

Data & Research Certification Networking Group

June 2009

Silver Spring, MD

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Overview

***“There are three kinds of lies:
lies, damned lies, and statistics.”***

-- Benjamin Disraeli

- This presentation will quickly cover ...
 - ◆ Why we need data ...
 - ◆ How to get it ... through transactions, database, research questions
 - ◆ How to apply it to your programs
 - ◆ Case studies and one of my favorite illustrations



First, A Word About Why



Your Goals/Needs

- From the survey...
 - ◆ Discovering shifts in demographics
 - ◆ Measuring demand outside core membership: demonstrate market needs
 - ◆ Improved tracking maintenance for re-cert
 - ◆ Encourage prospects to self identify
 - ◆ Improve communications to/from certificants/candidates
 - ◆ Improve content proficiency measurements
 - ◆ Understand the ed/experience of examinees
- Some of you aren't that proud of your data....
 - ◆ Prospect targeting; recognition for loyalty
 - ◆ Better piloting methods
 - ◆ Data loss/conversions



Observations in Doing my Homework ...

- Personal interviews with some of you suggest:
 - ◆ **Data Rich/Data Poor**: Although certification programs require sophistication, there is relatively little corresponding use of data for operations, and it's a commonly accepted practice.
 - ◆ **Clear Task Delineation**: Vendors do much/all of the psychometrics/testing; staff do the administration. Data in that context is episodic, very purposeful.
 - ◆ **Varying Culture/Structure**: Relationship to the associations may vary, as do # of staff/amount of resources.
 - ◆ **Different Terminology**: When I say “data” today ... I mean information that guides Relationship Management Marketing/Communications, Financial/Pricing
 - Not the more familiar educational/testing statistics
 - What we're talking about it much simpler (after all, I do it!)



How Data Can Create Value

- **Program Support:**
Documenting common business or professional practices & impediments for outreach, programs, issue identification
- **Decision Support:**
Helping Boards make right, fact based decisions on program launches, sunsets, pricing, etc.
- **Background:**
Documenting membership profile, populating demographic database, supporting trend analysis
- **Feasibility Assessment:**
Measure market receptivity, estimate use/profit/loss



Who Uses Data Well?

Texas Medical Association

- Using the MS SQL that comes with their network pack
 - ◆ Queries/very minute and flexible
 - ◆ OLAP/datacubes—ability to click to drill down or up
- Used for program evaluation/design
- Used for marketing: micro-selections of physicians with a range of criteria:
 - ◆ Status: licensed/board certified
 - ◆ Emphasis: specific specialties & sub-specialties
 - ◆ Need: probable CE requirements
 - ◆ Geographic location: x county radius/comfortable drive
- Incredible market penetration, then more stagnant (saturation)



Decisions/Activities that Need Data

Decisions, decisions...

- Staff up/down
- Do more/less
- Do something new/
drop something old
- Do something different

Implications *(if done right)*

- More effectiveness; better ROI
Greater value in “bundle”
- Better strategic focus, minimal fallout
- More support/excitement for new
program launches or re-releases
- Become more efficient if budgets or
services need to be cut
- Demonstrate responsiveness to your
body of certificants
- Sometimes, being dynamic in the
face of change



Potential Benefits and Uses

Benefits/Issues...

- Data: potential forces for evil or for good
- Overlooked asset to your program: you *know* these people
- Over time, an indispensable tool
- Rational ignorance

Potential Areas for Growth

- Getting answers you don't already have
- Getting answers you couldn't possibly anticipate
- Identifying a new set of questions which you didn't know you needed answered before
- Diagnostics for the problems and issues you observe

Why Data Is *More* Necessary Today

The majority of communication is non-verbal
(and we miss most of it)

- We still put a premium on face to face: an entire industry of conventions exists because of it
- Adult learning theory: emphasis on application and personal interaction with the content

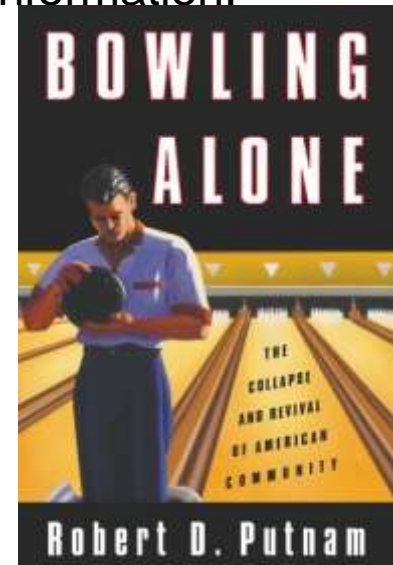
Two disadvantages in my mind:

1) Insulates us from the intelligence that reflects a steady flow of information.

- ◆ We "miss" the equivalent of conversations with our audience about the weather & their health...
- ◆ But we also miss real in-depth knowledge of their motivations, experiences now and changing over time

2) Actual applied research becomes more challenging

- ◆ We can't identify a problem today and act on it next week to include it in conversations;
- ◆ to flesh out our understanding of individuals, the market

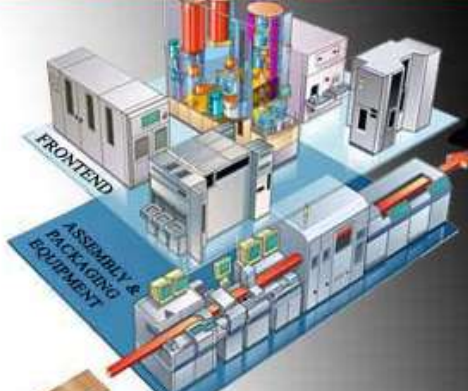




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Choose a Specialty

- Nurse Practitioner
- Clinical Nurse Specialist
- Other Advanced Level
- Specialties

I Want To...

- Find a Magnet Organization
- Find a Pathway to Excellence
- Credentialed Organization
- Find an Accredited Organization

I'm Looking For...

- Magnet Nurse Opinion Survey
- Pathway Nurse Survey

Events

- National Magnet Conference™
- Certification Review Seminars
- Pharmaceutical Seminars
- Magnet Showcase
- Accreditation (CNE) Workshops
- Pathway Workshops
- Research Symposium
- Certified Nurses Day



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MEMBER LOGIN

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CMAA University: Learn ... Experience ... Connect!

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Our Friend, the Internet

- Needless to say, it's had an impact
 - ◆ Allowed us to offload much of our pesky customer service burden
 - ◆ Changing interactions: you could suddenly shop us for information instead of calling
 - Routine requests: requirements, testing locations, etc.
 - ◆ All easy to post now: anything non-confidential.
 - ◆ With appropriate security, posing confidential scores/grades/status
- Better data/information search process?
 - ◆ Probably not: my favorite classroom experiment at Loyola



Simple Truth: Most of the Data We Need Is Already Ours or Easily Accessible

- For real analysis, I find most AMS unhelpful
 - ◆ Best to export and manipulate in spreadsheets, programs such as SPSS or SAS or Excel's pivot tables
 - ◆ Feed your database and ensure it's as complete as possible
- Short survey by The Communicators told me:
 - ◆ Most of you do quantitative surveys/evaluations, some interviews
 - ◆ Few do any data mining; few see any missed opportunities or found any surprises when using their data
- Database ROI is unpredictable
 - ◆ You already have to maintain it: fixed cost asset can be leveraged to do much more for you



Next, A Little on How-To & Methodology



Data: Techniques & Methods

- It is easy to do bad research
 - ◆ But it's better than not doing any at all
 - ◆ Learn from your mistakes, and the mistakes of others
- The data is often already there ...
 - ◆ Key is retrieving, analyzing, & reporting



External Data/Secondary Research

External Data: Mining your government and marketing resources

- Educational field
 - ◆ NCES (National Council for Educational Statistics) for educational enrollment and related statistics
 - ◆ MDR (Market Data Retrieval) for finding specific people, segmented by geography, emphasis
- Business entities
 - ◆ Census Bureau: Economic Census, County Business Patterns: Total establishments, average payroll, total employment
- Professionals/individuals
 - ◆ BLS (Bureau of Labor Statistics), Statistics Canada
- General household purchase behavior, media usage statistics
 - ◆ ACNielsen, IRI, Arbitron
- Always a groovy mix of public and private resources
 - ◆ Use them to assess universe, penetration, changing trends



Key Steps in Qualitative Research

- Plan**
 - Define objectives: identify unmet information needs, collect dangling hypotheses, poll stakeholders.
- Guide**
 - Draft series of core questions, sub-questions or probes, ground rules and introductory language. Review guide for completeness, reasonableness, flexibility and length. Vary by audience.
- Sample**
 - Identify a pool of appropriate participants. Ensure a mix for interviews, in terms of demographics and engagement profile (leaders and rank-and-file). Ensure homogeneity for focus groups when helpful to encourage candid conversation.
- Recruit**
 - Draft invitations, record confirmations, do reminders/other followup with desirable non-respondents to yield representative group.
- Conduct**
 - At scheduled interview time or focus group time/location, manage the session. Interviews are often 30 minutes, focus groups 90.
- Analyze**
 - Transcribe the sessions if possible, then categorize by primary themes, pull call-out quotes. Seek to explain some findings in terms of demographics, other causal factors.
- Report**
 - Write a report/presentation that summarizes overall findings including additional questions that inevitably arise.



Keeping Research Simple

Methods

- Online surveys
- Mail surveys (audience coverage)
- AMS data-mining
- Qualitative research:
 - focus groups
 - interviews

SurveyMonkey - My Surveys - Windows Internet Explorer

http://www.surveymonkey.com/MySurveys.aspx

SurveyMonkey.com because knowledge is everything

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Current Folder: -- View All Surveys -- Manage Folders Title Search: Search

Survey Title [sort]	Created [sort]	Modified [sort]	Design	Collect	Analyze [sort]	Clear	Delete
CLARB Candidates Final	Tue, 1/13/09 8:09 AM	7 hours ago			305		
CLARB Council Record Holders final	Tue, 1/13/09 8:23 AM	7 hours ago			618		
CLARB MBE	Wed, 12/24/08 8:16 AM	11 hours ago			47		
CLARB Candidates	Wed, 12/24/08 8:42 AM	2 days ago			23		
Short Survey	Wed, 12/31/08 6:58 AM	2 days ago			343		
CLARB Council Record Holders	Wed, 12/24/08 12:40 PM	6 days ago			10		
2007 Health Benefits Survey	Sun, 12/17/06 6:09 PM	9 days ago			826		
State of the Art Evaluation	Tue, 11/4/08 4:28 AM	59 days ago			21		
IPC Member Survey	Fri, 9/26/08 1:48 PM	92 days ago			162		
IPC Non-Member Survey	Fri, 9/26/08 2:14 PM	97 days ago			93		

Showing survey 1 - 10 of 135

<< 1 2 3 4 5 6 7 8 9 10 >>

Key Steps in Surveying

- Plan**
 - Define objectives: identify unmet information needs, collect dangling hypotheses, poll stakeholders.
- Draft**
 - Hire or assign task: write questions and response items, compile and prioritize vis a vis final objectives.
- Design**
 - Once reviewed, select software, convert questions to its format.
- Pre-test**
 - Draft invitation and reminder language, and administer with small, randomly-selected group selected from your sample or census.
- Administer**
 - Once any appropriate improvements have been made, load address book and transmit personalized invitations and reminders on a set 7-10 day schedule.
- Download**
 - Run some statistics from the survey software, then download all data including closed ended data for coding/cleaning and open-text responses to convert to a document.
- Analyze**
 - Run cross-tabulations on values such as institutional characteristics (size, type), demographics, predicted behaviors, source, satisfaction level & related attitudes.
- Report**
 - Write a report that summarizes overall findings, discusses meaningful differences by segment, embeds graphics, categorized comments and cross-tabulations.



Nuances of Applying Data

- Growth, proportions, and size affect interpretation of metrics
 - ◆ It's easier to grow when you're small: India/China, Wal-Mart
 - ◆ Later achievements can seem less impressive
- Programs with low penetration of their profession can make greater leaps
 - ◆ Programs that under-represent a gender or class
 - ◆ Far greater future opportunity if they can diagnose and address their systematic bias
- Using backward-focused indicators to promote forward thinking

Finally, How to Interpret & Apply Data to Programs ...



Classic Misinterpretation: Omitted Variable

- Classic textbook case: "Ice cream and violent crime"
 - ◆ Studies frequently showed a high correlation between ice cream sales and violent crime
 - ◆ Could be cause for serious concern: high correlation
 - ◆ Akin to clinical studies that show an x% increase in likely risk of a heart attack
- However ...
 - ◆ Epidemiological studies take into account all possible factors
 - ◆ Ceteris paribus: "holding all other things constant"
 - ◆ Controlled conditions ensure that observed change is not spurious
- "Ice cream study" ignores powerful third causal factor
 - ◆ Include temperature/weather and the correlation goes away



Simple Illustration: Certification Program

- Let's say you know only a bit about your demographics and certification program metrics

Current Program Statistics	<u>Male/Female</u>
Passing Rate	63% 77%
Satisfaction (5-point scale)	4.09 3.52

- What might be our hypotheses?
 - 1) Women are smarter than guys *or ...*
the test is systematically discriminatory
 - 2) Women are harder to please *or ...*
genders face systematically different set of stimuli
 - 3) Inverse relationship between satisfaction/passing *or ...*
false confidence leads many to happily fail
without knowing the outcome

Simple Illustration: Certification Program

	<u>Male / Female</u>
Passing Rate	63% 77%
Satisfaction (5-point scale)	4.09 3.52
Proportion of total certificants	52% 48%
Proportion of test-takers	25% 75%
Proportion of total cert. 5 years ago	63% 37%
Attitudinal Stuff	
Satisfaction with testing center logist	High
Fairness of items in exam	Moderate
Belief that passage is key to greater achievement	Very high

- Complexity and interpretation changes the more we know

Some Observations, Without Answers

- Raises the potential of "strategic responses"—keep us happy, we are powerful.
 - ◆ Hidden explanatory emotional factors: hopeful trumps logic.
 - ◆ Greater expectations outrunning your ability to perform and satisfy.
- Potential omitted variable problem: we focused on gender.
- What about age, repeat attempts, classes of certificant, backgrounds/strata defined by field?

More Caveats

- Research doesn't answer our questions so much as it allows us to ask more, better questions.
 - ◆ Always bear in mind limitations: observer/participant biases, sampling errors, sufficient size for statistical significance.
- Lots of research yields incredibly obvious results:
"Rich people live longer"
 - ◆ But size matters: and research often fleshes out new paradigms
 - ◆ How much longer might I live? What factors drive it?
 - ◆ Which factors work against it (e.g., rise of diabetes in 3d world)

Philosophies Toward Data

- "Facts are our friends"
or ... "The truth is never a bulletproof vest"
 - ◆ Being right never guarantees success or survival
 - When are board reports are just number crunching:
 - "Certificant volume was up 2.5% in the last quarter"
- Collecting and analyzing data more methodically
 - ◆ May never yield a return on your investment, psychically, politically, or financially
 - ◆ I argue simply that it's worth considering

A Favorite Case Study of Association Based Statistics

"Where the Winners Meet"

***Arthur Brooks, PhD
Syracuse University,
SmithHanley Foundation***



Key Premise: Association Members Make More Money

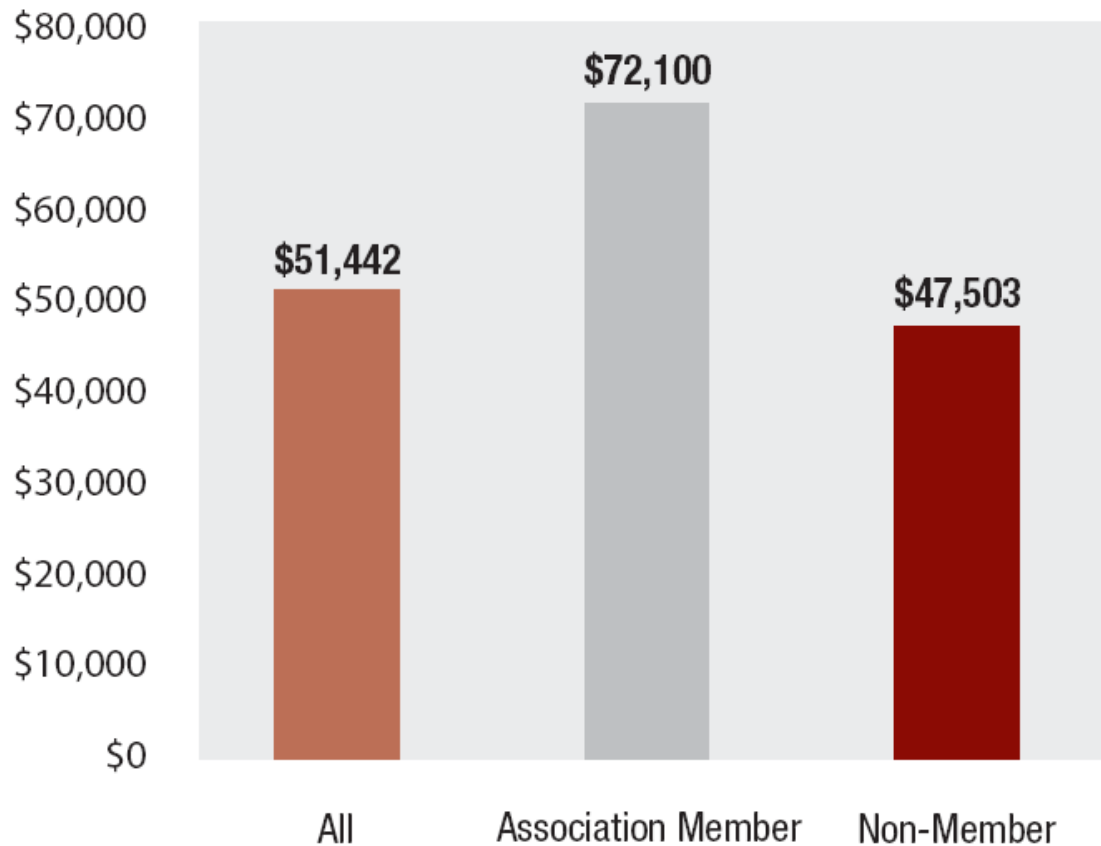


Figure 2. The earnings difference between association members and non-members

Source: GSS, 2004.



But Wait, There's More! Association Members are Happier, Too

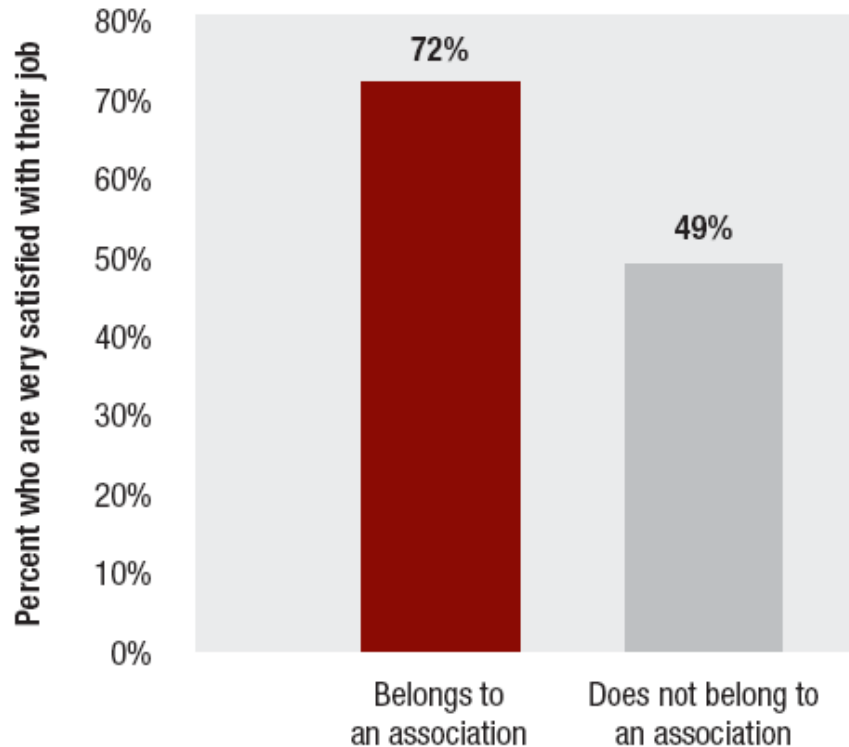


Figure 4. The job satisfaction difference between associational members and non-members

Source: GSS, 2004.

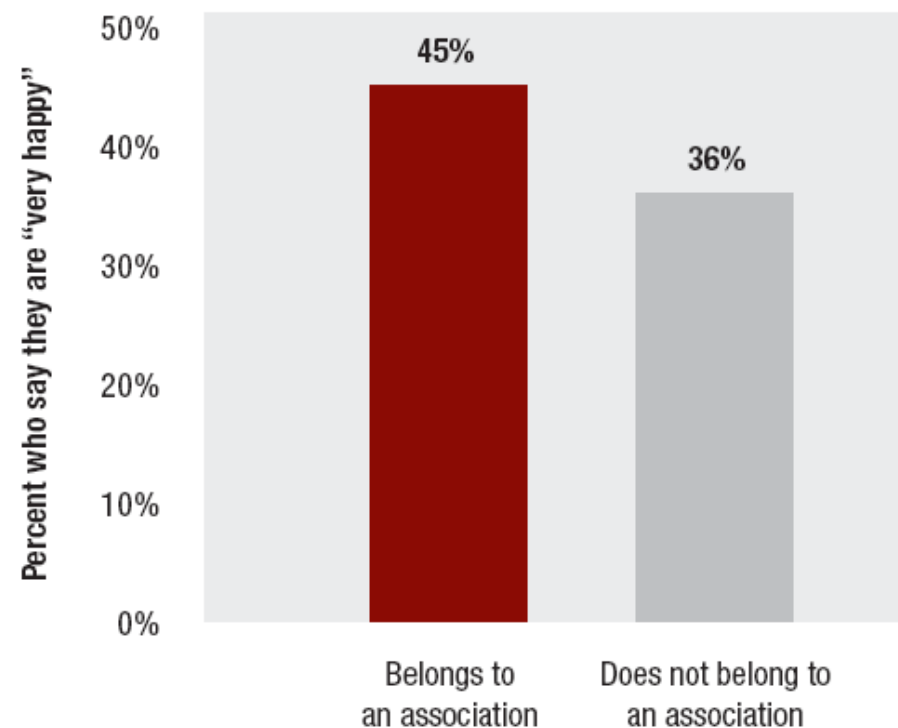


Figure 5. The happiness difference between associational members and non-members

Source: Social Capital Community Benchmark Survey, 2000.

Modeling/linear regressions:

- Using a sophisticated tool to yield very simple answers.



Regression Model Proves Impact of Membership on Income

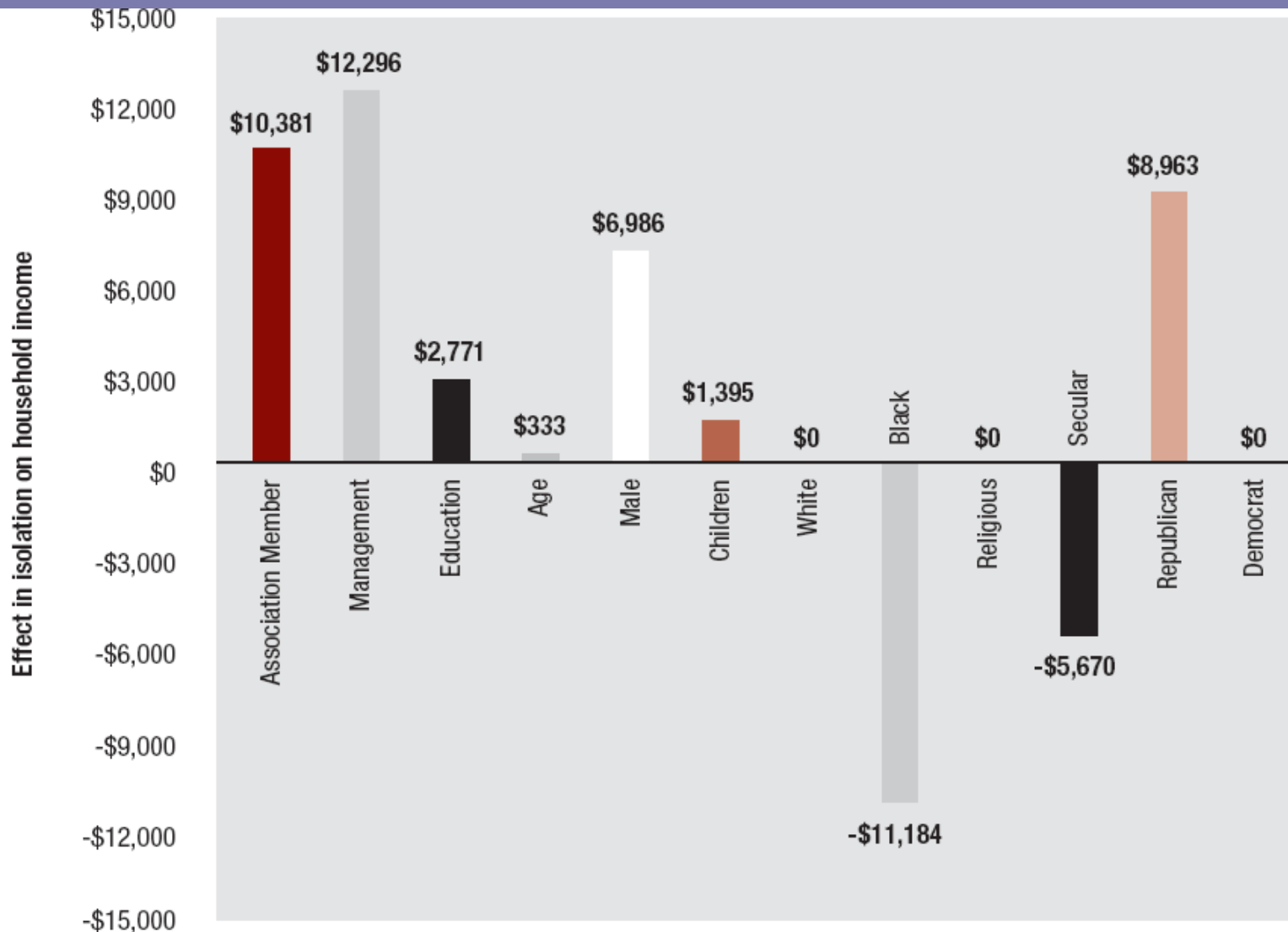
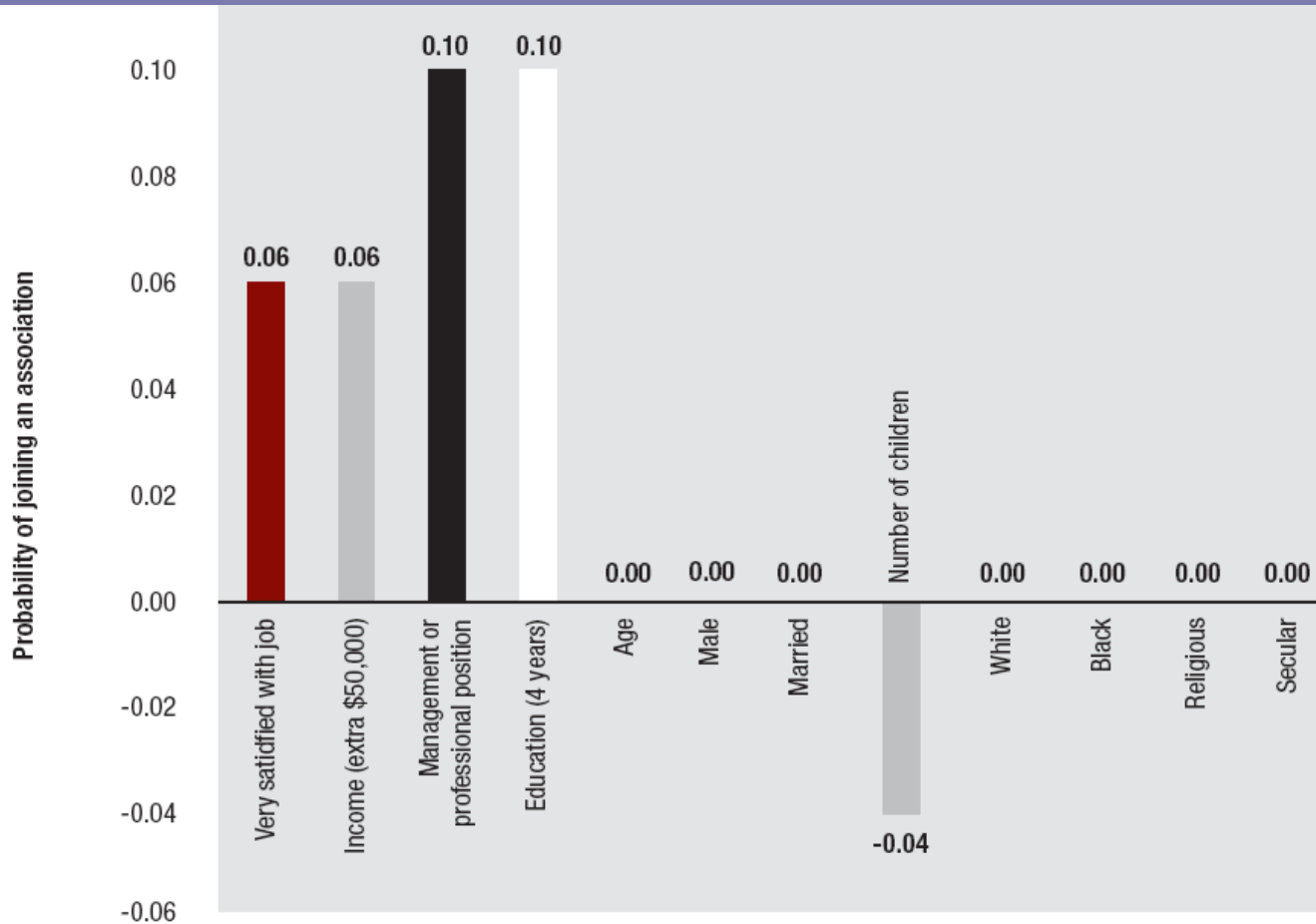


Figure 3. The association between individual personal characteristics and annual income



Care Taken to Monitor Things Such as Probability, Multicollinearity



- Run your equations then see what makes the most sense
- Use logarithmic transformations: coefficients become percentage changes
- Criteria: significance tests by coefficient and for the equation: R2 can be quite low for cross sectional studies.



The analysis here uses two basic empirical modeling procedures. The first regresses money income on association membership and demographics; that is,

$$1) \quad y = \alpha + \beta A + \gamma X + \varepsilon,$$

where y is income, A is a dummy variable for association involvement, and X is a vector of demographics. Equation (1) is estimated using ordinary least squares; the results are contained in Table C.

The other models involve estimating probabilities such as the probability that one who earns a particular amount of money or is very satisfied with his or her job belongs to an association; that is,

$$2) \quad A = f(\alpha + \beta y + \delta S + \gamma X + \varepsilon),$$

where S is a dummy for job satisfaction and the other variables are as described above. The nonlinear probability function f is fit using a probit model, and the marginal effects are evaluated at the mean values of the regressors. The results for this model are contained in Table B.

Table A. Summary statistics for the 2004 General Social Survey data

	Mean value (standard deviation)
Belongs to an association	15.1%
Household income	\$50,531 (33,941)
Very satisfied with job	50%
Very happy in life	31%
Management or professional position	35%
Education (years)	13.7 (2.9)
Age	46 (16.8)
Male	46%
Married	53%
Children	1.82 (1.62)
White	79%
Black	13%
Religious	33%
Secular	24%
Republican	30%
Democrat	35%

N=1,337

Table B. Variables that affect household income, 2004

Independent variable	Coefficient (standard error)
Constant	-4,521 (7,883)
Belongs to an association	10,381*** (3,026)
Managerial or professional job	12,296*** (2,582)
Education (years)	2,771*** (461)
Age	333*** (98)
Male	6,986*** (2,150)
Children	1,395* (821)
White ⁷	-2,616 (3,982)
Black ⁷	-11,184** (4,745)
Religious ⁸	-1,983 (2,587)
Secular ⁸	-5,670** (2,720)
Republican ⁹	8,963*** (2,723)
Democrat ⁹	501 (2,625)

Notes: N=1,467.

Significance: *** Coefficient is significant at the .01 level or higher. ** Coefficient is significant at the .05 level or higher. * Coefficient is significant at the .10 level or higher.

Data: GSS, 2004.

Association Field Facing a Tough Time: Some Parts of It, Anyway...

Short term changes due to economy: January 2009 study

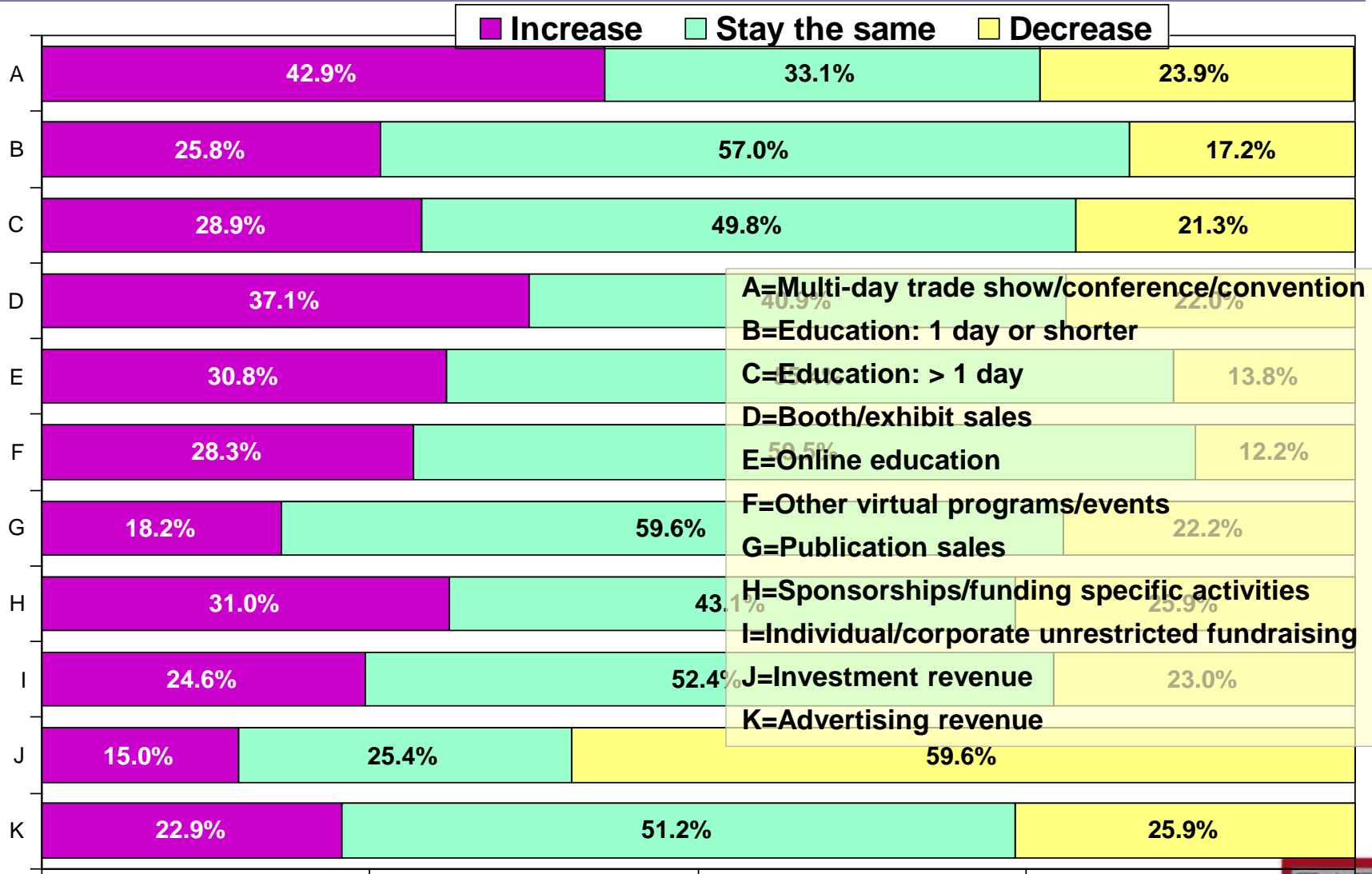
- Median membership retention: > 7% drop
- Median change, conference/education participation: 20% down
- Membership inquiries: 20% down
- Yet 31% of IMOs are seeing no changes
- Responses: more “touches” with existing members, shifting to lower-cost marketing, not eliminating specific campaigns, some doing more gentle policies to carry members

ASAE Economic Conditions Survey: May tabulation

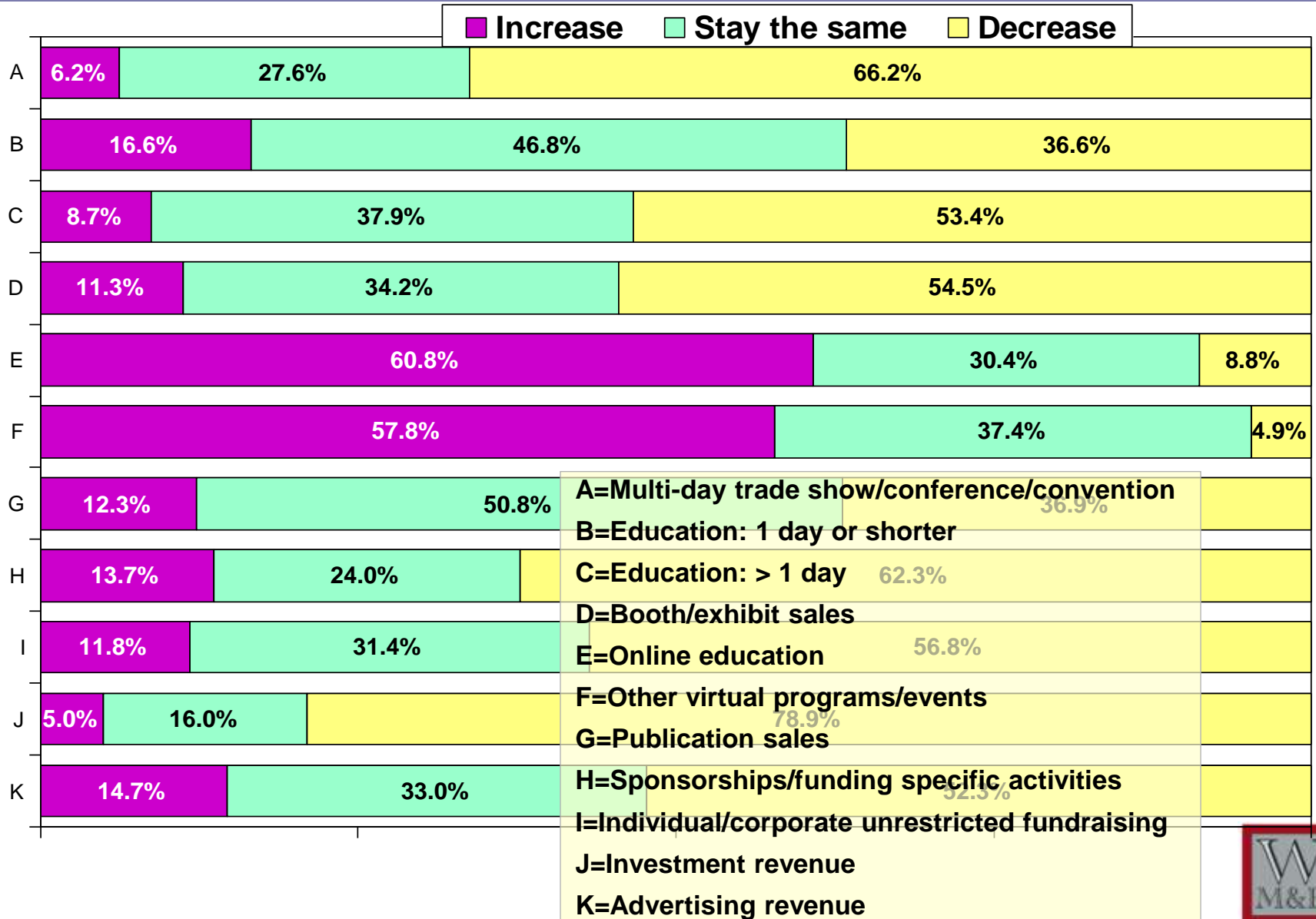
- Trades: 57% staff budget cuts, 70% reduced attendance, 43% using fewer vendors/consultants, 43% using reserves to address revenue shortfall.
- 38% renegotiating meeting contracts, 17%-20% laying off staff, reducing member services in the bundle, restructuring member dues, decreasing prices for services.
- IMOs: less striking changes in general



Specific Areas of Revenue Change, Past Year



Expected Areas of Change, This Year



Thank You!

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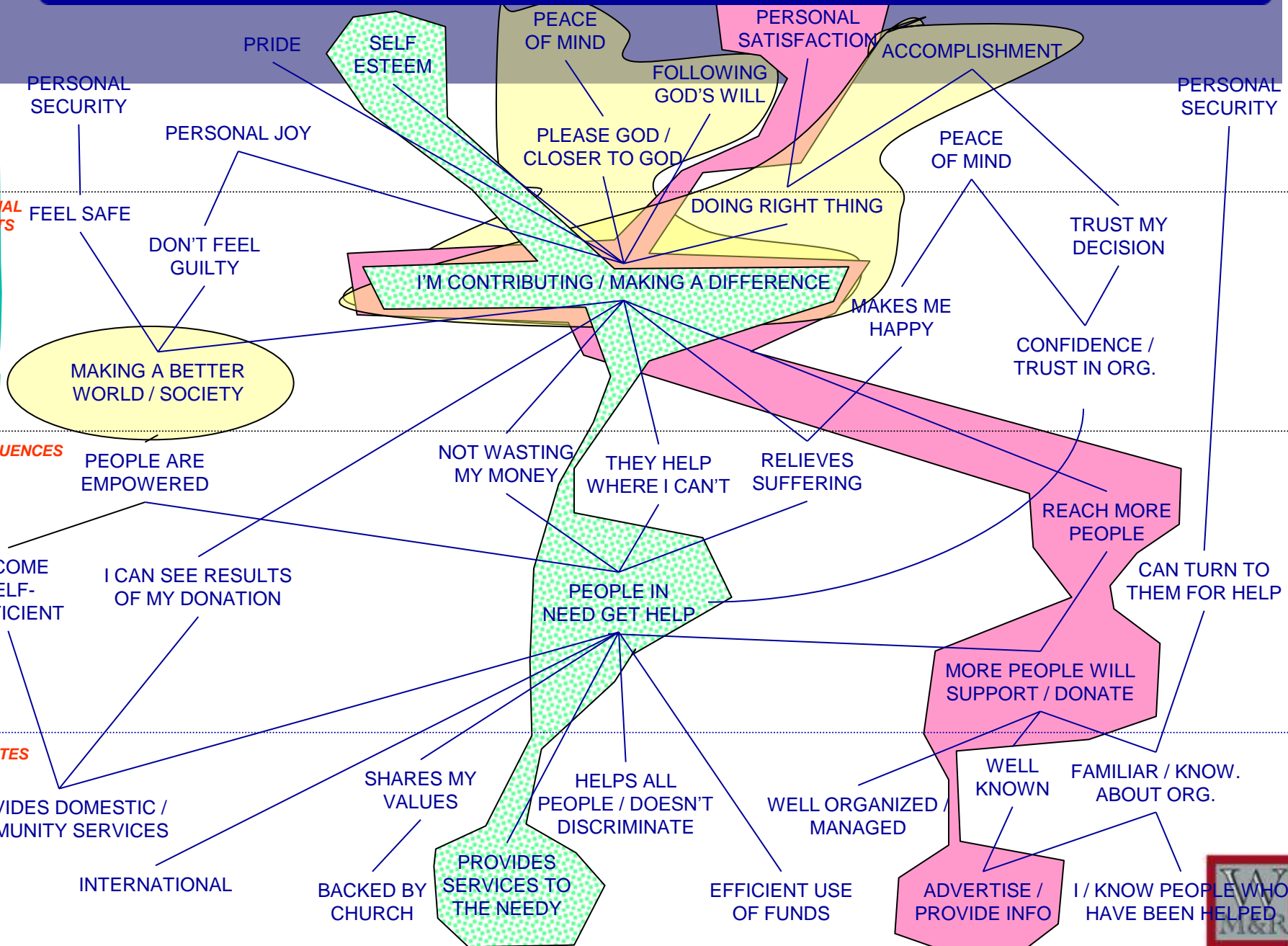
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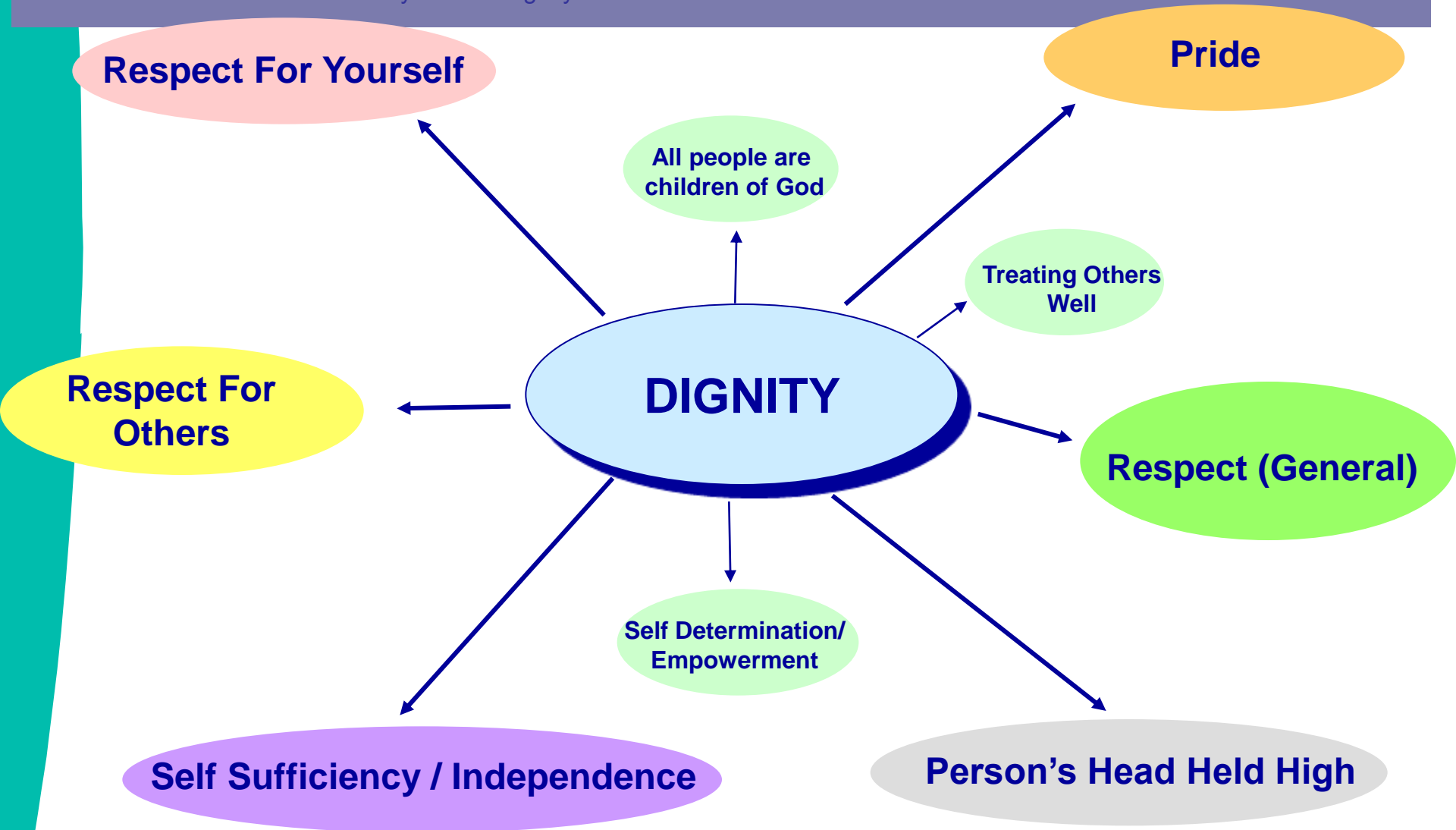
EMOTIONAL BENEFITS

CONSEQUENCES

ATTRIBUTES



“What comes to mind when you hear Dignity?”



NOTE: Those elements in the outer circle had greater than 10% mentions; those in the inner circle had fewer than 10% mentions.

Effective measurement: solid metrics

Client Membership Acquisition Program: Sample Results Report											Prepared 5/24/2006	
06B											First response received 4/10, doubling day 22 calendar days	
Package I: Control Package												
Mail	Segment and Description		Mailed	Revenue	Gifts	Avg	Response	Rev/M	Other cost	List cost	Tot Cost	CPDR
D01	1	List Source A1-ABC Donors: Control	3,650	\$3,075	41	\$75	1.12%	\$842	\$1,896	\$353	\$2,248	\$0.62
D01	2	List Source B1-NMBA Members: Control	2,962	\$3,132	36	\$87	1.22%	\$1,057	\$1,538	\$274	\$1,812	\$0.49
D01	3	Test List Source A6-ABC Lapsed Donors: Control	1,450	\$1,458	18	\$81	1.24%	\$1,006	\$753	\$89	\$842	\$0.52
D01	4	Test List Source B2-NALA Members: Control	1,004	\$375	5	\$75	0.50%	\$374	\$521	\$97	\$618	\$1.39
D01	5	Test List Source C2-Licensure Names: Control	3,111	\$3,948	47	\$84	1.51%	\$1,269	\$1,616	\$75	\$1,691	\$0.41
D01	6	Internal lapsed '02-'05: Control	1,850	\$3,525	47	\$75	2.54%	\$1,905	\$961	\$0	\$961	\$0.27
D01	7	Internal lapsed pre '02: Control	2,325	\$2,625	35	\$75	1.51%	\$1,129	\$1,207	\$0	\$1,207	\$0.46
		Web joins, attributed to mail campaign		\$2,325	31	\$75						
D01		Unallocated/white mail		\$600	8	\$75						
Total Control Package			16,352	\$21,063	268	\$79	1.64%	\$1,288	\$8,492	\$887	\$9,379	\$0.40
Costs: \$2,250 creative/program management; \$8,373 production (est \$.31 cents); \$1,794 postage (est 12.5 cents)												
Package II: Test Offer												
Mail	Segment and Description		Mailed	Revenue	Gifts	Avg	Response	Rev/M	Cost	List cost	Tot Cost	CPDR
D02	1	List Source A1-ABC Donors: Control	1,825	\$1,875	25	\$75	1.37%	\$1,027	\$794	\$176	\$970	\$0.77
D02	2	List Source B1-NMBA Members: Control	1,481	\$1,575	21	\$75	1.42%	\$1,063	\$644	\$137	\$781	\$0.61
D02	3	Internal lapsed '02-'05: Control	925	\$1,425	19	\$75	2.05%	\$1,541	\$402	\$0	\$402	\$0.26
D02	4	Internal lapsed pre '02: Control	1,163	\$729	9	\$81	0.77%	\$627	\$506	\$0	\$506	\$0.81
Total Test Package			5,394	\$5,604	74	\$76	1.37%	\$1,039	\$2,346	\$313	\$2,659	\$0.42
Costs: \$0 creative/program management; \$1,672 production; \$674 postage (est 12.5 cents)												
Overall Campaign												
			Mailed	Revenue	Gifts	Avg	Response	Rev/M	Cost	List cost	Tot Cost	CPDR
			21,746	\$26,667	342	\$78	1.57%	\$1,226	\$10,838	\$1,200	\$12,038	\$0.41
Comments:												
Test to rollout lost 20% for ABC Donors, lapsed donor segment better--may be "cherry picking" or encountering rapid fatigue with repeat names.												
NMBA members have large universe--rollout in next campaign.												
Discontinue test of NALA names and reconsider names from similar list sources.												
Continue to work lapsed names hard going back as far in time as possible.												
Test offer worked better with control lists--split run next campaign with test offer to prospects, existing control/offer to lapsed.												
Web joins are a small proportion of total; consider package modifications to encourage more web/e-tie ins.												

- ◆ Source coding
- ◆ Metrics/targets
- ◆ Defined expectations



Example: Interest Codes Used for Inclusions/Exclusions

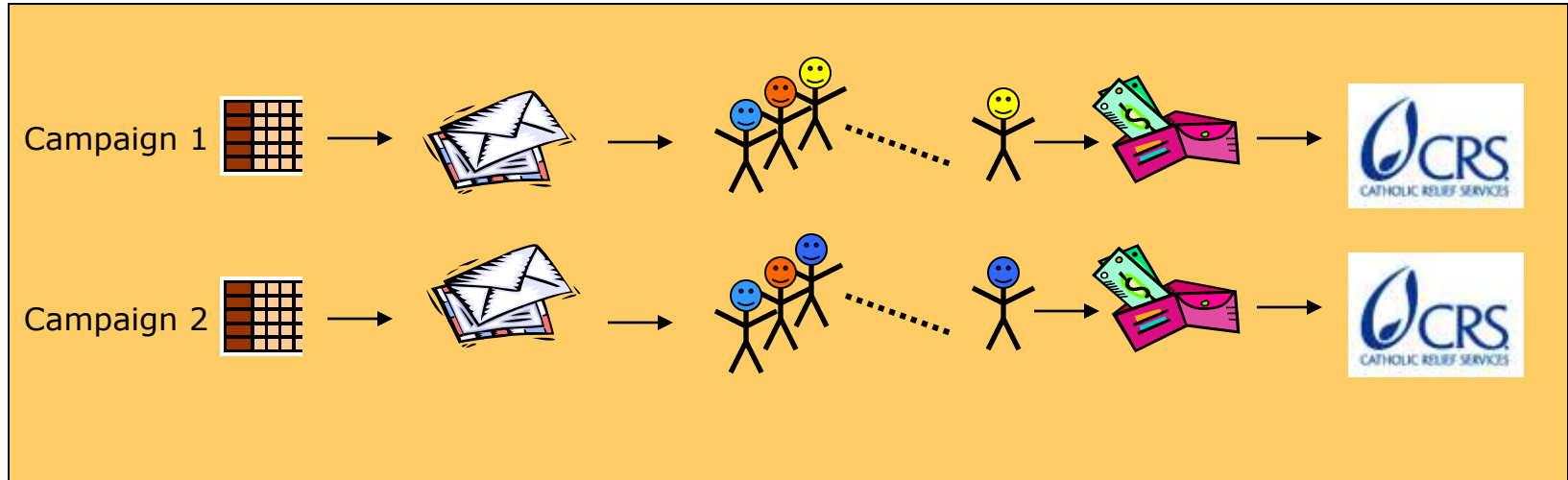
Entire file

- Coded with a mix of Donor Service & DM codes
- Simplify our house file selection
- Behavior captured to:
 - simplify ad hoc analysis
 - extend RFM
 - develop profiles
 - crosstab “donor types”

Interest Code Description	Interest Code	count ID
Fiscal Year 2003 counts	FY2003	734794
Delivery Point Validation	DSF1	663157
Emergency Donors	ED	363374
Newer Donors	ND	324288
Renewal Donors	RD	103340
Catalog Overlay	CAO	87914
Premium Donors	PRD	82993
Hispanic Indicator	HISIND	67420
Wooden Bell Donors	WBD	65556
Telemarketing Donors	TD	65489
Score 0-4	0S4	56137
Score 95-99	95S99	55684
Calendar Donors	CD	49677
Low Dollar Donors	LD	13843



Before: List Effectiveness

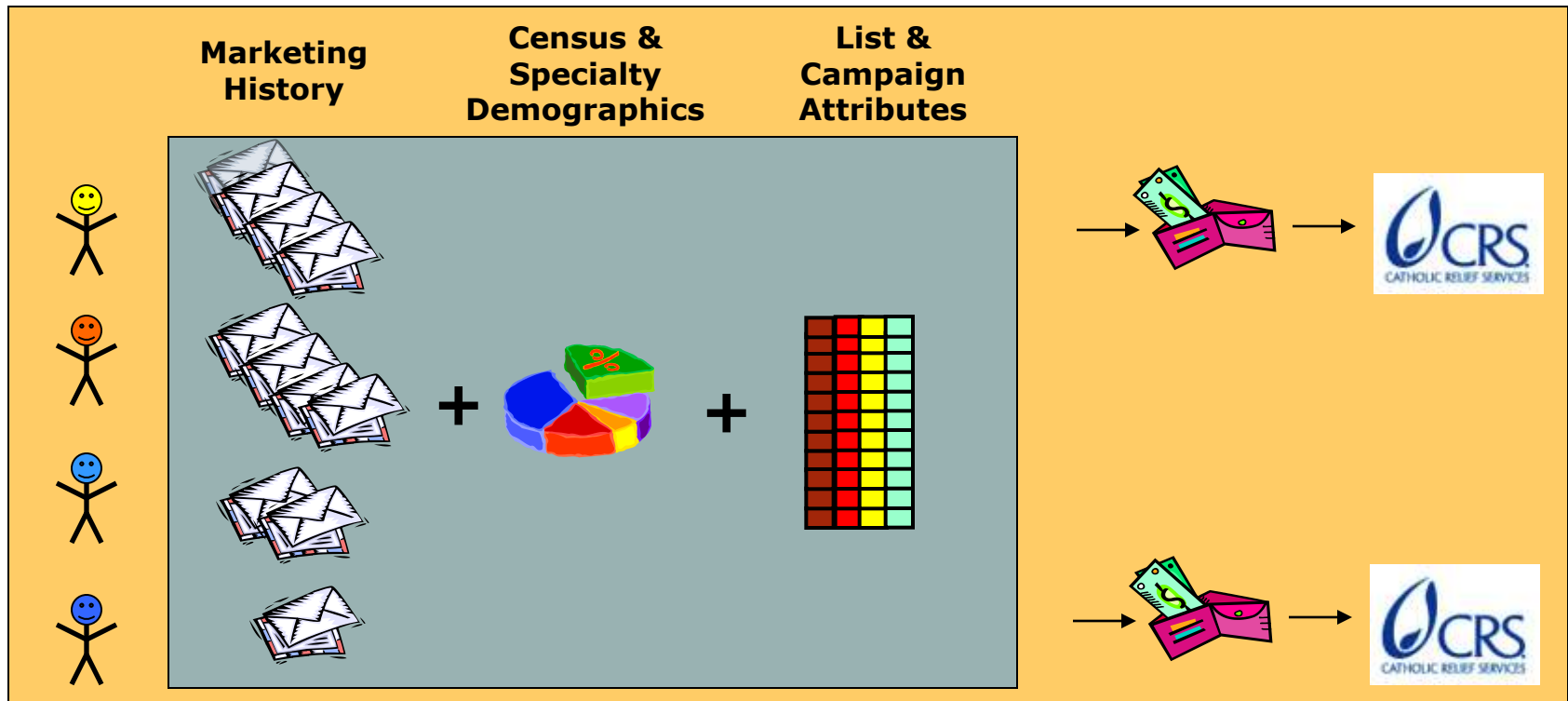


- Targeting based on **list effectiveness**
- Focused on “finding more **lists** like these”

New Approach

- New analytic system to drive programs
 - ◆ Build prospect universe of likely responders
 - ◆ Overlay with demographic and census data
 - ◆ Catalog interaction over time by person
 - ◆ Develop insights over time with modeling
 - ◆ Select/suppress based on predicted behavior

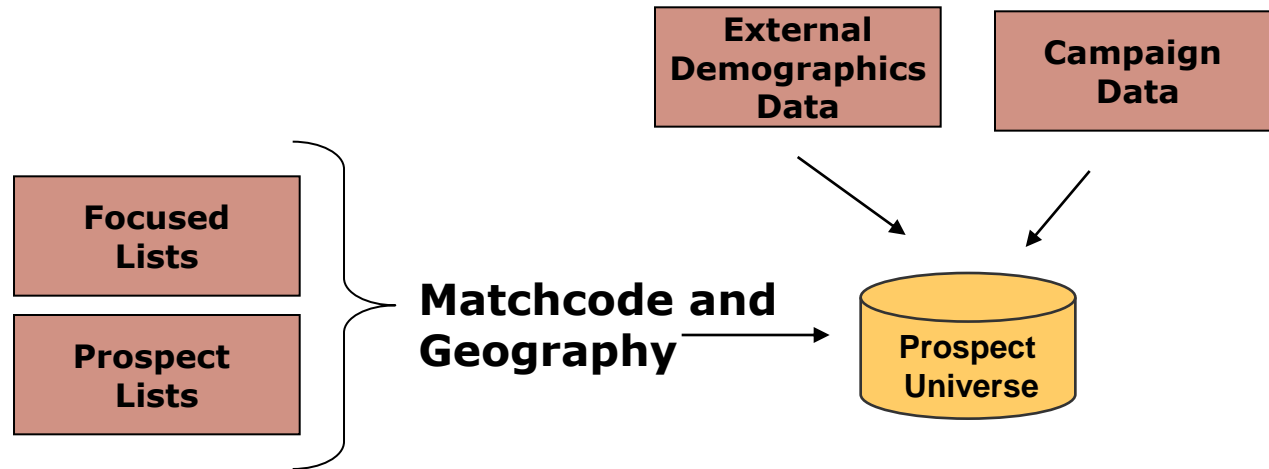
After: Prospect Behavior



- Targeting based on **prospect behavior**
- Focus on “finding more **people** like this”

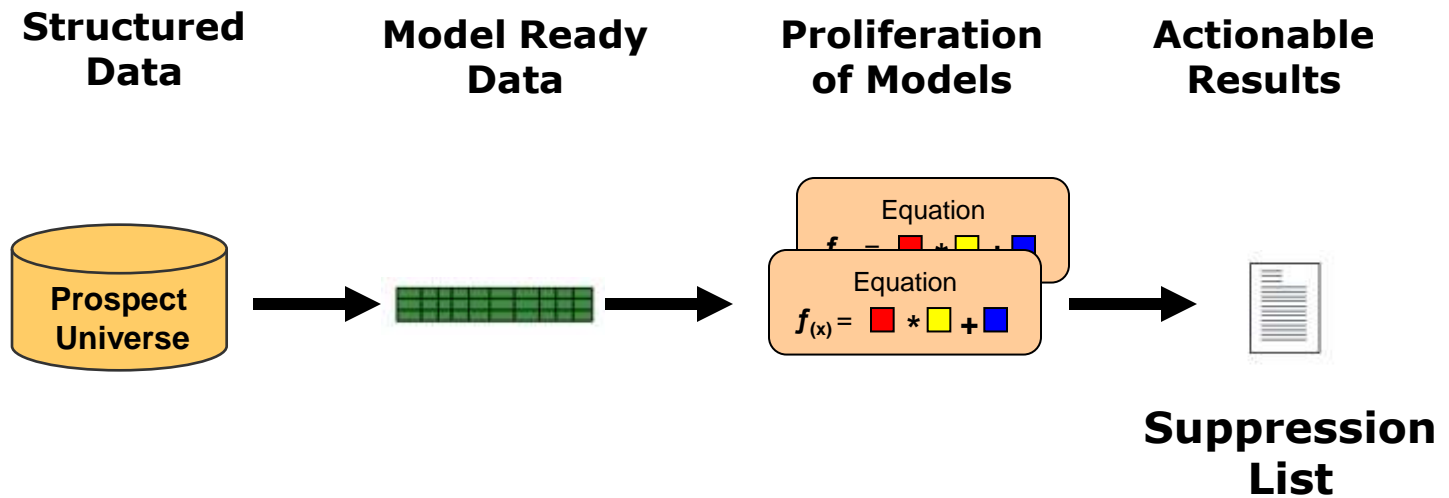
Preparation

- Develop infrastructure
- Collect and organize data



- Response behavior retained
- Other available information added

Applying Analytics to Discover Patterns



The Final Solution

