Making Direct Mail Work for You
Mission

- Institution
- Office/Program
- Annual Fund
Define audience

- Alumni
- Grads and Undergrads
- Reunion and Non-reunion
- Classes 1925-2005
- Domestic and international
- All genders, races, ages, spouses
Database

- NCOA updates
- New record creation
- Coding
- Ordering data
- Database
  - Bio maintenance procedures
  - Valid contact info
  - Contact restrictions
Know Your Results!

- What was your retention rate?
- What was your reactivation rate?
- What was your acquisition rate?
- What was your upgrade % and how much extra cash did that bring in?
- What was your downgrade % and how much cash did you lose?
- How did your direct mail perform?
- What were your results with phonathons?
What elements of gift history can be used to analyze and segment an audience?
Analyze Audience

- Gift history
  - No gift history: Acquisition
  - Lapsed donors: reactivation/Sybunts
  - Renewal donors: Lybunts
  - Upgrades
  - Participation
Analyze Audience

- Wealth indicators
- Job titles, employer
- Prospect Research
- Academic history
- Volunteer history
- Alumni Association history
Vehicles for solicitation

Direct mail

Phone

E-mail

Personal visits

Mix of the above
What are elements of an annual fund solicitation plan and strategy?
Annual Solicitation Plan & Strategy

- Apply analysis
- Budget
- Messaging/campaign
- Frequency
- Timing
- Vehicle mix
Be sure...

direct mail vehicle matches audience
to set clear goals
goals can be monitored by your reports
Direct Mail Creation Process

- Concept
- Offer
- Package
  - Envelopes, color, graphics, brochure
  - Reply device
  - Outer envelope
- The Lead
- The Ask
- The P.S.
Letter signer

- Interview signer
- Role of signer
- Get the signature
What are top qualities of a good annual fund letter?
Top Qualities of a Good Annual Fund Letter

- Personal – language is person to person and full of “You”
- Donor-centric tone and text – focus on the donor and donor benefits

Format
  - white space
  - short sentences
  - short paragraphs
  - direct language
  - simple words
Make Your Constituents Insiders

- Tell your constituency how the money was used last year (give specific examples if you can)
- Inform your constituency of your annual fund goals for the current year
- Let them know about new and/or current initiatives that their gifts will help support
- Remind/Show them that supporting the annual fund is the same as supporting their area of interest with a restricted gift
Artwork

- Return address/outer envelope
- Letterhead
- Contribution card
- Reply envelope
Production

- In-house or Vendor
- Proof: art, data, text
- Preprint signature
- Postage: first class to non-profit
Besides gift history, what are other ways to segment audiences?
Segmentation – why do it?

- Lybunt, Sybunt, Future Donor
- Reunion/Classes
- Central vs. Decentralized AF
- Demographics: age, geography, gender
- Degree, department, college
Contribution card

- Name, address
- ID
- Appeal code
- History
- Ask matrix
- Designation
Variable data in the letter text

- Ask matrix
- Designation
- Bio information: state, class year, etc.
- Last gift amount
Reports

- Reflect goals of mailing
- Dollars
- Donors
- Segmentation
What to look for in reports?

- Participation
- Return on investment
- Increases over last year
- Trends over multiple years
- Fall versus Spring results
- Results of different vehicles
Overall Analysis

- Can your database provide detailed analysis?
- Hire analysis service?
Testing

- Package, message, offer, concept
- Control group and Test group
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