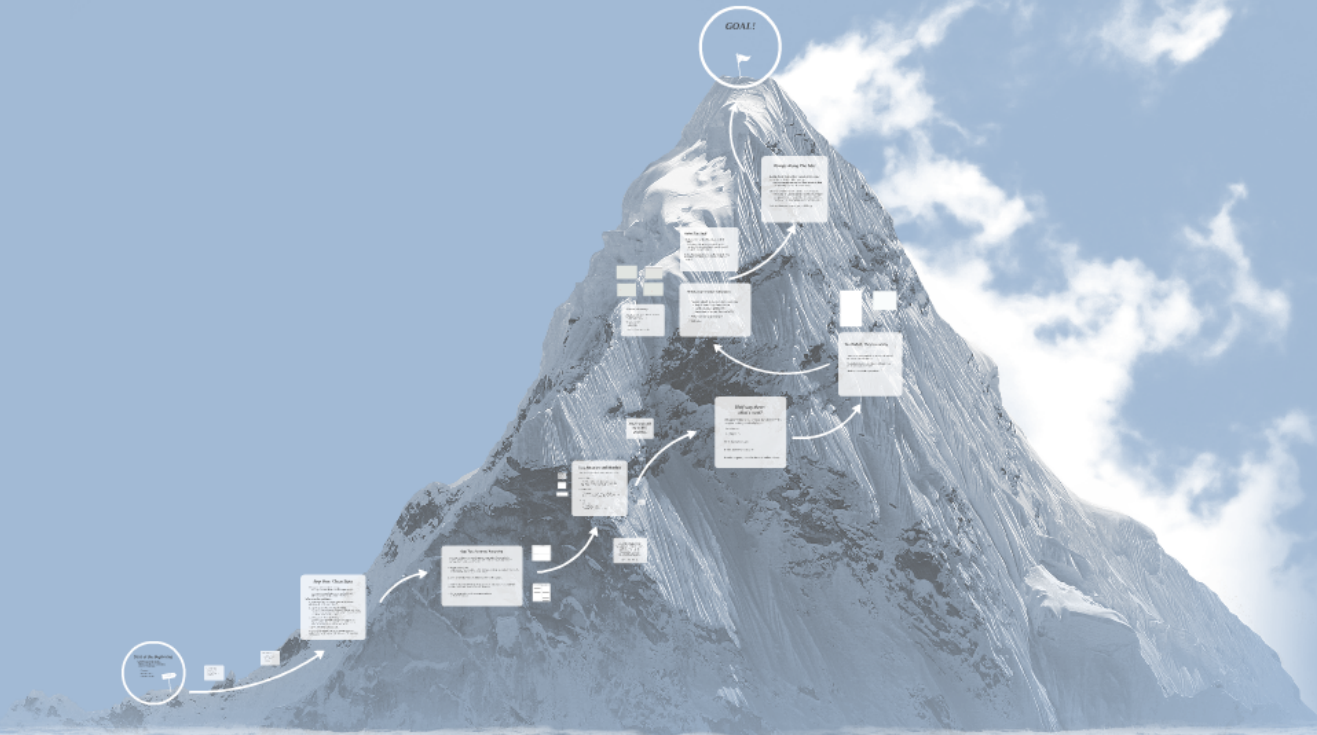
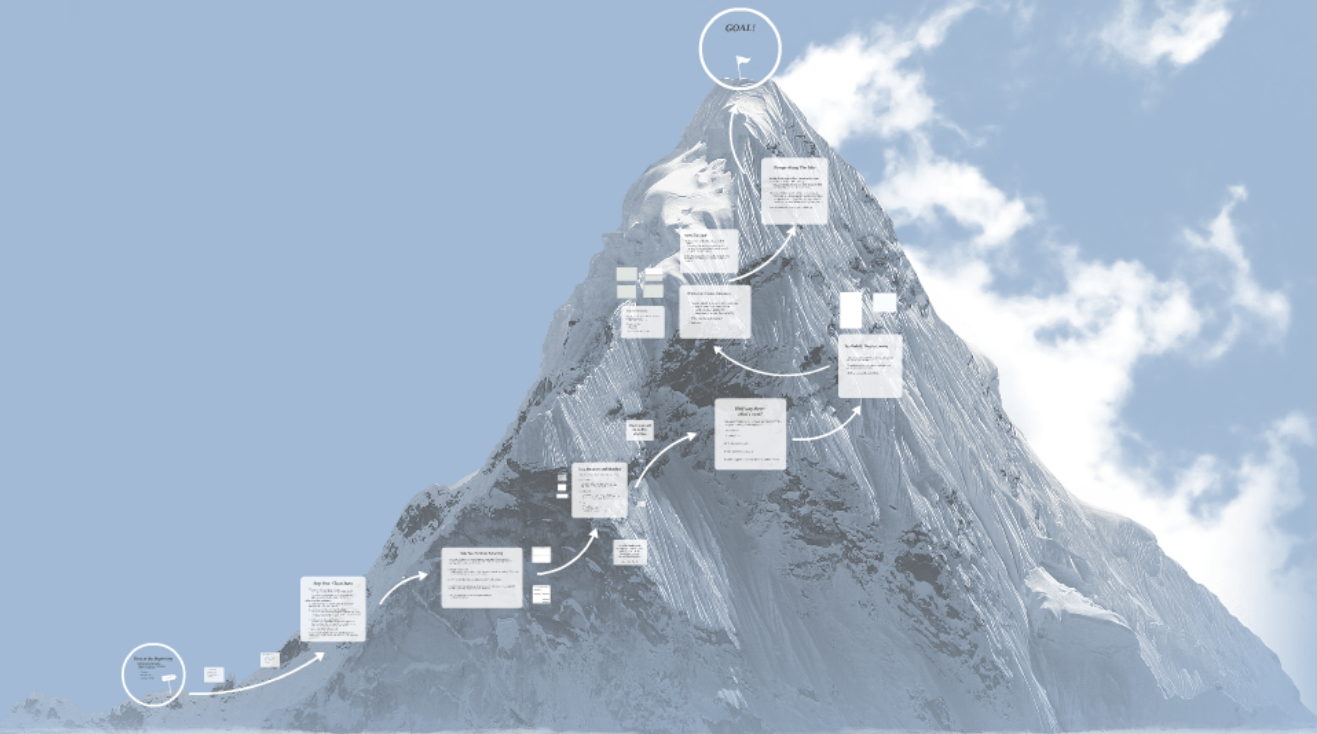


The Extra Mile: Driving Incremental Revenue in Campaigns



Doug Hoogstra, Account Executive
Darwill
Erin King, Donor Relations Manager
The Field Museum
Janelle Stevenson, Assistant Director of Membership Renewals
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Start at the Beginning

Achieving large goals...

Like eating an Elephant - you have to take it one bite at a time.

It's a process

Every little bit helps

Never too late to start



The first step is a doozy...

Data Foundation is key

- 1) What are you trying to do?
- 2) What data do you need, and do you have it?
- 3) Is the data consistent?

Lather, Rinse, Repeat...

Test, Track, Analyze, Test Again

Know what you want to measure before
you measure it - campaign codes

Ongoing Process

One test begets another...

Step One: Clean Data

Mishaps during acquisition campaigns

i.e. people outside criteria receive mail/phone calls

- How did this happen if asked for the right "stuff" and reviewed the list for people outside of my criteria?

Where are the problems?

1. Communicate with your data team/person about the issues experienced during the latest campaign.
2. Look at columns that are not part of the criteria.
 - Name of a business or public office in the first address column?
 - Do membership expiration dates make sense? Are people marked as “lapsed” but are actually “active”?
3. Add more columns to your data pulls.
 - Added: other membership categories; giving/membership history for the past five years (including restricted giving); wealth and giving ratings; and largest gift details
4. Review lists with a tooth and a comb.
5. Fix mistakes in database and begin to address larger scale problems, like inconsistent data input and a lack of current policies and procedures.

Step Two: Accurate Reporting

In our case, tracking numbers at the beginning was frustrating. Strategy had to be created based on hunches, not actual results. We couldn't test new strategies because there was no way to obtain reliable results.

1. Standardize appeal codes.
 - a. What are the main campaigns or efforts you use to acquire donors/members? What are the typical methods for receiving gifts/memberships?
2. Codify key definitions and create standard queries for defined groups.
3. Tweak and scrutinize database reports that you need for basic numbers (i.e. membership categories, appeal and package codes, renewal numbers)
4. Run reports regularly to track your progress in real-time.
 - a. Progress IS coming!

Appeal and Package Example

Appeal ID	Appeal Description	Package ID
14TAF	2014 Trustee Annual Fund	
		First
		Second
		Third
		Unsolicited
		Add
		New
14FC	2014 Founders' Council	
		SOLDIR
		SOLPRES
		SOLPRM
		SOLSC
		TOYB
		CCUPD
		ITF
		GFTMEM
		OnSite
		CALLIN
		Mail
		ADDGIFT
		NEWUnsol
Unsol		
14FCREN	FC Renewals	
		First
		Second
		Third
14FCPerm	FC Permanent Members	
		First
		Second
		Third
14FCLaps	FC Lapsed Effort	
		First
		Second
		Third
14AF	2014 Annual Fund	
		SOLDIR
		SOLAFT
		SOLPRM
		MEMNITEUP
		DANTIX
		CCUPD
		ITF

		GFTMEM
		OnSite
		CALLIN
		Mail
		BROCH
		ADDGIFT
		NEWUnsol
		Unsol
14AFREN	AF Renewals	
		First
		Second
		Third
14AFREXP	2013 AF Explorer Renewals	
		First
		Second
		Third
14SpringAFDM	AF Spring Direct Mail	
		LAPSAF
		LAPSAF
		LAPSCont
		LAPSMEMBS
		ActMEMBS
		RNDM
		RST
14SpringAFEM	AF Spring Email	
		Seg1
		Seg2
		Final
14SpringAFTM	AF Spring Telemarketing	
		LAPSAF
		LAPSAF
		LAPSCON
		LAPSMEMB
		MEMBS
		RNDM
		RENQ1
		RENQ2
14SummerAFTM	AF Summer Telemarketing	
		TBD
14FallAFDM	AF Fall Direct Mail	
		LAPSAF
		LAPSAF
14FallAFTM	AF Fall Telefunding	
		TBD
14FallAFEM	AF Fall Email	
		TBD

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Reports Example

9/17/2014

Donor Category Report 2014 2014

Page 1

Donor Category	Level	No. Constituents	Amount Given
Founders' Council- Chairman's Circle Distinguished Leadership	\$75,000.00	3	\$454,062.50
Founder's Council- Chairman's Circle Leadership	\$50,000.00	10	\$511,970.11
Founder's Council-Chairman's Circle	\$25,000.00	11	\$320,754.81
Founders' Council-Conservator	\$10,000.00	19	\$242,500.00
Founders' Council-Collector	\$7,500.00	5	\$39,500.00
Founders' Council-Surveyor	\$5,000.00	36	\$184,302.92
Founders' Council-Member	\$2,500.00	93	\$254,920.17
Field Explorer	\$1,000.00	89	\$109,194.17
Field Naturalists	\$500.00	150	\$80,932.48
Field Advenurers	\$250.00	635	\$167,109.70
Field Contributor	\$1.00	728	\$58,975.34
A Total of 11 Donor Categories Listed		1,779	\$2,424,222.20

9/17/2014

Donor Category Report 2013 2013

Page 1

Donor Category	Level	No. Constituents	Amount Given
Founders' Council- Chairman's Circle Distinguished Leadership	\$75,000.00	3	\$300,000.00
Founder's Council- Chairman's Circle Leadership	\$50,000.00	9	\$460,048.98
Founder's Council-Chairman's Circle	\$25,000.00	13	\$392,727.70
Founders' Council-Conservator	\$10,000.00	18	\$237,238.85
Founders' Council-Collector	\$7,500.00	4	\$30,000.00
Founders' Council-Surveyor	\$5,000.00	21	\$107,067.77
Founders' Council-Member	\$2,500.00	64	\$177,813.55
Field Explorer	\$1,000.00	79	\$96,091.13
Field Naturalists	\$500.00	180	\$95,355.14
Field Advenurers	\$250.00	751	\$195,927.77
Field Contributor	\$1.00	879	\$71,340.40
A Total of 11 Donor Categories Listed		2,021	\$2,163,611.29



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4. Run reports regularly to track your progress in real-time.
 - a. Progress IS coming!

All of this builds trust
between you and your data,
and clean data is the
foundation to more
successful campaigns.

Now it is time to...

Test, Measure and Monitor

Build strategies with the goal to increase revenue.

Segmentation

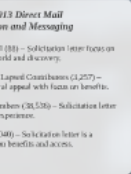
- You likely know the main groups of people you want to target, now what is the message you think they need? What call to action is most effective for each group?

Conditional asks

- Different segments have different capacity levels.
- Make an ask that fits with their previous purchases and/or gifts
- Make an ask ladder and lay everything out in a grid

Testing

- Pick one thing
- Test content as well as appearance
- Make sure you can track it!
- Go back and refresh your statistics basics



Spring 2013 Direct Mail Segmentation and Messaging

- Lapsed Founders' Council (88) – Solicitation letter focus on investing in science, the world and discovery.
- Lapsed Annual Fund and Lapsed Contributors (3,257) – Solicitation letter is a general appeal with focus on benefits.
- Members and Lapsed Members (38,536) – Solicitation letter taps into Members' Night experience.
- Random Contributors (4,040) – Solicitation letter is a general appeal with focus on benefits and access.

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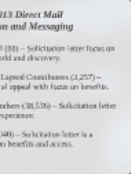
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Year End Appeal:

2013 Year-End Annual Fund

Direct Mail

Short Codes

13YEAADM

Additional 2013 Gift

Contributor

Annual Fund

Founders' Council

Loyalty Club

Packages

ADCONT

ADAF

ADFC

ADLYL

Ask Ladder (Use Last 00003 Gift Amount)

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	
\$0-249 (ADCONT/ADLYL)	\$30	\$75	\$150	\$250	Other
\$250-500	Last Gift	plus \$150	plus \$250	Other	
\$501 - 1000	\$250	\$500	\$1,000	Other	
\$1001 - \$2500	\$500	\$1,000	\$1,500	Other	
\$2501 and above	\$1,000	\$1,500	\$2,500	Other	

First 2013 Gift

Contributor

Annual Fund

Founders' Council

Lapsed Members

Active 2 year Memberships

Consecutive Memberships

Active Members

Random

Packages

LAPCONT

LAPAF

LAPFC

LAPMEM

2YRMEM

5CONMEM

MEMBS

RNDM

Ask Ladder- Contributor, AF & FC

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	
\$0-249	\$30	\$75	\$150	\$250	Other
\$250 - 500	Last Gift	plus \$150	plus \$250	Other	
\$501 - 1000	\$250	\$500	\$1,000	Other	
\$1001 - \$2500	\$500	\$1,000	\$1,500	Other	
\$2501 and above	\$1,000	\$1,500	\$2,500	Other	

Ask Ladder- Members

	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	
LAPMEM/2YRMEM/5CONMEM/MEMBS/RNDM	\$30	\$75	\$150	\$250	Other

Yes! I'd like to give:

- \$30 \$75 \$150
 \$250* Other \$ _____

*Join as a Field Adventurer to enjoy benefits beyond Membership for 1 year and receive a limited edition Field Museum calendar poster on your next visit, while supplies last. See back for details.

Enclosed is my/our contribution of \$: _____

Payment type:

- Check made payable to The Field Museum
 Please charge my Visa MasterCard Discover AmEx

Account Number (please print clearly)

Exp. Date

Signature (required)

14743 - 13YEAADM - ADCONT



Mr. and Mrs. Sample A Sample
123 Main Street
Suite A
Anytown, US 12345-6789

Email

If your address has changed or is incorrect, please revise the information listed above so we can update your record. Thank you.

- I/We have included The Field Museum in my/our Estate plans.
 I/We prefer to waive all benefits associated with this gift, including membership, making the entire contribution tax deductible.
 I/We wish for this gift to be anonymous.
 My company will match this gift to The Field Museum.

Company name: _____

Please detach this form and mail back in the provided envelope. Thank you for your continued support of The Field Museum.

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Build strategies with the goal to increase revenue.

Segmentation

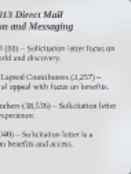
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Year-End Results

Year-End Appeal 2012

Direct Mail 11,022 = \$111,069

E-Mail 22,736 = \$5,334

Year-End Appeal 2013

Direct Mail 29,794 = \$203,794

E-Mail 22,633 = \$41,249

*Small steps add
up to BIG
progress.*

Half way there: what's next?

Add opportunities to collect more data and maximize the opportunities you already have.

Encounters

Loyalty Club

Multi-channel appeals

Reduce barriers to response

In order to grow, needed to increase online presence

You Built It, They're Coming

You send out your carefully personalized direct mail with customized ask ladders.

Telemarketing efforts have been coordinated with your customized ask ladders.

And then your member goes online...

For proofing purposes only - [RenewLevel = "C1"] [TEST GROUP= "A"] [Category = "Member"] [GIVENBY = ""] [package = "Co4C1A"] [pricing = "D1"] [CA= "o"]



THE ART INSTITUTE OF CHICAGO
111 South Michigan Avenue Chicago, Illinois 60603-6404

1000670
Cynthia and Duane Perkinson
1310 Mockingbird Ln
Chicago, IL 60677-0001

FOUR EASY WAYS TO RESPOND

- ONLINE** renew.artic.edu/DuaneCynthia8633
- ON SITE** at the Membership Desk
- MAIL** via enclosed form
- PHONE** (312) 499-4111

LIMITED TIME OFFER
RESPOND BY NOVEMBER 30

Renew Today and Save \$10!

We've missed you! Renew your membership by November 30 and enjoy \$10 off your Member dues. That's a full year of outstanding art and Member benefits for less than \$7 a month!

Last days for **Magritte: The Mystery of the Ordinary, 1926-1938!** If you have not yet visited to see this outstanding retrospective of the Surrealist master's early work, you won't want to miss it. Renew your membership today to enjoy Member Weekend Mornings to see the exhibition before the museum opens at 10 a.m., Saturdays and Sundays through October 13. No reservations necessary—just show your member card at the Modern Wing entrance on Monroe.

Member Number: 1000670
Bill To: Cynthia and Duane Perkinson

Previous Membership Level: Member

Total Due: ~~\$90~~-\$80 fully tax deductible



Your Renewed Benefits:

- Admission for member and one guest
- Subscription to the Art Institute's *Member Magazine*

Respond by **November 30, 2014** to receive \$10 off your Member, Member Plus, or Premium Member dues!

Renew online at renew.artic.edu/DuaneCynthia8633 or use promotion code **10COCT1A** at www.artic.edu/joinaic.

Yes, I want to renew my membership today!

	1 Year	2 Years
Member	<input type="checkbox"/> \$90-\$80	<input type="checkbox"/> \$170-\$160
Member Plus	<input type="checkbox"/> \$125-\$125	<input type="checkbox"/> \$255-\$245
Premium Member	<input type="checkbox"/> \$185-\$175	<input type="checkbox"/> \$345-\$335
Other _____	\$ _____	
Affiliate Group	\$ _____	
Length of Affiliate Group membership will match length of base membership.		
Additional Gift to the Museum	\$ _____	
TOTAL	\$ _____	

Enclosed is my check made payable to the Art Institute of Chicago

Please charge my: Visa MC Amex Discover

Card #: _____

Expiration Date: _____ / _____

Please make any updates to your contact information on the back:

1000670
Cynthia and Duane Perkinson
1310 Mockingbird Ln
Chicago, IL 60677-0001

1510MMBDMC_Co4C1A
10VS



K00000007874060282

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\$10 discount offer valid for Member, Member Plus, and Premium Member levels only. Not valid in combination with other offers. To redeem this offer online, visit renew.artic.edu/DuaneCynthia8633. To redeem this offer on site, present this form at the time of transaction. Valid through November 30, 2014.



MEM
\$90-\$

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MEMBERSHIP

\$90–\$345

LIONHEARTED

\$500–\$1,500

SUSTAINING FELLOWS

\$2,500+

MEMBER

\$90/1 YEAR

\$170/2 YEARS



x 2

Admission for two adults



Includes one member card

MEMBERSHIP BENEFITS INCLUDE

- Admission for up to 2 adults every day
- Member-only lectures, classes, workshops, events, and more.

JOIN



BUY AS GIFT

MEMBER PLUS

\$135/1 YEAR

\$255/2 YEARS



x 4

Admission for four adults



Includes two member cards

ALL MEMBER BENEFITS PLUS

- Admission for up to 4 adults every day
- A second cardholder with full benefits.

JOIN



BUY AS GIFT

PREMIUM MEMBER

\$185/1 YEAR

\$345/2 YEARS



x 6

Admission for six adults

ALL MEMBER PLUS BENEFITS PLUS

- Admission for 6 adults total every day

JOIN

For proofing purposes only - [RenewLevel = "C1"] [TEST GROUP= "A"] [Category = "Member"] [GIVENBY = ""] [package = "Co4C1A"] [pricing = "D1"] [CA= "o"]



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MEM
\$90-\$

DUP="A"] □

□ [pricing = "D1"] [CA="o"]

26

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ON SITE at the Membership Desk

MAIL via enclosed form

PHONE (312) 499-4111

LIMITED TIME OFFER

RESPOND BY NOVEMBER 30

Welcome, Abbey! [Not Abbey Anders? \(click here\)](#)

YOUR MEMBER BENEFITS

- Access for member and 1 guest
- Subscription to the Art Institute's Member Magazine

Choose your membership level:

	1 Year	2 Years
Member	<input type="checkbox"/> \$90-\$80	<input type="checkbox"/> \$170-\$160
Member Plus	<input type="checkbox"/> \$135-\$125	<input type="checkbox"/> \$255-\$245
Premium Member	<input type="checkbox"/> \$185-\$175	<input type="checkbox"/> \$345-\$335

Please consider an additional tax-deductible gift today. Your gift will make a real difference.

\$5.00

Other Amount

[Click here to purchase a gift membership or renew at another level.](#)

Continue

PURLs Offer Unique Advantages

- Pre-completed forms maintain clean data
 - drop downs keep data uniform
 - avoids manual updates for inconsistencies (William vs Will)
- Multi-membership renewal
- Soft asks

Provide your information

Please review your mailing address below and make any necessary changes. If there are no changes click "Continue" at the bottom of the page.

*Required

*Prefix

*First Name

*Last Name

Spouse/Partner Prefix

Spouse/Partner First Name

Spouse/Partner Last Name

*Address Line 1

Address Line 2

Address Line 3

*City

*State/Province

*Zip Code

*Country

*Primary Phone

*E-mail

Continue

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Premium Member	<input type="checkbox"/> \$185 -\$175	<input type="checkbox"/> \$345 -\$335



We invite you to renew your Evening Associates membership at the same time.

EAS Single	<input type="checkbox"/> \$30	<input type="checkbox"/> \$60
------------	-------------------------------	-------------------------------

Please consider an additional tax-deductible gift today. Your gift will make a real difference.

\$5.00 **Other Amount**

[Click here to purchase a gift membership or renew at another level.](#)

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 \$5.00 Other Amount

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Continue

Show Me The Money!

PURL soft asks resulted in an additional \$9,300 for the Annual Fund in FY14

(Paid for itself in one year!)

Q1 revenue in PURLs

FY14 \$1,057

FY15 \$2,400

Next step: testing custom ask ladders

Other Fun Stuff

All AIC online membership pages are mobile-friendly.

Members read our emails on their mobile devices. If they click a link, it should be easily navigable from that device.

Social sharing options are available. Complete your transaction and share your renewal on Twitter or Facebook.

Bumps Along The Way

Reality check: most of this "incremental revenue" comes in the form of labor savings

Online transactions are less labor-intensive than manual entry, or even bar code entry

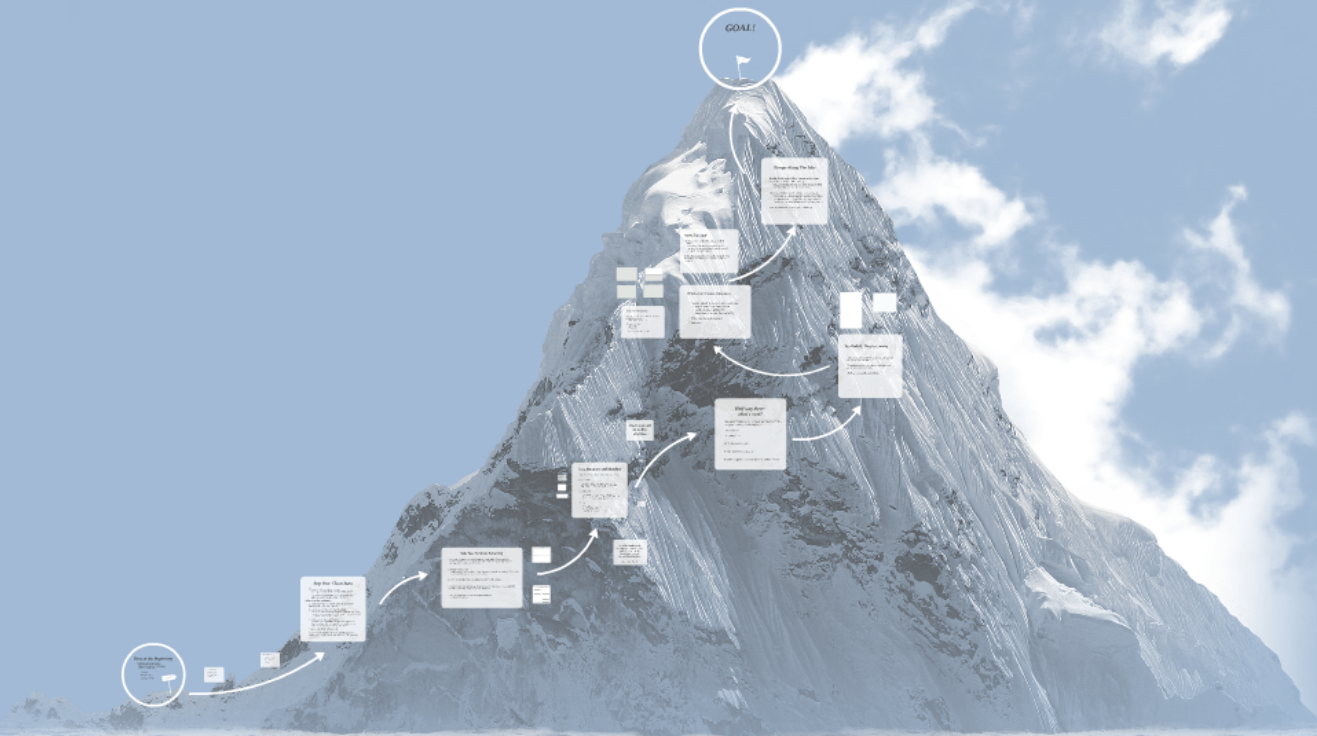
More stakeholders need to be in the conversation

The IS bone is connected to the direct mail bone is connected to the e-mail bone is connected to the data entry bone. When in doubt, bring 'em in.

Data maintenance is an ongoing challenge

Questions?

The Extra Mile: Driving Incremental Revenue in Campaigns



Doug Hoogstra, Account Executive
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Erin King, Donor Relations Manager
The Field Museum
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