TeamApproach Enhancement Training

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Agenda

- CDP data collection
- Overview of the TeamApproach enhancement
- Using “TA_Source_Category”
  - Code assignment
- New upload & report
- Finding unassigned sources & their value
- Scheduling CDP data extraction
CDP data collection

Reference Database

Station DB

Reports

Opt-in Projects

Overlays

Other Projects

Proprietary & Confidential
Key high yield metrics will be reported quarterly

Online

Prospects

Lapsed recapture

Retention

Matching gifts

Planned giving

Sustainers

Reference Database
CDP data collection

- Drive towards automation
- Updating schedule - quarterly
- 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 revenue 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.
TeamApproach Enhancement

- Source Code Entry screen – new field
- Source Code Upload – new CDP layout
- Ability to schedule automatic transfers
TeamApproach Enhancement

Source Code Entry

- **Source**: TOP110501001
- **Description**: Washington Week
- **Activity**: TO Television, On-Air
- **Campaign**: P Pledge
- **Initiative**: 1105
- **Effort**: 01
- **Fund Type**: A Annual
- **G/L Credit**: CREDIT_DEFAULT
- **Analysis**: GENERAL_X
- **Offer Amt**: 
- **TA Src Cat**: P

TA Source Categories

- Code
- Description

Additional Mail
Acquisition Mail
Capital Campaigns
Customer Service
Events
Lapsed Mail
Local Underwriting
Other Mail
Major Donors
Matching Gifts
Memorial/Monument
National Underwriting
On-Air Pledge
Planned Giving
Publications/Newsletters
Renewed Mail Eff (Unknown)
Renewed Notices
Other Renewal Mail
Sweeps
Acquisition Sweeps
Sustainer
Additional Telemarketing
Acquisition Telemarketing
Lapsed Telemarketing
Other Telemarketing
Renewal Telemarketing
Web/Internet
Web Email
Web Pledge
Miscellaneous/Other

Find
OK
Cancel

Attachments
TeamApproach Enhancement - Layout

- New CDP layout is modification of PB1 upload layout
  - Addition of TA_SOURCECATEGORY at the end
New field added to position 524 of the PB1 layout

New name "*.CDP"
TeamApproach Enhancement - Extract

- Ensure you correctly mark classification coding
- Separate multiple values by COMMA
TeamApproach Enhancement – Extract (2)

- Selecting correct Activities for extract
- File Name Prefix – Call letters ONLY

![Image of software interface showing parameters and values]

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
<th>Opt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Thank Classification(s)</td>
<td>TV_ACK:NO</td>
<td>Y</td>
</tr>
<tr>
<td>Survey Classification(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Activity Type(s)</td>
<td>T</td>
<td>Y</td>
</tr>
<tr>
<td>Planned Giving Activity Type(s)</td>
<td>V</td>
<td>Y</td>
</tr>
<tr>
<td>Volunteer Activity Type(s)</td>
<td>J</td>
<td>Y</td>
</tr>
<tr>
<td>Event Activity Type(s)</td>
<td>B</td>
<td>Y</td>
</tr>
<tr>
<td>File Name Prefix</td>
<td>KUHT</td>
<td>Y</td>
</tr>
<tr>
<td>Transfer File?</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>
TeamApproach Enhancement - Extract

- Procedure is to run each month -15th of each month - Last 5 fiscal years of data
ALL SOURCES MUST BE CATEGORIZED!
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
Unassigned Categories

- Finding unassigned sources with a query
Value of Unassigned Categories

- Running a report to find current source assignments
Value of Unassigned Categories

- Running a report to find current source assignments

### melcher

<table>
<thead>
<tr>
<th>FISCAL YEAR</th>
<th>TA SOURCE CATEGORY (SOURCES)</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>#</td>
<td>$</td>
</tr>
<tr>
<td>A</td>
<td>8155</td>
<td>$496,717.27</td>
</tr>
<tr>
<td>C</td>
<td>2982</td>
<td>$199,756.88</td>
</tr>
<tr>
<td>L</td>
<td>2736</td>
<td>$190,315.30</td>
</tr>
<tr>
<td>MG</td>
<td>271</td>
<td>$192,869.24</td>
</tr>
<tr>
<td>P</td>
<td>20247</td>
<td>$2,559,818.14</td>
</tr>
<tr>
<td>R1</td>
<td>7321</td>
<td>$490,951.42</td>
</tr>
<tr>
<td>R2</td>
<td>3353</td>
<td>$250,356.05</td>
</tr>
<tr>
<td>R3</td>
<td>1956</td>
<td>$146,628.38</td>
</tr>
<tr>
<td>R4</td>
<td>1841</td>
<td>$133,279.49</td>
</tr>
<tr>
<td>R5</td>
<td>1027</td>
<td>$83,629.00</td>
</tr>
<tr>
<td>R6</td>
<td>494</td>
<td>$43,326.00</td>
</tr>
<tr>
<td>R7</td>
<td>397</td>
<td>$32,611.00</td>
</tr>
<tr>
<td>R8</td>
<td>156</td>
<td>$12,124.00</td>
</tr>
<tr>
<td>SG</td>
<td>4071</td>
<td>$58,552.98</td>
</tr>
<tr>
<td>TA</td>
<td>1958</td>
<td>$102,210.12</td>
</tr>
<tr>
<td>TL</td>
<td>1385</td>
<td>$79,965.00</td>
</tr>
<tr>
<td>TR</td>
<td>2796</td>
<td>$167,651.50</td>
</tr>
<tr>
<td>W</td>
<td>5984</td>
<td>$480,935.36</td>
</tr>
<tr>
<td>WE</td>
<td>260</td>
<td>$18,913.00</td>
</tr>
<tr>
<td>WP</td>
<td>1737</td>
<td>$268,018.00</td>
</tr>
<tr>
<td>X</td>
<td>3962</td>
<td>$1,676,725.10</td>
</tr>
<tr>
<td>2006</td>
<td>73088</td>
<td>$7,665,173.23</td>
</tr>
</tbody>
</table>
Recap

- Schedule QC procedure (query & report) to run
  - Quarterly 1 month before extract

- Schedule extract procedure to run Quarterly
  - 15th of each month: January, April, July, October

- Utilize CDP source upload layout
  - Can be used for updating missing categories

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

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