



Marketing Initiatives

© 2001 – 2002 Janice Sorrell

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or other wise without the permission of the publisher.

Acknowledgements

A very big THANKYOU to Westwood Forster for allowing me to use the Visual Alms logo.

This manual is one in a series developed at The City University, London for training courses which I developed for the Visual Alms installation there. While City does not officially endorse these manuals I would still like to thank them for my time there and the learning experiences it afforded me.

Janice Sorrell Sept 2002

Course Aims

The aim of this course is to show you the Marketing Initiatives module of Visual Alms. We will see how all outward contacts can be tracked across departments as well as the University as a whole. We will see how Marketing Initiatives can be used for advanced planning of activities. The main aim of this course is to allow you to set up and use your own Marketing Initiatives for it is this module that marks up the records to show that a constituent has received a particular mailing.

Contents

- ◆ Accessing Marketing Initiatives
- ◆ Overview of City's work with the outside world
- ◆ By Year
- ◆ By Activity
- ◆ By Department
- ◆ By Project
- ◆ By Approach
- ◆ Advanced Planning
- ◆ Coding Structure
- ◆ Setting Up a Marketing Initiative
- ◆ Filling in the Marketing Initiative Screen
- ◆ Setting up Approaches
- ◆ Organising your Marketing Initiative
- ◆ ToDo
- ◆ Updating Approach History

Accessing Marketing Initiatives

Today we will be using a copy of Visual Alms – not the live database itself. Your account should still be in place and, from the Introduction to Alms Course, you should have a Marketing Initiatives Button on the button bar.

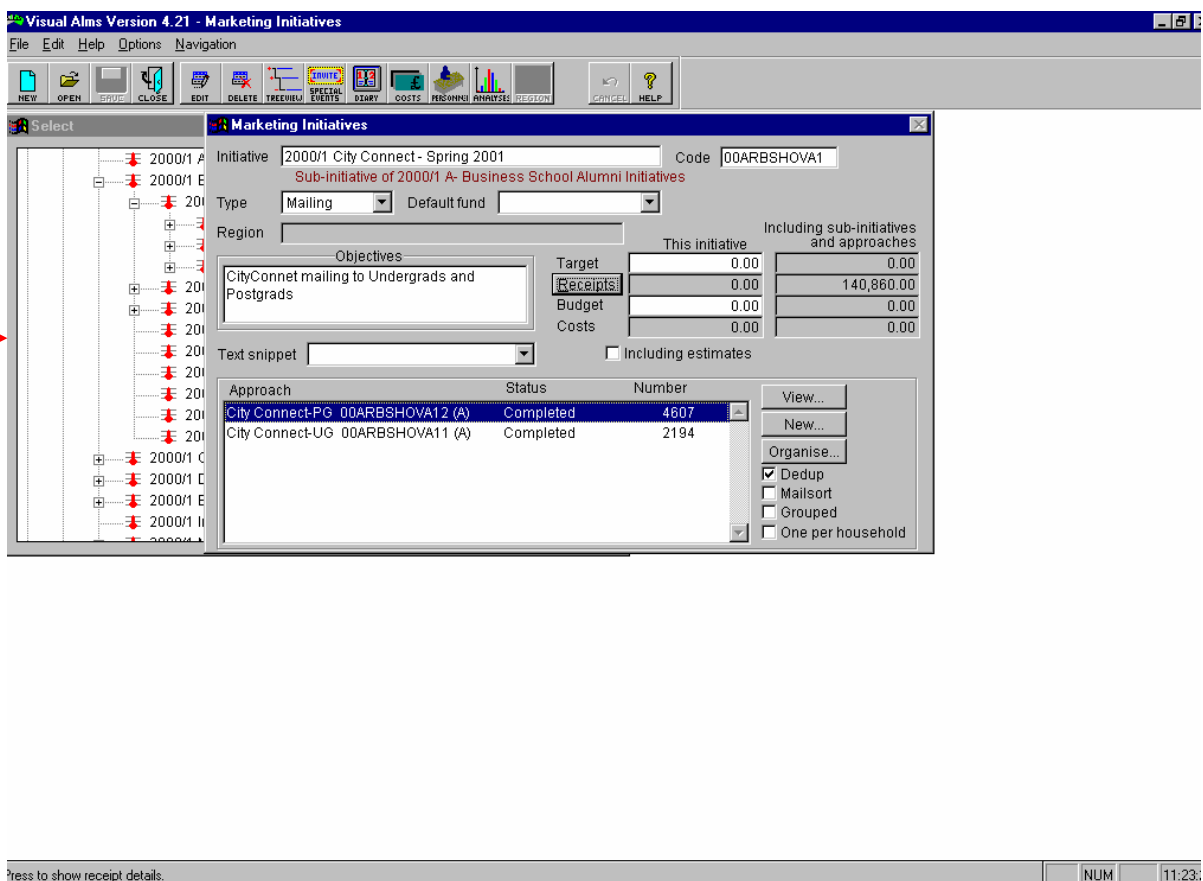
In case you don't

Go to the Navigation menu

All Processes

Marketing Initiatives

Your screen will probably look like this



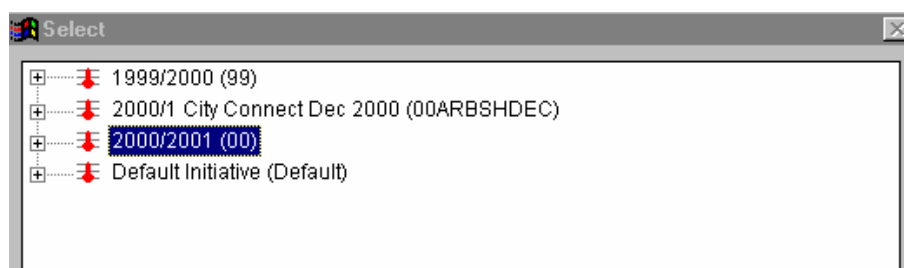
The part we are initially interested in is the Select Window. Click on to it to make it the active window. You can also resize it if you like.

Overview of City's work with the outside world

When Alms was first brought into City, we had to decide how we wanted to use the Marketing Initiative structure. Like Departments and Courses on the Education table, Marketing Initiatives has a hierarchical structure. Should we organise by School and Department then Activity or vice-versa?

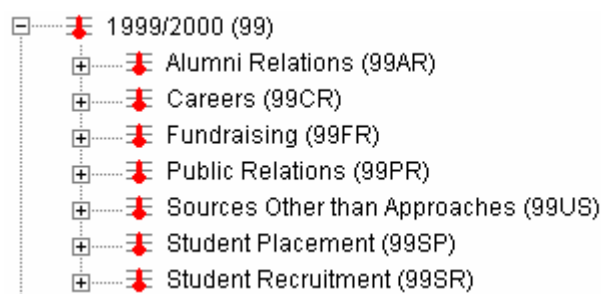
We have decided firstly to organise

By Year



This is the top most level in the structure. It is defined in terms of academic year, hence 1999/2000 and 2000/2001. The Default Initiative was there when Alms came out of the box since the system had to come with at least one initiative. We ignore the Default Initiative, the sub-initiatives and approaches under it (we come on to these later). And we must 'fess up here and say that 2000/1 City Connect Dec 2000 (00ARBSHDEC) was created mistakenly at this level. It should live at a much lower level in the 2000/2001 Initiative. Since it has been run we don't have any way of moving it to a better location. Please, learn from our mistakes!

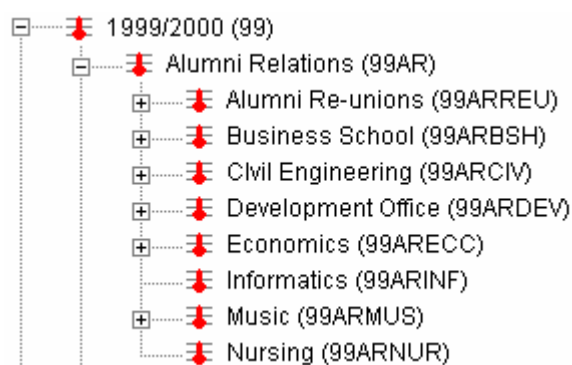
By Activity



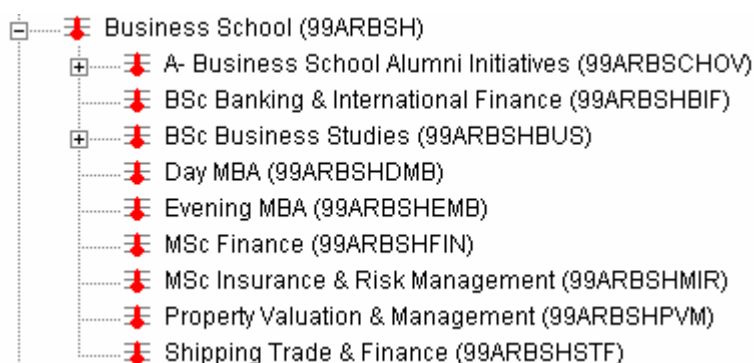
These are the types of activity carried out by City in regard to the Visual Alms database. Most are self evident. "Sources other than Approaches" however requires some explanation. The most usual of these is the Unsolicited Approach – i.e. a letter, phone call or email that come in unprompted from the contact, "out of the blue". Others can be from the Web Update Form which passively awaits contacts to fill it in and submit it. Vice Chancellor (or other senior member) contact can be from direct face to face meetings. Certain data cleaning processes we wish to record onto the record.

It is worth saying here that the entries in the In/Out button, or Approach/Response History, are generated as a combination of Marketing Initiatives and Inbound Contact Logging where data entry occurs.

By School/Department

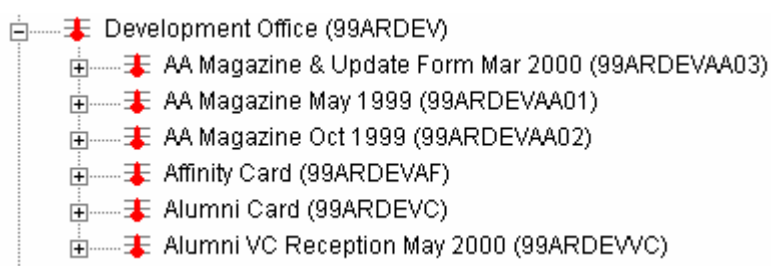


Under each of the Activities are the Schools and Departments that are likely to be performing these activities. In the case of Schools, Departments are grouped under these e.g. Business School



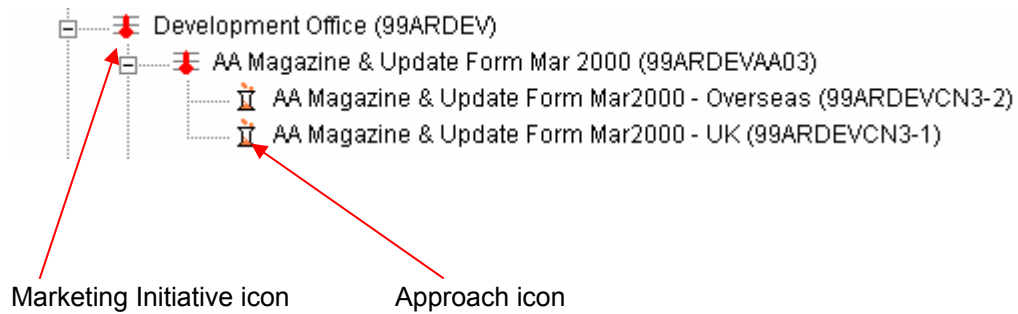
By Project

Under each Department are the Projects, be they magazine mailings, surveys, letters, news letters, phone campaigns etc.



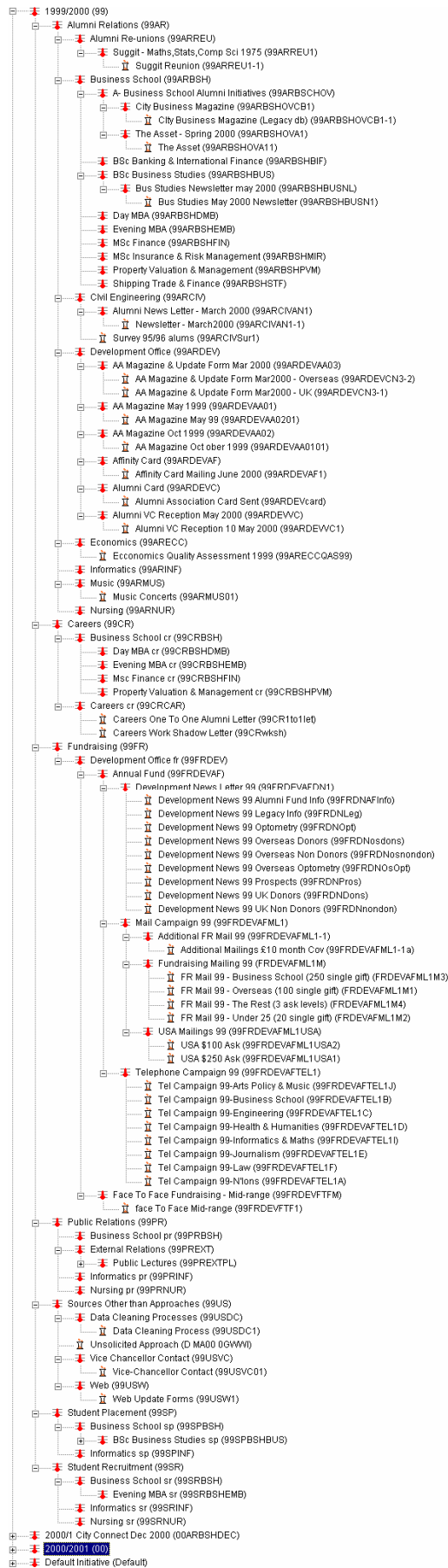
By Approach

Up to this point, in Alms speak, we have been dealing with Initiatives, Sub-initiatives, Sub-sub-initiatives etc. Approaches are the lowest level in the whole Marketing Initiative structure and they are the business end of the process.



On the next page is the Marketing Initiative Structure 1999/2000. Activities are easily identified by the Approach icon. Sorry about the print size.

Marketing Initiatives



Advanced Planning

Advanced planning with this module happens at two levels.

- ◆ At the level you will be dealing with where you can set up your mailing etc months in advance of when you want to do them.
- ◆ At the System Administration level, the structure for the year is copied to set up a structure for the next year. This generally happens just before the start of the new financial/academic year.

Alms, like most of these packages, was written for the standard charity market. Year on year you would have standard activities – newsletter mailings, fundraising mailings, sponsored events, car boot sales etc. You know these things are going to happen so why not set them up in advance? The same holds true in most departments here at City.

Although you set things up in advance, then you have more data added to the system, nonetheless when you come round to running a marketing initiative you are working from the most up-to-date information in the system.

Coding Structure

You may have noticed that there are codes after the initiative and approach such as 99ARBSHBUS and 99ARDEV. These codes are required field in Alms. However we set them up manually.

First two digits - the year **YY**

Next two digits - the activity **AA**

AR – Alumni Relations
CR – Careers
FR – Fundraising
PR – Public Relations
SP – Student Placement
SU – Student Recruitment
US – Sources other than Approaches (Unsolicited)

Next three digits – school/department **SSS**

BSH – Business School
CIV – Civil Engineering
DEV – Development Office
ECC - Economics
INF – Informatics
MUS - Music
NUR – Nursing
REU – Alumni Reunions

Next two/three digits – department within school (if required) **DDD**

For the Business School (this may change given the re-organisation)
OV – Overall
BIF – Banking & International Finance
BUS – Business Studies
DMB – Day MBA
EMB – Evening MBA
FIN – Finance
MIR – Insurance & Risk Management
PVM – Property Valuation & Management
STF – Shipping Trade & Finance

Next two digits – individual initiatives **NN**

Two digits to identify the initiative

Next two digits – individual approaches **PP**

Two digits to identify the approach

So **YYAASSSDDDNPP**

We're not rigid about the number of digits here, the key is to be consistent. The codes build up on each other so that if you were to sort them they will come out the same way as the structure (this may even be what is happening behind the scenes).

Why bother? Because the approaches are indexed on the code and this becomes SO important in Inbound Contact Logging (Data Entry).

Setting up a Marketing Initiative

Since we are not using the live database, in the following demonstration/exercise please set up an initiative for your own department.

The first thing is what year are you in? The Marketing Initiative you are about to set up should come under that year (unless of-course it is almost the start of the next year....).

- ◆ Click onto the + beside the year to expand out the list for that year

Next, what type of activity is it?

- ◆ Click on the + beside the activity of your choice (lets take Alumni Relations)

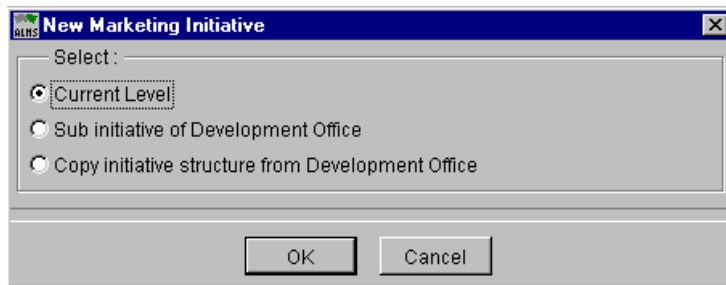
Now, which school or department?

- ◆ Again you can click the + to open up the structure of your school/department further.

Once you have got to the level where you want to set up your initiative, use the New button at the top left on the Button Menu.



You are then presented with the following screen.



As you can see, you have three options, to set up at:

- ◆ The Current Level – unlikely that you would want to set up an initiative at the department level – unless your department has just been introduced to Alms.
- ◆ As a Sub initiative of the current level – most likely option – in the case above we were looking at Alumni Relations and the Development Office under this.
- ◆ Copying the Initiative structure is something that the System Administrator does. It would be very unlikely that you would want to copy the structure of any other department. If you do, please contact the System Administrator.

Take the Sub initiative option. This brings up the Marketing Initiatives Screen.

Filing in the Marketing Initiative Screen

Name your Initiative

Fill in your Manual Code (see earlier)

Type of Initiative

Default Fund
(fundraising-Development Office Only)

The screenshot shows the 'Marketing Initiatives' software window. It contains several input fields and sections:

- Initiative:** A text box containing 'Sub-initiative of 2000/1 Development Office'.
- Code:** An empty text box.
- Type:** A dropdown menu with 'xGala' selected.
- Default fund:** An empty dropdown menu.
- Region:** A text box containing '///'.
- Objectives:** A large empty text area.
- Text snippet:** A dropdown menu.
- Approach Table:** A table with columns 'Approach', 'Status', and 'Number'. It is currently empty.
- Summary Table:** A table with two columns: 'This initiative' and 'Including sub-initiatives and approaches'. It has rows for 'Target', 'Receipts', 'Budget', and 'Costs', all showing '0.00'.
- Options:** A checkbox for 'Including estimates' and a list of checkboxes for 'Dedup', 'Mailsort', 'Grouped', and 'One per household'.
- Buttons:** 'View...', 'New...', and 'Organise...'.

Objectives
enter a description
of what your Initiative
is aiming to achieve

Approaches
We come onto this next

Targets (for fundraising)
Receipts (for fundraising)
Budget (how much you can spend)
Costs (accumulated costs – field is
updated when costs are recorded
through Costs option on Icon Bar)
Include Estimates (in Costs)

The boxes to the right show the totals for
These fields including the figures from sub-
Initiatives and approaches, if any

Text snippet (for fundraising)

Types of Initiative: Event, Mailing, Telethon, Ticketed, xGala, xSponsored

Important Bit

In any drop-down or F4 list, items prefixed by x are not in use. These items are supplied as standard by Westwood Forster and are re-established, minus the x, after each update. While we do try to get rid of these after each update there are a lot of tables to do. Please check the x-list and don't use these or their un-xed counter-parts.

Setting up Approaches

The lower half of the Marketing Initiatives screen is for the Approaches. For some it will be enough to have one approach per initiative. But if you are breaking a mailing down to say UK and Overseas you will have two approaches. The number of approaches you have is the number of queries you have (sometimes known as segments) to define your overall mailing.

Use the New button to bring up the Approach Screen

Title of your approach

Manual Code (see earlier)

Notes – a description of what this particular approach is designed to achieve

Default Fund and Text snippet (for fundraising)

Class, Type
Medium, Issue
Date
Output
Status

Class, Type, Medium and Issue are all systems tables. If you don't see an option that suits your needs, contact the System Administrator to set it up for you.

Class and Type

First select your approach class. The following lists are printed direct from the system tables. What you will see is a standard drop down list.

Approach class
Assistance Req Drct
Assistance Req Indct
Contact Research
Direct Marketing
Merchndsnsg (Direct)
Fundraising (Direct)
PR (Direct)
FaceToFace Fnrsng
Indirect Marketing
Merchndsnsg(Indirect)
Fundraisng(Indirect)
Marketing (Indirect)
PR (Indirect)
Reunion
Cultivation (Direct)
Cultivatn(Indirect)
xxxxxx

The Approach Type will depend on the Approach Class

Approach type	Approach class
Fndrsng Mail-Initial	Fundraising (Direct)
Fndrsng Mail Foll-Up	Fundraising (Direct)
Market Mail-Init	Direct Marketing
Market Mail-Foll-Up	Direct Marketing
Alumni Mag	Cultivation (Direct)
Xmas Card	Cultivation (Direct)
Alumni Questionaire	Assistance Req Drct
Legacy-Initial	Fundraising (Direct)
Legacy-Foll-Up	Fundraising (Direct)
Phonathon	Fundraising (Direct)
Phon PreCall Mail	Fundraising (Direct)
QAS Survey	Contact Research
Surveys	Contact Research
Careers Advice	Assistance Req Drct
Alumni Organised	Reunion
City Organised	Reunion
AA Cultivation	Cultivation (Direct)
Public Lectures Lflt	PR (Direct)
Event Publicity	PR (Direct)
Careers Fair	Assistance Req Drct
Bulk mailings	
Mailing	Direct Marketing
Newspaper ad.	Indirect Marketing
Radio appeal	Indirect Marketing
Television	Indirect Marketing

Marketing Initiatives

Medium

Select your medium

Medium	Type
Alumni Association Card	City Mailings
Brighton Evening Argus	Local Newspaper
Barts Newsletter	City Publications
University Brochure	City Mailings
Capital Radio	Local Broadcast
City Connect (Business School)	City Publications
City Connect	City Publications
Channel 4	National Broadcast
Civil Eng Newsletter	City Mailings
City Network	City Publications
Development News	City Publications
Departmental Brochure	City Mailings
Daily Telegraph	National Newspaper
Granada TV	Local Broadcast
Hampstead & Highgate Express	Local Newspaper
Journalism Newsletter	City Publications
LBC	Local Broadcast
Letter	Direct Marketing
Invitation	City Mailings
CUBS Newsletter	City Publications
Nursing Times	Press Specialist
Observer	National Newspaper
Public Lectures Leaflet	Direct Marketing
Radio 1	National Broadcast
Sunday Telegraph	National Newspaper
Telephone	Electronic Media
Conference Brochure	City Mailings
City Website	Electronic Media
Email	Electronic Media

Approach Issues

Select your issue

Issue description	Issue type
STF Alumni Relations	STF Issues
Careers Svc Stud Placemnt	Careers Servc Issues
Devel Office Alumni Relations	Devel Office Issues
Devel Office Fundraising	Devel Office Issues
Devel Office Contact Cultivate	Devel Office Issues
Music Concerts	Music Issues
Economics Survey	Economics Issues
Civil Engineering Surveys	Civil Engineering
Civil Eng Alumni Relations	Civil Engineering
Careers - One To One	Careers Servc Issues
Careers - Work Shadow	Careers Servc Issues
Business Studies Alumni Reltns	Careers Servc Issues
PR - lectures	External Relations
PVM Lecture	PVM Issues
Actuarial Science Conferences	Actuarial Science Is
Actuarial Science Lectures	Actuarial Science Is
BIF Issues	Actuarial Science Is
Careers Dev Centre Issues	Careers Servc Issues
Global Warming	World Issues
Pollution	World Issues

Date

This is the date when you will be taking the data from the system.

You cannot backdate this. It must be today's date or greater.

Output

The form of output you would like from the Output Toolkit. In this case, lets take LABELS J3

Once you have set all of this up, Save it.

Approach - Initiative: 2000/1 Extra Magazine Mailing

Title: Extra Copies for those born in Aug 42 Code: 00ARDEVSU01 Man. code: 00ARDEVS

Class: Cultivation (Direct) Medium: City Network City Publications

Type: Alumni Mag Issue: Devel Office Contact Cultivat Devel Office Issues

Date: 28/06/2001 Output: LABEL LABELS J3

Status: No query defined Destination: ...

Note: sending extra copies of CityNetwork out to those born in Aug 1942 Inactive

Approach Cost	£0.95	Number (Estimate)	52	Total costs	£0.00
Target	£0.00	Number (Maximum)	70	<input checked="" type="checkbox"/> Including estimates	
Budget	£70.00	Number (Actual)	0		

Target group: _____ Weight: 0

Default fund: _____ Text snippet: _____

Status

This is changed by using the Query button on the Icon Bar and selecting the query which defines this approach.



Lets select the query "Born in August 1942".
Once the query is chosen, the Status will change to "Defined".

Your screen should be roughly as follows,

The screenshot shows a software window titled "Approach - Initiative: 2000/1 Extra Magazine Mailing". The form contains the following fields and values:

- Title: Extra Copies for those born in Aug 42
- Code: 00ARDEVSU01
- Man. code: 00ARDEVS
- Class: Cultivation (Direct)
- Medium: City Network
- City Publications: City Publications
- Type: Alumni Mag
- Issue: Devel Office Contact Cultivat
- Devel Office Issues: Devel Office Issues
- Date: 28/06/2001
- Output: LABEL
- LABELS J3: LABELS J3
- Status: Defined
- Destination: [empty]
- Note: sending extra copies of CityNetwork out to those born in Aug 1942
- Approach Cost: £0.95
- Target: £0.00
- Budget: £70.00
- Number (Estimate): 52
- Number (Maximum): 70
- Number (Actual): 0
- Total costs: £49.40
- Including estimates:
- Target group: [empty]
- Weight: 0
- Default fund: [empty]
- Text snippet: [empty]

The lower half of the screen can also be filled in, and Saved. This will allow you to keep track of your costs.

Approach Costs – is the cost per contact, i.e. how much each “packet” costs including all materials and mailing.

Target – this is for fundraising and is the target amount that this approach is hoping to make. This is for analysis and statistical purposes only.

Budget – how much you have available to spend on this approach.

Number (Estimate) – how many you think this approach will reach – you may have previously run the query and have a pretty good idea how many you will be reaching.

Number (Maximum) – This field is for information only and is used when you have a maximum number of people that you can possibly include in an approach (for instance for a special event). It's there to make the next field more interesting when the Initiative is run.

Number (Actual) – this is filled in by Alms once the initiative is run.

Total Costs – calculated from Approach Costs times Number (Actual)

Weight – we don't currently use the mailsort facility on Alms so this field isn't in use.

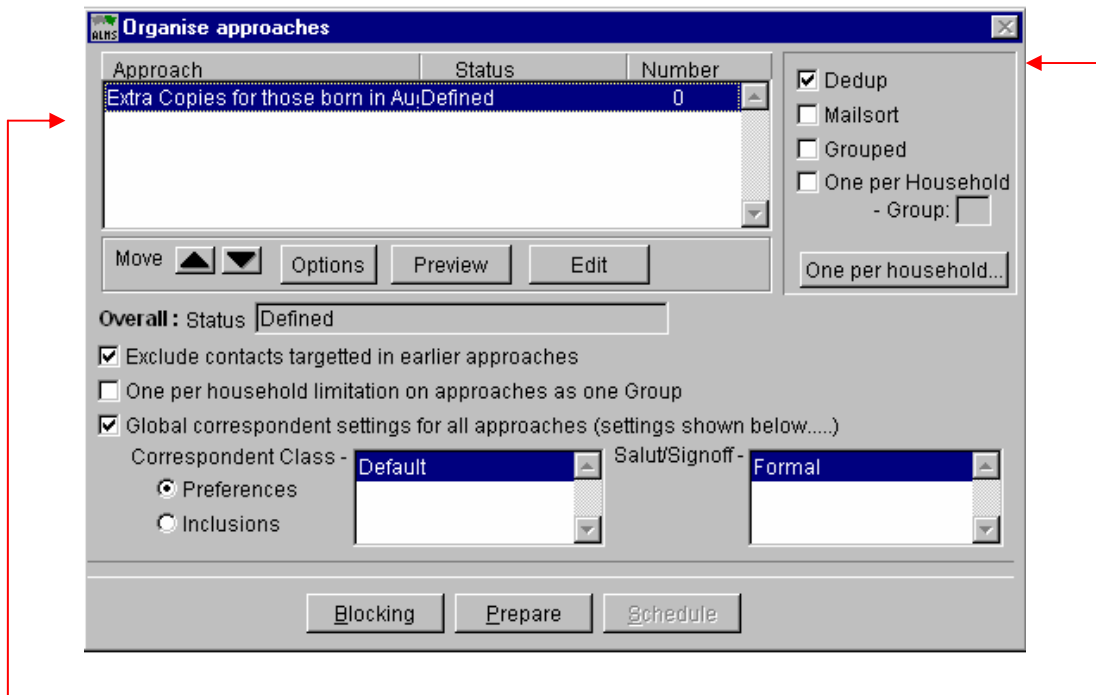
Target Group – isn't in use

Defaults Fund and **Text Snippet** are for fundraising.

Organising Your Marketing Initiative

So, you've set up your initiative, you've set your approaches (and double checked you have everything exactly the way you need it, including making sure of the date).

Now's the time to push the Organise button. This brings up the Organise Approaches screen



This is the list of the approaches in your initiative. The order of them is important if you have ticked the **Dedup** (de-duplicate) box. The approach at the top of the list is run first. Subsequent approaches will not include anyone who has been included in this approach. You also need to ensure that the **Exclude contacts targeted in earlier approaches** box is ticked to guarantee that duplicates are removed from each subsequent approach based on earlier approaches. Use the **Move** arrows to put your approaches into the order you want.

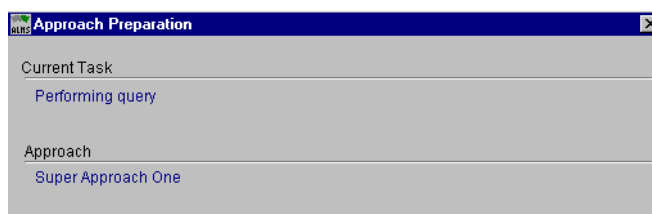
Mailsort, as we have seen, is not used here at City. Larger mailings are sent out to a Mailing House that can run this facility for us.

Grouped and **One per Household** are not currently in use.

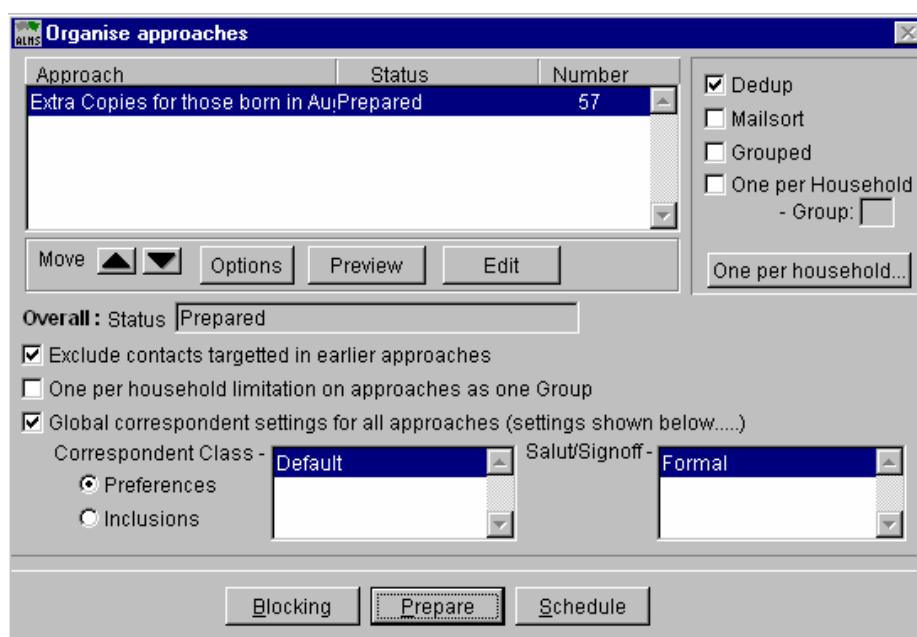
Global Correspondent setting are however used whenever you are doing something that involves addresses and addressing. They automatically come up with the Default Correspondent and Formal Salutation/Signoff types. You can select several correspondent type, for example Work then Default. If the record has a Work Correspondent it will use this in preference to the Default. If there is no Work correspondent then it will use the Default. Similarly for the Salutations and Signoffs. At the moment most records only have the Formal Class.

Blocking can be set in place here though it is generally best to have this sorted at the query stage.

Once you have the approaches suitably organised and the other options set, use the Prepare button. This will run the queries, make sure that blocked contacts are not included and make sure that duplicates are excluded. You can prepare an initiative as often as you need to. At the preparation stage no updates take place to the records.



Once the query is prepared, the status changes and you are now able to use the Schedule button to add all the approaches of your initiative to the ToDo list.



You will get a message that Alms has added the approaches to the ToDo list. Once you have Scheduled an initiative it can no longer be changed.

ToDo

You should already have a ToDo button on the Button Bar on your desktop.

Just in case, you can access ToDo by

Navigation

All Processes

ToDo

This brings up the following screen.

Type	Name	Date due	Freq.
APPHIST	APP/HIST Extra Copies for thos	28/06/2001	T

Each of the approaches in your initiative will be listed here. If you have forgotten to do a previous set of approaches then by using the AD-Today button at the top as opposed to the Today-Only button.

To run your approaches, select each one in turn and push the big Do button.

When an approach is running it will run the query, having been de-duped and un-blocked at the preparation stage, and will the product the output for you.

Updating the Approach History

Once you have obtained your output and closed the screen, the act of closing this will prompt the following question

Update Approach History?

Yes No

By saying Yes this will do two things

- ◆ Put an entry of the approach into each constituent's record – this allows us to see who has received what. It also ties data updates to the mailings etc that prompted them. This will let us see how successful these initiatives are in terms of prompting a response.
- ◆ Put an entry into the Financial Summary on each record – this is essential to the financial processing side of the system as it makes gift processing fast and allows us to analyse how successful fundraising initiatives have been through the analysis reports.

If you now go back to Marketing Initiatives you will see that the status has changed to Completed.

The screenshot shows the 'Marketing Initiatives' window. The 'Initiative' field is 'MI Training Course Initiative' with code '00ARDEVSU'. The 'Type' is 'Mailing'. The 'Objectives' field contains 'Marketing Initiatives Training Course. Extra mailings of CityNetwork (Approach History not updated)'. A table shows financial data for 'This initiative' and 'Including sub-initiatives and approaches'.

	This initiative	Including sub-initiatives and approaches
Target	0.00	0.00
Receipts	0.00	0.00
Budget	0.00	70.00
Costs	0.00	54.15

The 'Approach' list shows one entry: 'Extra Copies for 00ARDEVSU01 (A)' with status 'Completed' and number '57'. The 'Including estimates' checkbox is unchecked. The 'Dedup' checkbox is checked, while 'Mailsort', 'Grouped', and 'One per household' are unchecked.

You should also be able to go into the records of those you were aiming to send the initiative to check the Approach/Response History on the In/Out button.

Conclusion

In this course we have seen

- ◆ Activity across the University, Schools and Departments
- ◆ Advanced planning for mailings etc
- ◆ How to set up a Marketing Initiative
- ◆ How to set up and Approach
- ◆ How to prepare and run the Initiative
- ◆ How to update the Approach History

Now, while you can get your outputs just through the Query module, Marketing Initiatives allows us to build up a picture of the level of contact BOTH ways. For the University to fulfil its mission statement is very important to capitalise on our relationships with its alumni and other friends.

When it comes time to set up initiatives for real, please feel free to contact the Information Systems Team in the Development Office. We will be happy to sit in with you and help you.