

Using Your Donor Data with Confidence

Diocese Annual Appeal Case Study

Atlanta Tuesday September 19, 2017, 3:30pm-4:30pm

This session describes the dynamics of the Diocese Annual Appeal. Using data to understand the different parish markets that compose the entire diocese might feel overwhelming, or at the very least, sketchy. We describe simple steps to help Stewardship and Development offices have confidence to reach appeal goals by using data to create stories and strategies to guide testing and tactics!

“I have an agency that prints, mails, and provides analysis, but I need to understand how we affect appeal results. ROI Dataworks did a wonderful job of guiding me through the following steps, which improved results and increased my data confidence!” Rob Faughnan

Data Audit – What do we have? What does it say? What do we need?

Donor Profiles – Who are they? How do they behave? What are the trends?

Segmentation – How do we group donors for actionable messaging?

Metrics – How do we know what is possible? How do we know what resources are required to reach the goal? How do we determine success by segment?

Strategy – Once we know the market, profiles, segments and metrics how do we develop the plan? How do we know what to test? How do we know how many items to test? Where do we start?

Tactics – Why is postal mail important? How do we integrate the message with email, video, parish and newsletter? Is digital media important for a diocese?

Results – How do we measure results against the established metrics to make changes and to answer question posed by leadership? How do we use results measurements to confidently establish next years’ goals and determine the resources needed?

