

Module 1:

Database Marketing

Presenter: Kevin Whorton



A. Database marketing: goals & definition

- Right Message, Right Time, Right People
- Often we miss those key points
 - DM metrics: what drives effectiveness
 - 60% audience, 30% offer, 10% format
 - Often surprising to people who anguish over single words
 - Other impediments:
 - Marketing (as a discipline) dominated by agency mindsets
 - Branding is often an logo, image-driven thing
 - Insufficient focus on message and tailoring by audience
 - Our internal review process may be uneducated
 - We unwittingly design materials in an over-expensive manner
 - Lack of tracking means less focus on results
 - Insufficient formal/informal research means less alignment with real need

Getting the Most of Your AMS

- Using Aptify to track members' activities and interests, the NJSCPA is able to easily identify members for future involvement opportunities.

Persons ID: 502755

Name: Mr. Jordan Amin
Nickname: Jordan
Designations: CPA
Title: Senior Manager
Position Code: 103
Company: Amper, Politziner & Mattia, LLP

Attributes: Details Membership Committees Transactions Contact Log Comments Attachments History

Linked Persons: Attributes Lists

Contact Personal Professional Topic Codes Co. Relationships Pers. Relationships Pictures

Browse By Category: All Selected Topics

Top Level \ AREAS OF INTEREST \ PERSONAL/PROFESSIONAL DEVELOPMENT

- Golf
- Leadership
- Mentoring
- Negotiating
- Networking
- Professional Ethics
- Public Speaking/Instructing
- Sporting Events
- Young CPAs Events

Check All Un-Check All

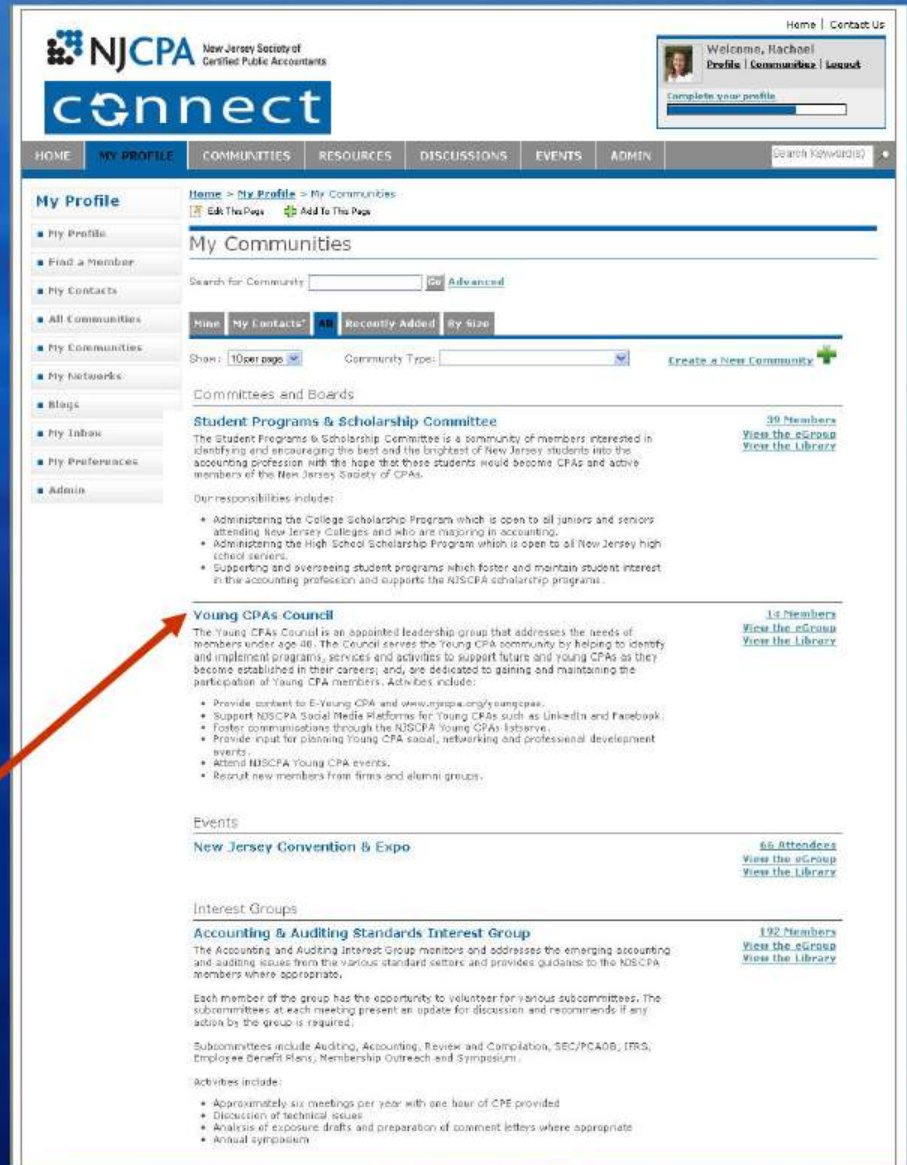
Aptify - cpa-aptify - sa

Public Speakers in Edison

| ID | First Name | Last Name | Designation | Company | Title | |
|--------|-------------|-----------|-------------|------------------------------------|-----------------------------|---------|
| 502755 | Jordan | Amin | CPA | Amper, Politziner & Mattia, LLP | Senior Manager | amin@ |
| 519770 | Amichai | Avraham | CPA | Amper, Politziner & Mattia, LLP | Senior Accountant | Avrah |
| 529713 | Pabb | Barry | CPA | J.H. Cohn LLP | Senior | pbarr |
| 520630 | Kenneth | Bohall | CPA | Arup | Regional Controller | kboha |
| 328440 | Giovanni | DeBari | CPA | Mad-Cali Realty Corp. | VP, Corp. Controller | gdeba |
| 541231 | Umesh | Desai | | S. Grover & Company, LLC | | umesh |
| 520850 | Kevin | Douglass | CPA, MBA | Amper, Politziner & Mattia, LLP | Audit Supervisor | dougl |
| 543739 | Theodore | Dudek | CPA | Weiser LLP | | tdude |
| 526034 | John | Genbarski | CPA | Amper, Politziner & Mattia, LLP | Manager | genba |
| 511544 | Dov | Goldstein | CPA | CheckPoint HR | Controller | dovgo |
| 203354 | Debra | Hahn | CPA | Grant Thornton LLP | Director, Independence | debra |
| 522754 | Vagif | Isakhanli | CPA | Amper, Politziner & Mattia, LLP | Staff Auditor | vagfis |
| 504576 | Christopher | Jaris | CPA | Weiser LLP | Partner | chrisj |
| 541595 | David | Katz | | Amper, Politziner & Mattia, LLP | Senior Accountant | dkatz |
| 528301 | Kevin | Kohler | | Amper, Politziner & Mattia, LLP | Recruiting Manager | kohler |
| 510820 | Gavesh | Malhan | CPA | Weiser LLP | Auditor | gaves |
| 506102 | Rosario | Manco | CPA | Weiser LLP | Senior Manager | rmanco |
| 341041 | Robert | Marshall | CPA, CMA | Automated Distribution Systems, LP | VP Finance & Administration | rsherif |
| 542768 | Greg | Martinez | | Prestige Window Fashions, Inc. | Payroll and Benefits Admin | gmart |

Phase II

- Integration with Aptify enables automatic creation of communities in Higher Logic based on data from Aptify (committees, events, etc.)



The screenshot shows the NJCPA Connect website interface. At the top, there is a navigation bar with links for HOME, MY PROFILE, COMMUNITIES, RESOURCES, DISCUSSIONS, EVENTS, and ADMIN. A search bar is located on the right. The main content area is titled "My Profile" and "My Communities". Under "My Communities", there is a search bar and a list of communities. The "Young CPAs Council" is highlighted with a red arrow pointing to its description in the "Communities ID: 289" window.

Communities ID: 289

Name:

Parent:

Organization:

Committee Type:

General | Terms | Members | Attachments

Description: The Young CPAs Council is an appointed leadership group that addresses the needs of members under age 40. The Council serves the Young CPA community by helping to identify and implement programs, services and activities to support future and young CPAs as they become established in their careers; and, are dedicated to gaining and maintaining the participation of Young CPA members.

Goals: Leader plus 6-10 members under age 35 including CPA Candidates, (Exam Pending and Exam Passers) new CPAs and at least 1 Student Member over the age of 21. North, Central and South Jersey should be represented. Time Commitment: 18-20 hours

Date Founded:

Web Address:

Active

Listserve Email:

Show On Web

Listserve Archive:

Allow Online Signup

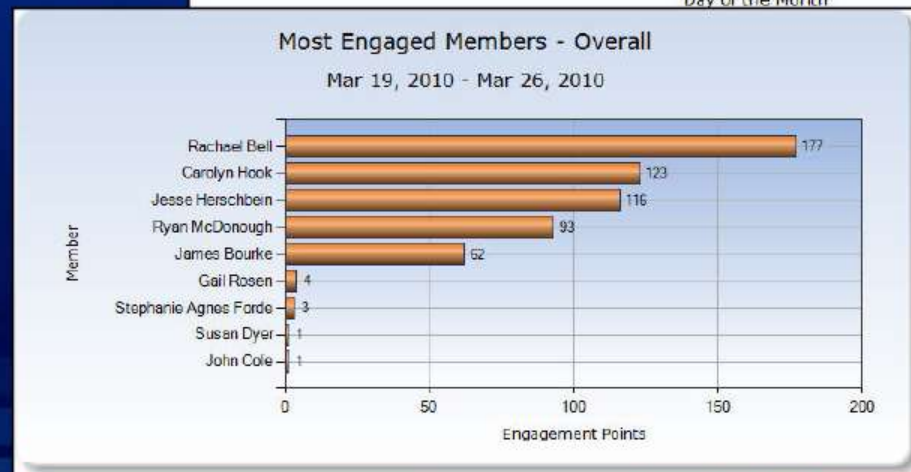
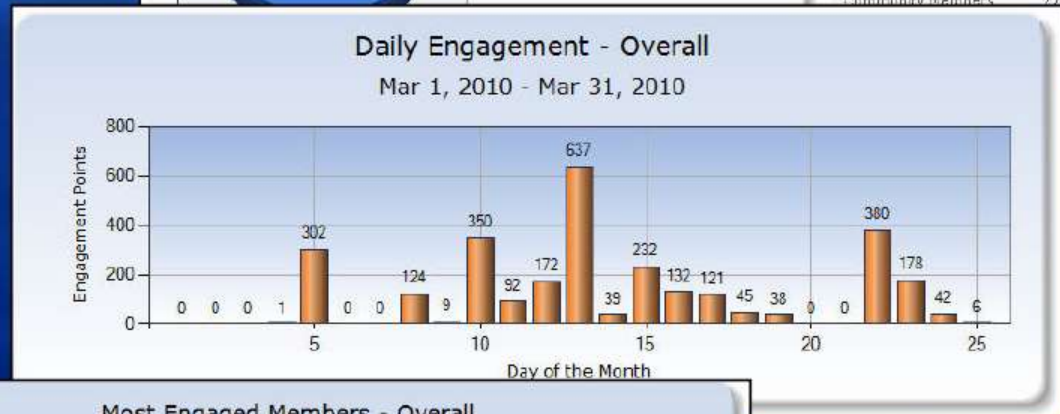
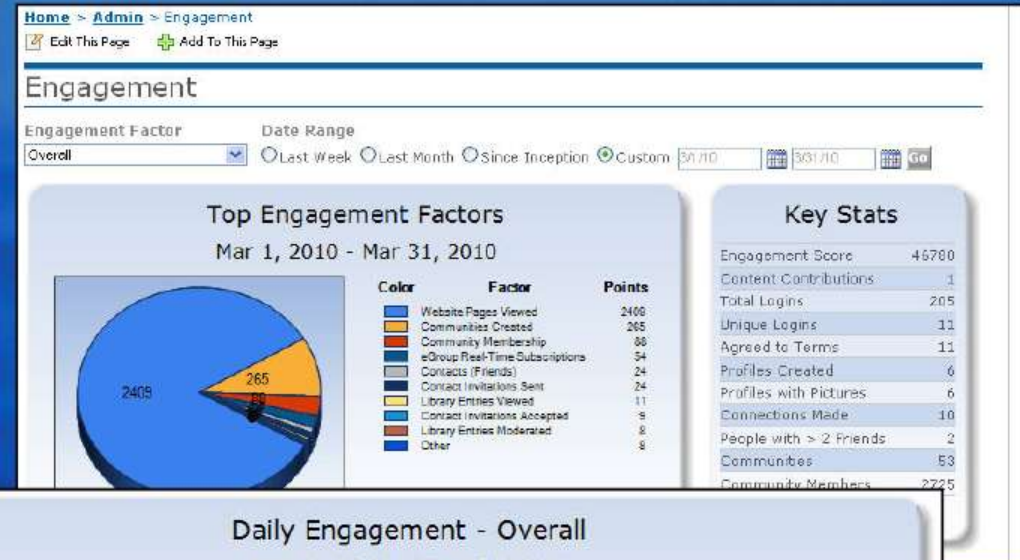
CPE Developer ID:

Create Community

Old Id:

Phase II

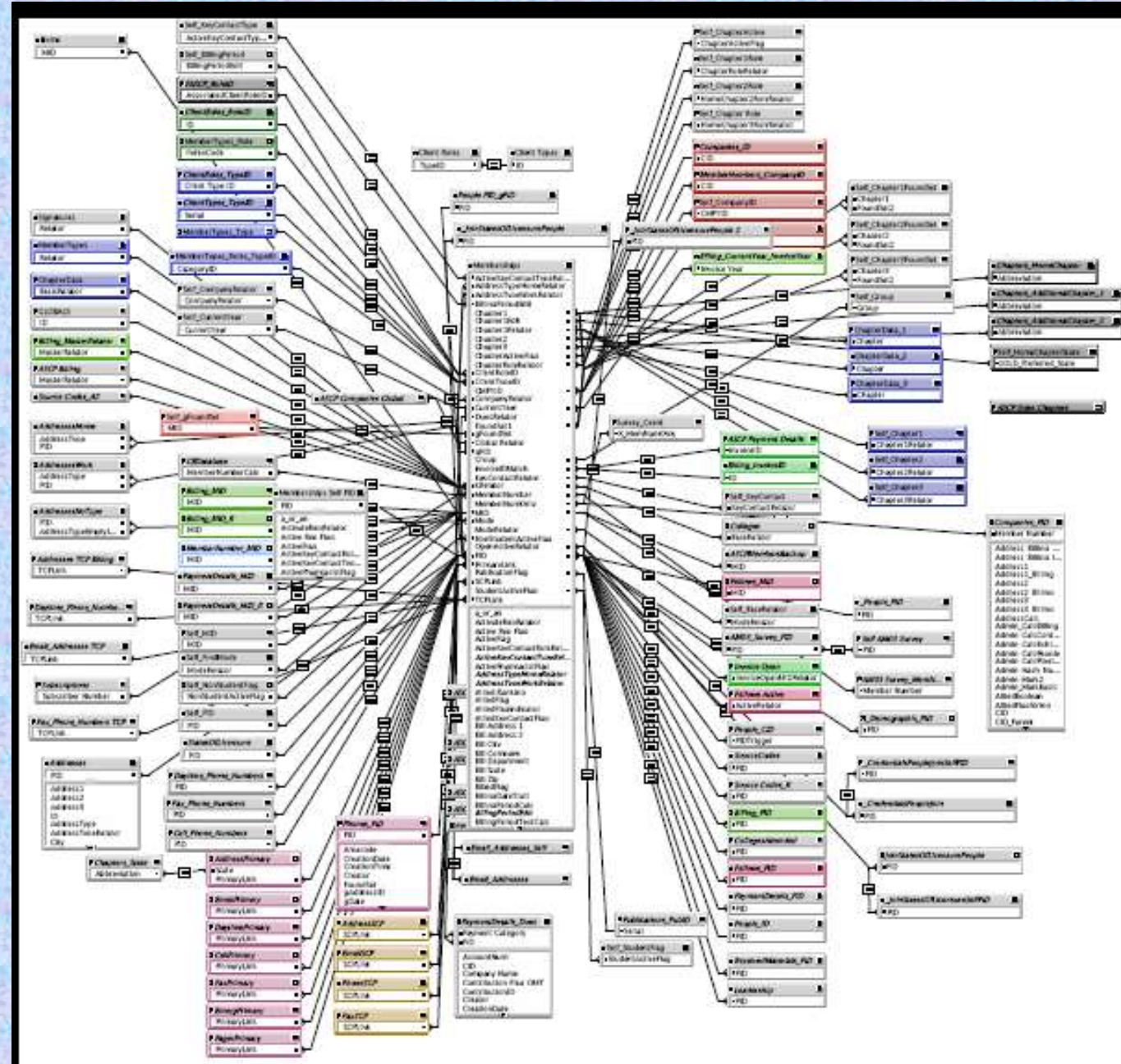
- The Higher Logic engagement reports help the NJSCPA identify the members who are most engaged and the features of the online community that are generating the highest levels of engagement.



“Looking Under the Hood:” Data Exports

Actual database structure

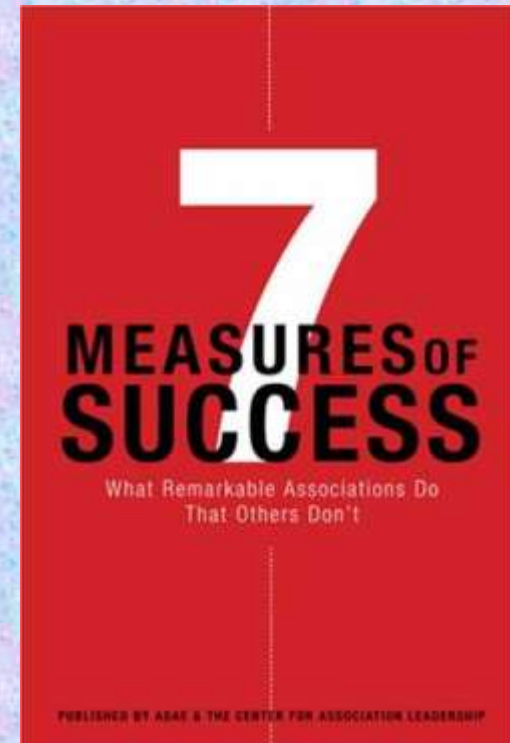
- Provided in response to request for data dictionary and glossary
- Many systems are poorly documented
- IT's role is to maintain at a reasonable cost
- Mission-critical, just not best environment for data mining



Why Data Mining/DB Marketing Is Critical

In many associations our programs are:

- Often ruled by perceptions
 - Anecdotal evidence of success=ok
 - Quality judged by design/copy, not audience, usage, results
- Metrics are often flawed/insufficient
 - Poor measures of share of market, mind or wallet
 - Sales tracking rates low
 - Weak/no early warning systems
- Data mining addresses all of these
 - ASAE recognized “Data Driven Decision Making” as one of the 7 Measures



B. Defining your business model: statistics

- Essential: know where money comes from/drive value
 - What is the source of member value?
 - Need activity based costing within your system
 - Typically we know facts such as ...
 - \$2.3 million revenue; 9 staff; \$2.15 million expenses
 - \$150k contribution to reserves; 575 company members
 - Avg. dues \$1,800; 750 attended 2008 AM; avg. reg \$595
 - We could extrapolate: 45% dues, 19% registration
 - But we don't automatically know (needs some effort):
 - How diversified are you *really*?
 - What % of companies participate & do so regularly?
 - What is the net margin of your primary activities (membership, events, etc.)?
 - What is a member worth (now and long-term value)?
 - What is your penetration today and how has it changed?

Planning activities within the business model

- With some key figures, you can plan & project ROI for meaningful marketing activities
- Conference example
 - Major event requires 2 FTEs and 400k hard costs
 - Exhibits/sponsorships of \$200k, margin of \$100k (18%)
- What are the marketing implications?
 - Every new "butt in seat" might net \$450 more ... ten more might boost it by almost 5%!
 - If 750 attendees come from 250 companies (200 members) you have:
 - Potential membership conversion opportunities
 - Gains from relationship building
 - Potential gains through clever meeting location choices
 - Opportunities for group pricing schemes, tie-ins
 - Linking attendance gains to exhibit/sponsorship rates

Define what business you are in

- We just used finances to illustrate business model
 - But often this is living in the past: financial performance is seen as a “lagging indicator”
 - Even usage reflects what we have trained our audiences to expect and receive
 - Familiarity breeds respect: members say they prefer what they’re used to seeing us deliver
 - Needs assessments research often=program evaluations
- Try to employ a more strategic, future-oriented focus
 - Visioning: where do we want to be
 - How to reach out to new ‘untrained’ member/customers
 - Link to/align with focus
 - Don’t confuse this with ‘strategic planning’
- Ideally this process feeds a systematic marketing plan

B. Managing frequency of contact

- Benchmarking study of 70 nonprofits/associations.
 - Average # of contacts/campaigns per year showed programs were managing median of 20 efforts
 - Associations far less likely to use TM, direct mail acquisition, much more likely to use email

| Efforts | MEAN | MEDIAN |
|----------------|------|--------|
| DM acquisition | 4.5 | 3.4 |
| DM house file | 9.6 | 7.9 |
| DM other | 5.8 | 2.1 |
| TM active | 1.0 | 0.4 |
| TM lapsed | 1.3 | 0.4 |
| Email | 13.1 | 6.0 |
| Total | 35.3 | 20.1 |

- These were often high-scale programs
- Frequent changes to improve ROI; constant tweaking.
- Repetition is key to recognition.
- Over-contacting reduces results.
- Key operational question: How much is enough?
Often we don't do enough

Marketing programs: what is your target ROI?

- Benchmarking study of 137 associations.
 - Membership programs
 - Mean retention of 85%; median 2,600 total members
 - Acquired 300 members past year
 - Average dues revenue/member of \$264, LTV of \$2,200
 - Membership acquisition performance
 - Median 3.0 campaigns, 2.3% response rate, 1100 contacts per campaign
 - Median \$50,000 membership marketing budget (\$30k acq)
 - Median \$95 CPA; mail \$2, sales \$55 cost per contact

| Sources of First Exposure | |
|---------------------------------|-------|
| Word of mouth from others | 46.4% |
| Direct mail campaigns | 10.5% |
| Attendance at events | 16.4% |
| Advertising/publicity | 5.2% |
| Web site visits: search engines | 11.0% |
| Other venues/ sources | 10.5% |

| Recruitment Channels | #1 | #2 |
|--------------------------------|-----|-----|
| Direct mail | 19% | 14% |
| Electronic (email/Web) | 21% | 32% |
| Direct/personal sales by staff | 17% | 21% |
| Recruitment by members | 35% | 22% |
| Other methods | 9% | 11% |

C. Managing specific channels

- Most efficient method of targeted communication
 - Supplements advertising, web: indirect communications
 - Repository for knowledge for current users/customers
 - Vehicle for introducing outside world—non-members, customers, employees of members
- Best applications
 - Personalized letters/forms, first-person dialogue
 - Repetitive/frequent communication, sequencing
 - Campaigns with measured effectiveness/tests & control
 - “Push media:” drives to other channels (call/web)
- Key errors/weaknesses:
 - Under personalization: postcards, ‘junk’ formats
 - Forgetting that ‘less is more’
 - Over-spending on inefficient production/design
 - Artificially constraining the external audience’s size

Specific channel: telephone

- Effective, often most overlooked/underused method
 - Very effective when managed systematically
 - High cost per contact but low *cost per acquisition/sale*
 - High-touch sales tool: 'when we care, we call'
 - Highly intrusive (can be a good thing)—cuts thru clutter
- Best applications
 - Reinstating lapsed and slow-renewing members
 - Late-cycle conference promotion to close the deal
 - Quick polling to measure attitudes/real-time issues
- Key errors:
 - Insufficient volume/frequency of use
 - Using amateurs: volunteer 'calling trees' work well on a high level for small numbers of people
 - Passive scripting: trying to tone down the appeal
 - Total outsourcing: inadequate screening/monitoring

Specific channel: web

- “Home” for the association—central to image
 - Repository for knowledge for current users/customers
 - Vehicle for introducing outside world—non-members, customers, employees of members
- Best applications
 - Costless dissemination of information
 - Discrimination by user class: filters/password areas
 - Facilitating transactions: vehicle for registrations, joining, profile updates
 - Reciprocal links to other sites
- Key errors:
 - Over-control of content/too-insular focus
 - Poor/static content management/difficult updates
 - Insufficiently engaging, poor overly sales focused

Specific channel: email

- Most cost-effective targeted communication
 - Supplement to mail when it can be used
 - Easy design/administration
 - Crowded field: commonly understood best practices
- Best applications
 - Customized content for a specific event
 - Ability to test/modify in real time
 - Easiest vehicle for response
 - Natural integration with web: short & enticing
- Key errors:
 - Poor integration with mail, sometimes phone
 - Overuse leads to high opt-out rates
 - Insufficient audience management
 - Insufficient personalization
 - Institutional feel: over use of graphics

Specific channel: social media

- Key vehicle to connect people with little face to face contact
 - Not only the young, but also people in diverse locations
 - Increasingly meeting the promise of distance learning, e-newsletters
 - Systematic adaptation of your methods to cut costs AND increase value in key areas ...
education, communication, and now networking
- Best applications
 - Encouraging SIGs, affinity groups through Facebook, LinkedIn, etc.
- Key errors:
 - Trying to create/imprint your own over organic ones
 - Forcing formality/control over self-forming communities

Combining channels: IMC

- Integrated marketing communications has been a primary driver in commercial marketing past 25 years
 - Don Schultz, Northwestern University/Kellogg School
 - Disciplined, outcomes focused approach
 - Allocating resources based on return per channel
 - Modeling actual behavioral response: synergies/sequence
 - Basically helping to make marketing more DM-like
 - You develop a logic within your program
 - Codify it into your normal marketing plan
 - Contact sequences designed to raise awareness/close sales
 - Example: broad based advertising, mail, teaser offers to encourage email signup, e-marketing then telephone
 - And simple adjust level of effort and expenditures by quality of prospect/member/customer
 - Not all are equal value, why spend identical levels of effort?

Effective measurement: developing 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

Defining/Managing/Creating to Metrics

Recent listserv discussion/illustration:
how do you project/track success?

- Meetings oriented example
 - Aggregate plans, traffic report, actual response data, and evaluations
 - Provides audience size, known (tracked) response, inferred response
 - Paint the entire picture: how many registrations do you expect; how many do you attain?
 - What is your ROI overall and by channel?
 - How would/should this drive your budget size, allocation decisions?

| Effort | Audience | Resp rate | Regist. | Gr. Rev. | Cost |
|-------------------|----------|-----------|---------|-----------|---------|
| Mail I: Week 18 | 2,000 | 1.00% | 20 | \$11,900 | \$3,000 |
| Email I: Week 16 | 7,980 | 0.50% | 40 | \$23,800 | \$100 |
| Mail II: Week 13 | 1,940 | 2.50% | 49 | \$29,155 | \$3,000 |
| Email II: Week 10 | 8,000 | 0.50% | 40 | \$23,800 | \$100 |
| Email III: Week 7 | 8,000 | 0.50% | 40 | \$29,000 | \$100 |
| Overall: | 27,920 | NA | 189 | \$117,655 | \$6,300 |

Key Areas of Inquiry

1. Member life cycle: join, engagement, attrition
2. Basic item/campaign profitability
3. Market testing/feasibility assessment
4. Campaign success measures/assessing channel impact
5. Cross-selling/conversion rates/indicators
6. Measuring member and customer value
7. Event analysis: frequency/stability of purchase/actions
8. Response modeling: linear regression/ANOVA
9. Assessing price sensitivity/willingness to pay
10. Basic segment analysis: descriptive cross-tabulations
11. Audience cluster analysis:
psychographics/demographics
12. Exception reporting/early warning for defection

- My Basic Approach

1. Define goals: specific applications and lessons to learn
2. Assess data resources: current/past databases, research report, new primary collection
3. Download AMS data, reconfigure, transform, clean, and load into SAS
4. Begin running queries: share preliminary results
5. Expand the discovery process into spreadsheets, narrative reports
6. Refine goals/identify new hypotheses
7. Complement existing data with newly collected, share with AMS
8. Apply to marketing tests, segmentation, personalization
9. Continue process in traditional cycle



- SAS: Basic BI/Data-Mining Tool

Easy to use tool:

- Import data
- Run cross-tabulations, correlations
- Data-step programs to merge data
- Easy queries:
- Customer, member analysis
- \$1600/year software license

The screenshot displays the SAS software interface. On the left, a file explorer window titled 'Contents of X:' shows a directory structure with files named 'Aaas', 'Alongit', 'Mem', 'Mem05b', 'Mem05d', 'Mem06b', 'Mem06d', 'Mem07b', 'Mem07d', 'Mem08b', 'Mem08d', 'Mem09b', 'Mem09d', 'Mem5', and 'Survey'. The main window is titled 'Log - (Untitled)' and contains the following text:

```
NOTE: Copyright (c) 2002-2003 by SAS Institute Inc., Cary, NC, USA.  
NOTE: SAS (r) 9.1 (TS1M3)  
       Licensed to WHORTON MARKETING & RESEARCH, Site 0053127001.  
NOTE: This session is executing on the XP_PRO platform.  
  
NOTE: SAS 9.1.3 Service Pack 4  
  
NOTE: SAS initialization used:  
       real time      3.26 seconds  
       cpu time       0.67 seconds  
  
1      libname x 'c:\proj\clients\aaas';  
NOTE: Libref X was successfully assigned as follows:  
       Engine:       V9  
       Physical Name: c:\proj\clients\aaas
```

Below the log window, a code editor window titled 'means2.sas *' contains the following SAS code:

```
libname x 'c:\proj\clients\aaas';  
  
proc sort data=i.ifma; by alsfr;run;  
proc means data=i.ifma noprint;  
  var sfratio; output out=one mean(sfratio)=a;by alsfr; run;  
proc print data=one;run;
```

The bottom of the interface shows a taskbar with the Windows Start button and several open applications: Active Version..., Microsoft Word, My Pictures, Removable Di..., 4 Microsoft..., and Microsoft Office.

Library has 15 member(s).

Effective offers/pricing: critical one of the "4 P's"

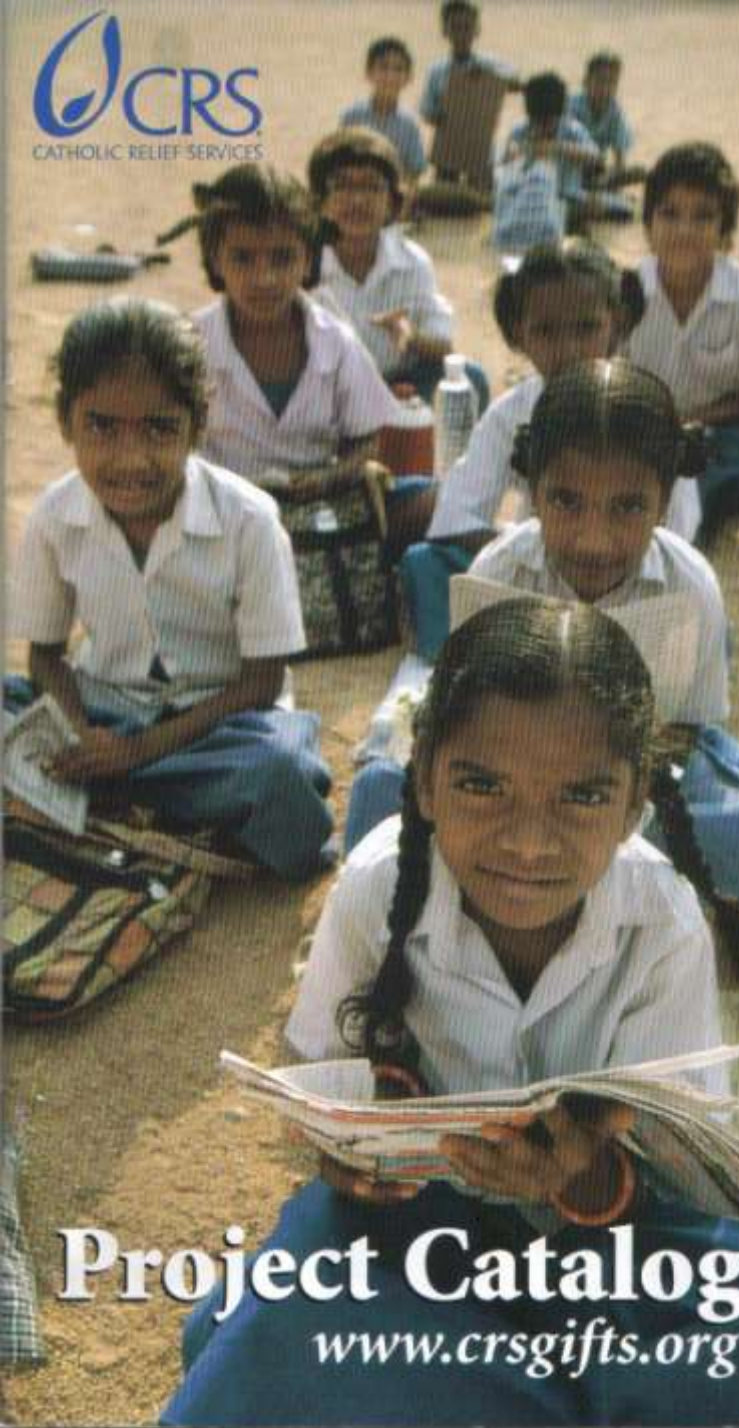
- The 'offer' generally refers to how you describe and price the product
 - Example: membership (insert bundle here), 15-for-12 months, \$149 (off \$165 list price), act by October 31
- Variable offers
 - Encourage trial and adoption, reward loyalty
 - Incentives for early response: early bird or early renewal
- Price discrimination
 - Economic term for the practice of pricing according to ability/willingness to pay
 - Think: scaled dues in trade associations
 - Student, new member, recent graduate pricing
 - Might mean "pricing on the fly" (temperature sensitive Coke machines)
 - In associations, optional pay-in programs: voluntary contributions to a PAC, special advocacy fund, participation (personal & company) in fundraising programs

D. Marketing tactics: effective messaging

- Key points in your messaging
 - Conversational language, conveying simplicity to convince, complexity to address diverse needs
 - First person voice, declarative statements ... good writing often resembles good speaking
- “Made to Stick” principles
 - Checklist/scorecard for successful ideas (messages)
 - Is it simple?
 - Is it unexpected?
 - Is it concrete?
 - Is it credible?
 - Is it emotional?
 - Does it tell a story?
- “If you say three things, you don’t say anything.”

Effective positioning: becoming *understandable*

- Take an objective approach to identify sources of confusion; address these in your messaging
 - ASAE Decision to Join study helps demonstrate
 - Primary demand vs. secondary demand: how we feel about associations affects decision to belong to *yours*
 - Many people don't know what an association is ... some are 'joiners' and others are not
 - Effective membership marketing requires explaining what you get out of it, what you have to put in
- Not an uncommon problem
 - Example previous page: large international charity
 - Large donor base driven by emotional appeals
 - "Project Catalog" sought to present program examples, both fundraising & education
 - In membership, mix of promotion & 'user manuals'



Project Catalog

www.crsgifts.org

Catholic Relief Services

Mission Statement

The fundamental motivating force in all activities of Catholic Relief Services is the Gospel of Jesus Christ as it pertains to the alleviation of human suffering, the development of people, and the fostering of charity and justice in the world.

CRS gives active witness to the mandate of Jesus Christ to respond to human needs in the following ways by:

- Responding to victims of natural and man-made disasters
- Providing assistance to the poor to alleviate their immediate needs
- Supporting self-help programs which involve people and communities in their own development
- Helping those it serves to restore and preserve their dignity and realize their potential
- Collaborating with religious and nonsectarian peoples of goodwill in programs and projects which contribute to a more equitable society
- Helping to educate the people of the United States to fulfill their responsibilities in alleviating human suffering, removing its causes and promoting social justice.



Visit our websites:

www.crsgifts.org: home of the CRS online project catalog and updated information.

www.crs.org: home of CRS and its worldwide programming.

www.myglobalvillage.org: detailed information about select villages and programs.



Lucas and his dog Rey-Isaac, Guatemala

www.crsgifts.org

Gift of Hope

Project Catalog

2004 Fall/Winter

Example: **Membership/donor marketing**

- Key elements to convey value and overcome key objections
- Create a simple vehicle to process transactions from supporters
- Rarely a vehicle for raising awareness
- Key marketing goals:
 1. Convey desire to have an individual join
 2. Articulate the value
 3. Describe initiatives
 4. Provide sufficient information for a decision (yes or no)
- Donor appeals are very similar to membership: included examples that are better documented
- Examples of testing & general DM economics

Example: **Association member marketing**

- Professional association: short history of existence
 - #1 slowly growing: reinstatement ↓ acquisition ↑
 - #2 strong competition: ACA, state chapters
 - #3 low penetration: 6k members/80k universe
 - #4 dissatisfied with past creative: garish, no brand
 - #5 external: decent awareness: web, 3x/yr mail
 - #6 strategy: very concerned with growth, business model
 - #7 sectors: strong with students, tougher with practice
 - #8 future: expect product diversification, membership needs new techniques

AMHCA Program Description

- Membership marketing program
 - Splashy, joint publication-membership offer
 - Replaced with combo 15-for-12, \$15 discount
 - All mail, no integration or e-acquisition
 - 0.45% acquisition, 1.1% lapsed reinstatement
 - Campaign economics
 - 30,000 to 45,000 pieces, \$0.52 cost per contact
 - Drawn from rented/downloaded state licensure lists
 - Nonprofit Standard postage, licensure (free) lists
 - Kept ongoing creative minimal
 - Initial tests inconclusive
 - Limited leeway on changing offers
 - Temptation to “change it up” periodically



We hope that you will choose to learn more about AMHCA. For more than 25 years, AMHCA has served the professional needs of mental health counselors nationwide.

Profit from AMHCA work to get you recognized under Medicare, other federal programs, and healthcare plans.

Enjoy more recognition through AMHCA's growing collaborative relationships with professional organizations, government agencies, and consumer groups.

AMHCA is dedicated to your success and growth of our field. AMHCA strives to support its members with programs and services that expand our professional knowledge and services to our clients, help us to manage our work, and provide opportunities to network with our colleagues in mental health counseling.

AMHCA also works for universal recognition of our profession and for third-party reimbursement.

Your membership makes these efforts possible. And most of our members find that involvement is key they more they put in, the more they get out. Attend events. Serve on a committee. Submit an article to The Advocate. Contact your lawmakers to support AMHCA's legislative work on your behalf.

We want to advance practice and to serve your needs. We hope you will join us today.

Sincerely,

W. Mark Hancock, Ph.D.
Executive Director & CEO

Investment & the Key

When you join, you can dramatically increase the value and benefit you receive with active participation. Here are just a few of your benefits:

Giving the a Voice... in Washington and State Capitals

1. Profit from our work to win reimbursement under Medicare and leading health plans.
2. Enhance client access to your services with our awarding support of mental health care parity.
3. Enjoy more respect and recognition through AMHCA's growing collaborative relationship with private health plans and managed care advocates.
4. Receive low-costing legislation, public policy and court opinion news from the *Advocate* from Washington electronic newsletters.
5. The AMHCA Office of Public Policy and Legislation works with federal and state governments to protect your interests.

Affordable Peace of Mind

3. Gain access to low-cost malpractice insurance coverage. With our affordable professional liability insurance protection, you can continue to practice securely.
4. Our online Health Insurance Mart can help you locate the most affordable rates in your state and our exclusive Member Advantage program offers other insurance programs as well.
8. Our Long-Term Care Protection Plan with John Hancock helps to secure your future in the event of a debilitating health crisis.

Stay In Touch With Power

16. Participate in networking events with your affiliated chapters in their states.
17. Attend timely presentations and discuss issues with your peers at our Annual Conference. In 2009 this program is held in St. Louis, MO. Visit our web site for future locations.

Continue Your Professional Development

12. The *Advocate* monthly newsletter features research highlights, legislative bulletins, business updates, practice advances, and association and chapter news.
13. The *Journal of Mental Health Counseling* quarterly journal provides practical knowledge and flourishing background from in-depth research on clinical studies and counseling practice.
14. Enjoy your state license requirements current with at least 11 continuing education credits a year through AMHCA's Journal Learning Unit in each monthly newsletter.
15. At www.AMHCA.org, online educational courses help keep you current and provide the CE credits that you need for license renewal—up to 60 credits each year through our online work-at-home course catalog more than 22 hours.



Membership Inquiry Form

Yes! I want to join AMHCA today!

I have enclosed my dues for the following:

Clinical: \$185 Regular: \$195
 Associate: \$60 Student/Graduate: \$60
 Retired: \$50 AMHCA plus State** *See reverse for definitions

Name: _____
 Address: _____
 City/State/Zip: _____

Please provide the following contact information:
 Email Address: _____
 Business Telephone: _____

I certify that I have met all the criteria for my membership category. I pledge to uphold and abide by AMHCA's Code of Ethics (please review www.amhca.org/ethics.html).
 Signature: _____

Payment Method: Professional association dues only:
 Enclosed in a check or money order payable to AMHCA
 Please charge to membership dues to my:
 Visa MasterCard American Express Discover
 Authorization #: _____ Expiration Date: _____
 Card #: _____
 Signature: _____
 Name: _____

Mail your application to:
 AMHCA c/o Welfare Bank
 P.O. Box 764717
 Baltimore, MD 21276
 Fax: 703-548-4775
 Call: 800-225-2642 ext. 102, or (703) 548-4002

Joint State Chapter/AMHCA Dues

For many of us the services of the AMHCA network reflect a combination of national services and state-level benefits. We also offer joint state chapter dues at a discount of 20% before the following states.

If you wish to join both today, please indicate the appropriate amount on the attached form.

| | |
|---------------------------|-------|
| Arkansas..... | \$172 |
| District of Columbia..... | \$148 |
| Florida..... | \$220 |
| Iowa..... | \$164 |
| Michigan..... | \$184 |
| Missouri..... | \$176 |
| Montana..... | \$204 |
| New Hampshire..... | \$184 |
| Oregon..... | \$184 |
| South Carolina..... | \$164 |
| Vermont..... | \$204 |
| Washington..... | \$204 |
| West Virginia..... | \$184 |

Please also indicate if you want to learn more about other services of AMHCA:

- Annual Conferences
 Professional Advocacy Programs
 Professional Liability Insurance
 Other Services (please specify)

AMHCA Membership Categories

Clinical Membership—Master's Degree or higher in Counseling

What Our Members Say About Us

Don't just take our word regarding the quality of our service to the community. Here are just a few of the comments from our members:

"When I moved from community mental health to private I wondered where/how I would connect with colleagues. Then I found you. The wonderful thing is that you target mental health issues directly."

"I love what you do for me and the communications you send to me. Your organization became the foundation of our state's licensing the Professional Counselor."

"AMHCA does an outstanding job representing the interests of mental health counselors."

"AMHCA has always been extremely responsive and helpful to any questions, concerns, or needs I have expressed."

"You folks are proactive and very engaged in furthering the profession. As AMHCA membership provides money."

...the lobbying and going on top of session in

...what we have not and AMHCA active."

AMHCA is a community of more than 5,500 mental health counselors. You and your colleagues make an important impact on the lives of Americans, and AMHCA strives to make a difference for you in your profession.



AMHCA Membership Invitation

Yes, I accept your invitation to join an AMHCA member today!

Special Membership Offer: 15 Months for the Price of 12

- Clinical Member: ~~\$185~~ \$139**
 Regular Member: ~~\$195~~
 AMHCA plus State dues* \$204 *see reverse for definitions

** special offer if you act by April 15

Cara L. Chinchir, LCMHC
 65 Howard Street
 Burlington, VT 05401-4818 VT

Send me information for the special Annual Conference rate of \$275 for first time members.



As an individual, you make a difference in the lives of a great many people. Together, you can do so much more.

Cara L. Chinchir, LCMHC
 65 Howard Street
 Burlington, VT 05401-4818

Dear Cara,

We are currently reaching out to professional mental health counselors who are not currently members of the American Mental Health Counselors Association, in the hope that you will consider joining us today.

Thank back to when you first became a mental health counselor, and everything you have done and learned since then. You've quickly understood why we take our role so seriously, and why we need your support. Although we have done so much to increase the public understanding of mental health, there is so much more left that we can accomplish together.

Cara, we know that your work as a professional mental health counselor has never been more challenging. Ours, we could devote our energy and talents to work with clients to help them improve their lives. Today, we have to worry about so much more - increasing costs, client access, licensure, staying informed, even malpractice suits.

At AMHCA, we exist to help you address all of your professional challenges. You need the benefits designed exclusively for you and offered only by the AMHCA—the one association dedicated exclusively to the needs of professional mental health counselors.

- Benefit from our work to win reimbursement for you under Medicare and leading health plans.
- Enhance client access to your services with our unwavering support of mental health care parity.
- Enjoy more respect and recognition through AMHCA's growing collaborative relationship with private health plans and managed care advocates.
- Gain access to our affordable malpractice insurance coverage and continue to practice securely.
- Save money on insurance by using our online Health Insurance Mart to locate the best rates in Vermont or by using our exclusive Member Advantage insurance program. Our Long-Term Care Protection Plan with John Hancock helps to secure your future in the event of a debilitating health crisis.

Membership in AMHCA is an honor held by the best mental health counselors in the nation. They find it an invaluable resource, professional credential and a source of information and support in challenging times.

I invite you to review the enclosed brochure and visit our website at www.amhca.org to learn about our benefits in greater detail, and join today. As with AMHCA—the only national organization dedicated exclusively to your interests—as the best decisions you can make to ensure your long-term career growth and the growth of our profession.

We realize that you probably belong to one of our network of thirty state associations. We work with them in close collaboration to advocate for your interests and your right to practice. In fact, to make it easier for you to belong at national and state levels, we offer special joint-discounted membership rates. Please refer to our brochure to learn if you can benefit from this arrangement today!

(over, please)

801 East Finkle Street, Suite 201 • Alexandria, Virginia 22304 • Phone: 703-688-0227 • Fax: 703-688-4174 • www.amhca.org



An Urgent Message for Mental Health Counselors

Make the Most of Your Tools

Case studies:

- PPAI: Data cubes quantify value of membership each renewal cycle
 - Numeric benefits, FedEx, other affinity programs
- TMA: Years of effective use of in-house network's MS SQL
 - Drives county level education & membership development
- NDIA: Using BI/AMS/e-marketing
 - Doubled revenue/membership

