	112
L0414908	Lapsed	85-96 MONTHS, \$100-\$999.99	12,422	12,411	99.91	93	0.75	61	52	0.91	620	4.99%	56
L0414909	Lapsed	97-108 MONTHS, \$100-\$999.99	7,479	7,470	99.88	54	0.72	30	33	0.84	331	4.43%	36
L0414910	Lapsed	25-36 MONTHS, \$1000+	17,758	17,741	99.90	97	0.55	93	65	0.89	822	4.63%	118
L0414911	Lapsed	37-60 MONTHS, \$1000+	43,106	43,066	99.91	284	0.66	200	199	0.93	1,909	4.43%	218
L0414912	Lapsed	61-72 MONTHS, \$1000+	36,246	36,222	99.93	236	0.65	159	140	0.82	1,638	4.52%	168
N0414155	Non Donor	25-36 Months	9,152	9,100	99.43	70	0.76	72	27	1.08	186	2.03%	90
N0414455	Non Donor	37-60 Months	24,653	24,384	98.91	180	0.65	166	50	0.88	841	3.41%	199
N0414555	Non Donor	61+ Months	26,395	26,315	99.81	95	0.36	158	59	0.82	933	3.54%	181
N0414463	House Test List 1	All	39,901	39,409	98.77	25	0.06	7,303	398	19.30	2,078	5.21%	250
N0414464	House Test List 2		98,021	98,927	99.91	15	0.02	6,879	847				
72784	List 1	L12	109,208	109,178	99.97	3	0.00	1,154	1,005				
72825	List 1	L13-24 \$10+	15,006	15,001	99.97	0	0.00	211	144				
72785	List 2	L7 - 12 \$5+	99,826	99,121	99.29	15	0.02	3,933	998				
72786	List 3	L24 \$10+	63,544	63,522	99.97	11	0.02	233	198				
72787	List 4	L12 \$10+	80,272	80,252	99.98	13	0.02	177	116				
72788	List 5	L18 \$10.00-99.99	3,629	3,622	99.81	0	0.00	15	21				
72819	List 6	L12 \$10+	15,011	15,008	99.98	5	0.03	26	61				
72789	List 7	L18	6,500	6,493	99.89	5	0.08	36	21				
72790	List 8	\$5+ Donors	35,010	34,819	99.45	10	0.03	176	102				
72823	List 9	Active Donors	15,000	14,949	99.66	5	0.03	257	82				
72791	List 10	L24 \$10+	3,484	3,484	100.00	0	0.00	25	50				
73102	List 10	L24 \$0-4.99	26,524	26,514	99.96	0	0.00	274	327				
72792	List 11	L12 \$5+	10,006	10,006	99.94	3	0.01	79	80				
72793	List 12	L3	10,006	10,006	99.93	1	0.00	141	347				
72794	List 13	L13-24 \$10+	10,006	10,006	99.93	3	0.02	92	71				
72795	List 13	L12 \$5+	10,006	10,006	99.93	3	0.01	109	102				
72816	List 14	L12 \$10+	10,006	10,006	99.93	2	0.01	310	248				
72821	List 15	L12 \$5+	10,006	10,006	99.93	0	0.06	28	20				
72796	List 16	L12	10,006	10,006	99.93	0	0.03	158	942				
72797	List 17	L12	10,006	10,006	99.93	0	0.00	345	329				
72798	List 18	L12	10,006	10,006	99.93	0	0.00	84	40				
72799	List 19	L12	10,006	10,006	99.93	0	0.00	178	418	1.24	631	1.31%	362
72800	List 20	L12	10,006	10,006	99.93	0	0.01	1,903	1,178	4.01	1,324	1.72%	354
72801	List 20	L12	10,006	10,006	99.93	0	0.00	210	281	1.96	425	1.70%	99
72803	List 21	L12	10,006	10,006	99.93	0	0.00	209	151	1.12	207	0.64%	34
72802	List 21	L12	10,006	10,006	99.93	0	0.00	160	117	0.86	188	0.58%	29
72804	List 22	L12	10,006	10,006	99.93	0	0.01	35	23	0.31	408	2.21%	186
72818	List 23	L12	10,006	10,006	99.93	0	0.00	443	176	3.97	322	2.06%	145

TIP: Issues might be hidden in total job percentages so look at hygiene stats for individual lists

Individual List Hygiene Report:
 Lapsed Donors
 Active Donors
 Non-Donor House Files
 Outside Prospect Lists



MMI Direct List Hygiene Report

File Code	Description	Segment	Input	Zip +4	Zip +4%	Zip Corr	Zip Corr%	Moves With New Address	Moves Without New Address	Moves %	PCOA Moves With New Address	PCOA Moves %	Apt Number Appended / Corrected
L0414711	Lapsed	25-36 MONTHS, \$1-\$99.99	8,909	8,893	99.82	21	0.24	53	57	1.23	170	1.91%	41
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L0414905	Lapsed	37-60 MONTHS, \$100-\$999.99	10,415	10,405	99.90	62	0.60	70	50	1.15	497	4.77%	48
L0414906	Lapsed	61-72 MONTHS, \$100-\$999.99	9,683	9,674	99.91	65	0.67	51	25	0.78	449	4.64%	42

Analyze:
 Zip +4/Corrections
 Moves %
 PCOA Moves %
 Apt Number Appends/Corrections

Are Any Counts or Percentages Suspicious?

What Names & Addresses Should You Omit from Your Mailing?

It depends on your situation and strategy.

- Deceased
- NCOA Undeliverable Name/Addresses (“Nixies”)
- Prisons
- No Zip+4
- Company records without individual name
- Temporary Moves
- Unique ZIPs
- Disaster areas
- Profanity/Buzzwords
- Vacant Lots





USPS Address Hygiene Services

Address Change Service (ACS)

- After your mailing drops, the USPS provides any change-of-address and other non-delivery info to you electronically.

Benefits:

- Reduces returned mail and cost/time of manual corrections to your database
- Save money on future mailings by removing bad addresses
- Corrected addresses can be delivered faster in upcoming mailings

Address Element Correction (AEC)

- Identifies and corrects addresses missing address elements or with incorrect elements which may delay or prevent delivery



Pro Tips from Ross



Run NCOA more frequently due to increase in moves

Example:

In Q4 2020, a nonprofit ran NCOA process three weeks after initial run and saw 60% increase in moves between to two runs.

In 2022, population migration continues.



Acquisition Data Merge Purge

1. Acquisition Data Merge/Purge Strategies & Processes
2. Merge/Purge Reporting
3. Post Merge Processing

Definition: Merge/purge

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



Unduplication Strategies



- *Tailor your merge/purge processes to the types of files in your acquisition data set and your unique program requirements.*

List Priorities

Which record should be retained when duplicates are identified?

Criteria to consider when assigning list priorities:

List Ownership

**List Cost/Exchange
Agreements**

**List Type:
Test, Retest,
Continuation**

Unduplication Levels

Who will receive a mail piece using the following levels?

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

Match Criteria to Eliminate Duplicates

Tight:
Allows for very few variations

Medium:
Allows for moderate variations

Loose:
Allows for many variations

Match process interrogates each element of the name, organization, address line, city, state and zip.

Adjust or tweak the unduplication + match criteria depending upon List Type.

Customized strategies for different list groups. Test, test, test!

Name/Address Match Process Examples

Marvin Dawson
988 Cattails Drive
Ooltewah, TN 37363

Marvin Dawson
989 Cattails Drive
Ooltewah, TN 37363

Janet Dawson
98 Cattails Drive
Ooltewah, TN 37363

Janet Carter-Dawson
988 Cattails Drive
Ooltewah, TN 37363

L M Dawsonville
9 Cat Drive
Ooltewah, TN 37363

MMI Direct Merge Purge Summary Report

File Code	Description	Segment	Merge Purge Input	Multi Drops	Single Drops	Suppression File Drops	Single-Buyer Output	Multi-Buyer Output	Merge Purge Output	Percent Kept
SUPPRS	Suppression File	Suppression File	486,681	0	0	0	0	0	0	0.00%
SUPPOL	Hygiene Changes Original Record	Suppression File	69,545	0	0	0	0	0	0	0.00%
L0414711	Lapsed	25-36 MONTHS, \$1-\$99.99	8,451	7	1	133	4,358	3,952	8,310	98.33%
L0414712	Lapsed	37-60 MONTHS, \$1-\$99.99	4,452	5	0	101	2,028	2,318	4,346	97.62%
L0414713	Lapsed	61-72 MONTHS, \$1-\$99.99	2,268	2	1	49	1,027	1,189	2,216	97.71%
L0414714	Lapsed	73-84 MONTHS, \$1-\$99.99	5,587	6	2	104	2,653	2,822	5,475	98.00%
L0414715	Lapsed	85-96 MONTHS, \$1-\$99.99	3,978	5	2	96	2,103	1,772	3,875	97.41%
L0414903	Lapsed	97-108 MONTHS, \$1-\$99.99	4,057	27	3	133	3,083	811	3,894	95.98%
L0414904	Lapsed	25-36 MONTHS, \$100-\$999.99	14,809	51	33	402	12,514	1,809	14,323	96.72%
L0414905	Lapsed	37-60 MONTHS, \$100-\$999.99	9,024	79	5	303	6,804	1,833	8,637	95.71%
L0414906	Lapsed	61-72 MONTHS, \$100-\$999.99	8,298	65	1	265	5,920	2,047	7,967	96.01%
L0414907	Lapsed	73-84 MONTHS, \$100-\$999.99	18,887	78	21	442	15,123	3,223	18,346	97.14%
L0414908	Lapsed	85-96 MONTHS, \$100-\$999.99	10,837	61	2	284	7,966	2,524	10,490	96.80%
L0414909	Lapsed	97-108 MONTHS, \$100-\$999.99	6,347	38	1	230	4,467	1,611	6,078	95.76%
L0414910	Lapsed	25-36 MONTHS, \$1000+	15,785	66	10	290	11,397	4,022	15,419	97.68%
L0414911	Lapsed	37-60 MONTHS, \$1000+	37,922	156	33	834	28,083	8,816	36,899	97.30%
L0414912	Lapsed	61-72 MONTHS, \$1000+	31,151	130	22	771	22,496	7,732	30,228	97.04%
N0414155	Non Donor	25-36 Months	8,706	137	54	165	5,389	2,961	8,350	95.91%
N0414455	Non Donor	37-60 Months	22,664	178	62	710	18,008	3,706	21,714	95.81%
N0414555	Non Donor	61+ Months	23,763	183	50	786	16,578	6,166	22,744	95.71%
N0414463	House Test List 1	All	37,669	1,549	2,182	545	32,308	1,085	33,393	88.65%
N0414464	House Test List 2		91,191	532	168	590	83,964	5,937	89,901	98.59%
72784	List 1	L12	105,381	16,088	56	5,708	74,094	9,435	83,529	79.26%
72825	List 1	L13-24 \$10+	14,149	1,679	3					
72785				17,416	226					
72786				24,229	6					
72787				17,706	118					
72788				1,499	0					
72819				3,075	1					
72789				1,851	2					
72790				11,287	19					
72823				2,546	14					

Any lists that fall outside the accepted verification parameters should be reviewed. Then a determination is made regarding the integrity of the merge purge process and any prior processing.

- Watch out for:
- Significant variance between ordered and received quantities
 - Unusually high number of omits
 - Unusually high (or low) hits against another list or suppression file

Analyze List Interaction with the Match Analysis Report

MMI Direct Match Analysis Matrix

Threshold:

	SUPPRS	SUPPOLD	L0414711	L0414712	L0414713	L0414714	L0414715	L0414903	L0414904	L0414905	L0414906	L0414907	L0414908	L0414909	L0414910
SUPPRS	11.5	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.0	0.1
SUPPOLD	20.3	9.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414711	1.6	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414712	2.3	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414713	2.2	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414714	1.8	0.0	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414715	2.4	0.0	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414903	3.2	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414904	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414905	3.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414906	3.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414907	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414908	2.6	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414909	3.6	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414910	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414911	2.2	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
L0414912	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
N0414155	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
N0414455	3.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
N0414555	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
N0414463	1.3	0.0	0.3	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
N0414464	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72784	5.4	0.0	0.2	0.1	0.1	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72825	3.1	0.0	0.2	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72785	10.3	0.1	0.4	0.3	0.1	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72786	27.2	0.1	1.3	0.8	0.4	0.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72787	11.1	0.0	0.5	0.3	0.2	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72788	35.4	0.1	1.6	1.2	0.9	1.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72819	8.6	0.0	0.3	0.2	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
72789	12.4	0.1	0.6	0.2	0.1	0.4	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

AG	AH	AI	AJ	AK	AL	AM
0.1	0.2	1.9	0.5	0.4	0.5	0.8
0.2	0.3	2.7	0.9	0.6	0.7	1.1
0.1	0.0	0.1	0.1	0.1	0.1	0.0
0.1	0.0	0.2	0.1	0.4	0.1	0.2
0.7	0.1	0.8	0.7	0.2	0.6	1.5
0.7	0.0	0.6	0.5	0.2	0.6	0.9
0.1	0.2	1.3	1.3	0.9	1.3	2.0
0.6	0.7	5.0	13.2	1.9	8.8	18.5
0.2	0.2	1.9	2.8	0.7	1.7	4.3
0.8	1.0	8.1	12.3	2.7	8.9	19.9
0.3	0.2	1.4	2.7	0.7	0.9	2.9
4.6	0.1	1.0	1.4	0.8	1.2	2.0
4.3	0.2	2.6	4.0	1.3	3.8	6.4
0.1	0.1	0.6	1.2	0.4	0.9	2.2
0.5	0.0	58.1	72791 List 10	1.3	3.3	9.6
0.3	7.8	0.2	L24 \$10+	1.4	3.9	7.4
0.7	0.7	5.4	73102 List 10	2.3	6.7	21.1
0.3	0.2	1.5	L24 \$0-4.99	0.2	1.7	2.5
0.8	0.6	5.6	9.6	2.4	0.1	1.9
1.1	1.1	6.1	17.3	2.0	1.1	0.5
0.2	0.0	0.3	1.5	0.5	0.7	1.1
0.6	0.9	5.1	29.2	2.9	8.6	34.7
0.4	0.3	2.4	7.1	1.5	2.4	6.7
0						5.7
0						1.9
2						3.6
0						1.6
0						2.3
0						8.0
0						3.5
4						6.3
0						4.3
2						3.4
0						2.4
0						1.2
0						2.5

Same List
Different Select
Major Overlap
Investigate Further!

MMI Direct Multibuyer Summary Report

File Code	Description	Segment	MLT-BUYRS	2-TIME	3-TIME	4-TIME	5-TIME	6-TIME	7-TIME	8-TIME	9-TIME +
L0414711	Lapsed	25-36 MONTHS, \$1-\$99.99	3,952	1,787	968	515	266	189	119	54	54
L0414712	Lapsed	37-60 MONTHS, \$1-\$99.99	2,318	880	558	355	229	125	74	47	52
L0414713	Lapsed	61-72 MONTHS, \$1-\$99.99	1,189	484	285	173	93	66	41	24	23
L0414714	Lapsed	73-84 MONTHS, \$1-\$99.99	2,822	1,187	734	402	230	136	68	40	25
L0414715	Lapsed	85-96 MONTHS, \$1-\$99.99	1,772	858	450	240	111	69	22	8	14
L0414903	Lapsed	97-108 MONTHS, \$1-\$99.99	811	443	198	82	42	24	8	10	4
L0414904	Lapsed	25-36 MONTHS, \$100-\$999.99	1,809	1,236	321	130	76	27	7	9	3
L0414905	Lapsed	37-60 MONTHS, \$100-\$999.99	1,833	1,053	389	186	104	47	20	17	17
L0414906	Lapsed	61-72 MONTHS, \$100-\$999.99	2,047	1,096	449	221	127	62	53	19	20
L0414907	Lapsed	73-84 MONTHS, \$100-\$999.99	3,223	1,995	658	299	129	63	41	19	19
L0414908	Lapsed	85-96 MONTHS, \$100-\$999.99	2,524	1,440	528	289	113	85	31	20	18
L0414909	Lapsed	97-108 MONTHS, \$100-\$999.99	1,611	843	355	175	112	60	31	15	20
L0414910	Lapsed	25-36 MONTHS, \$1000+	4,022	2,249	850	435	231	121	67	33	36
L0414911	Lapsed	37-60 MONTHS, \$1000+	8,816	4,876	1,991	897	495	268	143	86	60
L0414912	Lapsed	61-72 MONTHS, \$1000+	7,732	4,136	1,696	870	474	249	161	76	70
N0414155	Non Donor	25-36 Months	2,961	1,310	716	433	243	133	67	35	24
N0414455	Non Donor	37-60 Months	3,706	2,217	766	369	184	83	47	19	21
N0414555	Non Donor	61+ Months	6,166	3,542	1,372	627	310	163	84	31	37
N0414463	House Test List 1	All	1,085	884	149	31	12	4	1	4	0
N0414464	House Test List 2		5,937	4,448	939	317	128	59	27	12	7
72784	List 1	L12	9,435	7,160	1,526	467	188	74	21	8	15
72825	List 1	L13-24 \$10+	1,051	837	147						
72785	List 2	L7 - 12 \$5+	7,885	5,979	1,244						
72786	List 3	L24 \$10+	8,666	4,699	2,000						
72787	List 4	L12 \$10+	8,935	6,406	1,529						
72788	List 5	L18 \$10.00-99.99	398	196							
72819	List 6	L12 \$10+	1,626	1,235							
72789	List 7	L18	844	568							
72790	List 8	\$5+ Donors	4,097	2,437							
72823	List 9	Active Donors	1,239	868							
72791	List 10	L24 \$10+	598	322							
73102	List 10	L24 \$0-4.99	3,084	1,850							
72792	List 11	L12 \$5+	3,388	1,798							
72793	List 12	L3	2,135	1,596							
72794	List 13	L13-24 \$10+	2,331	1,176							
72795	List 13	L12 \$5+	3,803	1,800							

Multi-Buyer names appear on more than one acquisition list. These individuals have contributed to multiple organizations and typically perform better than individuals who appear on only one acquisition list. What is the best way to cultivate multi-buyers?

Innovative Ways to Optimize Your Merge



Multi-Buyer Strategies

Ask String Optimization

Removing Non-Responders

Try this Multi-Buyer Strategy

Multi-buyer names can be mailed in subsequent mailings.

Try mailing the second record in household dupe groups:

If you've identified these dupes in your merge, instead of mailing **John** in both the main and multi drops, try mailing **Mary** in the multi drop.



John Smith – retained

Mary Smith – dropped

Gift Ask String Optimization

- Many acquisition mailings use the same static gift amounts for every prospective donor on reply devices and in letter copy.
- You can customize the suggested donation amounts for each prospect, based upon their giving history, to maximize revenue.

Example:

Jane Smart:

\$30 \$40 \$50 My Best Gift \$

John Smith:

\$25 \$35 \$50 My Best Gift \$

Remove Non-Responders

- You can remove records from your merge list that are unlikely to respond.
- Modeling providers can identify these names, based upon past behavior data.
- You can replace these names with records that are likely to respond.
- *Additional method: Build a chronic non-responder file to use as a suppression file.*



Post Merge Processing

- ✓ Key Coding and Package Splits
- ✓ Seeds
- ✓ Formatting – Upper/Lower casing, punctuation
- ✓ Title code assignment
- ✓ Salutation build
- ✓ Finder number/scanlines
- ✓ Presorting for postal discounts
- ✓ Matchback analysis: multi-channel attribution report (track direct mail recipients who give online)

Pro Tips from Ross

Apply hygiene results to your database/CRM:

- NCOA Moves
- PCOA Moves – not recommended for active records
- NCOA Nixies
- ZIP corrections
- Deceased

SMART!



Pro Tips from Ross



Get involved in your merge/purge strategy and process!

Collaborate with your fundraising strategists, list broker and merge/purge provider to customize the process to meet your goals.

Merge/purge processing is not a commodity! It's a critical part of your donor prospecting strategy.

Thank you for joining us today!



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