

# **Blackbaud**DirectMarketing

New Features and Enhancements Guide

012910

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BBDirectMarketingNewFeaturesGuide-012910

# New Features and Enhancements

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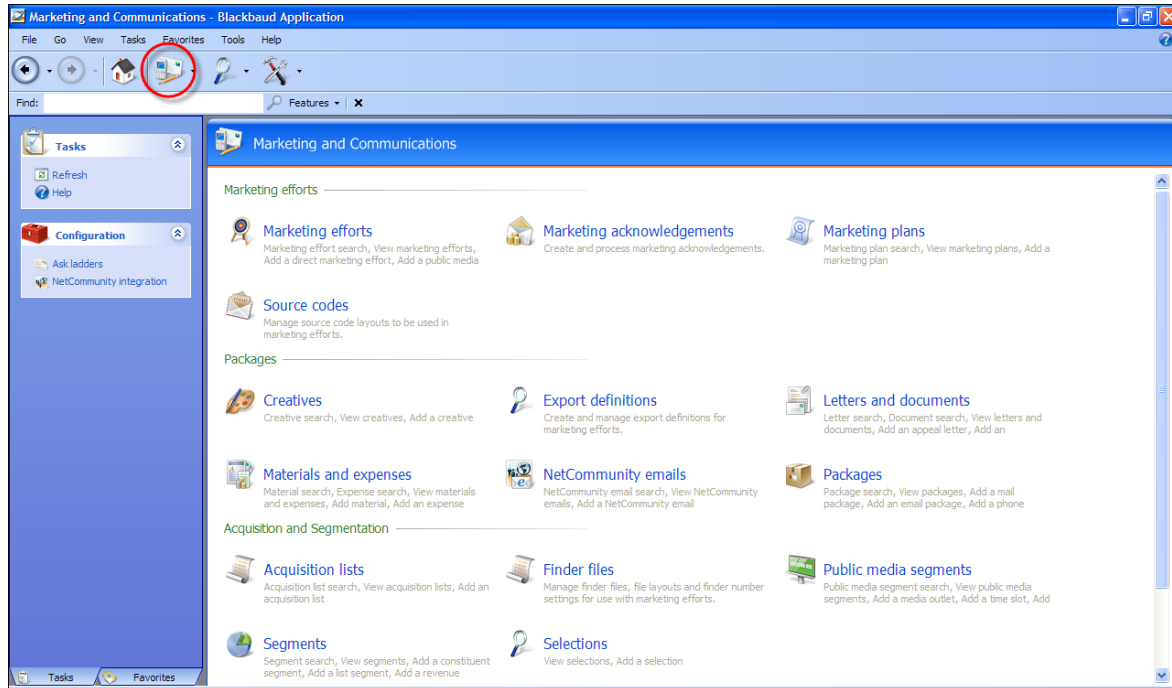
Before you begin using *Blackbaud Direct Marketing 2.5*, review the following notes which highlight new features and changes to existing features. It is important to share this information with all *Blackbaud Direct Marketing* users in your organization.

## Navigation and Shell Changes

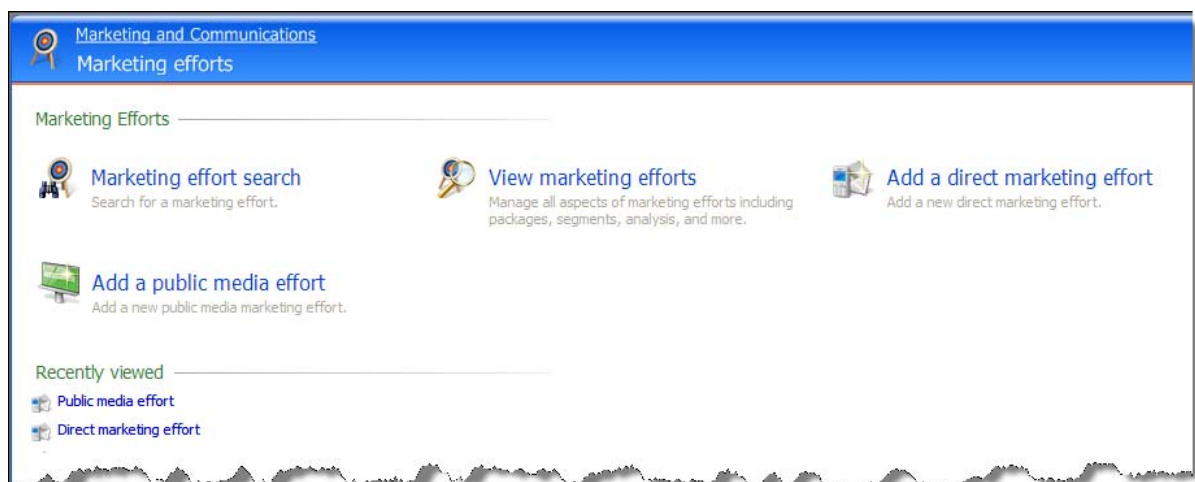
We changed the location and grouping of some features to make them easier to find and use.

## Marketing and Communications

- In previous versions, **Blackbaud Direct Marketing** features were grouped in the *Mailings* area of the program. These features are now found in the new *Marketing and Communications* area. For **Blackbaud Enterprise** users, this area includes additional marketing and communications features such as Appeals, Receipts, and Reminders.



- Several features that used to be located under **Administration** now appear on the Marketing and Communications page. These include Export Definitions, Source Codes, and Finder Files. Other features, including Plan Templates, Finder Number Settings, and Postal Templates, appear under **Configuration** when you access their related area. For example, Plan Templates appears under **Configuration** when you access the Marketing Plans page.
- Some of the features, such as marketing efforts, acquisition lists, and segments now include a landing page where you can quickly add, search for, and view a list of records of that type. You can also view recently viewed records.



## Administration and Analysis

- Query, KPIs, Reports, OLAP Excel reports, and OLAP Explorer now appear in *Analysis*. Previously, these appeared in *Data* and *Reports*.
- Export and Data marts now appear in *Administration*. Previously, these appeared in *Data*.

## Marketing Efforts

Because marketing includes much more than mailings, we renamed the Mailings feature area to Marketing Efforts to better reflect the available functionality. Marketing efforts include direct marketing and public media marketing efforts.

### Direct Marketing Efforts

Mailings were renamed “direct marketing efforts” to distinguish their purpose from the new public media efforts. There are no changes to the existing functionality other than the name. Like mailings, use direct marketing efforts to target segmented donors with mail and email packages based on criteria such as recent giving history and wealth.

### Public Media Efforts

You can now create public media efforts to target masses of people rather than particular individuals. For example, a public media marketing effort may include a commercial on television. The time slot and networks you select for running the commercial include people with certain demographics, but overall you do not know exactly who will view the commercial. Other examples of public media marketing efforts include content broadcast on radio or displayed in print publications, online through website banner ads or interactive media, or on billboards or signs.

### Public Media Segments

Use public media segments to manage how your organization uses public media efforts. Public media segments include media outlets, time slots, and marketing locations. Use these segments to target prospects you do not know with customized content based on their characteristics. For example, you can base public media marketing efforts on media outlets and time slots, such as for broadcast or online efforts, or marketing locations, such as for billboards, promotional literature, or other out-of-home efforts. Through these segments, you can communicate your message to a specific demographic, such as prospects who live in a specific area, visit a specific website, or prefer a specific television or radio program.

From the Public media page, you can manage the public media segments your organization uses for public media efforts. To access the Public media page from *Marketing and Communications*, click **Public media**.

For information about marketing efforts, see the Marketing Efforts chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

# Source Codes

The Source Codes feature was enhanced to better validate codes and maintain consistency. In previous versions, it was sometimes difficult to know what a particular source code value meant so you could unintentionally add values that did not follow the layout rules. To solve this problem, you now add source code parts to layouts and define which code values can be used for the layout. Source code parts are the elements that build the code. When you create a part, you define all the possible values for that type of element. Layouts define the rules for the source code, including the position, format, and valid values for the code parts. For example, when you build a source code for membership renewals, you can define rules for the layout such as the Program code is always M, followed by the Campaign Code RENB or RENA, and the Year code is 10, 11, or 12.

When you create segments, packages, and lists, you can assign part code values to them. When you create a marketing effort that uses these segments, packages, or lists, their part code values roll up to the marketing effort's source code. You can use these default values or enter other values. These values must follow the restrictions defined by the layout selected for the marketing effort.

For more information about how to add and manage source codes, see the Source Codes chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

For detailed information about the source code enhancements and why the changes were made, see these blog posts:

[Source Codes: Part 1](#)

[Source Codes: Part 2](#)

[Source Codes: Part 3](#)

[Source Codes: Part 4](#)

# Packages

There are two new types of packages:

**Phone packages** — Add phone packages for content that you intend to communicate over the telephone, such as for a phonathon. You can attach a Microsoft *Word* document to the package, such as the script used by callers to communicate its content.

**Public media packages** — Add public media packages for content that you intend to communicate through passive marketing efforts such as billboards, website banner ads, and advertisements broadcast over television or radio. You can select the creative information to include in the package, such as a digital media file for a broadcast advertisement or an image file for a billboard or banner ad.

# Materials and Expenses

You can now create materials and expenses to associate with your packages. For example, packages may require materials, such as paper, envelopes, and shipping containers, or small gifts such as pens or magnets with your organization's logo. You may also have expenses required to implement packages, such as postage or printing. To access materials and expenses, from *Marketing and Communications*, click **Materials and expenses**.

## Letters and Documents

Letters are largely the same except that they now have their own task area. Marketing documents are items you may have created creative records for in the past, such as reports or pamphlets in your packages. To access letters and documents, from *Marketing and Communications*, click **Letters and documents**.

## Creatives

Creatives have a more defined purpose. In previous versions, these were any marketing items included in a package. Now, creatives are the content you include in packages you use with public media marketing efforts such as billboards or online advertisements. Examples of creatives are images and digital media files of the content used in a marketing effort. To access creatives, from *Marketing and Communications*, click **Creatives**.

## Export Definitions

To simplify export definitions, there are no longer “email” and “mail” export definition types. You can now use the same export definition for the mail, email, and phone channels. If you need to use different export definitions for each channel, you may create as many definitions as you need and simply name them something like “Mail Export Definition” or “Email Export Definition” to distinguish how each should be used.

After you upgrade to ***Blackbaud Direct Marketing 2.5***, you can use your existing export definitions on any type of channel.

For more information about packages, items associated with packages, or export definitions, see the Packages chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

## Sponsorship Efforts

In ***Blackbaud Enterprise***, use **Sponsorship Efforts** to create marketing efforts for segments of constituents based on sponsorships. For example, you can send welcome kits to new sponsors or reminders to existing sponsors whose sponsorships are expiring soon.

Sponsorship Efforts is an optional feature that your system administrator configures. If you need to use sponsorship efforts and the Sponsorship Efforts task does not appear, consult your system administrator.

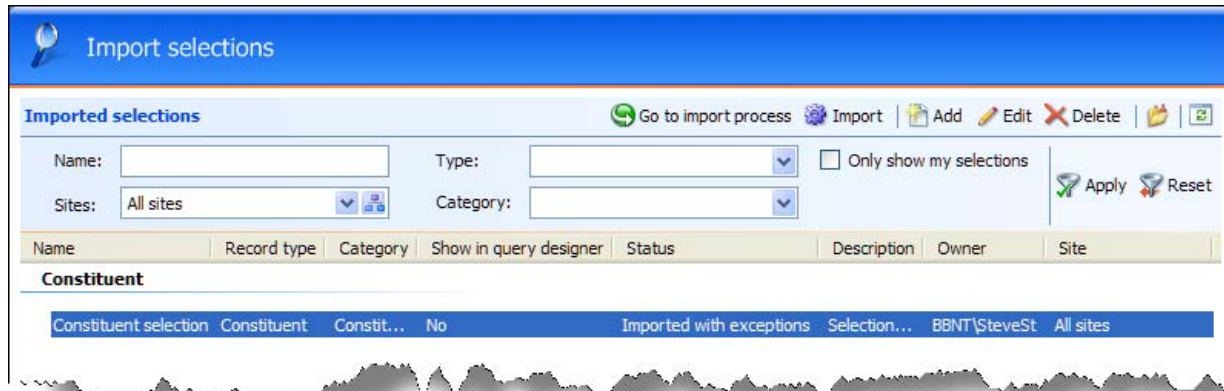
You create sponsorship effort processes to select sponsorships based on criteria, such as voluntarily or involuntarily upgrading sponsorships. When you add sponsorship effort processes, you define a source code and define the universe and exclusions for the sponsorship effort.

For each sponsorship effort process you create, you can specify one or multiple sponsorship rules. Sponsorship rules determine when and how the program processes sponsorships. When you specify rules, you can also tie the sponsorship process to a sponsorship segment to target specific sets of sponsors with certain packages. You can create a job schedule to run the sponsorship process automatically and unattended. Sponsorship efforts are included in KPIs and marketing effort reports.

For more information, see the Sponsorship Efforts chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

# Import Selections

From *Analysis*, you can create a process to automatically generate a selection of records based on the system record IDs included in an import file. On the Import selections page, you can view and manage the processes your organization uses to create selections from import files. After you create an import selection process, you can manage the process and view detail information from its status page. For more information, see the *Blackbaud Direct Marketing Query and Export Guide*.



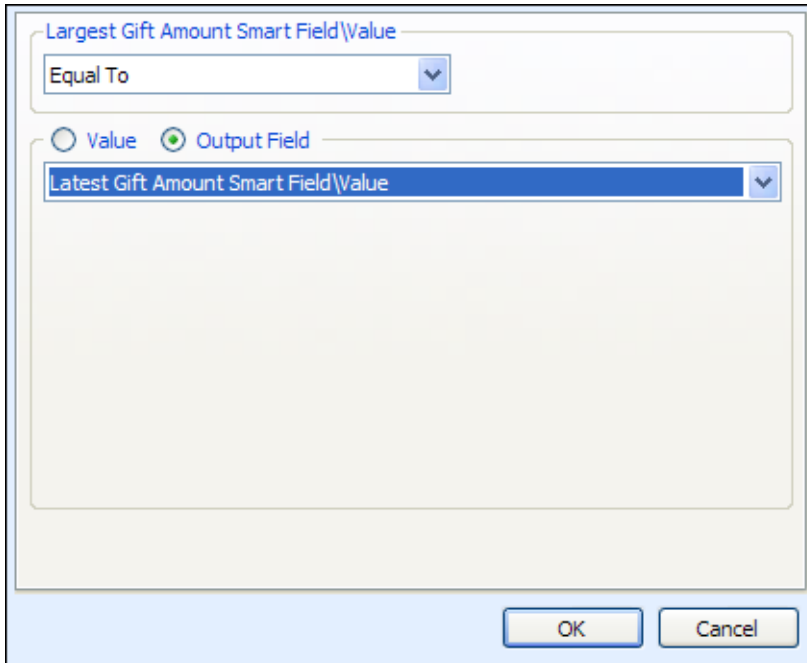
# Segments

In previous versions, you could not create segments that contain the same segment codes as another segment. Now you receive a warning that you will create a duplicate, but the program allows you to ignore the warning and create the segment anyway. The warning lists the segment code that is already in use as well as any selections that are being duplicated (if the segment includes selections). This warning appears for all type of segments. For more information, see the *Blackbaud Direct Marketing Marketing Efforts Guide*.

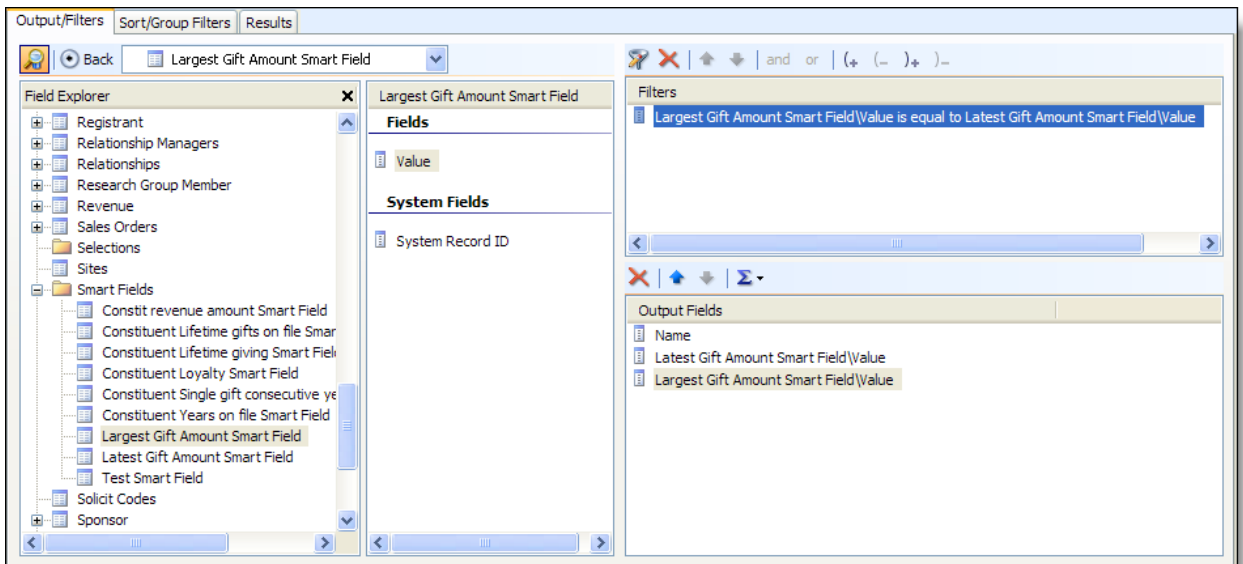


# Query

Use the new **Output Field** option on a query filter criteria screen to compare output fields of the same data type. For example, you can create a query that selects constituents whose Largest Gift Amount equals their Latest Gift Amount. To do this, add the Largest Gift Amount and Latest Gift Amount smart fields to the **Output Fields** pane and then add the Largest Gift Amount field to the **Filters** pane. On the criteria screen, select the criteria operator, in this case, “Equal to”. Select **Output Field**, and in the drop-down field, select the **Latest Gift Amount** field.



When you return to the query, the **Filters** pane now includes “Largest Gift Amount is equal to Latest Gift Amount”.



On the Sort/Group Filters tab, you can compare COUNT, SUM, AVG, MIN, or MAX values of filter fields. For example, you can compare the SUM of planned gifts payments to the SUM of pledge payments.

## Reports

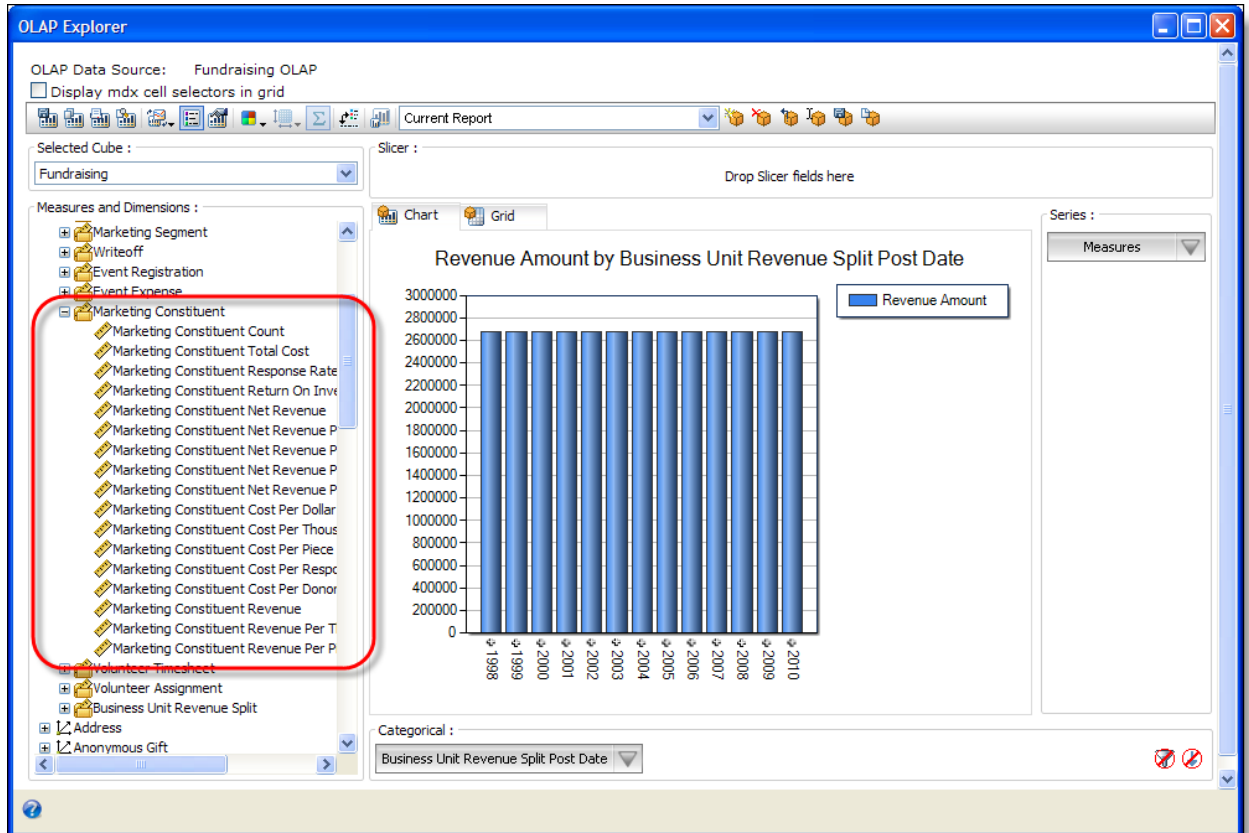
There are three new reports. You can find these under **Reports** on the Marketing Efforts page.

- The Export definition file layout report provides detailed information about the export definitions associated with marketing efforts. This report lists the output fields that match fields in the export definition. It includes field paths, header names, and the type of data. This report is sent with the export file to indicate what to expect in the file.
- The Marketing schedule report provides an overview of marketing efforts over a given time period. The report can include both active and inactive marketing efforts, and it uses the schedule date to determine which efforts to include.
- The Segmentation summary report provides summary information about segments included in a marketing effort and about the selections within the segments. You can run this report for both active and inactive marketing efforts.

# Data Mart

## OLAP Reporting

For *Blackbaud Enterprise* users, the OLAP cube now includes additional measures and dimensions to report on your *Blackbaud Direct Marketing* data. The OLAP cube now includes the **Marketing Constituent** category.



The **Marketing Constituent** category includes measures with data about the constituents in your database who you targeted in your marketing efforts. With these measures, you can create complex reports with a multidimensional view of your data about these constituents.

## Configuration Tasks

For *Blackbaud Enterprise* users, you can now include source analysis rules and source codes in your data mart. When you create the data mart, the deployment wizard copies data from records in the source. With the new configuration tasks on the Reporting data mart page, you can add the source analysis rules and source codes that are associated with those fields in the data mart.

To add source analysis rules, click **Deploy eligible source analysis rules** under **Configuration** on the Reporting data mart page. Source analysis rules provide snapshots of constituent attributes at specific times and allow you to track the impact of mailings on constituents in a record source.

To add source codes, click **Deploy eligible source codes** under **Configuration** on the Reporting data mart page. Source codes identify lists, offers, packages, and segments associated with advertisements or promotions, and you can use them for analysis of any gifts or responses you receive.

## New User Guides

We restructured some of our user guides to reflect changes in the program and to help make information easier to find. New user guides include:

- *Query and Export Guide*
- *Reports and KPIs Guide*
- *Data Mart and OLAP Guide*