

## Market & Industry - Improving Donor Retention



It seems like most tweets and articles that I have read over the past 12 months are focused on donor retention. It has become the Holy Grail for most fundraisers. That makes sense to me when you think about how the cost to acquire new donors increases year-over-year. The fact that many non-profits scaled back or reduced entirely their donor acquisitions programs back in 2009 - 2012 also placed greater emphasis on hanging onto the donors that they have.

While many are espousing the need for a greater emphasis on retention there is little in the way of a cohesive strategy to accomplish the goal.

While I would like to tell you that I have such a strategy, the truth is that I don't. What I do have are several "best practice" recommendations that Merkle RMG can execute to support whatever your own strategy is for improved donor retention.

Focus on delivering a faster "Thank You" to the donor. There has been a lot of chatter about this point but I am sorry to say that most of the discussion has centered on getting the printed acknowledgement in the hands of the donor faster. While that is an absolute imperative in today's fundraising world, the fact is that it still takes upwards of two weeks from the time of donation until the printed acknowledgment is in the

donor's hands. In 2015 that is not a donor's view of a timely appreciation of their donation.

Fundraisers have to look beyond traditional printed gift acknowledgments if they want to Wow and retain their donors. That's where Merkle RMG comes in. Our first donor retention solution is a cost-effective and timely outbound Thank You call program that is executed through our in-house call center. The call is made within 48-hours of processing the donation and you can customize the program to reach out to specific donor segments such as first time donors, mid-level donors etc. You can't get much faster or more personal than a phone call to say "Thank you for your generous gift".

Our second donor retention solution, currently in development, is an immediate email Thank You that is triggered within 48-hours of Merkle RMG processing the donation. Just like our Thank You call, you can customize the business rules to communicate unique messages for various donor segments and campaigns. The email message allows you to be more creative with your messaging as compared to traditional printed acknowledgement programs.

I believe that both of these solutions will become standard operating practices for most fundraisers over the next several years. In the meantime, you have an opportunity to get ahead of the donor retention challenge now. Give me a call to discuss how we can incorporate these two retention tools into your strategy.

## Customer Service News - The Dashboard Call

As your partner, you trust us. We handle critical pieces of your work and are stewards for your donations. We take that responsibility very seriously. It is important for you that we succeed and, in turn, it is important for us that you succeed. Merkle Response has several ways that you can peek into our operation and they all play a role. Web Reporting provides you with important financial information and Arch-e allows you to view the actual documents for review and research. While these are great, there is nothing like talking to a live Point Of Contact to get a sense for what is happening globally regarding your account and "What's going on over there at Merkle Response".

Your Account Manager is always just an email

or phone call away to assist with production questions and research items. This model is much more effective than having multiple people within your organization try to reach out to various areas of production to get answers. It would take your efforts away from your mission and our goal is to allow to focus on that mission, leaving the processing to us.

Which leads me to the Dashboard Call. Your Account Manager is an expert on our process and how your work flows through that process. If you are currently not having a scheduled Dashboard Call with your Account Manager, I would strongly encourage you to start. Weekly, biweekly, or even monthly calls will allow you to take a deeper dive into the work we are performing for you. It can be customized to your

needs or follow a pre-established template. Reporting on performance metrics, discussing best practices, stepping through issues, walking through new services, and setting up new projects can all be a part of this touch base.

So if having a better lens into "What's going on over there at Merkle" appeals to you, be sure you are taking full advantage of this service. A structured, recurring call will help both sides grow their personal relationships with one another and fundamentally strengthen the two-way partnership of our organizations.



## Merkle Response in the News

Subscribe to Bill Sayre's blog: <http://merkleresponse.com/blog>

Read Bill's article on turning one-time donors into regular donors <https://www.bisnow.com/washington-dc/news/association/why-nonprofits-need-to-say-thanks-42815>

## Best Practice - CVV Codes



We occasionally notice some pre-printed requests for the CVV code for mail in credit card donations. This provides more information than what is needed and places the donor at risk unnecessarily. In our processing environment, the CVV code is not applicable for mail-in donations. According to the article "Is it

Safe to Give Out your CVV code?" by Michael McKinnon

<http://now.avg.com/credit-card-security-code-cvv-safe-give-out> it is discouraged to provide CVV codes as it "serves no purpose other than providing someone the opportunity to steal the information". In our high volume mail environment, we receive hundreds and sometimes thousands of pieces of mail daily that does not belong to any of our clients because it has been miss routed. Not only do we want to protect and abide by our PCI (payment card compliance agency) rules but also advise there are risks having this information in the mail stream.

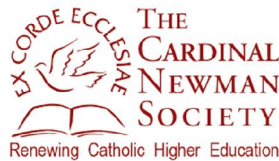
## Service Spotlight - Donor Interaction

Our **contact center** offers traditional inbound customer care services. It also has a robust outbound service where we will call your donors, communicating the importance of their donation and a sincere thank you for their generosity. These calls can include any number of additional topics such as details about your organization, specific information on the programs that their donation is helping to support, ways they can get involved in grass-roots programs and local events within their community. This is all completely customizable to you. It can be handled as quickly as the day after their donation has cleared the financial institution.

Our **contact center** and **exception services** groups offer personalized contact solutions through email management. Our skilled staff can customize the communication specifically to an individual based on their shared information (demographics, regional location, membership history, etc) and any comments/questions they've expressed, for a truly one-on-one, near real-time interaction.



## New Clients



## Business Growth at Merkle Response

Did you know that RMG tracks the deliverability of our USPS pick up locations by placing seeds in the mail for your organizations? Each month, my team selects clients and we mail from different drop off locations and then track the time it takes to receive the envelopes back at RMG. We not only track first class mail but BRE mail as well. We are compiling month's worth of data on average deliverability time so we can help our clients make informed decisions about the postal facilities they should be working with. We believe as many of you do that the average length of deliverability absolutely has an effect on the donor experience. We want to get the acknowledgment in the mail as quickly as possible and having this type of data at your fingertips can allow us all to make USPS location decisions much easier and less time consuming than testing different locations. After collecting thirteen months of data, the average deliverability time from mail date to receipt date at RMG for the following USPS locations is below:

Baltimore MD—6.25 days  
Brentwood (DC) – 7.2 days  
Merrifield VA—7. days  
Hagerstown MD—9 days

## Merkle RMG Holidays

Memorial Day—Monday, May 25, 2015