# 

The Art of Personalized Communication



#### Anne Curosh

Director of Advancement Alpha Chi Omega Foundation



### Jon Van Oss

Director of Analytics Pledgemine



### Pledgemine has joined the EverTrue family!

# About Anne...

9 years in fundraising - major gifts and annual giving experience

Alpha Chi Omega Foundation

Lives in Fishers, Indiana with her husband, Kevin and daughter, Sophia



# About Jon...

30+ Years Working for Non-Profits, both on staff and in a consulting role

Primarily focused on Database Marketing and DB Analytics

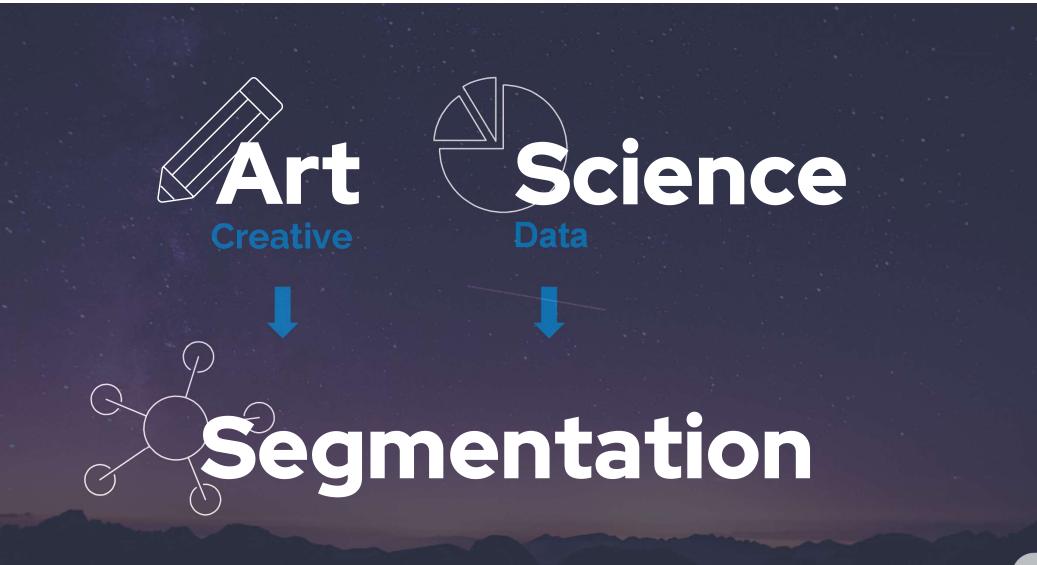
Analyzed 200+ Non-Profit Databases Across All Segments



# What is **Segmentation**?

**Definition:** Segmentation means to divide the marketplace into parts, or segments, which are definable, accessible, actionable, and profitable and have a growth potential.





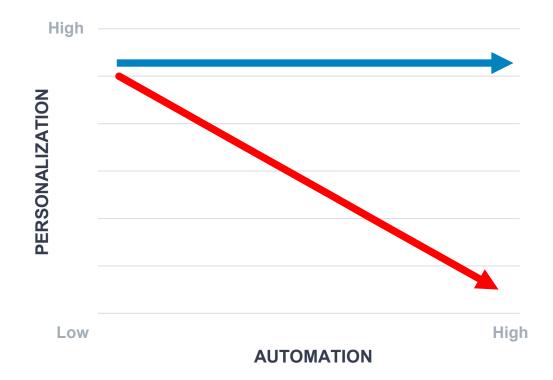
# **Benefits:**

- Create stronger marketing
   message
- Identify the most effective marketing tactics
- Design hyper-targeted solicitations
- Attract (and convert) quality leads



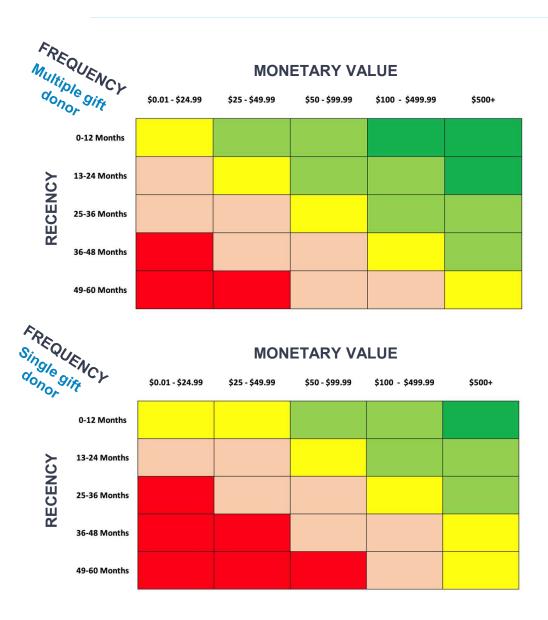
# **Personalization vs Automation**

- Historically, the higher the level of automation, the less personal the message
- Segmentation allows for high personalization, even with high automation



# **Beyond** Traditional RFM

- Recency how long since the donor's last gift
- Frequency how many gifts does the donor give (per year, lifetime)
- Monetary Value What is the size of the donor's largest gift, annual giving, etc.



# **Segmentation**

• Digital printing supports maximum segmentation



# Segmentation

- Digital printing supports maximum segmentation
- Variable text and images within the context of a design
- Personalize your messages without paying more
- Segments can be identified using multiple data markers



# Alpha Chi Omega Other Ways to Segment

### Valentine's Card

- Focus on stewardship
- Two segments looking at multiple categories



### **Day of Giving Postcard**

- Annual giving initiatives
- Three segments
- QR code on postcard vs. reply envelope

1 hope you'll join me for this year's Day of Giving on April 67, 2022! As a Foundation Partner, you can make your gift now and be one of the first to receive your donor number.

When you give, you'll join sisters for 1 day, 8 hours and 85 minutes to #AXOempower! Your support makes an uncommon impact on Alpha Chi Omega and allows us to respond to the needs of today's members with programming and opportunities to succeed, lead and serve.

Thank you for your continued commitment to the Alpha Chi Omega Foundation. We couldn't do what we do without you!

Loyally, Anne Curosh Alpha Beta (Purdue University) Associate Director of Annual Giving

P.S. Join me in being one of the first to give. Scan the QR code on the front of this postcard or visit give.alphachiomega.org/DGRSW to



# **Special Report**

- Over 140 segments based on donor chapter
- Hard ask vs. soft ask in past fiscal year
- Play off annual impact report in fall



# Calendar Year End Appeal

- Project journeys
- Alternating solutions for fiscal year



### **Impact Postcard**

- Two segments
- Stewardship focus

#### Thank you!

- Women.<sup>®</sup> Fund, creating transformational Empowering Real, Strong Wormen...



5939 CASTLE CREEK PARKWAY N. DR. INDIANAPOLIS, IN 46250

NON-PROFIT ORG

U.S. POSTAGE PAID

FOX VALLEY, IL PERMIT NO. 267

# Personal Relationship

- Student Callers
- Scholarship Recipients
- Assigned Advancement Officer



# **Personal Profiles**

- Additional personalization on top of segmentation and variable data
- Include picture, major, grade level, personal statement, and custom fields
- Can be used for student callers. development officers, student athletes, scholarship recipients, and more!

Personal statements that are editable by you:

Thank you for speaking with me, and I really appreciate your pledge of \$50! I came to Charter University to study mathematics and have been enriched by the wonderful community I have found here... -Scott

> Inston Chicago, IL

sophomore • Atlanta, GA

scott Black

#### **University of North Georgia Foundation**

- Unlimited student profiles with personal messages
- On demand mailing and dynamic test
- Potential for peer-topeer solicitations and stewardship



One st

# **Demographics**

- Age
- Gender
- Income
- Extracurricular



#### **Samford University**

- **Reunion Invite** Campaign
- Photos taken from associated yearbook
- Reminds alumni of their college experience



# In 1870 you were oncouraged to "keep it moving," Fifty years later, the world has offered us a rare opportunity to partae, with pause offer comes time to reflect on the past and the parts and the p

FOREVER SAA



#### Homecoming Weekend Saturday, November 14 9-10 a.m. CT

Join your fellow Class of 1970 alumni through Zoon to onely up on all that's teppened direct 1970 while reliving the benchmarks from your time 1830 while Share monories with classenaties and entilisted wit photos from your Semitori days.

Dr. Andraw Westmareland, prosident of Samford University, Randy Pittman, vice president for university advancement, and Stephan Dillard, president of the Samford University Automai Association, will also join the tun.

Register today so your classmates will know you will be part of the celebration. We look forward to virtually seeing you on Zoom for your 50-year reunion!

Need help with technology? Call us, we can help. 205-726-4371

For reuniting. For foundation building. For growing, Foreve

Your gift Samford's future.

#### Your pirts conve as the building blocks for our solid foundation. Each block building blocks for our solid and converse the university building block of the and converse solid and conversion our students that strengthens the solid conversion of the strengthener to the solid block of the solid block of the solid year. your impact and your Samford. Forever begins now!

13 Yes, / will attend th Email

students with a gift o

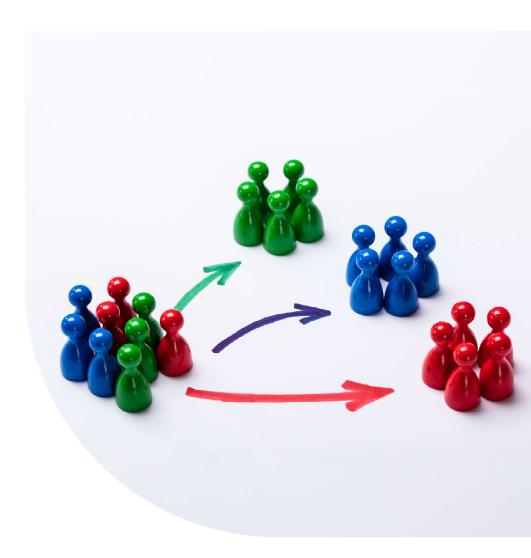
D \$1 m

Make it Simple. Make it Forever the Beeson Society with recurring gift is a great way to help Samford by recurring gift is a great way to help Samford by providing steady, reliable funding through monthly, quarterly or annual giving to the University A month of fun Samford socks.

Keep your record current!

# Donor Preference

- Channel
- Seasonality
- Giving Frequency



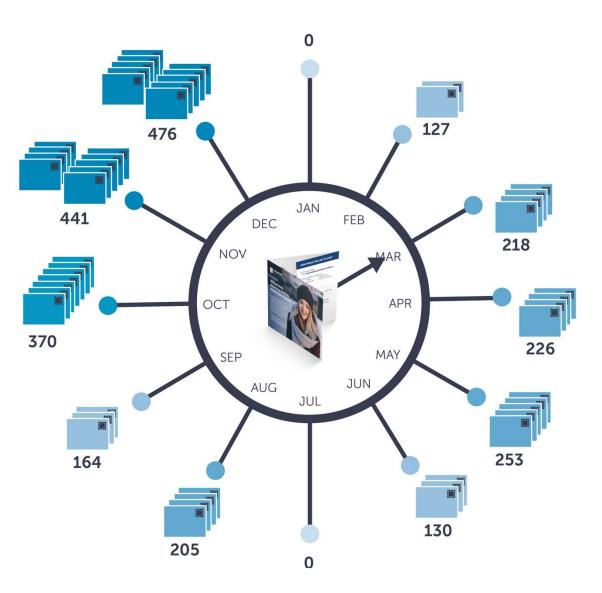
**Charter University** 

- Behavior Based sent when the donor is most ready to give
- Highly Personalized images and text can be targeted to individual donor
- Seamless across multiple channels



# Monthly Giving Invites

- Timed to arrive shortly after a donor's 2<sup>nd</sup> gift
- Mailed with any frequency
- No Minimums



# Combining

- Gender & Personal Relationships
- Age & Affinity
- Affinity & Donor Status



#### Western Illinois University

- Common specifications: Letter in 6" x 9.5" Window Envelope
- Department Head feature changes per segment

### **ROI** of \$1 for every 12.5 cents (8:1) spent in the recent year 🗾

Tim Hallinan • Western Illinois University

#### 45 departments

- x Donors vs Non-Donors
- **90** segments =



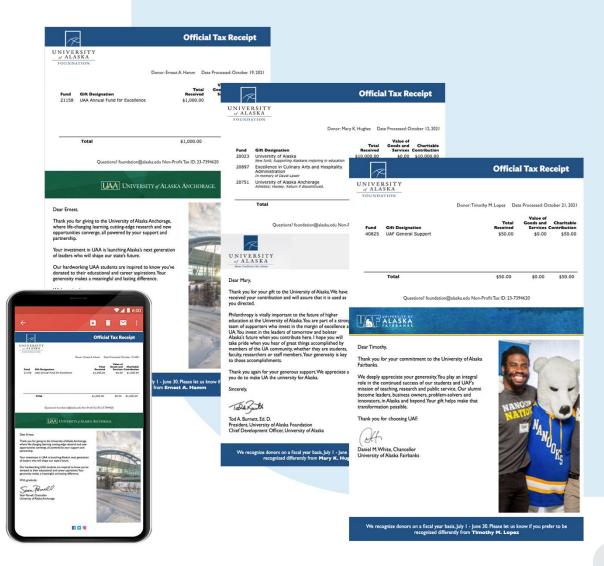
# Segmentation within Emails

- Impact Emails
- Thank You Email
- Tax Receipt Email



#### **University of Alaska**

- Tax Receipts emailed to donors
- Segment by campus
- Additional segment to exclude those who want paper copy
- Additional project setup in letter form (Omnichannel by donor preference)







### Kristine Barker

Annual Fund Director La Sierra University

kbarker@lasierra.edu



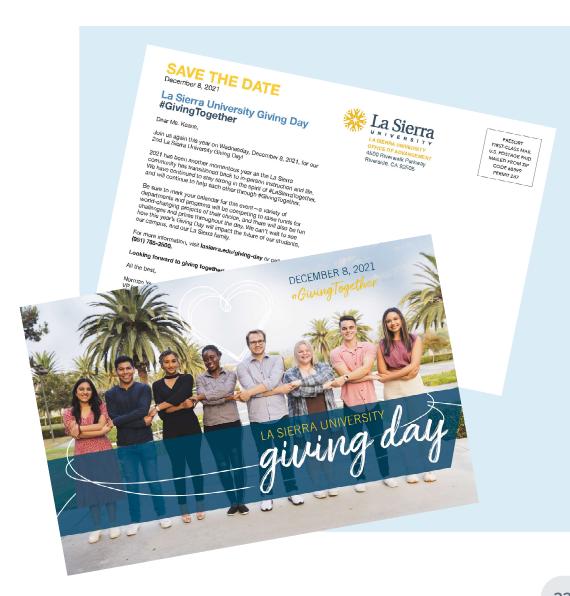




pledgemine\*

# Giving Day Save the Date 2021

- Pledgemine was HELPFUL during Giving Day
- Save the Date postcard mailed in October to the majority of our database (data based on likely participants)
- Benefits of postcards:
  - Simple, easy to read
  - No envelope to open
  - Easy to pin on a bulletin or fridge
  - More likely to read before trash



## **Giving Day Appeal** Fall 2021

- 26 total segmented appeals mailed
- 13 appeal letters segmented by department/project targeting age 35+



630 Weaver Pkwy

Giving Day will be **Wednesday, December 8, 2021**, although you can participite all month long. Each department will be challenging their alumni, faculty and the second second second second second second second second to aupport the world change project of their choice. You can even join fun department-led virtual events.

giving day

Dear Mrs. and Mr. Judd,

There will be many great causes to support, and a special effort just for the Emergency Student Aid Fund, but the one I thought might be of personal interest to you, the one I know you have a heart for, is **The Tom & U Zapara.** School of Measers.

La Sierra University has started an innovative new tradition that could very

La Sierra University has started an innovative new tradition that could very well be the opportunity we've been waiting for to move us from adversity to success after another unusual year. That's why I'm inviting you to be an active part of our second annual La Sierra Giving Day—# Giving Together!

Now before you discard this as just another request for money, check this out. Last year's inaugural Giving Day was born out of necessity and resulted in eight departments achieving important funding goals. Hundreds participated. Nearly a half-million was raised.

This year, after that unprecedented success, 13 departments are on board. Wil we see even more success? That's why your involvement is so vital this year.

ents are on board. Will

The Zapara School of Business, the alumni of HomeBase ministry, and the family of the late Iodi Cabill are establishing a special endowed scholarship to honer Iodi's legacy of helping students find and use their passion to serve PARTICIPATE IN THE LA SIERRA GIVING DAY #GIVINGTOGETHER

# Millennial Giving Day Appeal

- 13 appeal postcards segmented by department/project targeting Millennials (alumni age < 35 or based on graduation year)
- Used QR codes for easy access to department/project donation website



### **Segmented Giving Day**

#### **Emails**

- Sent a series of email to everyone in our database
- Included:
  - Save the Date
  - Reminders
  - Follow-up to appeals
  - Giving Day Donate Here
  - Thank you email



Dear Kristine

Giving Day is finally here! Thank you for your continued support of La Sierra University and our upcoming projects. No matter how you are able to participate today, and throughout the month of December, we are so

#### DONATE HERE

In the spirit of #GivingTogether,

#### Norman Yergen

P.S. Remember that everyone is invited to join in no donation or gift required. Feel free to check o

In the spirit of #GivingTogether

#### Norman Yergen Vice Presider

Strategic Engagement: Advancement and Marketing

P.S. Remember that everyone is invited to join in today's virtual no donation or gift required. Feel free to check out lasierra.edu/givingday whenever you like to see what we've g on

#### Free and Fun Virtual Events on Dec 8:

- <u>Virtual Brandstater Gallery Tour</u> (12:00-1:00pm) Preserving the Past: Live Online Conversation with C
- Fulbright Fellow Dr. Ziad Al-Saad (12:00-1:00pm) • 10 Amazing Women Artists You've Never Heard Of (5:00-6:00pm)
- Zapara School of Business Hangout (6:00-7:00pm) Portfolio Share + Live Photoshoot with Alumna Megai
- Joseph (6:00-7:00pm) Music Department Showcase (7:00-8:00pm)



ecause of you, we raised more than half a million dollars in December! We far surpassed our Giving Day fundraising goal and had about 440 amazing donors contribute.

We are humbled and grateful for your gift and generosity. Your impact on our students is greater than you will ever know. We are blessed to have you as part of our family, and are thankful for all you ove and suppor

May 2022 bring you much joy, because you have already brought

Because or you, we raised more than hait a million dollars in December! We far surpassed our Giving Day fundraising goal and had about 440 amazing donors contribute.

We are humbled and grateful for your gift and generosity. Your impact on our students is greater than you will ever know. We are blessed to have you as part of our family, and are thankful for all your love and support.

May 2022 bring you much joy, because you have already brought much to us.

Thank you for being you.

With appreciation

Norman Yergen Vice President Strategic Engagement: Advancement and Marketing

Office of Advancement | 951.785.2500 | advancment@lasierra.edu



#### SAVE the DATE

Dear Kristine,

Join us again this year on Wednesday, December 8, 2021, for 2nd La Sierra University Giving Day!

2021 has been another momentous year as the La Sierra has transitioned back to in-person instruction and life. We have continued to stay strong in the spirit of #LaSierraTogether, and continue to help each other through **#GivingTogether**.

Be sure to mark your calendar for this event—a variety of departme and programs will be competing to raise funds for world-changing projects of their choice, and there will also be fun challenges and pr throughout the day. We can't wait to see how this year's Giving Day impact the future of our students, our campus, and our La Sierra fai

2021 has been another momentous year as the La Sierra comn has transitioned back to in-person instruction and life. We have continued to stay strong in the spirit of #LaSierraTogether, and continue to help each other through #GivingTogether.

Be sure to mark your calendar for this event-a variety of departme and programs will be competing to raise funds for world-changing projects of their choice, and there will also be fun challenges and prizes throughout the day. We can't wait to see how this year's Giving Day will impact the future of our students, our campus, and our La Sierra family.

For more information, visit lasierra.edu/givingday or call (951) 785-2500.

Looking forward to giving together

Appreciatively

Norman Yergen vice President Strategic Engagement: Advancement and Marketing

### Segmented Giving Day Emails

 13 email appeals segmented by department/project



#### THE UNIVERSITY MUSEUM

Dear Kristine,

It's here! La Sierra University's second annual Giving Day is tomorrow, Wednesday, December 8, 2021.

With 13 departments raising awareness and funds for various lifechanging projects, Giving Day events will be a fun way for alumni, community, and friends to get involved. The department that has the most donors will receive an anonymous gift of \$5,000 toward their project.

To see the whole list of projects and fun virtual events, visit lasierra.edu/givingday. One area we thought you may be particularly interested in is the <u>University Museum</u>. Help them reach or exceed their goal of raising \$5,000 for curation funds and creating an online museum.



With heartfelt gratitude,

Norman Yergen

Vice President Strategic Engagement: Advancement and Marketing

Free and Fun Virtual Events on Dec 8:

#### Giving Day 2021 **Other Channels**

#### Multi-channel approach

- Webpage
- Direct mail
- Email
- Social Media (boosted/targeted posts)
  - Facebook
  - Instagram
  - Twitter
- Text messages (Millennials only)
- University magazine article
- Church magazine article

	It's here! Join us today for our 2nd annual La Sierra University Giving Day. Check o departments who are participating this year and their free and fun events. For mor information visit lasierra.edu/givingday.	
	TODAY IS GIVING DAY	(!
71777 > Wed, Dec 8, 10:20 AM		ATA?
Today is La Sierra University Giving Day! Join us by clicking the link below. https://igfn.us//Julifzu Text STOP to unsubscribe	La sierra university giving day	P.
	APP.MOBILECAUSE.COM La Sierra University I'm fundraising for La Sierra University. It's an amazing organization. Ever	earn more
	Social Media	
Text Message		

La Sierra University Alumni and Friends is 😆 feeling excited.

Published by Kristine Barker @ · December 8, 2021 · G



...

### Giving Day 2021 Results

- Raised: \$581,505
- Total donors: ≈ 440
- Total gifts: 500
- 13 departments participated



# These are not "Segments of One"



### Making the Most Out of Variable Data

- Make your recipient a segment of one
- Data merge, but better

- **Fund Names**
- Gift Amounts
- **Giving History**
- Name Callouts/Combinations

#### YOUR GIFT TO FIU IS A VALUABLE INVESTMENT.

Giving helps improve the educational experience at FIU, keeps you connected to your University, and increases the value of your FIU degree.

Please renew your gift today!



[] Learning Spaces

[] Athletics

[]Other:

Date of last gift: Jul 26, 2019 Amount of last gift: \$1,863.85 Designation of last gift: George R. Adams Memorial End.

Total gift amount: □\$1,864 □\$2,796 □\$3,728 □Other\_

Please designate my gift for: [] George R. Adams Memorial End.

[] Academics [] Forward Ever Fund/ Area of Greatest Opportunity []Scholarships [] Student Emergency Fund

Matching Gift will match my gift. □ My employer Check your employer's status at www.bsc.edu/match

Mrs. Dianne Adams 784 Oak Creek Drive Lombard, IL 60148

#### YOUR RECENT GIFTS TO FIU:

□ FY2018 ☑ FY2017 ☑ FY2016 ☑ FY2015 ☑ FY2014

Date of last gift: Jun 30, 2017 Amount of last gift: \$100

FIU's fiscal year runs July 1 - June 30. The data above was compiled on April 20, 2018 and only includes outright gifts or pledge payments. Renew your support by June 30 to be counted as a donor in the 2018 fiscal year

If you've already made your gift, Thank You!

	Renew online:
www.bsc.edu/	give/renew
It's simple, secure, an	d sustainable!

Enclosed is my check payable to: Birmingham-Southern College · 900 Arkadelphia Road, Box 549003 · Birmingham, AL 35254

I would	like to establis	h a yearly recurring pledge of
\$	for	years to be fulfilled in t
month of		each year.

Charge my card \$\_\_\_\_

Charge my card \$		_ monthly for	months,	
or \$	per year for	years (up	to five years).	
Name on a	ard	- 18 .CSI		
Credit car	d #			

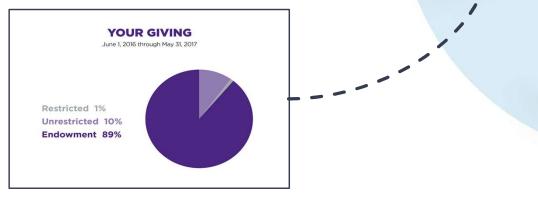
xp.	CVV code	
o make stock DAE or IBA rolls		

www.bsc.edu/plannedgift or call (205) 226-4909.

1-419 tmp2977 ID: 1067754 GA21-noFEF/GF21-FEF

#### **Ashland University**

- Solution 1Q: Horizontal Short Fold Self Mailer
- Each donor received personalized pie chart of their giving





### **Other Ways to Use Variable Data**

#### Last Gift Reminders

Last Amount	Last Month	Last Year
\$50	December	2020

### $\mathcal{O}$

Your gift of \$50 in December 2020 made a huge difference. Will you consider another gift of that same amount today?

#### Variable Data can be "smart"

Last Amount x 1.2

\$60



Or perhaps you can raise your gift amount to \$60 to help even more students?

### **Other Ways to Use Variable Data**

Salutation	Team	2019/20	2020/21	2021/22	Last Date
Anne and Neil	Rowing	\$1,200	\$1,500	\$500	October 28, 2021



Anne and Neil, here is your recent Friends of Dartmouth Rowing giving history:

2019-2020: \$1200 2020-2021: \$1500 2021-2022: \$500 (current year)

Your last gift to Dartmouth Rowing: October 28, 2021

45

### **Other Ways to Use Variable Data**

#### Monthly Giving Ask Amount = round (( Prior Annual Giving x 1.4 ) / 12)

Giving Society	Attribute	2021/22	Monthly	Annual
Heights & Hearts Circle	loyal	\$150	\$20	\$240

#### Reinforce Donor Relationships

Thank you for your loyal support. The Heights & Hearts Circle is a recurring giving society that allows you to make a significant annual contribution through smaller monthly installments. A monthly gift of only \$20 can add up to \$240 on an annual basis.

#### Le Moyne College

- Anniversary Cards mailed quarterly to donors with last gift 9 to 12 months prior
- Reminds donors of their previous commitment
- Contacts donors when they most likely want to be contacted

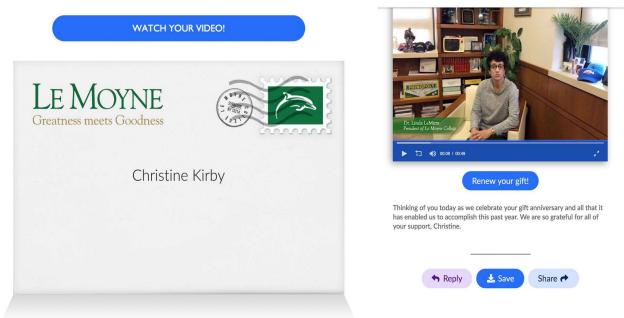
"Hi Christine! This time last year, you made a generous gift in support of Le Moyne College. On behalf of all of those your \$25 gift impacted, thank you and happy anniversary!"



#### Le Moyne College

- As reinforcement, send a personalized ThankView video with the same messaging.
- Able to schedule at the same time for these messages based on anniversary date.

Hi Christine! This time last year, you made a generous gift in support of Le Moyne College. On behalf of all of those your \$25 gift impacted, thank you and happy anniversary!



## Segmentation

Where your "creativity" combines with your data.



Request your free Pledgemine Solutions Library

### Special FFE Conference Offer!

Receive 10 free segments when signing your first Pledgemine contract

Contact: sales@pledgemine.com



