

Fundraising Direct Mail RFM Selection



Lane Services LLC
not-for-profit technology solutions

Process an entire appeal with a simple interface

Direct mail fundraisers require the ability to perform complex database segmentation so they reach out to the proper prospects or previous donors for special appeals. Based on historical recency, frequency & monetary (RFM) statistics, they assign key codes to these records and may offer special premiums to entice prospects to donate a greater amount than they had previously. In addition, it's important not to ask a previous \$100 donor for a gift in excess of \$100, or ask a \$100 donor for \$10. The application also handles prospect records from outside lists that were purchased or 'rented'. These records may be imported from either the iMIS Name or Prospect tables, for those using the Acquisition Management module. Prospect records are checked against previous donors using a match code stored in major key to minimize the possibility of duplicate mailings. Mailings are personalized and in many cases sent to an outside vendor for processing.

Direct Mail in iMIS? We make it easy!

By maintaining stored procedures that were used to select records for previous appeals, this application provides an organization with a user interface to:

- Process an entire appeal, from record selection to n'th naming
- Adding 'decoy' records
- Creating MAILING activities in iMIS
- Creating the export file

Select ID	Mailing Name	Description	Updated	Total Record	Date	Mail Type	Processed
Select 2	NAS_Appeal_Selections_FZ_09_2011	November 2011 Appeal Follow-Up (Food Distribution) Reminder/Mailing [C.L.G. Panel H]	FZ_SEPT_2011	653988	10/28/2011	HOUSE	True
Select 3	NAS_Appeal_Selections_FK_09_2011	November 2011 Appeal House Selection	FK_SEPT_2011	664393	9/15/2011	HOUSE	True
Select 4	NAS_Appeal_Selections_GL_09_2011	CLG Spanish Guadalupe - Oct. 2011 - Roll-out House Selection - iMIS	GL_SEPT_2011	91314	9/28/2011	HOUSE	False
Select 16	NAS_Appeal_Selections_GC_02_2012	March 2012 Appeal House Selections	GC_HOUSE_02_2012	1776736	1/22/2012	HOUSE	False
Select 8	NAS_Import_Acquisition_AR_12_2011	Annual Report House Dec. 2011 Appeal	AR_DEC_2011	225004	11/18/2011	HOUSE	True
Select 9	NAS_Appeal_Selections_LR_01_2012	House Selection for Edge Direct Little Red Enrollments	LR_JAN_2012	500004	12/27/2011	HOUSE	True
Select 10	NAS_Appeal_Selections_GW_10_2011	Holiday Gift Wrap November 2011	GW_NOV_2011	425004	12/29/2011	HOUSE	True
Select 24	NAS_WorldBulletin	World Bulletin 101	WB_FEB_2012	180357	2/7/2012	HOUSE	True
Select 14	NAS_EC_HOUSE_02_2012	Easter Cards Roll Out Feb 2012 Selections	EC_HOUSE_FEB_2012	1158192	1/17/2012	HOUSE	False
Select 15	NAS_Appeal_Selections_MZ_01_2012	Winter/Spring 2012 Magazines	MZ_HOUSE_MAR_2012	992707	1/23/2012	HOUSE	True
Select 21	NAS_APPEAL_Selections_SB_12_2011	Shoe Shine Box High Donor	SB_12_2011	1150	1/28/2011	HOUSE	True
Select 22	TOM_IMPORT_HOUSEHIT_GC_03_2012	MARCH_2012_HOUSE_HITS	GC_HITS_MARCH_2012	362719	1/30/2012	HIT	False
Select 23	NAS_Import_HouseHITfile_GA_01_2012	Ga House Hts January 2012	GA_HITS_01_2012	338698	1/18/2012	HOUSE	True
Select 25	NAS_Appeal_Selections_LP_03_2012	March 2012 Cambodia Label/RED	LP_HOUSE_MAR_2012	1000021	2/20/2012	HOUSE	False
Select 26	NAS_Appeal_Selections_RR_04_2012	April 2012 Rose Cross House Appeal	RR_HOUSE_APR_2012	1002846	1/21/2012	HOUSE	False

Select a 'house' mailing (previous donors) and add parameters.

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Integrated with ImageScan

Interfaces with ImageScan, which eliminates the need for operators to manually input the vast majority of gifts. Only those with unreadable scan lines, address change or special requests actually require intervention. All daily transactions passed through ImageScan are automatically added to an iMIS batch. The selection application creates a file that ImageScan uses to relate a donation to the request.

PLEASE SELECT ACTIVITY MAILINGS TO CREATE!

- [Activity House Mailing](#)
- [Create Prospect in IMS](#)

Please Select from Below Prospect Mailing files to process

TOTAL RECORDS: 3

Select ID	Mailing Name	Description	Updated By	Total Record	Date Created	File Processed?
Select 1	NAS_Import_Acquisition_PK_09_2011	September 2011 Mailing	ACO_SEPT_2011	1393876	9/2/2011	True
Select 17	MAD_ACQUISITION_QC_03_2012	March 2012 Appeal Prospect	QC_MARCH_2012	618897	3/29/2012	False
Select 11	NAS_Import_Acquisition_LT_02_2012	Little White February 2012 Prospect	LT_FEB_2012	2350000	12/29/2011	True

SEGN

17

File Name

MAD_ACQUISITION_QC_03_2012

Description

March 2012 Appeal Prospect

Select prospects.

iMIS DIRECT MAIL FUNDRAISING SELECTION Your home for fundraising database segmentation!

Import Prospect Process:

FILE IMPORT OPTIONS:

- [Import Prospect File](#)
- [Create Match Code](#)
- [Assign Category to Prospect Data](#)

Assign Category or Sect code to Prospect Data

Prospect Table Name:

Key Codes, separated by comma ex: '0W001','0W002','0W050'

Category/Sect code:

Assign the key codes.

iMIS DIRECT MAIL FUNDRAISING SELECTION Your home for fundrais

PROCESS NEWLY CREATED SELECTIONS:

- [Add selection list as previous Mailing](#)
- [Add Selections to be created as Mailing](#)
- [Add selections to be used as Clone](#)
- [Delete/Clean entries](#)

NAS_FilesToCreateMailing_in_iMIS

ADD MAILING THAT NEEDS TO BE CREATED IN IMIS ACTIVITY:

MAILING_NAME:

DESCRIPTIONS:

UPDATED_BY:

TOTAL_RECORD:

DATE_ADDED:

MAILING_TYPE:

Designed by Lane Services, LLC in cooperation with Salesian Missions

Create activity records.

Fundraising AP/Cash Orders System Setup Tools

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Import Image System

1 2 3 4

Select File:

Batch Name: No Spaces: yymmdd_XXXX (01218_2010)

'Read' the scanline (iMIS ID & key code).