

Got a question? Go to www.sli.do and enter code **P448**. Then ask away!

GAIL MARKETING

summer workshop

Welcome! We're so glad you could join us today!



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Hosted by Client Services in MLC Rm 368
Tuesday, July 30th, 2019, at 9:00am
Wednesday, July 31st, 2019, at 1:30pm



Purpose of this workshop

- Provide instruction on higher-level GAIL concepts
- Give users the opportunity to field their questions
- Show off what's new in GAIL in the last year or so
- Discuss best-practices and the reasons behind them
- Strengthen GAIL community by meeting users with similar roles



On the agenda!



- ★ What's new on the resources site
 - ★ What's new in GAIL in the last year
 - ★ Best practices for events
 - Planning calendar
 - Event or marketing effort?
 - Effort description
 - Large efforts with donations
 - Reusing segments and selections
 - Update that launch date
 - ★ Multiple segments
 - ★ Finder numbers and placeholders
 - ★ Excluding selections or other marketing efforts
 - ★ Exclusion reports
 - ★ Revenue pivot table
 - ★ Templates
 - ★ A/B testing and random sampling
 - ★ Your questions
-



NEW TO THE
GAIL resources site

Go to GAIL

Go to Reeher

Go to Advizor

Go to OneSolution

Go to Deposits

Search...



Training ▾

Resources ▾

ASKIT

Contact

Give Now

GAIL Dictionary

Naming Conventions

GAIL Blog

Guides & Videos

Forms & Policies

G-Wiz

How can we help?

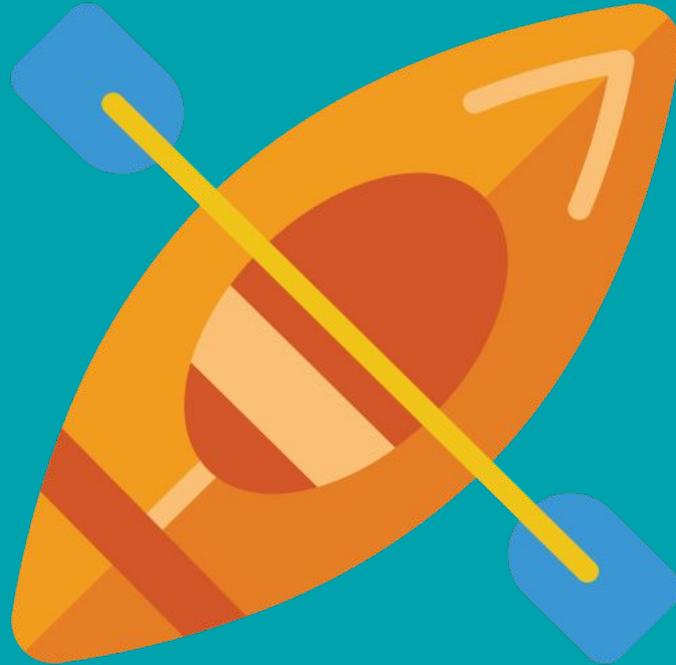


Marketing Efforts

How can I send my constituents a newsletter, solicitation, or general correspondence?

READY!

G-WIZ for marketing efforts



GAIL IMPROVEMENTS

from the last year



One page marketing efforts

New links on the sidebar combined with the DME Dashboard tab, means everything you need – from start to finish – is all in one place.

Tasks

- Edit marketing effort
- Delete effort
- Request a selection
- Create/edit an email
- Create/edit a package
- Create/edit a segment
- Calculate segment counts
- Activate marketing effort
- Export effort

Testing

- Test efforts

Reports

- Marketing exclusions
- Marketing record counts
- Segmentation summary
- Selection brief

Direct Marketing Efforts

ASRV - 20190701 Example Effort

Overview

Template: Simple Email Template
Effort ID: 15,788 Owner:
Appeal: ASRV - GAIL Gazette Budget:
Due date: Expected revenue:
Launch date: 7/1/2019 Total expenses:
Description: Testing speed of training environment.

DME Dashboard Summary Segments Universe Exc

Source code Edit

Source code part	Format
Dept/Program	Development
Marketing Effort	Marketing Effort
Channel	<by package>

BEE enhancements

Take greater control of how your event communication will display on a desktop/laptop computers vs. mobile devices with **“hide on desktop”**.

Add **salutations** to your email to pull in constituents' names and add a personal touch.

Easily undo your last steps with the **undo button**.





Email Statistics

Emails (8,557) More ▾

Columns ▾ Clear all filters

- Opt outs in list
 - Resulting global opt outs
 - Send after date
 - Sender
 - Sender name
 - Sent date
 - Sent hour
 - Site prefix
-

Email name

A&S - Cortona Italy Alumni Organization
TCOB - EMBA Career Workshop Aug 2019
A&S - Cortona Italy Alumni Organization
A&S - UGA in Rome (Copy of Event Invitation)
SSW - Ethical Frameworks that Underlie Social Justice
AA - San Diego Chapter Mail 7.17.19 (Copy of Event Invitation)
A&S - Dodd FY20 Weekly News (A&S - Dodd News)
CDPF - 2019 PLC Recruitment Richards' UGA Invitations
GMOA - 19.07.22 - Weekly Brief (GMOA - 19.07.22 - Weekly Brief)
AA - Tattnall & Evan County Freshmen Sendoff 8.6.19 (Copy of Event Invitation: AA - Tattnall & Evan County Freshmen Sendoff 8.6.19)
AA - Forsyth County Freshmen Sendoff 2019 - 2 (Copy of Event Invitation: AA - Forsyth County Freshmen Sendoff 2019 - 2)
AA - Freshman Send Off Evite - Dalton 2019 - 2 (Copy of Event Invitation: AA - Freshman Send Off Evite - Dalton 2019 - 2)

Email subject

on 6... Correction: Atlanta Cortona 50th Anniversary Celebration
er W... Executive Career Planning Workshop
50t... Atlanta Cortona 50th Anniversary Celebration & Reception
UGA in Rome: Call for Storytellers for the 50th Reunion
itati... SSW - Ethical Frameworks that Underlie Social Justice
apte... Get Involved!
Dodd News: July 22
hard... Don't Forget! You're Invited to the Richards' UGA Invitations
Weekly Brief from the Georgia Museum of Art
You're Invited!
Reminder - Meet fellow Dawgs!
Reminder - Meet fellow Bulldogs!

New **email statistics** columns



BEST PRACTICES
for marketing efforts

Check the planning calendar

Before creating your effort (and before sending your effort) check the [planning calendar](#).

This will show you all other marketing efforts (if they've been put in GAIL).

Hover to get event description.

Avoid confusing or dividing the attention of your audience by choosing an appropriate date.



Important Giving Dates:

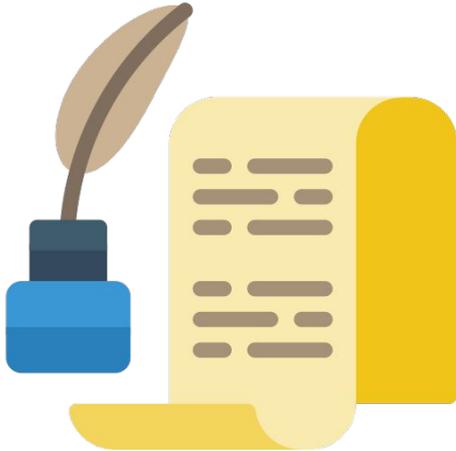
- *End of the calendar year (December)*
- *End of the fiscal year (June)*
- *Giving Week (April 20-26, 2019)*
- *Giving Tuesday (Dec. 3, 2019)*

—

When is a marketing effort an event communication?



Effort descriptions



Always leave a description.

If it is unclear from the title of the effort that the purpose is for solicitations, put that first in the description.

Write out unfamiliar acronyms and abbreviations.

If doing a regularly occurring effort (eg. monthly newsletter), describe what differentiates this from the last (eg. featured headline).



“Email to all previous 40 under 40 honorees to thank them for their participation in the annual 40U40 Giving Challenge.”



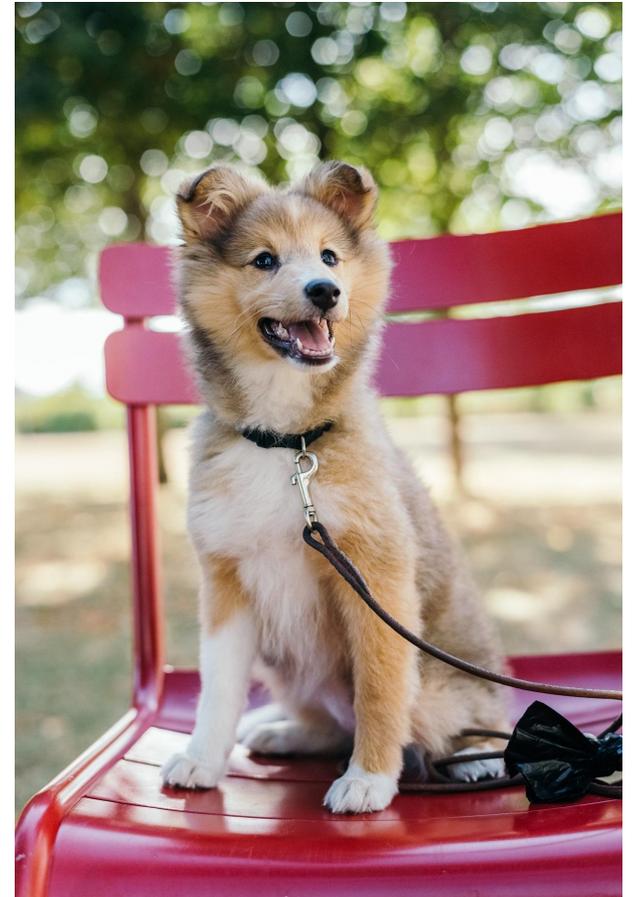
Save the date email for the BLC's phase 3 dedication, going to the YAB Million Campaign members only.

Efforts with lots of donations

If you anticipate that your marketing effort will generate a lot of donations, you should give gift accounting a heads up by emailing:

gifts@uga.edu

This is help them plan and make sure everything is processed smoothly.



Re-using selections and segments

Did you know?

- You don't have to request a **selection** for each marketing effort.
- You also don't have to create a new **segment** for each effort.
- You can **reuse segments** that you've used in previous efforts.
- You can even use selections and segments **other people have used** — you'll want to reach out to askit@uga.edu just to make sure it has the people in it you're looking for.
- In marketing efforts, you don't have to ask for selection to be refreshed.





From the query team

Example request

Hello!

I would like a selection of all TCOB Alumni including graduates and matriculates who have a major, minor or certificate living in the Athens area. Please use the predefined Region code. I will be sending mailed invitations through the Events module. The event is in September, but I am planning to mail the invitations around July 15th.

Could you please include the following fields in the excel file:

Gail ID, Name, Address, City, State, Zip,
Degree, Major, Class Year, TCOB Cumulative
Giving Total, UGA Cumulative Giving Total,
TCOB, FY19 Giving Total

Thanks!

1. If we ask follow-up questions, it **doesn't mean you made your request incorrectly**.
 2. Our general turnaround time is **2-3 business days for new selections/queries**, we provide **same day turnaround for refreshing** or updating existing selections/queries and on occasion we can accommodate emergencies.
 3. We are **happy to talk through a request** prior to submission. If you have questions about whether something is possible, we are happy to answer those questions as well.
 4. Lastly and most importantly, **you shouldn't feel pressured to submit a request perfectly!** We are happy to help you figure things out.
-

Before you send...

The screenshot shows the 'Edit marketing effort' interface. The left sidebar contains a 'Tasks' menu with 'Edit marketing effort' highlighted. The main panel shows the 'General information' section with the following fields:

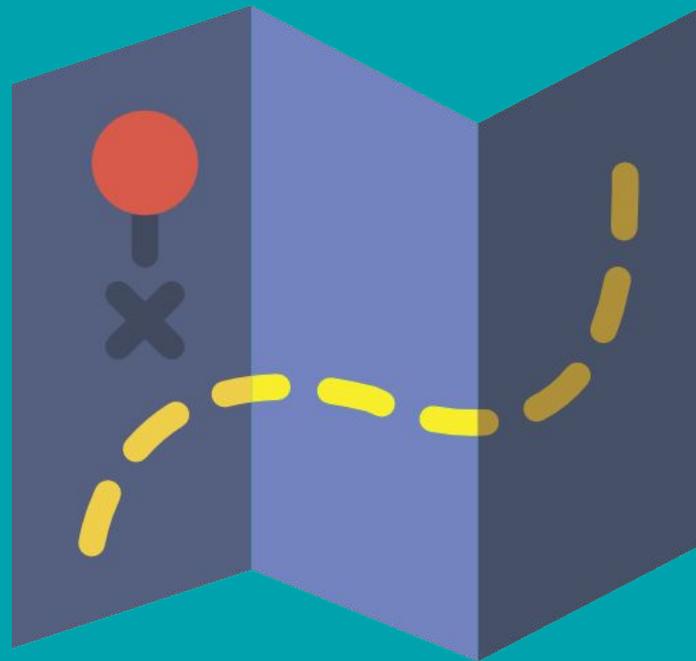
Template:	Simple Email Template
Name:	CDAG - WFNR - FY20 - Recurring Gift Email
Description:	Solicitation email requesting a \$10 monthly recurring gift designated to the Warnell School Fund.
Appeal:	CDAG20
Site:	Annual Giving
Due date:	7/26/2019
Launch date:	7/31/2019

The 'Launch date' field is highlighted with a red box. Below the 'General information' section is the 'Additional options' section, which is partially visible.

If the date that you're sending your marketing effort is different from the launch date, **edit the date** before sending and activating your effort.

If you don't, it will mark every recipients' constituent profile with the incorrect date.

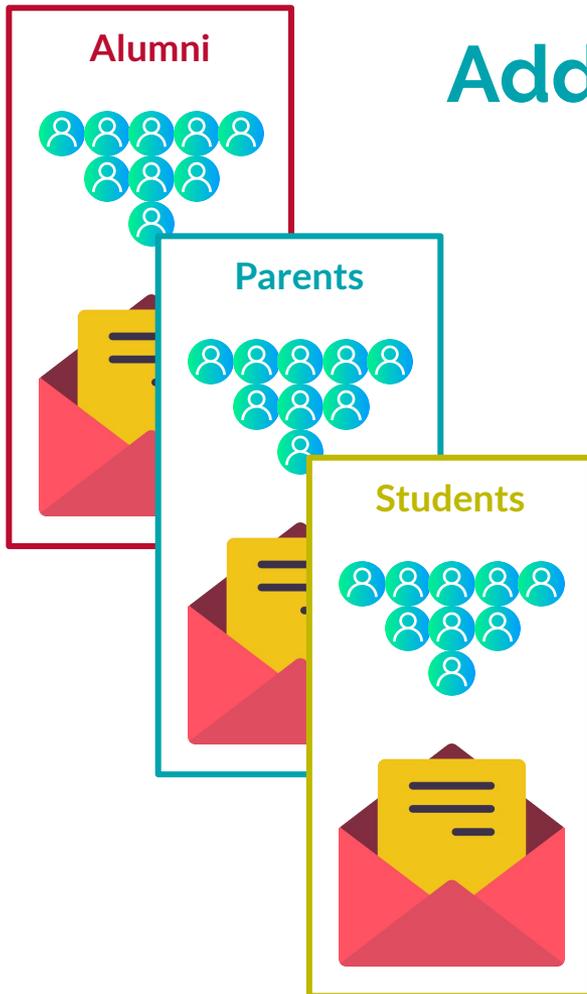




MARKETING EFFORT

how-tos

Adding multiple segments



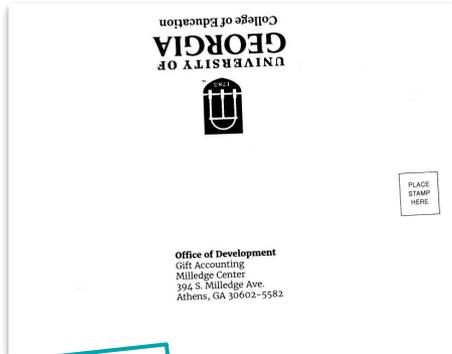
Each selection should have its own segment.

You can add multiple segments to a marketing effort to reach out to more than one group of people.

You can even use different packages to customize your message for each group of people.

GAIL will de-duplicate constituents who fall into more than one segment.

Finder numbers for postal mail efforts



outside

Name _____
Address _____
City/State/Zip _____
Phone _____ Email _____

Questions about giving to the College?
Email molly2@uga.edu

- This gift is anonymous. Please don't include my name on any donor list.
- Enclosed is a matching gift form from my employer.
- Please send me gift planning information about gifts through wills, bequests or other estate plans.
- I have included the College of Education in my will.

Thank you for supporting the College of Education!

Or, make a gift online: coe.uga.edu/give

1224540144



Enclosed is my tax-deductible gift of: \$25 \$50 \$100 \$250 \$500 Other _____

In support of the: COE Fund for Excellence _____
 Mary Frances Early Naming Campaign

GIFTS BY CHECK
Make checks payable to the UGA Foundation with the fund name in the memo line.

GIFTS BY CREDIT CARD

VISA MasterCard American Express Discover

Name on Card _____
Card Number _____ Expiration Date _____

inside

Exclude other efforts and selections

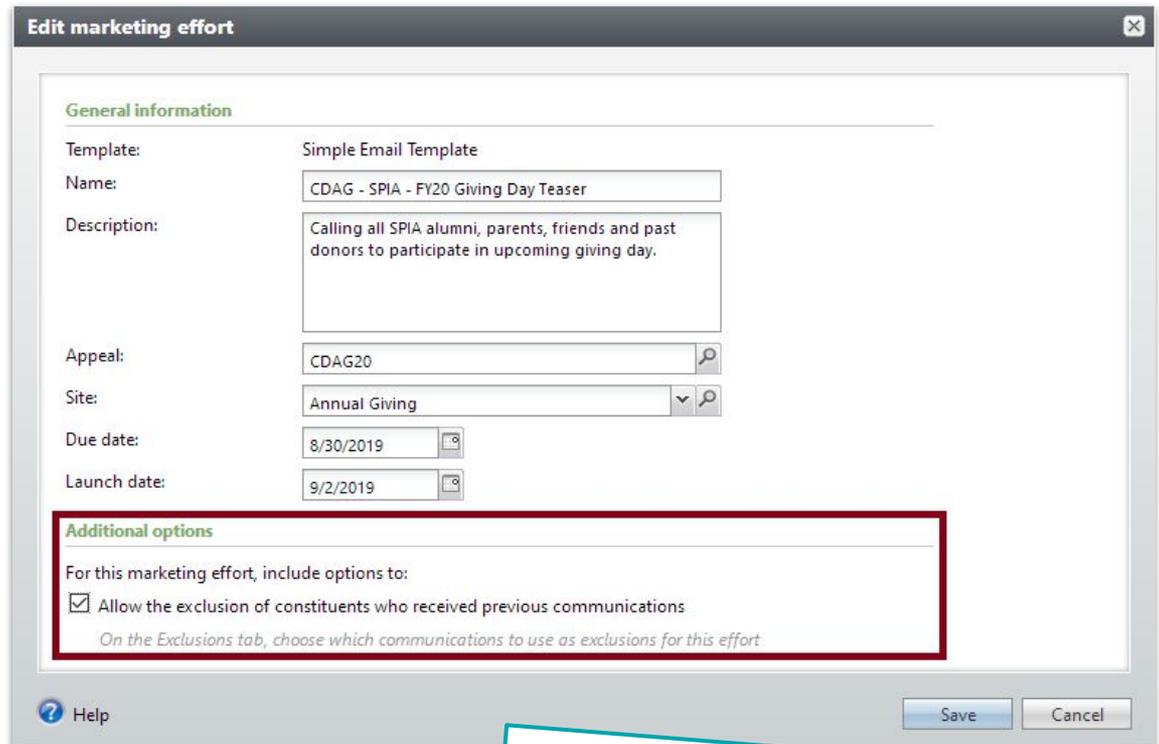
Check the **allow exclusions** box when setting up or editing your marketing effort (doesn't mess up anything if you don't end up excluding another effort).

Then head to the exclusion tab of the effort.

Under **previous marketing effort exclusions** click **add** and search for the other marketing effort.

Can only exclude previously **activated** efforts.

You can also **exclude selections**.



Edit marketing effort

General information

Template: Simple Email Template

Name: CDAG - SPIA - FY20 Giving Day Teaser

Description: Calling all SPIA alumni, parents, friends and past donors to participate in upcoming giving day.

Appeal: CDAG20

Site: Annual Giving

Due date: 8/30/2019

Launch date: 9/2/2019

Additional options

For this marketing effort, include options to:

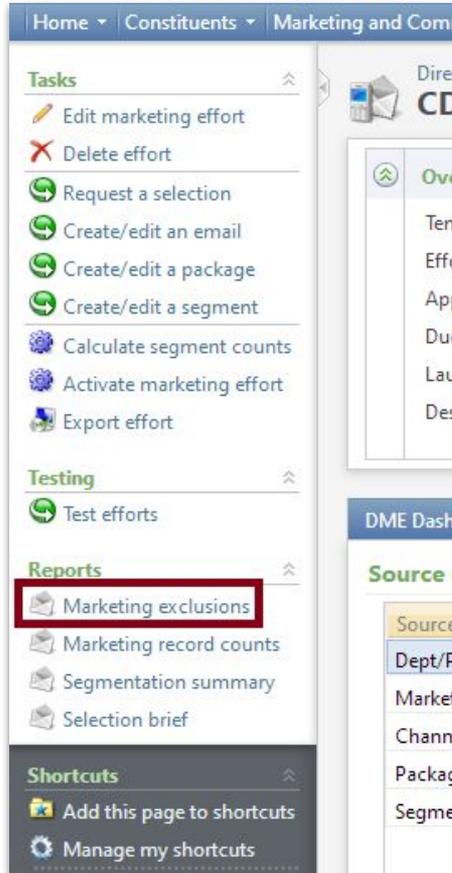
Allow the exclusion of constituents who received previous communications

On the Exclusions tab, choose which communications to use as exclusions for this effort

Help Save Cancel

When would be a good time to use these options?

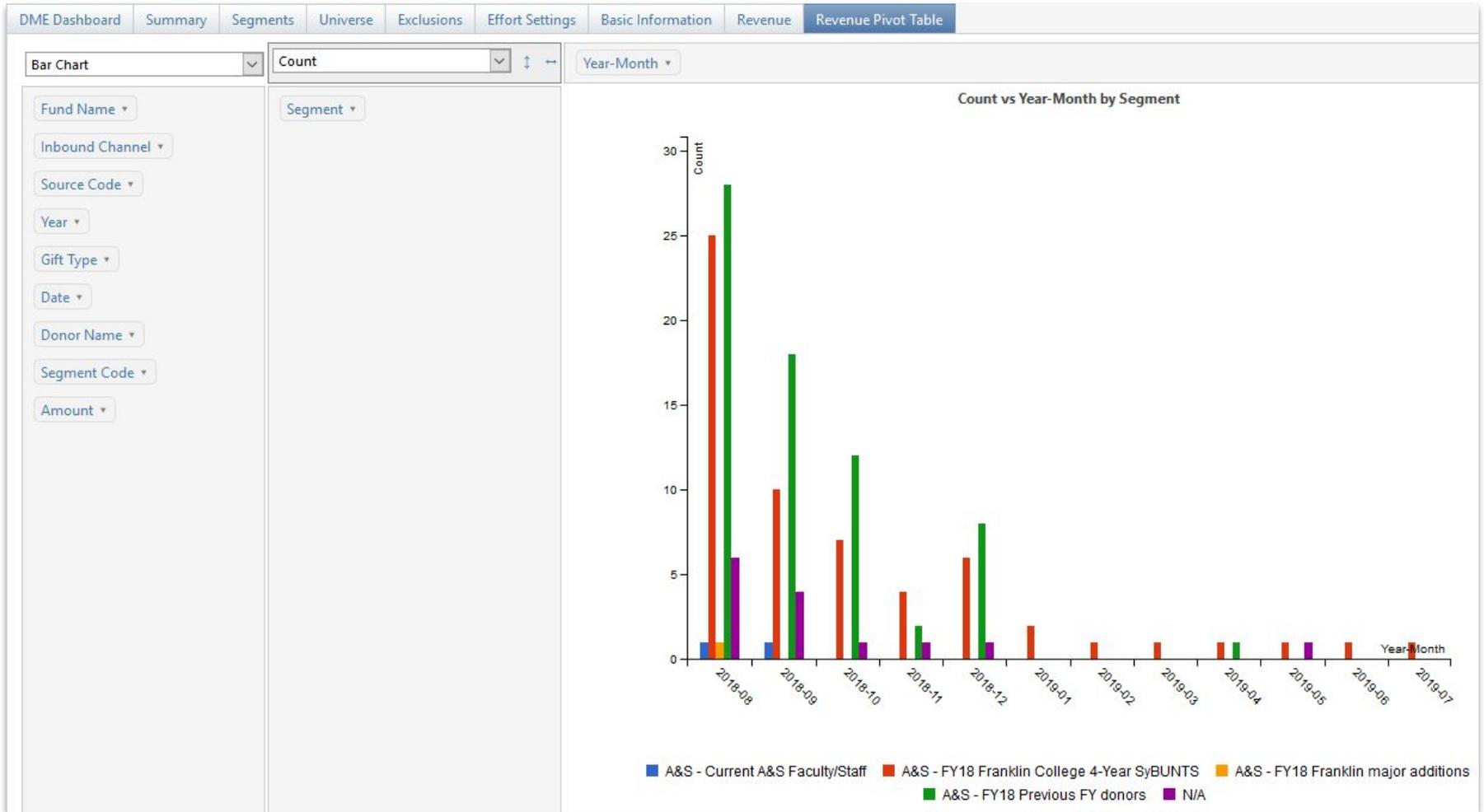
Marketing Exclusions Report



You can run a marketing exclusions report to see who is **not** going to receive your marketing effort and why.

It will download as a spreadsheet with two summary tabs and a full datalist tab.

You can only run this report after you have calculated the effort.



Revenue pivot tables

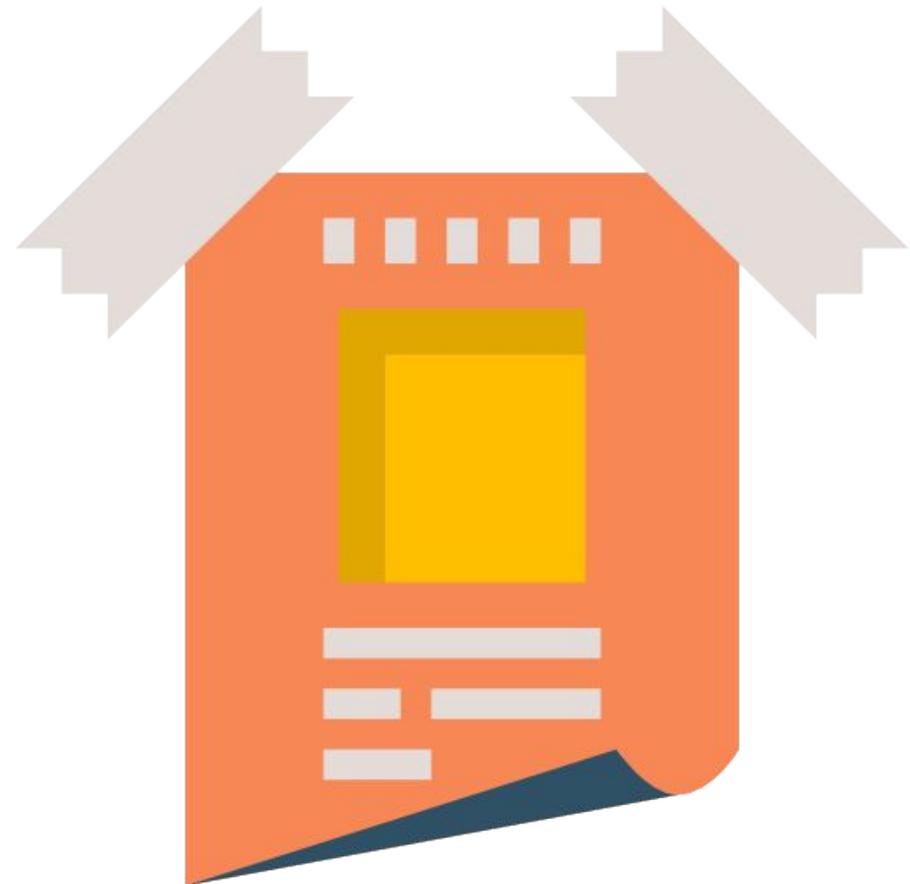
Simplify your DME creation with templates

Did you know?

You don't have to start from scratch every time you need to create a marketing effort! Just copy one of our templates, make a few adjustments and you'll be ready to send in no time.

Here's what you should fill out after copying:

- Change the launch date and description
- Attach a package and a segment
- Check your exclusions
- See if name processing is set up how you want it



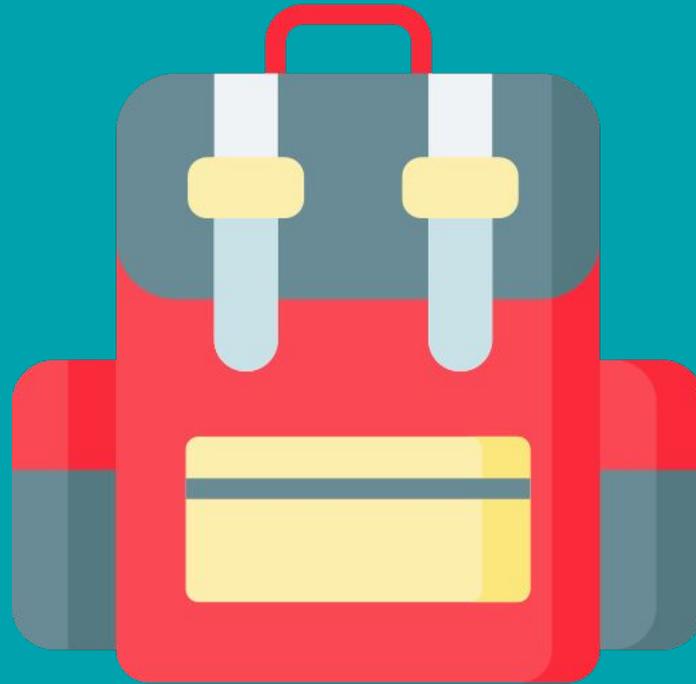
A/B Testing & Audience Randomization

When you set a sample size on a segment, your marketing efforts get a whole lot smarter. You can:

- Run your own marketing experiment by sending emails with two different subject lines to random samples of your segment.
- Work within a strict printing budget by allowing GAIL to randomly select a set number of constituents from your segment.

The screenshot shows the 'Add segment' dialog box with the following details:

- Segment details:**
 - Segment: WFNR - \$15K+ Donors
 - Package: WFNR - Solicitation with Subject Line A
 - Source code: FRFR19_FZZ15KPLUSDON
 - Ask ladder: (empty)
 - Exclude from effort but show counts
- Assumptions:**
 - Response rate: 5.00 %
 - Gift amount: \$0.00
 - Sample size: 50
 - Dropdown: Percent
 - Radio buttons: nth, Random
 - Exclude remaining records from the marketing effort



YOUR DME
questions
