Memsys Enhancement Training

Michal Heiplik
Agenda

- CDP data collection
- Overview of the Memsys enhancement
- Transfer setup
- Finding unassigned sources & their value
- Executing CDP data extraction
Key high yield metrics will be reported quarterly

Reference Database

- Online
- Prospects
- Lapsed recapture
- Retention
- Matching gifts
- Planned giving
- Sustainers
CDP data collection

- Drive towards automation
- Updating schedule - monthly
- Station-driven reporting - categorization
## Sample – ROAR Report

<table>
<thead>
<tr>
<th>Metric*</th>
<th>Average Station Value</th>
<th>Best Station Value</th>
<th>Opportunity @ Average Value</th>
<th>Opportunity @ Best Value</th>
<th>5-Year Opportunity @ Best Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Sustainers</td>
<td>4.3%</td>
<td>16.3%</td>
<td>$136,400</td>
<td>$880,400</td>
<td>$4,402,000</td>
</tr>
<tr>
<td>% Matching Gift Revenue</td>
<td>1.2%</td>
<td>3.3%</td>
<td>$40,000</td>
<td>$250,000</td>
<td>$1,250,000</td>
</tr>
<tr>
<td>First Year On-air retention</td>
<td>18.7%</td>
<td>31.9%</td>
<td>$28,560</td>
<td>$250,320</td>
<td>$1,251,600</td>
</tr>
<tr>
<td>Total Potential</td>
<td></td>
<td></td>
<td>$204,960</td>
<td>$1,380,720</td>
<td>$6,903,000</td>
</tr>
</tbody>
</table>

* Based on donorCentric Data from Target Analysis. 70 stations included.
Memsys Enhancement

- Setup Screens & Process
  - One-time
- Automated Export process
ALL SOURCES MUST BE CATEGORIZED!
Memsys – Initial Setup (Categories)
Memsys – Initial Setup (Categories)

AND operator

Response method: ADD
Source code: A*
Purpose code: 
Fund number: 
Selection notes: 

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Exported</th>
<th>Transaction file</th>
<th>Gifts</th>
<th>Total paid</th>
<th>Average gift</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>8</td>
<td>08/25/2011</td>
<td>k cpt db trn 0811.txt</td>
<td>1180</td>
<td>47388.29</td>
<td>40.15</td>
</tr>
<tr>
<td>2012</td>
<td>1</td>
<td>01/23/2012</td>
<td>hds db trn 0112.txt</td>
<td>1181</td>
<td>47398.29</td>
<td>40.13</td>
</tr>
<tr>
<td>2012</td>
<td>2</td>
<td>02/08/2012</td>
<td>hds db trn 0212.txt</td>
<td>1182</td>
<td>47458.29</td>
<td>40.15</td>
</tr>
</tbody>
</table>
Memsys – Initial Setup (Categories)
Memsys – Executing Export
MUST be call letters
Memsys – Executing Export

• After starting the export
  - Files will be generated into a data folder (subfolder CDP)
  - Informational window to let you know when file is ready
  - “OK” to trigger the automatic secured transfer

• Note: all transfers are PCI compliant

• Schedule: MONTHLY on 15th
Categorization guidelines

- Major donors – only gifts beyond annual giving
  - Ex. $25,000 gift for a project
- Single Renewals – coded as R1
- Email renewals – Coded as WE
- Sustainers – all sustaining gifts coded SG
  - Ex. Add gift campaign to sustainers – code A
  - Ex. Acquisition campaign for sustainers – code SG
Recap & Training video

- One-time setup
- Monthly export
- Training video link will be sent to you

**REMINDER: All sources must be categorized!!!**
THANK YOU!

Michal Heiplik
michal_heiplik@wgbh.org
(617) 300 - 3217
CDPcommunity.org