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Part Art, Part Science—Regional Non-Profit Mailers Need Both from Their List Broker Partners

Regional mailers today are challenged to find an adequate universe of names in their area that perform to expectation at a reasonable cost. A finite geographical area restricts volume and most non-profits experience very low retention rates after merge/purge. Whether it is a single regional organization or a cooperative of vertical market entities, the problems are still the same. When working with a list partner who has both the tools and experience to meet the challenges of regional mailers, those problems can be overcome.

The challenge is “not insurmountable and the benefits are enormous,” according to Lisa Greene, President of Specialized Fundraising Services, a Spartanburg, South Carolina based list broker with an exclusive focus on the non-profit sector. “Since we have been serving the needs of so many regional mailers, we have made a significant investment in developing the necessary tools to make regional mail planning run more efficiently and effectively.”

SFS’s proprietary tool, called **Solutions ToolboxSM** was built to address the growing need to offer timely services to regional clients. **Solutions ToolboxSM** tackles the problem on three fronts, timely regional counts, analytical reporting and forecasting of future mailings.

The key word for organizations is time, says Greene. “Gathering counts for each mailer’s program takes time; however, if the information is kept centralized, it is a function that does not have to be performed individually for each client and allows for quicker mail planning and more time to be put into the strategic details of the list plan.”

In one module, geographic and SCF counts are maintained on a client’s continuation mailing lists, with counts on multiple segments per list. The value of this tool is that quick queries can be made to ascertain available universes by list segments for regional clients. A preliminary list plan with available universes is all there at the click of a mouse button.

Now that an organization knows how many names are available in a region for a variety of lists, the question becomes which variety of lists and volumes will

provide the optimum bottom line results. That's again where the involvement of an effective list partner is critical.

With the **Solutions ToolboxSM**, two more modules work together for analysis and forecasting purposes. First, within a multi-dimensional database, all basic response information is stored and coded at a variety of levels, such as package format and audience. With this added level of coding, SFS slices and dices the response information to ascertain the best lists for the client depending on package being mailed, time of year and audience targeted.

Next, the **Solutions ToolboxSM** runs queries within the analytical module to build the forecast model for the next mailing. Within the model all viable list and package combinations are examined and sorted and multiple scenarios at differing volumes by list are reviewed to discover the optimum mix of lists and volumes by list, while taking into account historical response elements. Ultimately, a complete mail plan that meets or beats budget goals is created using these steps. The model is very detailed and predicts each important benchmark for non-profit mailers.

For regional mailers within a niche market, such as public television or humane societies, the individual plans can be combined for one group list purchase that can then take advantage of volume discounts and alleviate the worry of minimum orders.

"It is actually part science and part art," according to Greene. *"While these tools are wonderful and provide the science of list planning, the art is the expertise of your vendor partner who interprets the analytical data and makes strategic recommendations. At SFS, our years of experience in regional list planning make us the perfect experts who meld art and science—together."*

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