
Case Study - Reporting and Marketing Datamart Creation

Situation

A large charity organisation wanted to make better use of their customer data. Their current database held all the raw information they needed for their marketing and reporting activities, but was frustratingly difficult and time consuming to use.

When reviewing marketing and reporting activity they noticed that:

- The communications with supporters were not very targeted or personalized
- Response to appeals and income generated varied greatly and were sometimes disappointingly low
- Marketing and business reports were slow to produce and involved many manual processes

For the future and efficiency of the charity, they wanted to turn this situation around.

Vision

To streamline their reporting processes and increase the effectiveness of their appeals. The charity wanted to easily create:

- Targeted direct mail campaigns to existing supporters asking them to donate to various appeals
- Post-campaign analysis reporting to measure the effect of the appeals
- Reporting to monitor the ongoing health of the business

Specific Requirement

The aim of this project was to create a Reporting and Marketing Datamart as the platform for producing targeted marketing campaigns as well as tracking campaign success and overall portfolio trends.

We Provided

A Reporting and Marketing Datamart fed from the charities production database, including:

- A process for ongoing extraction of in-house data
- Data validation and cleaning
- Derivation of useful attributes and metrics
- A flexible system that can easily be updated to accommodate new business requirements
- A platform that is the basis for campaign and reporting activity

Targeted Marketing Campaign execution, including:

- Segmentation of supporters by donation size and location
- Construction of a new Ask Amount strategy personalised to each supporter based on past giving behaviour
- An 'acquisition' segment to encourage supporters to make their first donation
- Complex data manipulation to derive variable text for high level of letter personalisation
- Creation of final mail files for each appeal

Comprehensive Post-appeal Analysis Reporting, including:

- Overall appeal success and benchmarking against previous appeals (response rate, income, ROI etc)
- In-depth analysis of the segmentation scheme by various attributes
- Ask strategy effectiveness - analysis of how give amounts relate to ask amounts
- Tracking of large donations
- A presentation of findings and learnings gained through the analysis

Regular Portfolio-wide Reporting, including:

- Acquisition of new supporters
- Effectiveness of supporter recruitment method
- Growth: based on monthly and annual income
- Supporter Attrition

Result

A reliable and accurate platform for marketing and reporting activity, resulting in faster campaign and reporting turnaround.

Use of the Reporting and Marketing Datamart and ongoing implementation of learnings from post-analysis has resulted in a highly personalised, targeted appeal strategy that is very successful - providing results such as a:

- 75% increase in average donation
- 45% increase in Net Income
- Continuing upward give trend
- High Return on Investment - up to 7 times the cost of the appeal
- 20% reduction in number of items mailed (by excluding segments known never to donate).

Furthermore, the Datamart has provided a reliable source of management information in the form of regular reports on the health of the business.