Direct Mail Appeals Playbook

This playbook will help you use Dataro to include the right donors in your next Direct Mail Appeal for the best projected returns.

Smarter Fundraising for a Better World

1 **Select your optimal mailing list size**

- Login to the <u>Dataro App</u> and go to the homepage to find your recommended campaign size. Dataro calculates this using predicted responses to estimate the campaign size likely to yield the largest net return.

Campaign Size Suggestions

How do we create these suggestions?

DM Appeal
16,000 Total Appeal Volume
Learn more about DM Appeal

DM Appeal >$500
1,600 Total Appeal Volume
Learn more about DM Appeals

DM 24M Lapsed
800 Total Appeal Volume
Learn more about DM Appeals

Recommended campaign size

RG Churn
Contact 500 RG Donors per month
Learn more about RG Churn Campaigns

RG Upgrade
Contact 300 RG Donors per month
Learn more about RG Upgrade Campaigns

RG Reactivation
Contact 250 Lapsed RG Donors per month
Learn more about RG Reactivation Campaigns

How to build a campaign list using Dataro Ranks and Scores in Blackbaud CRM

2 Add the donors most likely to give to your campaign

- Using the 'Dataro DM Appeal Rank' field, add all donors with a rank equal to less than your desired list size to the campaign. E.g, if you desired list size is 10,000, select all donors with a rank <=10,000

Select desired list size using the 'DM Appeal Rank'.

Dataro DM Appeal Rank

This value

Less than or equal to

10,000

Apply   Clear   Cancel

Example shows query in RE NXT

Apply your normal mailing exclusions

- What if there are donors selected by Dataro that you don't want to mail? E.g. they have a 'Do Not Mail' or are usually excluded for another reason? That's fine. Just apply your normal exclusions to this list.

Apply your normal exclusions for that campaign to the list

Exclude solicit codes

Find in this list

☐ Show inactive

Select all   Clear all   ☑ Only show selected items

☑ Do not mail

☑ No mail temporarily

☑ Spring mailing only

Apply   Clear   Cancel

Example shows query in RE NXT

4   Adjust your list back to the recommended size

- After you've applied exclusions, your list will be smaller than Dataro's recommendation. Adjust your query to add the next-best ranked donors to get back to the recommended size. E.g, adjust your selection from the top 10,000 to the top 15,000 ranked donors.

Adjust your query replace donors who were excluded. Your final list size should be close to Dataro's recommended list size

Dataro DM Appeal Rank

This value ⇕

Less than or equal to ⇕

15,000

Apply   Clear   Cancel

Example shows query in RE NXT

5 **Optional: Add a mid-value segment**

- Now we want to make sure we've captured all of the donors who might give a larger amount using the DM Appeal >$500 Rank. This filter should be 1/10th the size of your original query. So if your DM Appeal Rank query selects the top 15,000 donors, the DM Appeal >$500 Rank should capture the top 1,500 donors.

The mid-value segment query should be 1/10th the size of your original query

Dataro DM Appeal >$500 Rank

This value

Less than or equal to

1,500

Apply   Clear   Cancel

Example shows query in RE NXT

6 **Optional: Add a reactivation segment**

- Do you want to include more 24+ months lapsed givers? Use the DM 24M Lapsed model to select the lapsed donors who are now most likely to give. Use the size suggestion from the home page in your Dataro App.

Use the Dataro App to identify how many 'lapsed' donors we suggest adding to the campaign

Dataro DM 24M Lapsed Rank

This value ⬍

Less than or equal to ⬍

1,000

Apply   Clear   Cancel
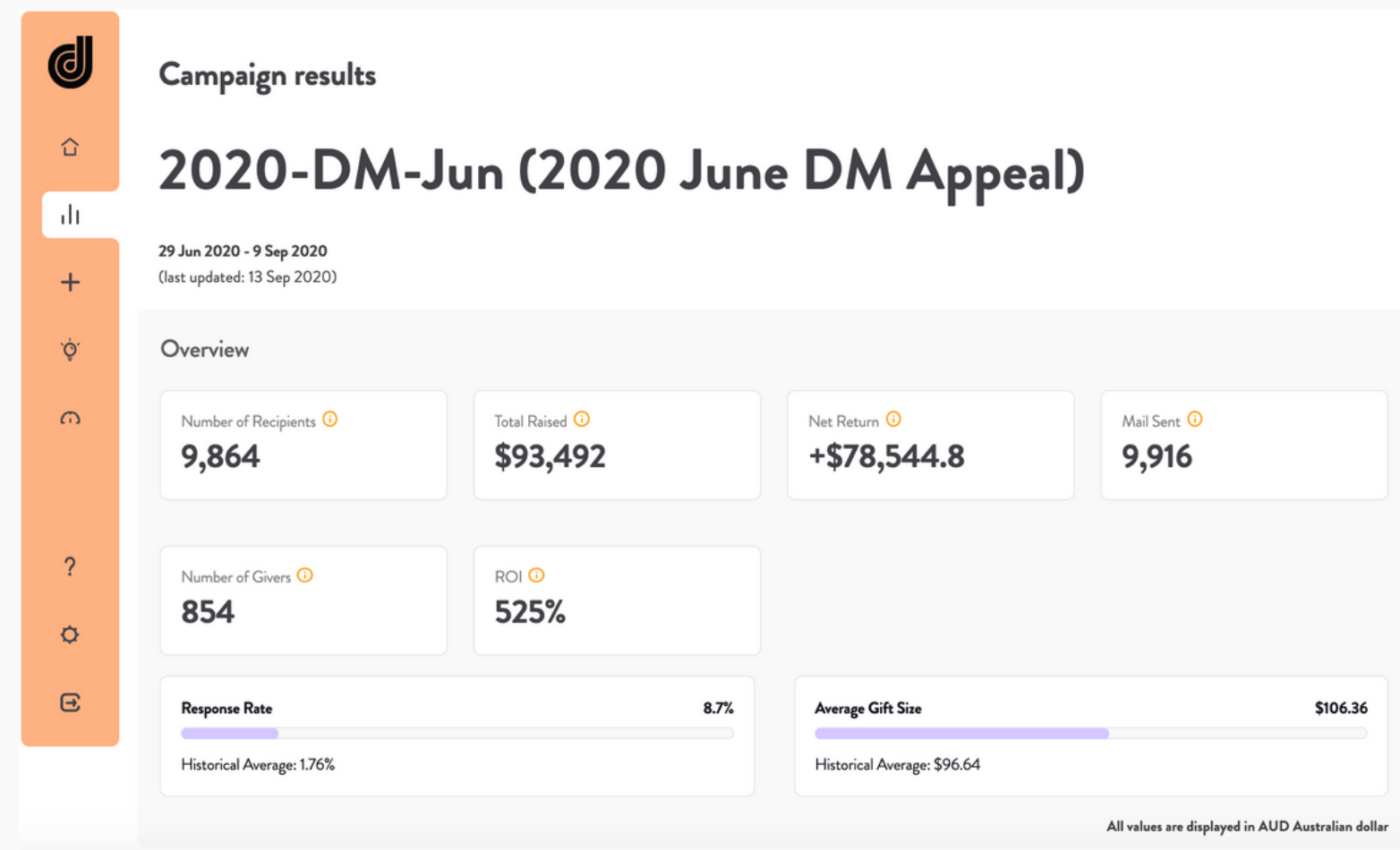
Example shows query in RE NXT

7 **Finalise your mailing file & track appeal results**

- Now you've created an optimised DM Appeal list for the best predicted net return. Easy! Follow your usual process to finalise your mailing file. Once the campaign is live, track results in your Dataro App account.

Don't forget to log in to your Dataro App to get automatic campaign results reporting

Campaign results

2020-DM-Jun (2020 June DM Appeal)

29 Jun 2020 - 9 Sep 2020
(last updated: 13 Sep 2020)

Overview

Number of Recipients ⓘ	Total Raised ⓘ	Net Return ⓘ	Mail Sent ⓘ
9,864	$93,492	+$78,544.8	9,916

Number of Givers ⓘ	ROI ⓘ
854	525%

Response Rate — 8.7%
Historical Average: 1.76%

Average Gift Size — $106.36
Historical Average: $96.64

All values are displayed in AUD Australian dollar

Keep reading for more tips and tricks to run better Direct Mail Appeals...

Direct Mail Appeal Tips & Tricks

- Want to compare Dataro's optimised list against your classic segments? You can <u>follow our instructions</u> to create an A/B Test and measure the ROI Dataro brings to your DM Appeals.
- Use the DM Appeal >$500 Rank to select which donors receive your mid-level or premium mailing packs
- Remove the least likely givers and save on print/postage (plus wasted paper!)
- Focus on maximum net returns by cutting the the size of your Wave 2 or Wave 3 mailings by 50% or more, so only the most likely givers receive multiple letters
- Use the DM 24M Lapsed model to find the lapsed single givers more likely to reactivate and add them to the appeal. Simply create a new query following the same steps you've seen in this playbook.
- Advanced users can also create Dataro-specific 'packages' in their CRM, so you can measure the additional value generated from extra donors Dataro finds in your database.

dataro

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