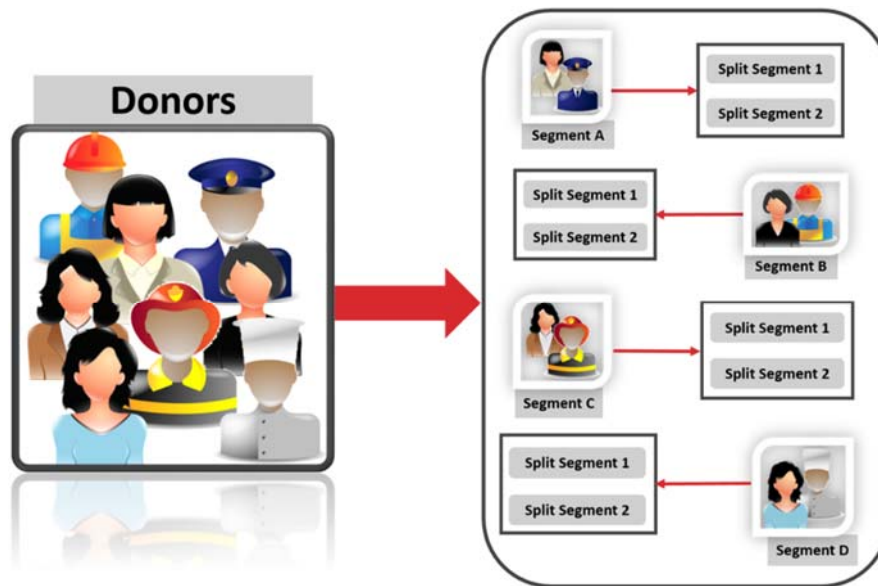


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## Strategic Donor Segmentation

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Regardless of the size of your organization, knowing how to segment donors is an important strategic process because it allows you to communicate with your donors in ways that are most meaningful to them as individuals. Using a combination of providing the right message in the right place at the right time gives you the opportunity to engage with your donors in creative, innovative, and intentional ways.



Splitting segments gives you the opportunity to test your appeal and analyze its success before reaching out to the other individuals in your segments.

### Identifying Appeal Segments

Segments help customize your messaging, ask amounts, and communication strategies to increase donor interest in support of your organization. In MyBernard, there are multiple appeal segments you can use in your fundraising campaigns that solicit donations from individuals in those segments.

The following table identifies the different segment types in MyBernard.

Segment Type	Description
<b>Global Attribute</b>	Requires the user to enter a mail date and communication channel, select any additional output fields besides the standard default fields, and select a primary set of criteria.
<b>Static</b>	Relatively constant and available for you to use with your fundraising campaigns. They provide you with a snapshot of the segment file makeup based on specific criteria and should be run on a nightly basis.
<b>Dynamic</b>	Create your own buckets to target messaging and packages by adding more criteria on top of the static-segment-id such as lifetime giving, gift count, or custom data flags.
<b>White Mail/Error</b>	Always create a segment to catch white mail and mail entered but the donor doesn't have a solicitation record tied to the appeal. This segment needs to be at the lowest alphabetical assignment.

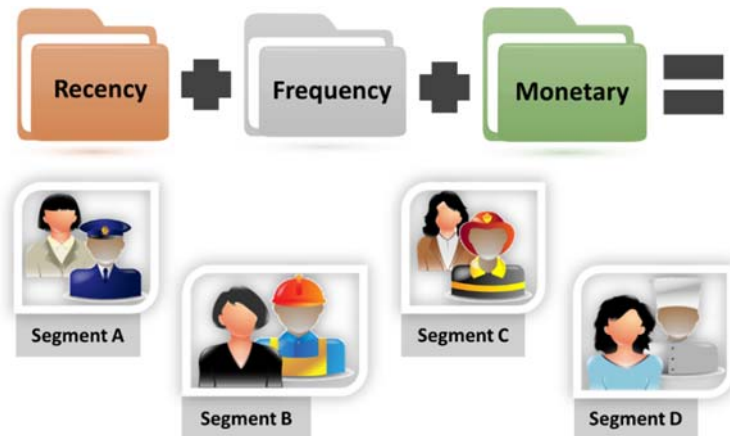
## Defining Static Segments

When thinking about categorizing your static segments, also known as segment groupings in MyBernard, recency, frequency, and monetary helps you determine when donors in the segment gave their last gift. You can also learn more about how often those donors gave gifts as well as the total amount given by each donor.

The following table identifies the groupings to consider when defining static segments and includes descriptions for each type.

Segment Type	Description
<b>Recency</b>	Knowing when the most recent gift was given to your organization allows you to rank your donors based on that information.
<b>Frequency</b>	Identifying how many times a donor gave in a specific time frame gives you another perspective to consider.
<b>Monetary</b>	Determining how much money your donors give to your organization in a specific timeframe is another way to target those who will likely give another gift.

When you analyze the recency, frequency, and monetary history of donors, you start to see a picture of those who may positively respond to future campaigns.



You will typically end up with many different segments using this approach and you should focus your efforts on those with a greater likelihood to donate. Not only will you save money, there is an increased chance that you will receive a better than average response.

If you consider the recency, frequency, and monetary approach to segmentation, use a 3-character code naming convention. The first character identifies the recency, the second character is for frequency, and the third character looks at the last gift amount.

<b>R</b> 1st Char	1st Char Description	<b>F</b> 2nd Char	2nd Char Description	<b>M</b> 3rd Char	3rd Char Description
A	00-03 month	1	1 time gift	1	\$.01-4.99
B	04-06 month	2	2 time gift	2	\$5-9.99
C	07-09 month	3	3-plus time Gift	3	\$10-14.99
D	10-12 month			4	\$15-19.99
E	13-18 month			5	\$20-24.99
F	19-24 month			6	\$25-49.99
G	25-30 month			7	\$50-99.99
H	31-36 month			8	\$100-plus
I	37-48 month				
J	49-60 month				
K	61-plus month				

## A/B Testing Appeal Segments

Once the segments for your campaign have been identified, you should test them to determine the best way to engage the individuals in each segment. Your fundraising campaign will be more successful when you analyze the results for certain audiences so it is important to develop a testing strategy.

## Communication Channels

These are the different ways you contact donors and ask them to donate to your organization. Individuals typically prefer how you contact them that include mail, email, and phone.

Knowing the communication preferences for your donors is critical to ensuring you use the right channel that provides the best response to your campaign.

## Ask Arrays

Description	From (\$)	To (\$)	Edit	Delete
0-10		\$10.00	Edit	Delete
10-50	\$10.01	\$50.00	Edit	Delete
50+	\$50.01		Edit	Delete

Provide a range of possible giving amounts to offer to individuals receiving your appeal. They help identify which potential gift amounts bring in the most gifts when soliciting those donors and could be based on the last gift amount.

When establishing an ask array you enter the array code and description, choose the based-on criteria, and establish formatting options. Select the rounding type and amount such as \$1.00 or \$5.00 and then determine your range.

## Split Types

Identify how to divide the segment for testing purposes. When using a percentage type, you enter the amount and number of splits. An example is to take a 50% split dividing the segment into two equal pieces.

A fixed type is when you enter a total quantity of names and determine how many splits you want. For 500 names and 2 splits, each split contains 250 names.

Use a lot segment type for multiple segments in the split and then enter the number of names to include. You can also select whether to use the parent ask array or create a new ask.

Once you have your splits, you should split them again to identify the individuals who will be included in your control and test groups.

