

DIRECT MARKETING

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THE ART & SCIENCE OF PREDICTABLE MARKETING

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When targeted fundraising is just what the doctor ordered

Using marketing analytics to reach unlikely donors



Chris Carter, director of annual giving at Mount Sinai Hospital Foundation, has led the charge to use more targeted messaging that speaks directly to donors.

M BY PETER BAKER
any hospital fundraising appeals read like a medical textbook—a lot of small print filled with technical jargon describing the hospital's latest research programs and ultramodern equipment.

Not so the marketing material from Mount Sinai Hospital Foundation.

The fundraising arm of Toronto-based Mount Sinai Hospital follows a different prescription with brochures that tell the stories of now-healthy patients, appeals designed to resonate with would-be donors. One piece targeted to young professionals tells the story of Jordan, whose birth followed a high-risk pregnancy when doctors discovered a tumour on his mother's placenta. Highlighting Mount Sinai's reputation as

one of the top women's hospitals in the world, the copy describes how Jordan's mother received successful treatment while her baby underwent several weeks of intensive care that allowed him to live an otherwise normal childhood. A photograph of Jordan, now 15 years old and the picture of health, shows that he's become a competitive tennis player.

"We used to fill our creative pieces with academic text, and soon found that they weren't working for us," says Chris Carter, director of annual giving at Mount Sinai Hospital Foundation. "Now we use a clear and more emotional message that speaks directly to our donors."

Carter credits the revitalization of the hospital's fundraising appeals in part to an analysis conducted this year by

Environics Analytics (EA), the Toronto-based marketing and analytics company. The project allowed the hospital to better understand their donors in order to better tailor their marketing and messaging. Traditionally, the foundation relied on a handful of wealthy donors as the major source of giving for Mount Sinai, an internationally known research institution and Ontario's largest birthing centre. But because multimillion-dollar gifts may be earmarked for a specific wing or program, the foundation sought to broaden its appeal to fund more general needs such as research programs, crucial equipment and Right From the Start—Mount Sinai Hospital's campaign for women's and infants' health. With a goal of reaching out to new donors, Carter asked EA to

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editor's letter

Amy Bostock

How I got an elephant

"As I started getting rich, I started thinking, 'what the hell am I going to do with all this money?'... You have to learn to give." ~ Ted Turner

Okay, I'll be honest here... this is not a question I ever find myself asking. I've never been rich and I don't see it happening anytime soon so trying to figure out what to do with my extra money has always been a non-issue.

That doesn't mean that I don't feel I should share what I have in order to make the world a better place. Every week my mailbox is full of various appeals for help, most of them from WWF, the OSPCA, and Greenpeace. Coincidence? I am an animal person. My family includes two dogs, a cat and three horses. I subscribe to animal-related magazines, am a member of a number of equine online message boards and last year I adopted an elephant from the Toronto Zoo for my nephew.

Someone out there has my data and knows what types of direct mail will best appeal to my emotions. In this issue of Direct

Marketing we look at how DM companies are mining customer data and using predictive marketing and geodemographic profiling to better target donors within the fundraising and not-for-profit sectors.

In our cover story we meet Chris Carter from the Mount Sinai Hospital Foundation. Chris spearheaded a new fundraising campaign that changed the way the hospital communicated with its donors. Using marketing analytics, Mount Sinai was able to better understand who their donors are and customize their marketing messages. As a result, the hospital received \$42 million in new pledges and gifts this year.

The past year has been a difficult one for not-for-profits and it's vital that these organizations have a plan in place to stay connected to their donors. Suzette Strong, president of the Markham Stouffville Hospital Foundation, talks about how

donor relationship management is critical for success and shares few simple strategies for an organization to improve its fund raising effectiveness.

Predictive marketing and targeting are not just for non-profits. Companies like Rogers Cable Communications and Shoeless Joes are also leveraging existing customer data for better business planning, performance management and customer insights. Read the case studies this month to see how these companies are putting data to work for them. Felix Gill of Assetprint looks at how socio-geographic marketing can enable even the smallest of businesses to be cost-per-click players across all mediums.

These articles can show you how predictive analytics can help your company move from large, unfocused marketing campaigns with low response

rates to smaller, targeted campaigns that help you increase revenues and customer satisfaction.

The English poet and politician Joseph Addison once said "with regard to donations, always expect the most from prudent people, who keep their own accounts". The most effective way to know who those people are is to collect data and use it to generate insights that help formulate more effective appeals.

The Toronto Zoo knows exactly who I am and how to effectively appeal to me. Last week I received an adoption renewal package for my nephew's African elephant who apparently consumes 1,000 kg of food per day. If I renew now my four-year-old nephew Callum will receive an updated photo of "his" elephant and a ticket to the annual Parents Day. I challenge any one of you to say 'no' to a four-year-old.

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directives

Michael Johnston

Customer service: the real challenge of multi-channel fundraising (or sales)

It's called many things and it can be a bit of a buzz term: integrated fundraising; multi-channel fundraising.

Whatever its name, its definition is the same: "the use of multiple channels to raise money". However, it's not the name or the definition that is debated; rather it is whether multi-channel fundraising leads to better results and a better donor relationship.

The furious adoption of the internet for fundraising has brought the issue of multi-channel marketing to the forefront. In the past, direct mail, TV, and the telephone have been effectively combined to help improve fundraising results. For example, the telephone has been used to reactivate lapsed donors and convert direct mail single gift donors to more valuable monthly debit (regular) donors. The evidence, generally, with multi-channel marketing prior to the emergence online giving, was that using a more active channel (e.g., the human voice of a phone call) was a very effective way of upgrading donors who were regularly swimming in the channels of a more passive medium like direct mail.

Why does this happen? A wonderful colleague of mine, David Love, once told me "No one has ever made a wet dash out of the bathtub to open a letter, but they have to answer a ringing telephone". And that's what I mean by active versus passive channels. The phone is much more active and more human with a voice. This doesn't mean that there aren't incredible

challenges to using the telephone, particularly around the invasion of the privacy of a donor, but it still has a place in multi-channel fundraising.

Unequivocally, the case studies in the charitable sector prove that the combination of online and traditional channels can make huge improvements to online fundraising.

But even if you can tactically ready to integrate your fundraising channels, are you doing it for the right reasons. And what I mean by that is are you doing it to provide a better customer (donor) experience. Because that is the key reason behind providing a cross-channel customer experience.

Nonprofit organizations (and most likely many companies) are contemplating (or already executing) cross-channel customer service models. The underlying justification for all of this should be better customer service. But one barrier to cross-channel customer service execution is finding the right staff. How do you take traditional (or new) staff and expect them to know both traditional channels for marketing and new ones on top?

I hope we can draw some focus and inspiration from the Four Seasons - the proudly Canadian hotel and resort company. No matter the changes in technologies, the company has remained focused on four key principles for success: service excellence; quality; culture; and brand. So when your company or

charity are beginning to debate the merits of cross-channel marketing or fundraising you shouldn't be focusing on the tactical issues - you should remain focused on what cross-channel marketing means to the customer.

How will cross-channel marketing make them a happier (and more profitable) customer or donor for you. Don't get lost in all the details on various channels integrating together except for how they can be evaluated in the area of customer experience.

And in the area of human resources, do not be discouraged if you cannot find someone who understands all channels (online and offline). Take heed of the Four Seasons and how they hire for their company. They look for the following qualities: excellent problem solving ability; autonomy; a love of what they do; someone who loves people. They don't hire people in non-executive positions with past hotel experience. Can you believe it?

Think about that for a minute. The Four Seasons has the best reputation for customer care in the competitive hotel industry but doesn't hire people with past experience in that industry. They have created a culture, and training structure, that guarantees that if the person likes people and can solve their problems - the Four Seasons will mould that foundation into something excellent for the industry.

That is key for charities and companies to understand in this cross-channel world. Find people (already with you)

or hired from the outside who just love interacting with people and want to solve their problems. Then give them the cross-channel training they need (or let them learn those technical things on the job) and make sure your corporate culture inculcates them to properly represent who you are to the customer.

Today's customer is demanding, needs more customer care than ever before and the cross-channel tools (offline and online) must be working seamlessly together. And standing behind those tools has to be staff who are not afraid to step in front of those powerful tools (social media; email; direct mail; the telephone) and solved someone's problem through what many call 'the human moment'.

Are you ready to do that?

In the spirit of inspiring action and creating a sense of urgency, organizations should have started an integrated fundraising strategy yesterday. But there's still time. Good luck!

Michael Johnston is the President of Hewitt & Johnston Consultants. He has been heavily involved with the non-profit industry and is a pioneer in viral marketing for charitable organizations. Michael has written three books on the subject of marketing on the internet for charities and has been a key-note speaker for AFP. For more information, visit his website at www.hjcnewmedia.com

coming in the
October issue of
Direct Marketing

Selling analytics

The first in a new series of articles by Colin Tener that focus on the challenges of leveraging database analytics.

Regional Report

The DM team heads to our nation's capital for an up-close look of how direct marketing professionals are doing business.

Operations and service

Our October issue focuses on fulfillment, shipping, distribution and warehousing... all the pieces that make up a successful DM campaign.

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When targeted... from COVER

determine the people most likely to donate to the hospital in order find more of them throughout Ontario.

EA turned to its flagship segmentation system, PRIZMC2, which classifies all Canadians into 66 lifestyle types based on their demographics and psychographic Social Values. With PRIZMC2, fundraisers only need a six-digit postal code to link a donor to a vast array of neighbourhood-level information—from leisure activities and media use to shopping preferences and donation behaviour. Analyzing the postal codes of Mount Sinai's 30,000 donors, EA found that the highest concentration of contributors came from three distinct groups: wealthy, older citydwellers from PRIZMC2 segments like Cosmopolitan Elite and Urbane Villagers; upscale immigrant groups in clusters such as Continental Culture and Asian Affluence; and younger urban professionals from the Young Digerati and Electric Avenues segments.

Discovering Mount Sinai had donors

in their thirties and forties came as a surprise at first. But the analysis revealed that young couples tend to have more discretionary cash for charities because they lack the costs associated with childrearing.

"It's a myth that younger people aren't donating to hospitals," Carter explains. "Clearly, they are. And we had the proof all along."

Knowing what kinds of people were most likely to support Mount Sinai, EA helped the foundation better understand the lifestyle and mindset of its three target groups. The analysis then identified neighbourhoods with high concentrations of the three target groups. Carter organized a direct mail test, sending an old fundraising letter focused on infection control to the new target groups. But the results were modest—registering a 0.10 per cent response rate—and Carter initially thought the targeted marketing approach was a disappointment. But when he compared the latest return to the control segment, he discovered a 254 per

cent lift using the PRIZMC2-based target groups. Just as important, the average donation amount rose 22 per cent over the control group to \$71.65.

"The test proved that targeting works," says Carter. "But it also demonstrated that we had to get better with different creatives."

This summer, the hospital foundation began revamping its marketing materials to better connect with its donor target groups. Gone are the plain academic letters with a "support your hospital" theme. In their place are colourful brochures and self-mailers with compelling patient portraits that are customized according to the targeted donor groups. For the young professionals starting families, the brochures feature stories and photos of pregnant women getting critical care at Mount Sinai. To appeal to the older donors, the foundation marketers profiled Rebecca, a sixty-something woman nearly crippled with arthritis who was virtually cured of the condition

thanks to the hospital's care. In addition, the foundation organized a Founders Society group for long-time donors and even sent them mailings with gift tags to encourage them to make charitable gifts in the names of their children and grandchildren.

Together, the revamped marketing messages and targeted mailings have proven successful. This year, the foundation received \$42 million in new pledges and gifts, and set a new record in revenue, with \$35.4 million. Because past direct mail campaigns typically involved renting magazine lists and paying full postage, the cost had run as high as \$1 per piece. But by sending self-mailers to all the households in a targeted postal code, postage amounts dropped to just pennies a piece and the total cost may run only 30 cents per mailer—a 70 per cent savings.

"Charities don't have the luxury of spending millions of dollars to blanket a market and hope for the best," says Carter. "You need to be efficient with your

fundraising and focus on areas with the greatest likelihood of getting donations."

Now that the analysis of Mount Sinai's donor pool has delivered results, Carter hopes to organize lectures with staff doctors and the development department in targeted neighbourhoods to raise awareness and better connect with the hospital's expanding donor base. He realizes that the foundation is one of thousands of worthy causes and that more personalized brochures are essential to resonating with potential donors.

"Hospitals can no longer rely on simple letters describing their good works to connect with people," Carter observes. "We have to think like corporations with clear messaging and marketing so we don't get lost in the clutter." **DM**

Peter Baker is vice president and practice leader, overseeing the fundraising, packaged goods, municipal government and fundraising sectors practice at Environics Analytics.

Case Study: Rogers Cable Communications

Leveraging network data, location intelligence to stay ahead of heavy industry competition

Rogers Cable Communications is a well-established company trying to stay ahead in a highly competitive and highly saturated market. Our company needed a way to leverage customer and network information so it could improve and refine its business planning, performance management and customer insights.

With 2.92 million television customers and more 1.58 million Internet subscribers, Rogers Cable Communications is Canada's largest cable television service provider. In the mid-1960s, Rogers became one of Canada's first cable-system operators when it secured licenses covering much of the Toronto area. The company now serves customers in Southern Ontario,

add value to their business. Our customer intelligence and data analytics groups didn't have a way to look at our data, to identify opportunities or threats, to look at patterns and trends in a visual format.

If Rogers was to maintain a competitive edge in a fast-changing marketplace, our employees would need a tool that could combine and leverage customer, network and third-party data within a single environment. We enlisted the help of Pitney Bowes Business Insight to work with our geospatial planning to build our very own interactive enterprise mapping application, dubbed 'MapMart'. MapMart connects Rogers employees with significant amounts of internal data that had previously been stuck in silos. Each

as they emerged.

The new tool quickly spread within the Rogers organization. One of our key requirements was getting MapMart into the hands of multiple stakeholders—sales, marketing, business planning people—to give them a tool that would make them more self-sufficient and better informed in their decision-making. Visualizing markets and customer information on maps enables employees to see both the big picture and the details needed for execution. This allows for faster decision-making and rapid redirection as we learn.

More than 200 Rogers employees now using MapMart are able to access it through their PC or Blackberry, tailoring it to meet their own needs. For example,

campaigns. The marketing team can track its success or identify a low response rate in a certain area and adjust activities quickly. For business planning, we can now see what's going on in every household in our footprint. We know whether people have our services, what they can be serviced for and whether they have had any technical issues. The result? Rogers can better manage its growth, building a plan from the ground up and investing its money and resources more wisely to retain current customers and attract new ones.

Thanks to its geospatial capabilities, MapMart continues to help the company meet corporate objectives and hone strategic planning. Visualizing markets and customer information on maps allows for faster decision-making and offers a huge competitive advantage. In the last year Rogers' marketing team has fielded more than 100 internal requests to run competitive comparisons and other sophisticated MapMart tasks and believes that the dollar value of these abilities is likely greater than \$200,000 and

growing. In other words, by not having to outsource that work, we've been able to get real ROI and save Rogers a lot of money. Because MapMart has proven to be so useful, Rogers plans to expand from its current consumer-focused model to include the business side of its customer set. **DM**

"By having more accurate, detailed information going into a customer meeting, sales staff can actually help drive customer satisfaction."

New Brunswick and Newfoundland and Labrador and has owned cable systems in the United States.

Despite its long history of success, Rogers Cable Communications needed new strategies that would help us thrive in one of the most volatile sectors in communications today. One of the biggest business questions our company faced was, "How can we continue to grow and win over customers in a highly competitive, highly saturated market?" We needed a solution that would help us be really targeted so we could leverage all of the customer data and prospect data we had accumulated over time.

Rogers lacked a method for making its masses of data visually coherent and for pulling it together in a way that could

night, the solution automatically pulled in, referenced and processed millions of records from multiple sources, yielding a cohesive spatial database rich with detail about Rogers Cable's customers and network. Rogers employees are now able to begin each day viewing an enormous amount of accurate, up-to-the-minute data via a very user-friendly and intuitive web-based interface.

MapMart was created with the goal of leveraging existing customer data for better business planning, performance management and customer insights. MapMart quickly paid dividends, helping our company realize immense business benefits across their enterprise. Employees could now visualize data like never before, helping us spot new trends and patterns

employees can proactively reach out to customers after a service outage, turning a potential negative customer experience into a positive one and opening up communication channels that can yield results over time. By having more accurate, detailed information going into a customer meeting, sales staff can actually help drive customer satisfaction. Employees can, for example, switch on their Blackberry to check in advance whether a customer they are about to meet has had any recent complaints and, if so, what they were.

Time-pressed executives can monitor performance at numerous levels, tracking how their piece of the business is doing in real time. Employees can use MapMart to monitor in real time the effectiveness of promotional



Charlotte Durand is the Senior Director, Market Planning and Development at Rogers Cable Communications.

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The Brave New World of Constituent Relationship Management

Seven Reasons to Get On Board *By Annette Balgord*

Many nonprofits struggle to achieve the coveted 360 degree view of their constituency.

Why? The biggest culprit is not talent – it's technology! Older, more cumbersome donor management systems are likely discouraging rather than encouraging relationship building throughout your organization. And whether you're part of a

evolved from the successes of the corporate world's Customer Relationship Management, the concept has been tailored to allow nonprofit organizations a total and transparent view of not only their constituency, but their organization as well. Instead of just storing data, CRM systems make work easier, more secure, and more meaningful. All divisions access

allows members of the organization to view all constituent relationships that affect the mission: donors, volunteers, members, affiliates, staff, directors, related companies, etc.

For example, maybe a certain geographic area has a high number of volunteers but only a small percentage of donors. With older systems, these constituents would not appear in your donor management system. Using CRM software, you would be able to pinpoint this scenario and create a specific campaign to target these potential donors.

Emails, letters, conversations and connections between the constituents and all areas of your organization are stored in one place. This allows you to provide consistent and targeted messaging - and increases and fosters transparency throughout your organization. Yes, the left hand will know what the right hand is doing!

to understand departmental jargon (especially acronyms)? CRM systems allow you to define database fields in order to match your organization's terminology. Further, you're able to rearrange the placement of fields to maximize the efficiency of data entry and the relevance of the information displayed. A system that is tailored to the terminology already in place will be more readily accepted and will quickly become part of the organization's culture.

“And whether you're part of a non-profit or for-profit business, there is no getting away from the fact that relationship building has been proven to provide earth shattering results!”

non-profit or for-profit business, there is no getting away from the fact that relationship building has been proven to provide earth shattering results!

The once upon a time, older proprietary systems and homegrown databases of the nonprofit organizations of yesteryear have evolved to the point of being incredibly complex, difficult to use, and unstable to operate. Further, this disconnected view of relationships creates extra work for everyone and prevents you from providing a consistent message to your constituents. Only a new way of approaching the management of all interactions in one centralized system will allow you to properly nurture relationships with the most accuracy and relevancy to your mission.

This integrated approach to donor management is called Constituent Relationship Management (CRM). Having

and update information in the same system without fear of data corruption or accidentally updating information they shouldn't be allowed to access.

Does your organization struggle to stay on top of campaigns, or manage large amounts of donor or volunteer information? Maybe your organization is in a fundraising crunch, or maybe you're ready to take fundraising or recruiting initiatives to the next level. Whatever the reason, here are 7 ways that CRM software can revolutionize your approach to constituent relationship management.

1. Strengthen constituent relationships inside and out!

Rather than focusing solely on the donor's relationship to the organization, a CRM system also

2. Harness the power of CRM

Once all of the demographic attributes are captured, configured and the data is populated, a CRM system is ready to plan, schedule and analyze events; track and complete tasks; analyze and report on trends based on demographics; and manage the lifecycle opportunities provided by major donors. Now that's powerful!

3. Increasing user friendliness = increased use

CRM systems allow you to provide access to everyone related to the organization from directors to volunteers. Views and permissions are tailored to each person accessing the system, not only to simplify the experience but to limit access to sensitive information. For example, one person may be able to tell that a specific constituent is a major donor while only the directors see the amounts that have been donated and the programs that the donations have benefited.

4. Improve efficiency through data integrity

Eliminate the need for spreadsheets and disconnected contact lists. With a CRM system, the integrity of your data is improved; duplicates are removed, confidence soars. You have the ability to define constituent lists based on category, demographic attributes, division, or geography.

5. Customized for a perfect fit

Is there anything more challenging than trying

6. Integrated systems eliminate manual processes

CRM systems allow for the import and export of critical data, such as constituents and donations. This import export process eliminates the need for external (manual) processing. Imagine collecting data and donations from your website and updating your CRM system automatically! You can also integrate CRM software with Outlook to ensure that contact lists are centralized and Outlook calendars are linked and visible. Now that's 20/20 vision!

7. Improved access to information

CRM systems can be configured for access from anywhere internet is available whether by browser or mobile device. This increases the flexibility of your CRM and the accuracy of the data as the system is updated as communications occur regardless of where they originate. For example, when someone at an event requests more information about a particular program, your CRM system may be accessed to send the information while the event is still taking place. You may also choose to have the system automatically create a task to follow up with the constituent the next day.

Reports and data filtering is also a very important function of CRM software. You can create your own data filters, views or reports and have the ability to share them or not. The possibilities are endless.

Nonprofit organizations are already facing economic pressures, competition for funds, donor fatigue and resource constraints. What you don't need are more headaches with missing, fragmented or suspect data in files spread throughout the organization that no one can ever find. CRM software offers the solution that the complex nonprofit world has been looking for. **DM**

Annette Balgord is the principal of Balgord Software Solutions, a firm specializing in the implementation of constituent relationship management (CRM), fundraising, and accounting systems for nonprofit organizations. Contact: (877) 222-7229-- abalgord@balgord.com -- www.Balgord.com

Strategies for fundraising effectiveness

Simple steps to ensure that you remain a charity of choice *By Suzette Strong*

Long gone are the days when a compelling case for support is enough to motivate donors. Donors are sophisticated; they expect results and meaningful updates on how their investment in a cause is making a difference. And rightly so.

As in the for-profit sector, the past year has been a challenging one for charities. With all of the financial uncertainty, fundraising organizations have necessarily focussed on improving donor retention. This is particularly urgent in an industry where 90 per cent of donors are typically lost through attrition. However, it has also been important to expand the donor base and sustain a longer term vision.

Donor relationship management (DRM) is a critical strategy for success. This is not new. Rather, during times of economic crisis, it surfaces as charities need to more effectively differentiate themselves from the competition. DRM is the key to understanding and minimizing decreasing revenue trends by reducing the rate of attrition. It is important to focus on retention strategies that build and maintain donor loyalty; upgrade donors from one time to repeat, and move them up through your organization's various giving levels. DRM enables us to measure results, improve efficiencies and reduce costs in an effort to maintain an acceptable cost per dollar ratio ~ the single most important benchmark in our industry.

Here are a few simple strategies for an organization to improve its fund raising effectiveness. Placing the donor at the heart of your thinking is the common denominator of each strategy.

Know your donors.

How well do you know your donors? Most organizations segment their donors into giving ranges or categorize them by fundraising appeal. This provides the opportunity to look for commonalities among your donors themselves which in turn helps ensure you are communicating appropriately with every donor. The more personal and relevant donor communication is, the better the odds of retaining the donor.

Let me show you what I mean. It is standard practice to code donors according to the appeal and then to measure results of that appeal, a direct mail letter followed by a phone call follow up, for example. Consider reviewing the results of this annual appeal year over year. In analysing your data you might discover that a certain group of these donors (to whom you have been mailing an annual solicitation



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for years) respond to the first mailing, others traditionally to the reminder mailing and others still make their gift over the phone when the telephone campaign kicks in, as a final effort in the

this choice for the first time. You will never get a second chance to make a first impression. Often the first written communication following a donation is the acknowledgement and tax receipt

"The more personal and relevant donor communication is, the better the odds of retaining the donor."

appeal to close the gap. Perhaps there is an opportunity to send fewer letters and to this latter segment, just one letter indicating that you will be calling them to ask for their support. Data analysis like this can help you better understand your donors and their giving trends and preferences. If you haven't actually asked them their preferred method of communication, by segmenting your data, you may discover that you already know!

Do you have a different thank you letter for monthly donors than one time annual donors? Repeat donors or new donors? There are many ways to make your communication with donors more personalized and a great number of these can be achieved through automation. Within annual giving programs, segmenting your donors based on giving patterns will empower you to speak with them slightly differently which may make the world of difference to the donor. Be sure to test key messages and measure results. Every one of your donors makes a conscious decision to give to you. New donors, for example, have made

letter. This is an important message that represents far more than a thank you and a completion of a transaction. Your letter confirms that their money was received safely, as intended. It gives you an opportunity to reconfirm for the donor how their investment makes a difference. It also allows you the opportunity to confirm any donor designations they might have indicated – giving them confidence that your organization is capable of managing small, yet important details.

At Markham Stouffville Hospital we consider our monthly donors amongst our most loyal and committed supporters. By sharing with us their personal banking information, they are telling us that they have high confidence and trust in our organization. Knowing this is a privilege and a responsibility. At Markham Stouffville Hospital Foundation we let them know how we feel about this in our thank you letter, along with a welcome package, which is sent to them upon joining our monthly giving program. Our new donors also receive a personal phone call that confirms our promise to them.

These examples are just a few ways to use your data base of donors to enhance your standard communications so that they are more meaningful to your stakeholders.

Provide meaningful communication and accountability

Saying thanks after you receive a donation is essential. Communicating with your donors, in between asks, is important. Saying thank you and reporting back before you ask for the next gift is critical.

The challenge is to make the communications in between solicitations meaningful without having to make a major financial investment. Some organizations publish regular newsletters or have e-news. Events with resulting publicity also help maintain awareness of your organization amongst your stakeholders. The key with such efforts is to provide useful information about how donations are making a difference and helping advance the mission of your charity.

In these days of multi-media campaigns and electronic communications, it is easy to overlook one-on-one verbal communications. And yet for many people this is still the preferred way of communicating. Having a culture in your organization that delivers an appropriate level of customer service is key to long term success. This, of course, involves training – especially in telephone dealings – as well as establishing acceptable metrics, such as response times. It is important that the accountability for "getting back" is very clearly defined.

How frequently do you have negative thoughts about an organization when on

hold and waiting to speak with a customer service representative? For organizations with a general voicemail where donors will call to inquire about making a donation, be sure to return their call promptly. Decide as an organization whether it is reasonable to return calls within one or two business days or even within hours. It is helpful to tell people what to expect on your outgoing message, especially if the response time is likely to exceed normal expectations

Use information management

Besides DRM, another theme connecting these strategies is information management. Information management is one of the best kept secrets for knowing your donors and enabling you to communicate in a meaningful way with your donors.

Although I recommend investing in a database designed for fundraising, using information management strategically is not so much about whether you have the latest and greatest most comprehensive data management system or an excel spreadsheet. What is essential is that you have a secure, central place to consistently record vital statistics and capture relevant and appropriate information about the relationships you have with your stakeholders. Today it is also important that controls are in place to respect donor privacy.

In my experience, regardless of the size and scope of an organization, there are usually the same key issues: the integrity of the data and limited knowledge about how to use it. With respect to integrity, the standards need to be set from the top. Every manager needs to define expectations

for each of their staff as to how their role interacts with the organization's database management objectives. In terms of using it, develop a mentoring program, talk to your peer organizations, and invest in training. It is necessary that everyone buys into working together on understanding the full potential of using your data. There is no doubt in my mind that this will result in greater efficiencies, better allocation of resources, more strategic annual program planning and evaluation, and more effective measuring of your results. It also empowers you to report back to your stakeholders and provide the accountability they deserve.

It used to be a common adage in fundraising that "if you don't ask you don't get". Today, with DRM at the fore of our industry's thinking, we know that to continue to strategically generate our market share of revenue, organizations must measure results and continue to evaluate, and re-evaluate our strategies for success.

In addition to asking, and having a sharp, inspiring Case for Support, continued success will be rooted in the relationships you build and maintain with your donors. I encourage you to step back from the day to day chaos and ask yourself: How well do you really know your donors? **DM**

Suzette Strong is President, Markham Stouffville Hospital Foundation in the midst of their largest fundraising Campaign in support of the Hospital's expansion plan that will double the existing space, increase inpatient beds, expand the Emergency Department, and increase capacity for diagnostic imaging.

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Bringing your message to the masses

Socio-geographic marketing enables the smallest of business to be cost-per-click players across all mediums *By Felix Gill*

Entertainment is rapidly becoming an on demand world. Never before has there been such a rich understanding of the customer available to advertisers. With that, marketing strategies are evolving to try and get their message to the masses. Sophisticated search engines and social networking sites such as Facebook® are changing the culture so that we, as a customer, expect the communication to be personal and relative. Nowadays we create and publicize an identity for ourselves in the online world as an individual informing all and sundry of our specific interests and quirks. This should make life simpler.

The reality is that this favors the smaller player. This is not to hail the death of 'The Brand' but to micro-market to a small demographic in a far off location can require a level of focus that marketing departments are slow to quantify much less understand. The internet provides many tools for the marketer to fine tune their product to target even smaller regions and demographics. The micro-financing aspect of this can sometimes relate to a sub-campaign that is billed for a few bucks instead of a blanket million dollar spend.

To this level, niche marketing works in much the same way that that a 19th

Century store would have promoted its business in a small town or village. A few good reviews, perhaps in print, coupled with positive word of mouth amongst a social group. This is essentially the mindset that social networking sites demand to reach an increased audience. But geographic marketing, though valuable, should be thought of more as socio-geographic marketing, or "SoGeo". In the sense that there is a concept of a global village, there is a "SoGeo" village that may or may not be proximate but interacts in much the same way that word of mouth did all those years ago.

If I were mailing to people in Montréal I might choose a background shot of the Olympic Stadium or Toronto, the CN tower to try and grab attention. Socially I may be presumptive and assume that my male customers, in Montréal, are going to be Canadiens fans, so a shot of the Bell Centre would encourage them more to pick up the correspondence and look closer. Generally this is the most any bulk mailer could hope for.

So when we target geographically we not only target locally, but we to some degree target socially. The modern era allows us the power to target SoGeo quite simply. Let's say; current students of McGill University. This is a group that, for a time period, is both social and

local to each other. In the future there would likely be continued socialization between former students of McGill yet geographically they could be dispersed across continents. For this as a guide we could use the initial SoGeo as a launch point to greater market saturation.

The difficulty with this type of approach is the amount of tweaking that is required to elevate the campaign beyond the core SoGeo component. Companies like Google® have extensive online tools to refine keywords, locations and some demographics based on the statistics that come from click-thru. Allowing us to dispense with the less successful targeting and evolve into something more niche and thus valuable.

Today sophisticated customer feedback and research is an exciting part of the online marketing experience. With technology advancing at a rapid clip, it is even possible to market SoGeo through print. Sending envelopes where the image on the cover is directly relevant to the recipient. Starting with small mailings then increasing the volume with refined variable logic once the early responses are evaluated. Applying customer relationship management to print has historically been difficult because there has been no opportunity to distinguish what made a customer respond. Yet with a personally

generated mailing these responses can be measured and continually improved in the subsequent envelope design variables.

The more original a document the more original a response becomes and from that we can learn.

Television is no longer what it used to be in terms of the go-to location for the big spenders to target pretty much everybody. Today people download TV shows without commercials (legally or otherwise) or wait for them on DVD. Then there are also SoGeo events and with this the opportunity to target specifically. If there were a strong news event in Vancouver that affected local people then advertisers could take advantage of the power of YouTube® to hit a particular audience. In this way the event drives the market for advertising. With costs of production decreasing smaller sponsors can create their own media event to promote a product. As an example, would it be unreasonable for a Montreal tattoo parlor to put a banner across the bottom of a short YouTube® documentary about the setting up of the Stage for AC/DC's Montreal concert? Additionally the benefits of downloading TV shows make it simpler for SoGeo targeting so be prepared for discounted, or even free episodes to be available with top and tail commercials

that cannot be skipped. Similar to what is already happening with the BBC's international web-site.

There are many options available to the modern marketer with that strategies become much more convoluted. There is an enormous pricing minefield to navigate. The enormous reconciliation between niche consumer expectation of free content versus the advertising mega-bucks of Super-Bowl slots. A degree of financial catharsis by some of the big media distributors still seems to be a while off though social networking sites are avidly encouraging the micro-marketer with penny based billing.

This will also become part of the wonder of socio-geographic marketing today. It enables the smallest of business to be cost-per-click players across all mediums. The niche player can create a global campaign even though he is targeting less than a thousand people around the world. A world where not only could a TV/Internet/Direct Mail campaign be priced under a thousand bucks but it could also just be targeting your street. **DM**

Felix Gill is the CEO of Assetprint®, Montreal, a firm that provides cutting-edge personalized printing, digital print and fulfillment services. Visit www.assetprint.ca for more information.

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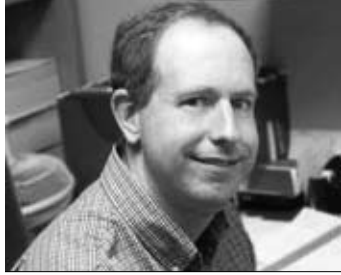


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Case Study:

Data mining to generate high value donors

The reality today for Canadian charities is decreasing response rates and increasing costs for new donor acquisition. As a result, the focus is beginning to shift from growing the number of donors to maintaining and enhancing the relationships they have with their current donor base.

Much of this focus has shifted to those donors who have high potential lifetime value, those who can either give multiple gifts (like monthly donors) or those who have the capacity to give large single gifts, either today or in the future. Identifying who these prospects are is a challenge given the current economic situation as resources, both financial and staff, are at a premium. Data mining is an ideal way to narrow the focus to those most likely to respond to approaches for high value giving (monthly, leadership, major or planned giving).

The challenge

One of our clients, a large GTA hospital, recognized these issues and was challenged by senior management to grow their current leadership program (donors giving \$500-24,999.99 cumulatively on an annual basis). They came to us for help in increasing the number of donors in this category and the net revenue derived from this program.

The program currently consisted of a pool of approximately 2,500 leadership donors, of which a third of these gave in the current year. The goal was to grow the active pool through targeting an identified group of 1,500 prospects resulting in a 15% growth over three years in donors giving annually and to generate net revenue growth of 10% within the first year, and 25% by the end of year three.

The solution

We recognized that a data mining approach was well suited to this situation, and proposed that we utilize existing leadership donors to develop a model which would identify those most likely to respond to a

strategic moves management process.

Prior to beginning work on the project, we held a scope meeting with the foundation executive and team members from the leadership program, who would be implementing the end program, to confirm and discuss the project. This

Table 1: Variables Considered for Data Mining

Tenure	Taxfiler data
Lifetime Value	PMB Survey Results on Charitable Giving
Consecutive Years Giving	Credit scores
Previous Monthly Giving	Affiliations (i.e.: volunteers, board etc.)
Giving in the Most Recent Year	Other Attributes
Census data (postal code level)	

meeting was very important as it allowed us to not only determine where the data was held in the donor database but also to find out what resources were available for implementing the project.

Working with the information developed from the scope meeting and our own sector knowledge we identified a series of over 50 variables in the client's database that we felt from an industry viewpoint had the potential to impact the propensity for a donor to upgrade their relationship to the leadership level. In addition, working with our partner Generation5® we appended demographics such as Census and Taxfiler data at the postal code level, this was the most granular data available at the time of this analysis.

Data preparation for this project involved single and multivariate descriptive analysis to look for unusual patterns, elimination of variables that were collinear, and identification of outliers in the dataset. At this stage a significant challenge was identified around missing data, driven by the following factors:

In the interests of privacy Canadian Census rules require that publicly available data mask certain key variables, such

as income, for geographies where few people live.

Donors sometimes provide mailing addresses that are either purely business (i.e.: the TD Tower in downtown Toronto) or through typographic errors in data entry and so cannot be matched by postal code.

Data from attribute variables is often obtained as the result of surveys or other limited scope activities - so only exists in a fraction of data, often those who have been Major gift prospects. Sometimes the presence of this data (or lack thereof) can cause models to be too predictive.

In our case we chose to fix the first and second issues by using averages derived from data at the FSA level which did

not have this same issue due to a larger population base to draw from. For the last issue, we carefully reviewed the variables to identify the problematic ones and removed them from consideration.

The combined variable list was reviewed up against the current leadership giving donor base, using correlations and other measures of "interestingness". Based on this analysis we were able to reduce the larger base of variables to 25 ones that, based on the data, proved to be meaningful to this

particular donor base.

Final model development involved the selection of a decision tree based approach to classify donors into predicted leadership and non-leadership donors. We kept back a 50 per cent sample of the data to use in evaluation of the overall performance of the model and its stability. To enhance the end result we found that using Stochastic Gradient Boosting, a technique which involves iterating the tree building process using the predicted results of the preceding tree to develop the subsequent tree, with the goal of minimizing the sum of the residuals between testing and training samples.

The resulting scores were appended to the donor records and in coordination with the program team we developed an implementation strategy for roll-out of the scores.

The Results

Two years since the program roll-out the results of the program have been staggering, beyond even the client's expectations. The number of donors giving at the leadership level is now up 12%, and revenue figures have grown by over 60 per cent since implementation.

Table 2: Year-over-Year Results to Date

Year 1	5% growth in donors	31% growth in revenue
Year 2	6% growth in donors (12% over 2 years)	22% growth in revenue (60% over 2 years)

This is only a single example of how data mining targeting high value donors can be beneficial to your organization. Over the years we have seen similar results from other charities that we have assisted in similar endeavours.

Key learnings

From this project and others like it we have developed a series of tips for building a data mining initiative that will prove successful in your organization:

Identify business objectives – going

into any data mining project it is important to ensure that you have identified the key business objectives; this often involves interviewing stakeholders to develop your understanding of the needs. Setting a series of criteria for evaluation will allow you to identify a "good" model from a "bad" one.

Develop data understanding – data can come in many different forms and at many different layouts. In projects we have seen everything from transaction level data (gifts) to the Foundation President's Christmas card list in an Excel spreadsheet. Knowing not only where data can be found but how to bring it to the right level of granularity (often the donor level) is critical to the overall success of a project.

Data preparation is key – as we found in this project some data sources are not clean; duplicates, outliers, missing data can all have a detrimental impact on the overall result of the model, and the success or failure of the overall project. In any project data prep should consist of 75-80 per cent of the time spent in developing the model.

Modelling is not enough – simply scoring a donor does not change their behaviour. As Albert Einstein once said "the definition of insanity is doing the same thing over and over again and expecting different results".

To develop a deeper relationship involves targeting the right message to the right prospect at the right time. Data mining will help with only one third of this, strategy and creative must work together with this for optimum results. **DM**

Jeff Eland is Director of Analytics for Blakely & Associates Inc., (www.blakelyassociates.com), which is a full service direct marketing agency that offers services including analytics, strategic guidance, program planning and tactical execution for non-profits across North America.



Mobile marketing is hot - why Canada is not

By Lydia Cappelli

Growth in the mobile phone market is surpassing personal computers, proving once and for all that the mobile phone is the most personal of personal computers. Today, most people do not leave home without their mobile phone making this communication device almost as essential as the wallet (in fact, it may one day replace the wallet). Mobile phones, especially smart phones, connect people to information, entertainment, business and social contacts with an immediacy and relevancy that is at the forefront of modern consumer needs. There are hundreds of applications that do everything from buying music, translating languages, reading books, making payments to finding the closest movie, gas pump or restaurant nearby. The choices and

possibilities are multiplying daily.

In corollary, advertising on the mobile phone holds great promise. The mobile phone allows for increased opportunities for interaction with consumers who are potentially more mentally and physically close to their purchase decision compared to someone who is at home staring at their computer. No other medium allows such precise targeting, reaching consumers wherever they are and engaging them in a meaningful way. Imagine the scenario where a consumer is renovating her apartment. She's been searching for decorating ideas and paint colours on the Internet. One day, she visits her mother and sees an ad on her mobile phone for a special on paint at a hardware store just around the corner from her mother's house. Sound like science

fiction? This is already possible thanks to geo-coding and other applications. In the competitive world of advertising, the mobile phone will surpass other mediums for superior ROI and conversion rates.

Mobile ad spending

According to eMarketer, there will be 280.8 million mobile phone subscribers by the end of 2009. This amounts to more than 200 million targets for mobile advertisements—a medium projected by eMarketer to reach \$760 million in spending in 2009 and \$3.3 billion in 2013, reaching double-digit yearly growth.

There are still obstacles for mobile advertising to overcome before it can reach its full potential. The main issue is

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DMPEOPLE



Scott Jamieson

ThinData, a Transcontinental Company, is pleased to announce that Scott Jamieson has joined its ranks as the new General Manager. Most recently, he served as the Managing Director of SJR Digital where he developed business and email strategies for leading brands across several complex industries.



Ann Lynch

Dataline, a leading compiler of consumer information and modeling services, announces that Ann Lynch has joined Dataline as Senior Account Director. Ann comes to Dataline with over seventeen years of experience in the direct marketing industry.



Michael Birkin

RPMC announced that Michael Birkin, former Vice Chairman of Omnicom Group and CEO of Omnicom Asia-Pacific, has taken a majority position in the privately held company, effective immediately.



Mark Weintraub

The Concept farm welcomes Mark Weintraub as their new Director of Account Management. With 16 years of industry experience that includes work with clients such as Subaru, Hershey and Michelin Tires, Mark will help guide The Farm's continued international growth.

LISTWATCH

Universe Canada™ B2B

Universe Canada business to business is one of the largest and most accurate databases of Canadian businesses on the market. This list consists of compiled and self-reported business information of private and public Canadian companies. Selects: RFM, subscribers, buyers, multi-buyers and various interest categories. Price: \$150.00 CDN (base cost/thousand) Contact: Cornerstone Group of Companies, Richard Todd, 416-932-9555 ext. 136

status, computers/internet, employment status, education, exercise/fitness, household income, occupation, outdoor enthusiasts, pets, self improvement, sport enthusiasts, sweepstakes/lotteries, travel destinations, type of vacations, hobbies/interests, length of vacation and donors to charitable causes. Price: \$160.00/M CDN.

Contact: West List Etobicoke, Jacqueline Collymore, 416-622-8700 or email Jacqueline.Collymore@westlists.com

Rogers Media Business Database

This is an unduplicated list of all paid and controlled subscribers to Rogers business publications. There are 248,578 male and 74,083 female records available. Selects: male, female, key records, province, FSA, cancellation fee, employee size, fax numbers, one per, paid, phone numbers, SIC code, splits, title Cost: \$150.00 CDN (base price per thousand)

Contact: Cornerstone Group of Companies, Stephen Manson-Hing, 416-932-9555 ext 415

The Encompass Masterfile

West List Etobicoke is now the exclusive list manager of The Encompass Masterfile rapidly growing with 204,325 responders. Encompass Masterfile responders are known travelers to Europe, Sun Destinations and/or Cruise Vacationer all who have completed a travel survey at the end of their vacation. Selects: age, FSA, gender, province, phone numbers, arts & entertainment, business travelers, club memberships, collectibles, credit cards holders, marital

WORTHKNOWING

Canadian consumer membership in loyalty programs near universal

Finding Canadian consumers that don't participate in loyalty programs is getting tougher, with a near universal 93.6 per cent saying they belong to at least one program, according to COLLOQUY research released today. The number reflects a 9 per cent participation growth by the general population since 2007.

Activity across all demographic segments is up, except for the Affluent segment, which remained flat at 96 per cent participation. Participation by Millennials (age 18-25) spiked to 86.5 per cent, up 11 per cent since last measured in 2007 to represent the fastest growing demographic. Women and seniors nudged up slightly, and consumers in French Quebec measured for the first time at 92.4 per cent participation.

COLLOQUY's study of loyalty perceptions examined trends in six consumer segments: General Population representing a statistically distributed sample of Canada overall; Affluent (heads of household with annual incomes of \$125,000 or greater); Millennials or Young Adults (any respondent 18 to 25 years of age); Seniors (any respondent 60 years or older); Core Women (any female respondent age 25 to 49 with an annual income between \$50,000 and \$125,000); and French Quebec (those residing in French Quebec). COLLOQUY magazine and white papers are published by LoyaltyOne.

Coalition loyalty programs, like AIR MILES in Canada are proving vital tools for consumers looking stretch household

budgets in response to a challenging economy. Exactly 25.8 per cent of survey respondents said that participation in coalition programs has become "more important" since the economy turned sour. Consumers found the value of coalition program participation in a recession higher than retail, financial services and travel rewards programs.

"We were already aware that Canada was a congested loyalty arena," said COLLOQUY Editorial Director Rick Ferguson. "But to see a nearly 10 per cent jump in such a market says that consumers are turning to rewards programs more than ever to offset economic woes. And the value of coalition programs in the eyes of Canadian consumers cannot be understated."

Cornerstone selected as exclusive list manager for Yves Rocher Canadian package insert program

The Cornerstone Group of Companies announced today that it has been appointed the exclusive list manager for the Yves Rocher Canadian Package Insert Program.

Through its package insert program, Yves Rocher offers marketers the ability to reach Canadian buyers of natural cosmetics purchased from a direct mail catalogue offer or online. Advertisers are offered the opportunity to insert an advertising coupon within packages shipped to active buyers. Consumers on the file have made an average purchase between \$30 and \$45. Approximately

50 percent of the consumers are multi-buyers, and 99 percent of buyers are female.

"We are pleased to be able to offer our customers this top-notch package insert program," says Stuart Young, Vice President of Cornerstone's List Management Services unit, "and we expect significant demand for this vehicle given its direct-mail generated target audience."

Brokers can now approach Cornerstone for all count requests, pre-clearances and Yves Rocher Canadian Package Insert orders.

Market is ripe for direct response marketers, report shows

Toronto agency Kingstar Media has just released its whitepaper, Direct Response TV in a New Age of Persuasion.

The paper shows that consumer spending on direct response TV products sits at a staggering \$2 trillion U.S. worldwide. It also shows that direct response media spending rose by 9.2 per cent during 2008 to \$2.58 billion, representing one of only two categories to show increases according to Nielsen's ad expenditures report. This increase is despite an overall U.S. ad expenditures decline of almost \$3.7

billion to a total spend of \$136.8 billion in 2008.

According to Kingstar Media, doors are opening for DR marketers, and as major advertisers scale back or shift their ad spending on television, the result is three-fold:

- cheaper media rates, aimed at enticing new advertisers
- broader time-slot selection
- new station opportunities with networks not previously open to DR advertisers

Agency launches pro bono campaign as call to artists in support of Canadian military

True Patriot Love Foundation, a non-profit organization founded by corporate and community leaders, dedicated to raising funds for programs for members of the Canadian military and their families, recently named FUSE Marketing Group Inc. its marketing agency of record. FUSE, a Toronto-based, privately held brand activation agency that offers a full range of marketing, direct, promotion, experiential and interactive services, is proud to unveil its new pro bono campaign in support of the inaugural fundraising Tribute Dinner to be held in Toronto on November 10, 2009. The event benefits the Military Families Fund established by General (Ret'd) Rick Hillier, which provides assistance to military families.

Entitled the Artists for Families program, True Patriot Love is seeking 100 Canadian artists to transform



Cont'd from Agency launches... page 10

military helmets resembling those worn in combat, into works of art. The helmets, designed and donated by the artists, will be part of a silent auction at the Tribute Dinner.

FUSE was responsible for developing the creative platform and the execution of a bilingual campaign called Defining Moments, consisting of logo design, print fundraising materials and advertising including print, online and broadcast elements.

"We were asked to be a part of this extraordinary project because of our not-for-profit experience and more importantly, our personal affinity toward the important cause," explains Garo Keresteci, president, FUSE Marketing Group Inc. and member of the True Patriot Love Committee.

"With our creative platform of Defining Moments we hope to unite Canada, its people and its artistic talent to support and honour the military families of those that serve our great country," he adds.

"We are confident in FUSE's ability to communicate the goal for our first-ever fundraising project in a wholly unique and compelling manner," says Shaun Francis, True Patriot Love Chair. "Canada has had many defining moments in history and our future is being written by the proud men and women of our military. This is a once in a lifetime opportunity to play a vital role in our next defining moment on the world stage. We want Canadians to answer the call," Francis adds.

DM LANDSCAPES

Canadians Who Donate to Charity

Seventy two per cent of Canadians donate to charity annually

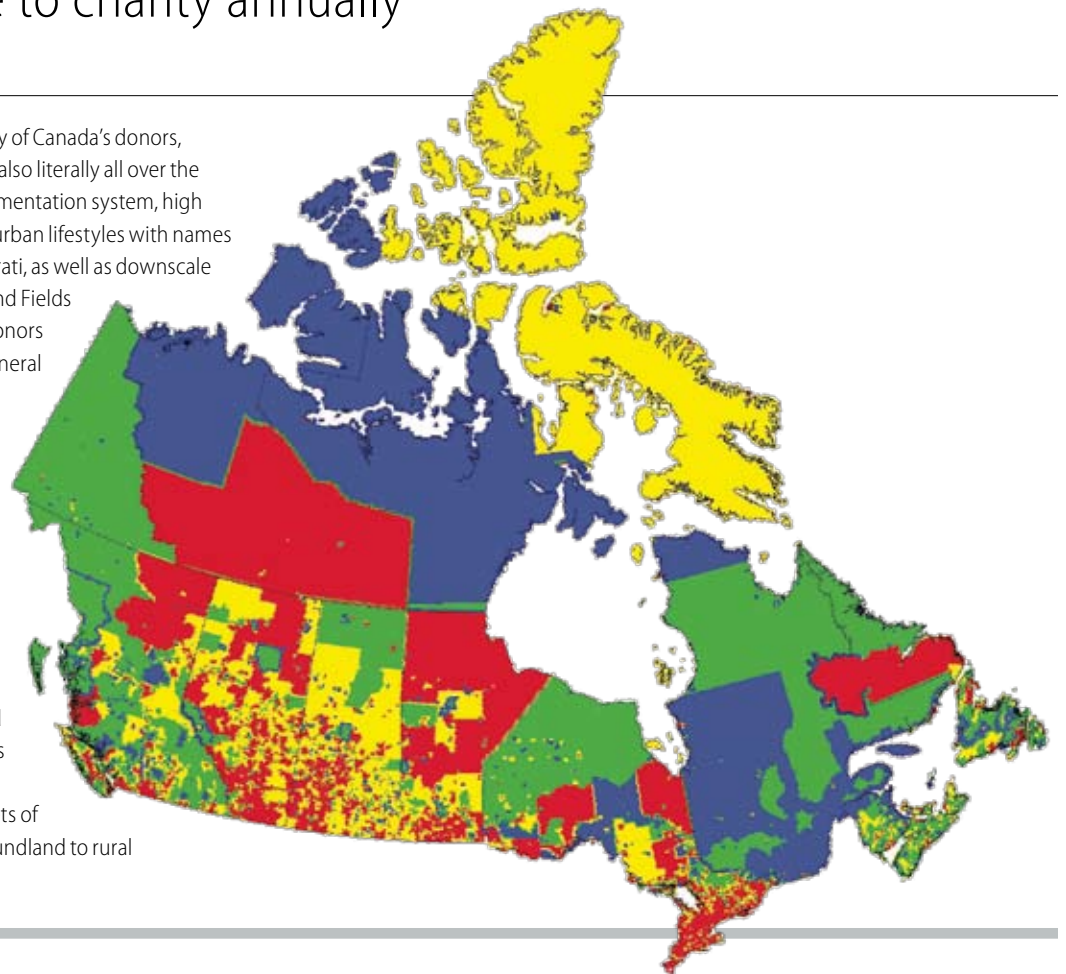
Canadians are a generous people, with seventy two per cent donating to charity annually. With the average household donating \$298, benefactors can be found in every province, at every income level and in every lifestyle. But as shown in this map from Environics Analytics (EA), the highest average donations per household are found in the Prairie provinces, southern Ontario, urban areas of Atlantic Canada and the Northwest Territories. By contrast, donation levels are relatively low in rural parts of Quebec, as research has shown consistently over the years.

Average donation per household indexed to Canadian average of \$298 (index=100)

- **Charitable Champs** (high index: >120)
- **Generous Hearts** (above-average index: 100-120)
- **Occasional Givers** (below-average index: 80-100)
- **Unmoved or Unable** (low index <80)

Sources: Environics Analytics 2009, based on PRIZM and BBM RTS Canada.

Given the wide-ranging geography of Canada's donors, it's no surprise that their lifestyles are also literally all over the map. According to PRIZM2, EA's segmentation system, high percentages of donors have upscale urban lifestyles with names like Urbane Villagers and Young Digerati, as well as downscale rural lifestyles such as Heartlanders and Fields of Dreams. Leisure surveys indicate donors as a group are more likely than the general population to enjoy both investment and motorcycle shows. Their favorite sports include golf and curling. However, donors also share a number of psychographic Social Values: community involvement, global ecological awareness and religiosity (which may explain why religious organizations receive the largest share of charitable giving). And many like to listen to country and classic rock radio—two media outlets that charities should consider when devising a fundraising strategy. Pockets of opportunity exist from urban Newfoundland to rural British Columbia



From Mobile marketing... page 9

fragmented mobile operating platforms as the war for supremacy continues to rage between Nokia's Symbian, the iPhone's Apple 3.0 and Google's Android. In addition, technical improvements need to be made to mobile processing power, network bandwidth latency and battery power.

Canadian adoption slower

In Canada, mobile advertising faces even more obstacles. In a recent international study, the Organization for Economic Co-operation and Development (OECD) found that Canada has the third-highest wireless rates among developed countries. The Canadian government has acknowledged that rates are too high and contribute to lagging mobile phone usage. Canada now ranks last for mobile phone users per capita in the OECD, having been surpassed by Mexico since the

organization's previous study. Canadians also pay more for their Internet access. According to the OECD Communications Outlook study, Canada has the second-most expensive high-speed connection rates, surpassed only by the Slovak Republic. Such a connection costs around \$90 US per month in Canada, well above the OECD's average of \$53.

Needless to say, Canadian mobile and Internet rates will only serve to slow down the adoption rate of mobile advertising in this country. Hopefully the arrival in 2010 of new wireless service providers, such as Public Mobile, Globalive and DAVE Wireless, will help to drive down costs and level the playing field so that Canadian advertisers can join the mobile marketing game. **DM**

Lydia Cappelli is an interactive marketing professional. To contact her, visit her Web site at www.lcappelli.com.

Case Study: Grace Culliton

Generating positive awareness in the non-profit sector

Initiative: Commercial site for Grace Culliton's artwork

Brand: Grace Culliton

Objectives

- To create a commercial web site for Grace Culliton in which she can sell her art note cards on-line to help generate income and work for Grace as an adult
- Generate awareness of Grace's work
- Funnel prospective customers into a sale
- Build a relationship with customers and site visitors
- Provide opportunities for visitors to learn more about Autism and Synesthesia

Solution

Henderson bas was approached to create a Web site that would showcase the artistic talents. Grace Culliton suffers from autism, but has not let this affect her talent. She is an accomplished artist and has been showing her artwork for 8 years. Her style is abstract but feminine. It is characterized by a mature sense of spatial design, and the use of colour. Grace's image has been used to help promote autism events. In 2000, she was the poster girl for the Geneva Centre—a Canadian and international leader in the development and delivery of clinical intervention, support and training for individuals, families and professionals. Grace's autism has contributed too many

learning difficulties and Grace will not earn a high school diploma, nor is it likely that she'll be able to find employment in the community. Pursuing her art may be her best opportunity to find employment and make a meaningful contribution to society. Her own dreams are to "be an artist", to take art classes, and to live on a small farm someday.

In the efforts to achieve Grace's objectives, henderson bas created an atheistically pleasing and functional Web site with traditional e-Commerce capabilities for online purchases. Social media tools are leveraged both on the site and in the traditional sense to encourage feedback and comments. This will also help build awareness and exposure of the Web site

REGIONAL REPORT

Kingston/Belleville

A tale of two cities *By Amy Bostock*

One hour. That's how long it takes to drive from Belleville to Kingston. And although they are close on a map, when it comes to the direct marketing industry, these neighbours are worlds apart.

We began our road trip in Belleville. With a population of 46,000 and a thriving industrial base, this city is the largest urban centre in a region that is home to about 200,000 people. About 10,000 of Belleville's labour force are employed in the industrial development sector by companies like Proctor and Gamble, Kellogg, Nortel and Autosystems Manufacturing Inc.

"We've made a significant investment in industry," says Karen Poste, Manager, Economic and Strategic Initiatives for the City of Belleville. "We're not dependant on any one sector either which allowed our economy to remain strong during the recession."

Belleville has a good sampling of employers from all sectors says Poste, and doesn't rely on any one employer to keep the economy going.

"You name it, we've got it," she says.

service in Belleville and then not long after we got high speed. Technology, like human resources, used to be a problem in this industry but not any more. We have a very strong DM sector here now."

Most of Dickson's business comes to him via word-of-mouth and is a combination of local businesses and companies from outside of Belleville.

"We prefer to have clients that are higher up the food chain and have larger budgets," he says, "and although it is mostly small to medium sized businesses here, we do have some larger businesses headquartered here."

He does have clients in Toronto but says it's easier to keep business close to home as personal contact is important in his line of work.

Snap is also able to deliver marketing solutions within the budgets of smaller companies since the cost of doing business in Belleville is far cheaper than many larger city centres. A benefit that has resulted in a growth within Belleville's marketing industry.

"In the 90s there was only one

Bombardier Canada.

Startek Canada is a Kingston-based call centre that employs anywhere from 1,500 to 2,000 people and Empire Life and Insurance Solutions also call Kingston home.

But the really big fish in this Eastern Ontario city fall into the logistics and warehousing category.

"Because of our geographical location and our access to the 1,000 Islands bridge into the United States, Kingston attracts a lot of warehousing and logistics business," says Shearer, who says that it is about 30 per cent cheaper for companies to set up shop in Kingston than in Toronto.

Compare the average price of commercial land in Kingston - \$90,000 per acre - to that of Toronto - which can be as high as \$500,000 per acre and you have a pretty good argument for moving to or expanding within Kingston.

With large players in both the public and private sectors, Shearer says Kingston really



unique to DigiGraphics," says Burget, "there are thousands of Toronto businesses who offer these services. The biggest difference is that in Toronto they're doing it while in Kingston we just talk about it."

According to Burget, Kingston lags behind when it comes to advancements in the DM industry and feels that the city doesn't have as many well-educated and web-savvy people as you'd find in bigger centres.

"I don't think that there are six people in all of Kingston with the title of Marketing Manager," he says. "It's much

themselves in the world of medical education. About one third of their sales are in this niche market, which involves producing medical education collateral for export to the U.S. and the United Kingdom.

They also acquired Mailrite and is now the only traditional mailing house in Kingston.

"There's nothing that we offer that is

REGIONAL REPORT *cont'd on page 13*

WHO WE VISITED

Snap Design

Snap Design, by Xynapse, is one of Canada's most experienced full-service web site design and development firms. Since 1995 they have earned a reputation for providing clients with interactive web systems, innovative technology, and eBusiness solutions that achieve results.

City of Belleville Economic and Strategic Initiatives Department

As the philosophy of the Economic and Strategic Initiatives Section is oriented to the promotion of community development, the role is key to the objectives of the City. This department can assist businesses in any aspect of their planning, development or investment needs.

DigiGraphics

DigiGraphics Inc. supplies clients with printing and communication materials at fair and competitive prices while providing guidance, highly creative graphic design, the most up-to-date facilities possible and exceptional,

prompt and concerned customer service using state-of-the-art technologies.

PrintFusion Inc.

PrintFusion has been a leading commercial printer in Kingston since 1973, printing business cards, stationary, brochures, posters, books and more. They also deliver a range of mailing services designed to help clients get real results from every campaign.

Kingston Economic Development Corporation

The Kingston Economic Development Corporation (KEDCO) is a driving force behind the great ideas and people helping to make Kingston such an exciting and dynamic place in which to work and do business. They believe in pushing great ideas forward and helping Kingston become the leader in today's highly competitive business world. Founded in 1997, the Corporation's mission is to ensure that Kingston remains a world-class city by supporting economic growth and investment.

"Our industry has really blossomed and we have a lot of talent here. The industry has really come alive and we currently have more talent and work here than they do in Kingston."

Belleville calling

The city is also home to an incredibly robust call centre sector, with about 3,500 people employed by the various customer contact businesses, which are primarily inbound. Thanks in part to a strong telephone infrastructure and direct access to fibre-optic lines, the call centre industry in Belleville has remained strong, despite the closure of some businesses.

"In the last three months we've lost some companies, either through closures or downsizing but because of the affordability of doing business here and the availability of skilled workers, I still believe that Belleville has a lot to offer this type of business," says Poste.

Although Belleville now boasts a fibre-optic loop that runs across the city, it wasn't always this easy to get a line out of the city.

When Ken Dickson started Snap Design, a full-service web site design and development firm that provides clients with interactive web systems, innovative technology, and eBusiness solutions, in 1995, he had to use a long distance dial-up connection to Toronto to get internet access.

"By the end of 1995 there was local

marketing company in the city and now there's a bunch," he says. "Our industry has really blossomed and we have a lot of talent here. The industry has really come alive and we currently have more talent and work here than they do in Kingston."

A fact not lost on the Kingston DM companies we visited.

So close, and yet so far...

An hour along the road and we reach Kingston, population 120,000 give or take. This historic city is home to a very large public sector. In fact, 60 per cent of the population is employed in public sector jobs - way above average for Canadian cities.

"Our economy is fairly stable because of this and has allowed us to remain insulated during the economic downturn," says John Paul Shearer, Director of Business Development at the Kingston Economic Development Corporation. "We offer a very strong foundation in CFB Kingston, Queens University, Royal Military College and Hotel Dieu Hospital."

Kingston is also home to some large industrial players such as Du Pont's research and development arm and

hasn't lost, or gained, anything during the recent recession.

Except, says Doug Burget, for work.

Going, going, gone

According to Burget, who operates DigiGraphics, a full service print and digital marketing service, in Kingston, a lot of the direct marketing work from the city is outsourced to Toronto - a bit of a sore spot for the resident DM-related businesses.

"There's a lot of leakage of work. We're close to Toronto and it's harder for us to compete for the bigger jobs," he says, pointing out that many of his out-of-town competitors don't actually have a physical presence in Kingston but instead send mobile sales reps out on the road.

Even the public sector, which is so huge in Kingston, tends to use outside services - in particular the City of Kingston itself, claims Burget.

"Our property tax bills were actually printed and mailed to us by an Ottawa company," he says.

Most of DigiGraphic's work is local, but since they are a horizontally diverse company they have carved out a niche for

EAST FACTS

Kingston

- ▶ Kingston's people are among the most educated and competent in Canada - 73% of the city's labour force has a post secondary education.
- ▶ According to a 2007 Statistics Canada report, Kingston has the highest scientific and engineering PhD concentration in Canada.
- ▶ Kingston has the highest property taxes in Canada according to a recent Maclean's survey
- ▶ Kingston is only a two-hour drive to the major population centres of Toronto, Montreal, Ottawa and Syracuse, New York - and offers immediate access to markets of more than 130 million people within a day's drive.

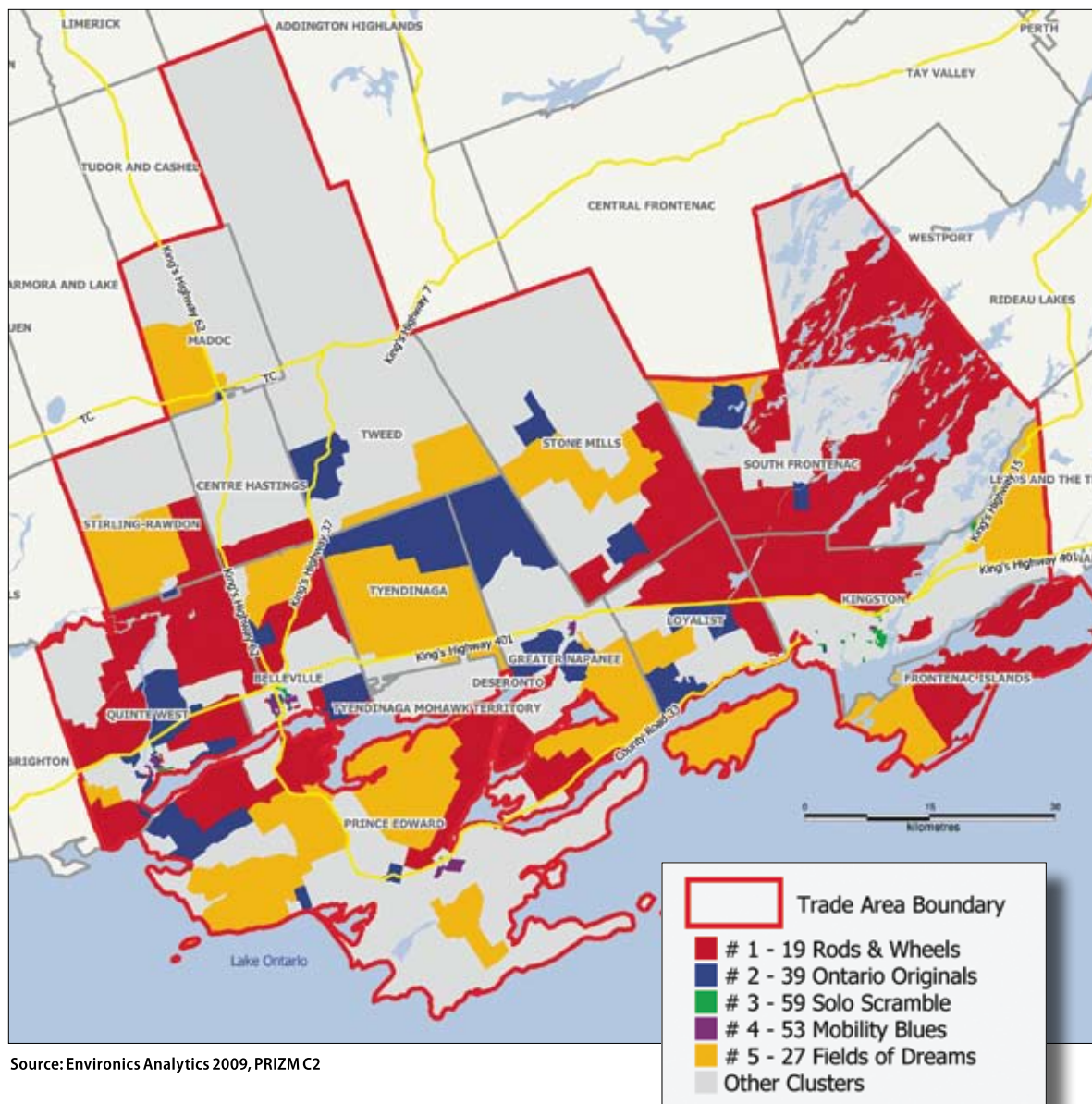
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Source: Environics Analytics 2009, PRIZM C2

EAST FACTS

Belleville

- ▶ The City of Belleville, enlarged by an amalgamation with the Township of Thurlow, and the annexation of a portion of the City of Quinte West, has a population of approximately 46,000 people, based on the 2001 census.
- ▶ Belleville is the largest urban centre in a much larger market area generally known as the Quinte Region. This area, which extends approximately 25 miles in all directions from Belleville's City centre, has an estimated population of approximately 173,000 people.
- ▶ The City's population is projected to increase by 7,500 people by 2021 to approximately 54,000 inhabitants, a growth rate of roughly .7% per year.

REGIONAL REPORT from page 12

more of an educational process here. Most people don't even know what variable data is because they haven't had the experience with it."

William Hughs of commercial printing house PrintFusion Inc., agrees that Kingston is still somewhat of an unsophisticated market when it comes to direct marketing.

"The biggest challenge we face is that our customers don't know about the value

of targeting so data is always an issue," he says. "We have variable data capabilities but Kingston businesses don't seem to have the marketing sophistication they need to collect to data."

But there is hope. According to Hughs, there is still a huge portion of the marketplace in a small community like Kingston that will allow marketers to take advantage of basic segmentation.

"We need to educate and make it affordable for smaller business," says Hughs, who adds that those small businesses make up the bulk of his business.

Hughs believes so strongly in the future of the DM industry in Kingston that he has helped to form the Kingston Media Marketing Group, a collection of creative, production and academic professionals getting together to form Kingston as a regional cluster.

"We realized that we had a vast amount of talent here and we needed to build it up to create opportunities. Sometimes the larger companies decide that if they have a head office here and they want something really good done in terms of DM then they have to go to Toronto. If we could have a group or a network that worked in unison to market the capabilities that are here then we can focus on keeping business in town."

Kingston, says Hughs, has a disproportionate number of large institutions and a disproportionate amount of small businesses so there is a massive amount of opportunity in the city in terms of small business if DM companies can come up with a DM product for the smaller business client.

"I don't know if this is an exciting region in terms of DM but I do think it is a promising one," he says. **DM**

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A dramatic sky with sunbeams breaking through a large, dark, stormy cloud. The sunbeams are bright and radiate from the top center, creating a strong contrast with the dark, heavy cloud below. The sky transitions from a deep blue at the top to a lighter, hazy blue near the horizon.

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INTHEMAIL

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from: anywhere
to: anyone

Rallying corporations to the cause

Terry Fox Works shows giving can happen in the workplace *By Sarah O'Connor*

Ever since his legendary Marathon of Hope in 1980, Terry Fox has held a special place in Canadian hearts. Inspired by his heroism, The Terry Fox Foundation has raised over \$450,000,000 in support of cancer research and recently launched a new program, Terry Fox Works, to help engage the corporate sector in their cause.

Most Canadians who are in their forties or older have personal memories of Terry Fox, whether they recall him running through their town or just seeing him on the news, but even those who were born after his death have grown up participating in annual Terry Fox Runs through their schools. The foundation works hard to maintain this connection and create opportunities for people to stay involved at every stage of their lives.

"Terry Fox events have an underlying policy of being non-competitive and family oriented," explains Bruna Raimondo, Special Projects Manager with the Ontario branch of the Terry Fox Foundation. "There's no participation fee, there's no minimum pledge. Anyone can get involved regardless of ability, age, or economic status."

Terry Fox Runs are organized by an extensive grassroots network of volunteers across the country, supported by a national staff of just 33 employees. This helps ensure that 87 cents out of every donated dollar goes directly to fund cancer research.

Although the foundation welcomes corporate donations and company-sponsored teams of walkers or runners, unlike the vast majority of modern charities they do not offer corporate sponsorship opportunities.

"Terry himself was not a big fan of corporate sponsorship and it's written right into our policies and guidelines that there are no corporate sponsors," explains Rhonda Risebrough, National Coordinator of the Terry Fox Works program.

A new way to give

As part of the 25th anniversary of the Marathon of Hope in 2005, the foundation launched the National School Run Day. While schools had always hosted annual runs, this was the first time that they took place on the same day all across the country. The program was a tremendous success, and it inspired organizers to come up with a similar offering for the corporate sector.

The Terry Fox Works program was launched as a pilot project in Calgary in 2006, and implemented nationally in 2007. The premise is "A day for employees to raise funds for cancer research at their workplace," and volunteers are encouraged to organize fun fundraising events for their colleagues to participate in, ranging

Terry Fox Works

Host a fundraising event at your workplace or in your community on Friday, September 11th. With over 106,400 Canadians being diagnosed with cancer every year, cancer touches all of us—including our coworkers and their families. So join us... TERRY FOX WORKS!

Featuring: **TERRY FOX WORKS GREAT CANADIAN HEADSHAVE**

What can we do to raise funds?

Our Terry Fox Works resource kit is packed with fun ways to not only raise funds, but ensure your employees will have fun doing it!

- Participate in the Great Canadian Head Shave. Last year, 1700 Canadians helped to raise more than \$1.8 million in Terry Fox Works donations by losing their locks at workplace or community head shave sites.
- Gather prizes and organize a silent auction.
- Let's Eat! Organize a lunch, barbecue, company picnic or bake sale.
- Double up! Many companies will match their employees' donations.
- Who's Who in the Zoo? Have a baby photo contest - donate to vote.
- Dress Down! Make a donation on Casual Fridays.

How much does it cost to participate?

There is no cost to participate. Terry Fox believed in making our events open to everyone.

How much do we have to raise?

There is no minimum amount required to be raised. Terry Fox asked for a dollar from every Canadian back in 1980.

What support is available?

We will provide you with posters, pledge sheets, online registration and pledging, an e-newsletter of tips and all of the guidance and support you need to put on a great event.

Does what we raise really make a difference?

Yes. The Terry Fox Foundation raises funds for innovative cancer research on all types of cancer. Over the past two decades, Terry Fox Foundation research grants have directly contributed to most of the major research breakthroughs in Canada. In October 2007, the Terry Fox Research Institute was created to bring together researchers in a new collaborative effort to expedite results.

The Terry Fox Research Institute

Our vision at the Terry Fox Research Institute is to improve significantly the outcomes of cancer research for the patient by having teams of academic and clinical researchers work completely in concert with one another sharing insights and knowledge and discoveries all with a focus to improve patient care by quickly generating practical outcomes from their research. TFRi funds and manages research projects that link hospitals, cancer organizations and universities together provincially and nationally.

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Friday, September 11, 2009 Register online at www.terryfoxworks.org, call us at 1.888.836.9766 or complete this form and fax to us.

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The Terry Fox Foundation
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THANK YOU FOR YOUR INTEREST!

ABOUT THE CAMPAIGN

Client:
Terry Fox Foundation

Campaign:
Terry Fox Works

Agency:
Created In-House

The core piece of the package is the Terry Fox Works brochure, which was designed in 2007 and has undergone only minor tweaking since. A personalized letter of introduction invites companies to get involved in Terry's cause while another sheet, entitled What Sets Us Apart, explains what happens to donor dollars. A list of fun fundraising ideas is intended to spark the imaginations of would-be volunteer organizers, and the 2009 Terry Fox Works registration form rounds out the package.

"We have a designer who designs our promotional materials but everything else is done in-house," Risebrough explains. "It comes back to keeping everything as low cost as we can. And so we rely on the talents within our organization to come up with all of our marketing campaigns."

"Every region, every provincial office will select their own target list in terms of companies they want to send this to. We do a big cross-section. We send it to small businesses, franchises, large companies, but that's determined on a provincial basis."

In keeping with the Foundation's grassroots approach, only about half to three-quarters of these packages are actually mailed. The rest are sent to volunteers, who are then free to choose which companies they would like to pass them along to.

Full steam ahead

Although the program is still in its infancy, it is already enjoying consistent success.

"This campaign has raised a million dollars each year in the three years we've

"It's been a challenge to try to let people know and let companies know that there is another option for them. They can do their own fundraising event in-house to raise funds for cancer research."

from head shaves to barbecues to by-donation casual Fridays.

Spreading the word

"Traditionally people think of The Terry Fox Foundation as being synonymous with The Terry Fox Run," says Risebrough. "It's been a challenge to try to let people know and let companies know that there is

another option for them. They can do their own fundraising event in-house to raise funds for cancer research."

The majority of the foundation's marketing, including their posters and website, is designed to encompass all three events, but because the Terry Fox Works program is so new it merits its own direct marketing campaign.

Approximately 15,000 packages are printed annually, with 4,000 each going to Ontario and Quebec, 2,000 to British Columbia, Alberta and Manitoba and the rest distributed amongst the smaller provinces.

"The Terry Fox Foundation is largely provincially driven, especially in terms of our corporate market," says Risebrough.

been doing it and it's been growing every year," says Risebrough. "We know that the program works and that people are really happy to have a new way to support the Terry Fox Foundation." **DM**

Sarah O'Connor is a Markham-based freelance journalist. She can be reached at (647)261-2260 or sarahaconnor@gmail.com.



DIRECT & PERSONAL

by Billy Sharma

Christine Foisy-Monk

The Associate Director of Development at Covenant House has made a covenant to help protect and safeguard homeless youth

Christine graduated from Wilfrid Laurier with a business degree but the business she really relishes is helping make a difference in others' lives.

What I admire about her is her dedication to Covenant House. She has worked there for 19 years.

There is nothing pretentious about her. I am sure that like many others who become successful in their jobs as fundraisers, there is always the temptation to move. I am sure she must have had

"Not long after I took the job, the Manager who hired me left. I let it be known that if there was more I could do to help out, I was willing. Within a year of being hired, I became the Direct Marketing Supervisor. Over the years I took on bigger roles, which included other fundraising departments."

She quickly learned and enjoyed the fact that direct marketing was a measurable medium and she could tell if she was doing a good job or not. And boy was she ever! To date she has helped raise

to ensure success in DM fundraising was to get more involved with the data, so she concentrated on that segment.

"I think data is the key element to campaigns. You can have a great story to tell but if you aren't speaking to the right people in the language that they relate to and if you aren't asking them to do what they're capable of doing, you won't be as successful. You need to understand the database you've got and how to maximize your returns.

"Over the last five years, I have spent

There are a few other things Christine enjoys when she is not working. "I'm an avid curler and have been doing it for about fifteen years. I play in a mixed league as the lead. This past spring we made it to the playoffs but lost in the finals.

"I love to go to the gym and I walk to and from Union Station to College Park every week day. I also love reading mysteries – my favourite author is Janet Evanovich.

"I've always done volunteer work. In the past I've been on the Board of the Brampton Library, on the Executive

"Friends like Neil Galliford. He has always been someone who is willing to help and give me advice when I needed it. In my career, Josie do Rego has had a huge impact on me. Josie is my current boss – the Director of Development & Communications at Covenant House. Although we've only worked together for the last five years, she has helped me stretch as a fundraiser and has given me many opportunities, including my latest challenge to help build our planned giving and major gifts departments."



many opportunities to do so, but has firmly resisted them all.

As she said, "I came to realize very quickly that there were two things that I loved about my job. The first was being at Covenant House. Every day I see the kids that I am helping. I knew I am making a difference in their lives. Even though the needs of homeless youth are greater than ever, I know that I'm one part of a tremendous team of people who are providing hope and opportunity to kids who may not have anywhere to turn.

"It didn't take me long after working at Covenant House to realize that the fundraising area was where I wanted to be and I would probably always want to work in it."

Born in Iroquois Falls and raised in Timmins, Christine graduated with a business degree hoping to work in the marketing field.

"I worked for eight months as a Marketing Coordinator for a small manufacturing company and then got laid off," she admitted. "One day I applied to an ad in the paper looking for a direct marketing assistant. Although I had studied marketing as part of my degree, we had never touched on direct marketing. It was a job in marketing and I needed a job. That job was with Covenant House.

over \$160 million for Covenant House.

"In particular, I'm very pleased about the monthly giving program I initiated over 12 years ago: all the planning that went into the program; how we were going to market it to our donors, etc. I remember thinking that if 20 people signed up, I'd be thrilled. We had about 250 people sign up the first time we offered the program. This initiative accounted for over \$2.8M our last fiscal year," she told me proudly.

"I love both the art and the science behind putting campaigns together."

"I think data is the key element to campaigns. You can have a great story to tell but if you aren't speaking to the right people in the language that they relate to and if you aren't asking them to do what they're capable of doing, you won't be as successful."

What I find remarkable about Christine is that for a person with no prior training in direct marketing, she did something really clever – she focused on the data. We all know that talking to the right people accounts for over 50 per cent of the success of any direct marketing initiative. Every direct marketing book will attest to this fact, yet few people heed it.

She quickly realized that the best way

a great deal of time looking at data and trying to take full advantage of the responses and average gift we get from donors. Based on research we had, we did appeals where we asked for 5X what the donor last gave and we were very successful. One of those campaigns generated over \$160,000 from about 1300 donors," she said with a smile.

The other remarkable thing about Christine is how closely knit her family is. She married Bruce Monk thirteen years ago. She met him at Covenant House. They have a seven-year-old son named Brandon.

After her two brothers, Marc and Roger left to go to university, her parents knew they weren't coming back to Timmins so they moved south to Brampton and eventually everyone in the family moved there to be close to each other.

"I'm happiest when I'm spending time with my son, husband and extended family. I'm very much a homebody who enjoys being around family and friends," she said.

of the CMA's Fundraising Council, run fundraising events for other non-profits, and canvassed door to door. Now volunteering centers around my son Brandon. I was treasurer of his co-op nursery school for two years and ran fundraisers for them. Currently I'm manager of his baseball team, a volunteer in his classroom and have sat on the parent council."

And oh yes, surprise of all surprises, she is a secret admirer and fan of wrestling. She enjoys watching one of her favourites, 'Triple H'.

"My parents, Marc and Marielle, were a big influence in my life. They always made me feel like I could do anything I wanted. They encouraged me to go to university and experience life even though neither of them had that opportunity. They wanted only the best for me."

Christine feels that she been fortunate to have some good friends and colleagues who have helped her.

After eighteen years of managing the Direct Marketing Department along with different departments along the way at Covenant House, last Fall Christine asked for a new challenge. She now oversees the Special Events, Major Gifts, Planned Giving and Corporate & Foundations Departments.

"I love hitting targets or learning something new. I also get great satisfaction from seeing my staff grow in their jobs. I get annoyed with people who won't try new things or people who say I tried that once and it didn't work but don't realize that times have changed since the initial test and it's worth re-examining," she concluded.

As I left the historic building after the interview, I couldn't help thinking back to the one project that I had worked on for Covenant House. It was in the early '90s and I was responsible for initiating a club called 'The Good Samaritan Club' which I'm told is still in existence and has been very successful for them.

I felt proud and smiled when I realized I had just interviewed the modern personification of a 'Good Samaritan'. **DM**

Billy Sharma is president and creative director of Designers Inc., Toronto. He can be reached at 416-203-9787 or by email at: designersinc@sympatico.ca

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Shoeless Joe's gains access to real-time customer data

New FACES Mobile Consumer Survey System supports more strategic decision making for marketing and real estate

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To optimize sales, we realized we needed to expand into new markets and reinvent Shoeless Joe's as a sports-themed casual dining restaurant with a bar element. As a result, we've set out to open eight locations this year and an additional 10-15 restaurants next year. To achieve this aggressive expansion strategy in a tough and competitive market, we work with Pitney Bowes Business Insight's (PBBI) location intelligence solutions and consulting services to acquire the insight needed to accurately position Shoeless Joe's restaurants based on market and consumer trends.

Shoeless Joe's is the first company in Canada to implement FACES (Faster, Accurate, Current Economical Surveys),



KnowYourFaces division, FACES provides restaurant and retail companies with customizable surveys to help them capture customer data more quickly and readily utilizing digital technology—electronic handheld devices such as PDAs or Smartphones. Equipped with customized FACES consumer survey software and PBBI location intelligence solutions, FACES helps Shoeless Joe's address the industry-wide issue of capturing consumer data by making it a more accessible, efficient process.

With FACES, Shoeless Joe's can routinely make adjustments to its survey questions, enabling us to keep our target customer profile up-to-date and readily available when making important decisions, such as where to open a new restaurant or where to aid in local marketing efforts. PBBI enables FACES to geo-code the customer's point of origin using a Canadian post code or point on a map, drill down to the neighborhood level and generate an in-depth customer profile based on lifestyle characteristics and demographic attributes. Working with PBBI, Shoeless Joe's has the tools to analyze the competition, gain a better understanding of its target customer and carefully evaluate potential areas for expansion.

For the initial project, Shoeless Joe's selected four restaurant locations to implement FACES. The consumer survey includes 10 questions. On busy nights, one to two staff members are responsible for going table to table and facilitating

the survey using the electronic mobile device. Shoeless Joe's plans to implement FACES in additional stores and also plans to customize and add new questions to the survey to gather more targeted information about its customers.

Using FACES helps Shoeless Joe's create a more streamlined process for collecting customer data, cataloguing it in a secure database, conducting sophisticated analysis and delivering actionable insight to help the company make more informed decisions regarding real estate, marketing, merchandising and branding. As a result, we have the power of consumer insight at our fingertips, which helps ensure our marketing and advertising dollars are reaching our target audience.

Shoeless Joe's Limited will continue to rely on this valuable customer data as the restaurant chain further repositions itself in the market and continues to open new sites. This data is used to constantly update our consumer demographic profile and thus ensure that the brand continues to hit the mark. As a company nearing 25 years old, we have older sites that need to be revived to ensure consistency with our brand. As we continue to add new sites, FACES will play an important role in collecting this data and feeding it back into our market optimization model. We will continue to use this data to drive the Shoeless Joe's Limited brand forward.

Joel Friedman is senior vice president of Franchising and Real Estate at Shoeless Joe's

“Traditionally, restaurants have relied on the time consuming and challenging process of using pen and paper to conduct customer surveys.”

a new mobile consumer survey system, provided by PBBI and LandPoint Systems, Inc. FACES enables us to collect customer data at the point of experience, such as while patrons are awaiting their bill.

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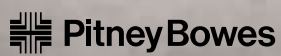
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