DIRECT MARKETING

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Know thy donor

The importance of CRM in the nonprofit world

The Salvation Army Red Kettle drive is a well-known sight during the holidays but now donors can also give through the 'Online Red Kettle', thereby opening up a whole new level of customer engagement.

By Tiffany Crumpton

The concept of CRM (customer/constituent relationship management) and applying the principles and best practices of CRM is crucial in the nonprofit space. Many of the core principles of CRM solutions are both applicable and relevant within the nonprofit world—such as tracking individuals and organization record types, recording the interactions between the organization and those constituents, and gathering a view of the historical information about their behaviors and preferences.

The hallmarks of nonprofit-specific CRM start to diverge slightly from this traditional CRM path in several key areas. One of those areas is the need for organizations to more deeply analyze the detailed connections between constituents and how they interact with one another. Relationships are key in the nonprofit world. The relationship between a constituent and nonprofit organization is often more intimate than between a customer and a bank—they feel more connected, committed, and part of that organization's

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FAST forward

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COLUMN

Editor's Letter

Amy Bostock

A good CRM strategy is the backbone of any business

Last Friday night at 9:30 our hot water tank malfunctioned. A frantic call to Reliance, a quick conversation with a pleasant and helpful CSR and voila! An appointment was made for 7 a.m. the following morning to have someone out to fix it. In fact, while I was still on the phone with Reliance, my other line beeped with an incoming call from the repair guy. Now that's service.

Wikipedia defines CRM as "a widely implemented model for managing a company's interactions with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support. The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients to return, and reduce the costs of marketing and client service."

I define it more simply – they fixed my hot water tank in less than 24 hours. Reliance has a CRM strategy in place that makes me happy to be a customer and want to refer them to others.

In this issue of Direct Marketing we focus on the changing role of CRM in today's market. We'll hear from companies like Jacada, Kenna, DMTI Spatial, SWC Technology Partners and Bluewolf and learn about everything from the social side of CRM to the importance of making your customers believe that you really care.

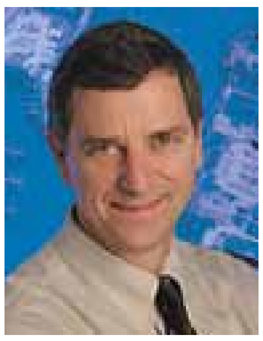
Our cover story takes a slightly different approach, looking into how and why CRM is so important in the not for profit space and how knowing thy donor can help with both donor acquisition and retention.

On the theme of knowing your customers we also have Doug Norris from Environics Analytics in this month to talk about how direct marketers can use the newly released Census date to better know and target their audience.

Cheers,
Amy

Directives

Your CRM software is only as good as the information inside it



John Fisher

You just bought an expensive Italian sports car. Are you comfortable filling it with low octane gas? Or would you spend more to ensure you're powering it with high octane fuel? The car would still run with lower quality gasoline, but its performance would suffer.

CRM tools are similar to sports cars. They're expensive and powerful, but they're limited by how they're powered. Many companies spend thousands of dollars annually on their corporate CRM system. It's the engine that drives them. As a marketer, you rely on it daily. Yet with such a large spend and high importance, many organizations don't spend enough effort ensuring the quality of information captured inside.

Customer, prospect and partner information is the fuel of the CRM. Poor data quality leads to communications breakdowns, slower transactions, ineffective analysis and wasted time. Studies show that inaccurate information can result in a 30% revenue decrease. With interconnected systems, CRM data flows into other tools including financial and marketing systems, multiplying the impact of incorrect information.

There are a number of causes of poor quality data. Manual user errors lead to missing or incorrect information. Combining multiple sources of data results in inconsistencies and a lack of standardization. Aside from customers moving, address information, such as postal codes, street names and municipalities, changes because of population migration and other factors. Research shows that more than 3.3 million Canadian addresses are affected each year due to postal code and municipal boundary updates.

To counteract incorrect or incomplete data, some organizations have data quality initiatives, but these don't always extend to the whole database. Management has an expectation that sales teams will keep contact names, phones, emails and job titles updated, and often assume that's all the attention required. In today's electronic-driven society, one element that's still important often gets ignored: mailing address.

Physical mailing address plays a key part in business operations, and incorrect data results in costly consequences. For example, invalid postal information might mean that a customer fails to receive an invoice, delaying payment. Poor quality address information could also result in an organization shipping products to the wrong customer location, or not shipping anything at all. The costs of rectifying billing and shipping errors often exceed the initial cost of the product you provide.

What about the money spent on direct mail that never gets delivered? With creative mailing campaigns that often rely on expensive pieces to grab attention, the costs of poor quality data adds up for every incorrect, undeliverable address. Duplicate addresses also pose a problem as they cost extra money and potentially damage your credibility with customers when they receive duplicate mailings. As a marketer, ensuring your organization or client maintains accurate address information is extremely important.

How does your organization ensure it's working with the highest quality data in its CRM system? You can implement data management policies to ensure consistency and completeness when information is added to or updated within your database. Since policy can only influence so much, and you'd prefer your sales team spend the majority of their time selling, specialized software, especially for address data, is often required.

There are a number of data quality solutions in the market, but not all are created equal. Some tools specialize in de-duplicating contacts, while others attach missing attributes. Some services clean up data as you enter it, while others can cleanse your entire database at the same time. You need a tool that allows you to maximize the value of your address information for better business decisions and more efficient operations, while allowing your internal resources to focus on the most profitable activities. I believe a good tool should recognize incomplete data, correct inaccuracies, attach contextual details and identify duplicate records. It should offer a simple interface and pull information from its own comprehensive, regularly updated and accurate reference database.

Once address data is clean, an additional benefit is improved analytical capabilities. Correct, complete data allows you to segment and target customers more effectively. Understand how close a prospect is to a retail store or overlay spending patterns in a specific area with customer addresses. The possibilities are endless.

So what am I trying to say? A CRM is a powerful tool, but it's only as valuable as the data inside it. Keep your CRM data updated and accurate to maximize efficiency, reduce time wasted, increase profitability and gain better business insight. There's great software out there to help you. Don't spend on the sports car and skimp on the gas.

John Fisher is the CEO of DMTI Spatial. You can visit www.dmtispatial.com to learn more about the value of address quality and investigate the various ways we can help you improve the data stored inside your CRM.

> *"The shifting consumer landscape is enough to overwhelm even the savviest retailer. But with good data and marketing analytics, the path to success can become easier to navigate—during the holidays and throughout the year."*

Coming in the Ocotber issue of *Direct Marketing*

Print Response issue

Does it seem like the print industry continuously bounces back from its predicted demise? Do you ever wonder how printers stay relevant in an increasingly digital market? Our October issue addresses these questions and more.

Regional Report: Ottawa

Two days and fifteen interview later I think we have a pretty good story to share with you about how things are going in our nation's capital. Hear from Ottawa DM suppliers about what it takes to stay competitive in this booming market.

Things that DON'T fit in an envelope

There are some really cool and innovative dimensional mail pieces out there right now. A renewed interest in these multi-dimensional pieces is sparking some great new campaigns and we're going to show you some of our favourites.

in this issue

departments

advertisers

resource directory

CRM

The future of marketing: the informed marketer

Marketing fads come and go. Banner ads, search engine optimization, pay per click schemes and social media have all been the darling of marketing managers in recent years.

One trend in marketing that is here to stay is what I like to call the "Informed Marketer." The rapid development of new marketing channels, the exponential growth of accessible data and new technology tools for marketers are fueling a new breed of marketer who is more knowledgeable than ever before.

Informed marketers are leveraging this knowledge to better understand customer needs and preferences and to create more personal relationships with the individuals and companies they touch.

Over the years I've noticed that there are certain traits that informed marketers share:

Strategic, not tactical, thinking. Informed marketers take a broad view of marketing that's not bogged down in the tactics of executing daily campaigns, meeting specific metrics, and checking to-dos off a list. While marketers have many things to do in an impossibly limited amount of time, informed marketers act with knowledge. They are privy to and understand corporate goals and formulate marketing strategies that align with these goals. In order to drive value to the organization, they develop integrated marketing strategies to drive stronger, more engaged prospect and customer relationships. The key is understanding market dynamics, corporate goals and the customer.

Customer lifecycle approach. The informed marketer understands the inherent weakness of the marketing funnel: it only targets individuals who enter the funnel through marketing efforts and ignores other sources of revenue. Informed marketers accommodate other revenue drivers, such as repeat business, customer referrals, upsells and cross-sells. Today, most sales that close are not sourced from marketing, yet companies continue to allocate the majority of their marketing spend on filling the funnel with new leads. Focusing on the customer lifecycle–the path a customer takes from initial contact to having a fully-engaged relationship with your brand–enables the informed marketer to communicate with customers across all channels at every stage to further engagement and drive revenue.

Ability to leverage technology. The informed marketer understands that technology is an enabler of good marketing. Informed marketers embrace technology and also understand how to use it to guide marketing strategy. They use technology to understand the customer, evaluate where customers are in their relationship with the brand and to identify their needs and wants. These findings fuel the informed marketer's messaging and communications, which technology automates.

There are five groups of technologies that enable the informed marketer to reach prospects and customers in a way that turns these relationships into revenue-generating streams:

1. CRM solutions: Campaigns are only effective if powered by quality data. Informed marketers use CRM solutions to capture relevant information on prospects and customers, and to track how the company interacts with them.
2. Analytics tool: An analytics engine provides important insight into the people a brand

‣ *Continued on page 23*

Business as usual is not an option.

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Think. Invent. Engineer. Transform.

CRM: If it's not social, it's not effective

By Corinne Sklar

CRM systems, which have given companies centralized access to customer account information, purchase history and contact information, were certainly a giant leap forward when they hit the scene. But today's customers have higher expectations than those of the past and, thanks to social technologies, unprecedented potential to impact your company for good or ill. These mobile, connected, social customers now interact dynamically with your brand. When they have a bad experience, broadcasting it through a social network and switching to a competitor is as easy as a few keystrokes (a recent Pew study shows that a simple Facebook post can reach well past 150,000 views).

According to BIGresearch, 85% of your business could be lost due to poor customer service; conversely, according to an American Express report, 73% of customers have spent more money with a company because of good customer service. All of this makes taking a customer-focused approach of paramount importance in designing your CRM strategy. For your company to thrive in such an environment, you've got to give your employees more than a sales/complaint history if you want to keep your customers happy, your CRM has to "go social."

> *"While customer service of the past engaged customers on the company's terms, Social CRM allows you to serve your customers through channels which they choose and feel comfortable in.*

Social CRM - "Beyond the Valley of the Apps"

Social CRM isn't an application, or even a system of applications. Rather, it's a combination of culture, technologies, people, and processes that empowers the enterprise with meaningful customer data, and the means to act on it. The fundamental components of a successful social CRM strategy include:

A culture that encourages and empowers employees to listen, engage, and respond to customer problems and desires through social media, collaboration, and even through traditional mediums

The ability to break through departmental silos and collaborate to improve each customer touch

A strong, central CRM system that provides a single view across the customer lifecycle, enabling a flow of data from all relevant social and mobile channels

As people, not just technology, change business, a leadership mandate to unite behind the needs of your customers

Unleashing the information flow: the only way to fly

My firm's co-founder Eric Berridge recently chronicled the shortcomings of traditional CRM by relating an experience in which United Airlines put its passengers in a position where they thought they might crash, and then failed to follow up with a single contact. Most likely this lack of attention wasn't deliberate, but rather a disconnect between those responsible for proactive customer follow-up and those on the front-lines. There's only one way to fly: give customer-facing employees your organization's full information arsenal.

A true Social CRM strategy redefines the prism through which a company views customer relationships. Beyond effective social media monitoring, social CRM requires people, processes, technology, and a culture that enable employees to collaborate and effect company-wide change based on customer ideas. As a case in point, last summer Airbnb got a crash course in the power of social media when a customer took to the web to complain about their apartment being vandalized. Their tepid initial response paved the way for the complaint going viral online.

The company not only learned from this experience, but took the opportunity to initiate the beginnings of a Social CRM strategy. Beyond taking customer complaints in social media more seriously, Airbnb has reshaped its creative process by listening to and engaging its customers and allowing them to take the lead in innovation, thus transforming the service from a house-sharing site to a global bazaar of travel-related services.

It takes a village

Once upon a time, a single customer service department owned the company's relationship with customers. Now every department shares that responsibility. Just as it takes a village to raise a child, so it also takes an entire workforce to win the hearts and minds of customers.

On the technical side, therefore, Social CRM requires socially configured platforms that allow your employees to engage customers and bypass corporate silos to collaborate with co-workers in other departments. Any employee that interacts with a customer should be armed with every bit of relevant information from each employee who plays even the smallest role in servicing that particular customer.

Small steps

Social CRM isn't a single system that you're going to implement in one fell swoop, but rather a consistent stream of small improvements and innovations. Don't, however, underestimate the value of each small step: according to SQM, a 1% improvement in first call response can drive more than $276K in annual operational savings. If this sounds far-fetched, consider that the ability to access a single piece of customer information in a crucial moment might make the difference as to whether or not your customer stays or switches to your competitor.

In a hyper-active business environment in which companies must constantly re-invent themselves to keep pace, Social CRM gives your organization the ability to listen, engage, collaborate, and respond to changes quickly. While customer service of the past engaged customers on the company's terms, Social CRM allows you to serve your customers through channels which they choose and feel comfortable in. Consequently, it allows you to gain a deep, early understanding of what they value, and drive both response and strategy through a customer-focused, rather than management-focused lens.

Corinne Sklar is VP of Marketing at agile business consulting firm Bluewolf, which helps companies leverage people, processes, and technologies for success in the increasingly rapid and erratic business landscape.

Reason to believe

If brands truly want to win the affection of customers, they must first convince them they actually care.

By Stephen Shaw

Consider what can happen today when customers feel abused.

A Canadian musician by the name of Dave Carroll had just landed in Chicago on United Airlines when he witnessed his prized Taylor guitar wrecked by uncaring baggage-handlers. Frustrated after nearly a year of begging for reimbursement, he composed a protest ballad called "United Breaks Guitars" and posted it on YouTube.

The video became an instant sensation, seen worldwide by 11.5 million people. The press joined in the public flogging of the airline, triggering a sharp drop in its market value. Hailed as a consumer rights hero, Carroll became a sought-after speaker, counseling his business audiences on how to avoid similar humiliation. The incident even gave birth to a new web service called Gripevine which serves as a clearing house for consumer complaints.

Airlines may be resented for treating customers like cargo, but telcos are vilified for behaving like profiteers. Like most publicly traded companies, their business model hinges on one objective: fast growth. Often that means luring new buyers with exclusive promotional offers – while denying current customers the same deal.

In a recent column ***Toronto Star*** consumer advocate Ellen Roseman slammed Bell Canada for behaving like a "sales culture gone wild", citing the endless litany of complaints she gets from irate customers, fed up with service runarounds, deceptive billing practices, price gouging, the difficulty of finding someone (anyone!) with the authority to fix a problem, and more. The other telcos were no better, she was careful to add, accusing them all of shoddy practices. Her screed spurred a wave of me-too grievances from customers, posted online for the world to see.

Thanks to social media, people are rebelling against corporate negligence – exposing injustices, ganging up on serial offenders, fanning the flames of protest - and there are now enough high profile lynchings (Dominos Pizza, Motrin, etc) to wake up the PR sentries. But even with consumer vigilantes storming the gates, waving their camera-phone evidence, marketers are careful to stay clear of them, too preoccupied with driving sales to pay much heed to the shouting in the street.

Of course, their insularity comes at a cost: a steady erosion of brand trust. Customers become cynical, their everyday experience at odds with the promises they hear. Sometimes that credibility gap is masked by apathy ('all telcos are the same') – but, more often, customers simply become mercenary, toggling between brands, their loyalty for hire, at least until a better deal comes along.

The solution is not to make scapegoats of the front line agents. Or rewrite the customer policy manual. Or cover up inferior service with a loyalty program. Or invest even more in CRM systems. With no place to hide, the answer must be more profound: taking stock of what the brand stands for – what it means to people – and whether anyone would care if it disappeared tomorrow.

Silent partner

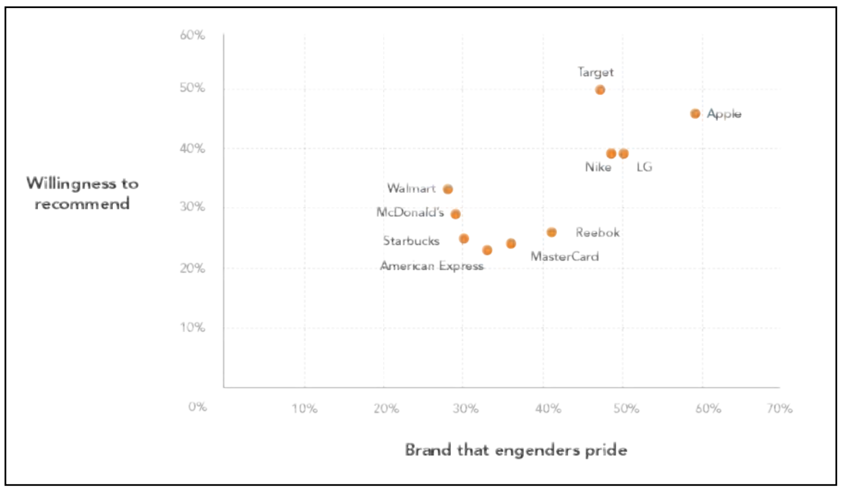
Winning the respect of customers is crucial. Even more than that - their affection. But that is only possible if they believe a brand actually cares about them. As Dave Carroll says, "Caring is the silent partner to passion".

Think of the most admired brands – every one of them makes a real difference in the lives of their customers, whether through simplicity and ease (Apple), choice and convenience (Amazon), speed and dependability (FedEx), quality and value (Target), or reliability and comfort (Hyundai). As a result, they have won a devout following of true believers – proud to call themselves citizens of the brand, convinced it makes their lives easier, richer, more joyful. And the most passionate believers see the brand as an extension of their own identity.

Listen to what this Apple store employee says: "When you're working for Apple you feel like you're working for this greater good." People believe that Apple enriches their lives – gives them the freedom to be more creative. And that love is felt the moment you step into its stores where adoring fans crowd around tables, gawking at the newest gadgets, helped by contagiously friendly staff.

Call it brand ethos: the guiding ideals that shape the behavior of a company. Ideals are essential to making a human connection with people. In fact, social psychologists now believe that moral attitudes largely define who we are – and that we are drawn to people who share our belief system.

Reasons to Believe



Brands that evoke pride in their customers are more likely to earn recommendations (Source: Forrester – Q1 2012 North American Global Brand Performance Online Survey)

Brand ethos should not be confused with corporate social responsibility (often just philanthropic wallpaper). A genuine ethos is a code of honour wrapped around an ennobling statement of purpose. And it is brought to life through a constitution which spells out the inalienable rights of customers. Instead of bowing at the altar of shareholder earnings, employees are mobilized to act in the interests of the greater good, seeing real meaning in their work.

Reason for being

According to Jim Stengel, the former Global Marketing Officer for Proctor & Gamble, brands with humanistic ideals almost always outperform their rivals by a wide margin.

"A brand ideal is a business's essential reason for being, the higher order benefit it brings to the world," he argues in his recently released book, ***Grow***. "It is the only thing that enduringly connects the core beliefs of the people inside a business with the fundamental human values of the people the business serves. Without that connection, without a brand ideal, no business can truly excel."

Proctor & Gamble's "***Thank You, Mom***" campaign during the London Olympics focused on its brand ideal - to improve the lives of mothers.

"We didn't sell them anything, we just connected with people," explains Mark Pritchard, the current Global Marketing Officer, while noting that the campaign drove a significant gain in favorability. All of the P&G brands are obliged to follow the corporate lead, seeking ways to help the communities they serve, and that goes for even the humblest products in the portfolio.

Nike is another brand with a clear purpose: inspiring the athlete in all of us. And that has elevated their brand strategy beyond bragging about their products. Through their Nike+ platform, they help recreational athletes get the most out of their activities, offering advice, content and tools, as well as sponsoring competitive events. An example is their mobile running app for smartphones which uses the GPS function to track the distance of a run and many other data points.

Outdoor clothing company Patagonia is a brand guided by ecological ideals, not only promoting the idea of sustainability but making it integral to their operations. That ideology extends to its relationship with customers. Founder Yvon Chouinard writes in his book ***The Responsible Company***, "How to gain a customer and keep one? First, make something or offer a service someone can use, for which satisfaction endures. Second, your company should romance, but not bullshit, the people whose business it solicits."

Moments of euphoria

What customers expect is value for their money. What they rave about is being valued. The equation is a simple one: give customers a reason to believe (the brand purpose) and then make believers of them (how the brand behaves). Not simply by reducing the chances of a bad experience - or making amends for mistakes - or answering the phones faster - but by creating moments of euphoria that live up to the ideals of the brand.

Reimagining the brand experience is the best way to do that: examining how a customer interacts with the brand across all touchpoints - and then dreaming up new ways to add value, especially if it improves everyday life: enhanced utility, relevant content, expressions of thoughtfulness, sincere conversation, a single point of accountability, price transparency, timely help, unexpected rewards - all designed to create an indelible impression: this brand knows how I feel - it anticipates my needs - it actually cares about me.

Marketers are eager for customers to feel that way - to truly love their brands - but are held back by a limited mandate. They own part of the brand experience, but not all of it. And while they may be responsible for the insight function, theoretically putting them closer to the customer than anybody, that knowledge is rarely used to rally the organization around a 'customer-first' agenda. When they hold a mirror up to the brand, they prefer to ask: "Who is the fairest of them all?"

Taming a sales-first culture is tough - recall the Bell example - but brands have no choice: either they yield to the rights of customers, or they can expect to see their reputation trashed every time they stray offside.

Road to redemption

Hitting the reset button is impossible without the blessing of top leadership. Grassroots movements are easily cowed by corporate antibodies resistant to change. The road to redemption must start in the boardroom - not by cooking up a new mission statement (a who-really-cares enunciation of imperial ambition) but by issuing an inspirational call to arms: here is how we will make the world a better place.

Defining that grander vision begins with an empathy exercise: looking at the larger milieu in which the brand exists – all of the intersection points with customers – their goals and hopes – the barriers to happiness - and then thinking: How can we play a broader role in improving the quality of their lives? How can we make them more feel more fulfilled? How can we show them we are on their side? Not easy when you consider how conditioned brands are to seeing customers as targets instead of people.

What emerges from this introspection should be a renewed spirit of invention. Even the makings of a new business model born out of a culture of caring. The best example is Amazon, renowned for being customer focused. "A big piece of the story we tell ourselves about who we are, is that we are willing to invent", Jeff Bezos told his shareholders last year. "And, very importantly, we are willing to be misunderstood for long periods of time."

For long periods of time.

That principle stands out in sharp relief from most corporations which have no patience for soft ideas with an uncertain payout. The business case for being more caring may seem abstract - and easily dismissed as utopian - except for one clear risk: a public backlash from customers angry enough to ruin the reputation of a brand.

Stephen Shaw is the Chief Strategy Officer at Kenna which specializes in helping marketers form more meaningful connections with customers.

Microsoft Dynamics CRM enables simple ROI calculation for print campaigns

Toronto Microsoft Partner, Atum Corporation's unique configuration techniques are simplifying ROI reporting using Microsoft Dynamics CRM 2011. In response to market demands for easier, faster and more accurate campaign-measurement capabilities, Atum Corporation is proving that ROI can instantly be determined by utilizing innovative reporting tools native to Microsoft Dynamics CRM. Marketing Effectiveness Reports are a stand-out feature of the system, providing the user with campaign results and trends in real-time, and with simplicity.

In particular, print campaigns have been notoriously difficult for marketing departments to monitor with precision – Marketing Effectiveness Reporting manages the entire campaign cycle using a familiar dashboard interface that ensures rapid user adoption and fast results. Introducing new software can often be disruptive to existing applications or technologies, accompanied by a laborious learning curve for primary users. The Microsoft Dynamics CRM installation is seamless with any other business application, and familiar to Microsoft technology users with an interface that integrates with Outlook and Microsoft Office.

Atum also shows users advanced functionality that optimizes Internet marketing campaigns and Email marketing campaigns, capturing the right information and delivering it directly to marketing teams to adapt at every stage in the cycle.

Rivalling major competition for market share, Microsoft Dynamics CRM has responded by developing a completely automated marketing workflow that reduces painstaking manual tasks that plague the marketing department.

John Posan, Director of Business Development for Atum Corporation, "Every Marketing department we've spoken to across the country is challenged to accurately measure and report on campaign ROI. Microsoft Dynamics CRM is a point and click dream for Marketers, making metric reporting absolutely effortless."

Atum Corporation has also developed a smooth software integration technique that will allow instant usability, and complete functionality at no cost to work flow. Data is easily accessible and managed via three flexible hosting options. Microsoft Dynamics CRM is offered over the Cloud, On-Premise or hosted on Atum's Virtual Private Server network in Toronto.

"It's easy to get started. There are no complications involved with the integration and no risk of conflicts with any other business applications. Microsoft Dynamics CRM is completely adaptable, and our team has the experience to tailor the perfect solution for Sales, Marketing or Customer Service requirements."

Providers are now developing innovative marketing functionalities within Microsoft Dynamics CRM that make it simpler than ever to measure and increase the effectiveness of marketing campaigns. Atum Corporation is committed to providing unique custom features that equip marketing departments with relevant information for the best ROI results.

Maximizing user adoption in CRM deployment

By Todd Wickens

Several best practices for encouraging CRM user engagement will promote long-term adoption of the platform. Complete adoption means the entire customer lifecycle can be managed through the solution, from initial outreach, through marketing, to end-user support. Adoption is not only vital for staff members and the continuity of data; it also is the ultimate driver of revenue and customer satisfaction.

Making a plan

To increase the odds of widespread usage, companies need to have a sustained adoption plan in place before launch. For some organizations, the use of a new CRM platform can be a significant shift in processes and even culture. Management first needs to tell staff that a change is coming and then provide the business case for the new system and what are the expected longer-term results. Some vendors will work closely with a company to help them educate staff and to generate excitement about the product. They might create customized videos or intuitive guidebooks to alleviate any initial concerns about the switch to CRM.

Firms that are working with a top consulting firm for implementation should feel the focus of the conversation is more about process than it is technology. A quality consulting outfit will focus initial conversations on what exact tasks and goals the sales, marketing and other teams need to complete on a daily basis. Company management and the consultants should present CRM as a tool instead of a task, and explicitly state the value statement before actual launch.

Adoption starts at the top

Once launched, the adoption of a CRM platform should be a top-down approach, meaning executive and manager-level staff need to be the frontrunners using the solution. If they are active users and participants they are not only leading by example, but are also able to describe and quantify the business value of the platform. One way of showing the inherent value is to encourage the management of data all in one place. In a sales environment, sales managers need to fully embrace the CRM to pull forecast reports and other needed data. Typical disconnects in some organizations find the sales manager asking for individual Excel sheets from each sales member that must then be aggregated. This is the type of situation that the right CRM solution should render obsolete, the double entry of information. Management needs to invest their own time in learning the system in order to have the trickle down adoption and resulting efficiency gains from their team members.

Another tactic to drive adoption is to introduce a phased approach, where an organization might offer the CRM to the department where adoption is likely to be highest. Once some "super users" are identified and encouraged, the company can develop usage cases to clearly show the value of the CRM platform to other departments.

Once launched, some staff members might complain there is not yet enough data within the CRM for them to actually do tangible work. Management needs things for the staff to complete right away. Creating a "competition" is a good tactic, especially in a sales setting where a level of competition already exists. Managers could offer coffee gift cards or some other reward for the sales staff who inserts the most prospect customers into the system within a certain time frame. Or marketing staff bonuses could be held back until all campaigns are placed into the CRM tool.

Choosing the right CRM to drive adoption - Salesforce.com and Microsoft Dynamics

For the business that needs several integrated apps in order to conduct core business functions, Salesforce.com is leading the way with their own app marketplace and exchange. Microsoft Dynamics also is driving forward with app integration, but it does not yet have the breadth found with Salesforce.com. They have very quickly opened up to the usage of third-party apps which can add more value to marketing, sales, or service. For example, CRM tools usually have basic functions for email campaigns, but are mainly relying on third-party partners such as Marketo which allows the business to create campaigns, track customer behavior, and other functions.

Salesforce.com can be expensive, with user fees ranging from $65 to $250 per user per month, but it is embracing innovation and offers advanced features that bring value. Alternatively, Microsoft Dynamics On Demand version is only $44 per user per month.

Both solutions are becoming more accepting of the bring-your-own-device (BYOD) trend, with Salesforce.com users able to access any needed CRM data through their phone. This access is free, but a top tier subscription is required for customizations. Microsoft is announcing enhanced mobile capabilities in Q4 of this year, and access will likely have a $30 per user per month charge.

Microsoft Dynamics is a winner when it comes to on-premises capability (not an option with Salesforce.com) and document management capabilities which are managed through SharePoint.

Salesforce.com and Microsoft Dynamics are also moving towards becoming part of the "social enterprise," where key business applications are built to allow easier sharing and team collaboration. Such features can drive adoption, but there are some hurdles, especially with sales teams that might compete with one another. With either solution, the rate of adoption still mainly rests with the efforts of individual users to find value and share their positive experience with others.

Todd Wickens is an Engagement Manager for Customer Relationship Management (CRM) solutions at SWC Technology Partners, Inc. He currently leads monthly educational events focused on choosing the right CRM system to effectively manage the customer lifecycle – from marketing to sales to service. Prior to joining SWC, Todd spent over 15 years leading cross-functional teams in consulting, sales, marketing, organizational development and customer service functions.

FEATURE

The data discovery

Investing in customer insight

By Richard Boire

In many of our engagements with new clients, the old Donald Rumsfeld phrase of 'We don't know what we don't know" is very applicable as these organizations commence their journey into database analytics. In these situations, there is no clear definable objective or goal when undertaking these projects. In fact, these companies look for outside consultation in the creation of a roadmap which represents both strategy and tactics on what database analytics projects they should undertake. These types of exercises don't yield an immediate return on investment which can be a barrier to many organizations who fail to appreciate the long term benefits that a data discovery can yield. It is often very difficult to convince these organizations of the longer term benefits of database analytics as they are focused on achieving short-term gains to resolve an immediate business need. In many ways, this is the true challenge of a data discovery as we seek to strike a balance between the longer term analytics needs versus establishing an immediate ROI.

In undertaking these types of projects, the only common feature is the open-ended nature of the assignment as an end solution to solving a specific business problem is not necessarily our goal. Instead exploration and discovery is the intent of the project with the goal being to build an analytical roadmap. Yet, even open-ended projects require some process in order to provide guidelines and steps which are necessary for its success. Typically, this process involves four steps which are:

- Preparation
- Data Audit
- Preliminary Analysis
- Recommendations

Preparation

The first stage of this project represents the portion of the project where the analytics practitioners attempt to increase their knowledge of the client's current business and results. In data mining and analytics, all experts agree that analytics projects require both domain knowledge and data mining expertise in order to really optimize a given solution. Domain knowledge is specific knowledge which pertains to that business. It represents knowledge which is both unique for the industry sector (finance, retail, etc.) of the client business but also knowledge which is unique for the mechanics of how that client business runs. The preparation stage of the project allows the practitioner to increase their domain knowledge of this business. Of course, the domain knowledge of the practitioner will never be as exhaustive as the client but the objective here is to obtain an adequate level of this knowledge in order to conduct an effective discovery exercise.

The initial tasks here are to conduct extensive interviews with key business stakeholders from marketing, I/T, analytics (if there is an area), finance, and the executive depending on availability. During these meetings, key business issues and challenges are identified as well as an understanding of what data is available. Business reports/analyses or any other documents that provide results and meaningful information about their business are shared with the practitioner. At the end of this stage, a data extract is then requested which consists of all the files and fields that will be required for the remainder of this project.

> *"Yet, even open-ended projects require some process in order to provide guidelines and steps which are necessary for its success.*

Data audit

Data audits have been discussed in the past and are a core prequisite in any data discovery exercise. At this stage of the process, the practitioner attempts to become "intimate" with the data which describes a much stronger relationship with data than the standard phrase of " data knowledge".

Once the data extract is received by the practitioner, the data is then loaded into their system whereby standardized reports are produced that essentially provide the following results:

- Data completeness or coverage as indicated by the number of missing values in a variable
- How do values or outcomes distribute within a given variable
- Data inconsistencies and data gaps. Do values change overtime and are there groups of records where certain data anamolies exist

From these results, the quality of the data can be assessed in terms of determining what information to use in a future analytics exercise. The results also yield files would be linked together since one objective in this phase is to create an analytical file where we have one record per one customer. With these links determined on how the analytical file would be created, the variable creation exercise can commence. This represents the most labor-intensive portion and arguably most important component of the entire discovery process as it is here that meaningful variables are created which can be used in any future analytics exercise.

Besides the exhaustive reports from the data audit, a summary level report is produced which indicates the major findings from the data audit. This would indicate what the current gaps are within the data environment and how it might be improved. Some of these gaps could to some extent be filled by data overlays. Good examples of this are Stats Can data for business to consumer type analytics and perhaps Dun and Bradstreet or Info-Canada data for business to business type analytics. A good example of how data overlays might fill a gap is if income was a key component in any analysis but simply unavailable within the current data environment. Its use here at the postal area level as opposed to being used at the individual level would be a secondary option in attempting to derive insights based on income. Once this data audit exercise is completed, some preliminary analysis is then conducted which essentially commences our journey into analytics.

Preliminary analysis

Note how we use the word preliminary here as our objective is to acquire a basic level knowledge or understanding of their current business using our data analytics expertise complemented by our domain knowledge. Obviously, as time goes on and the analytics discipline becomes more entrenched, the level and sophistication of knowledge will increase.

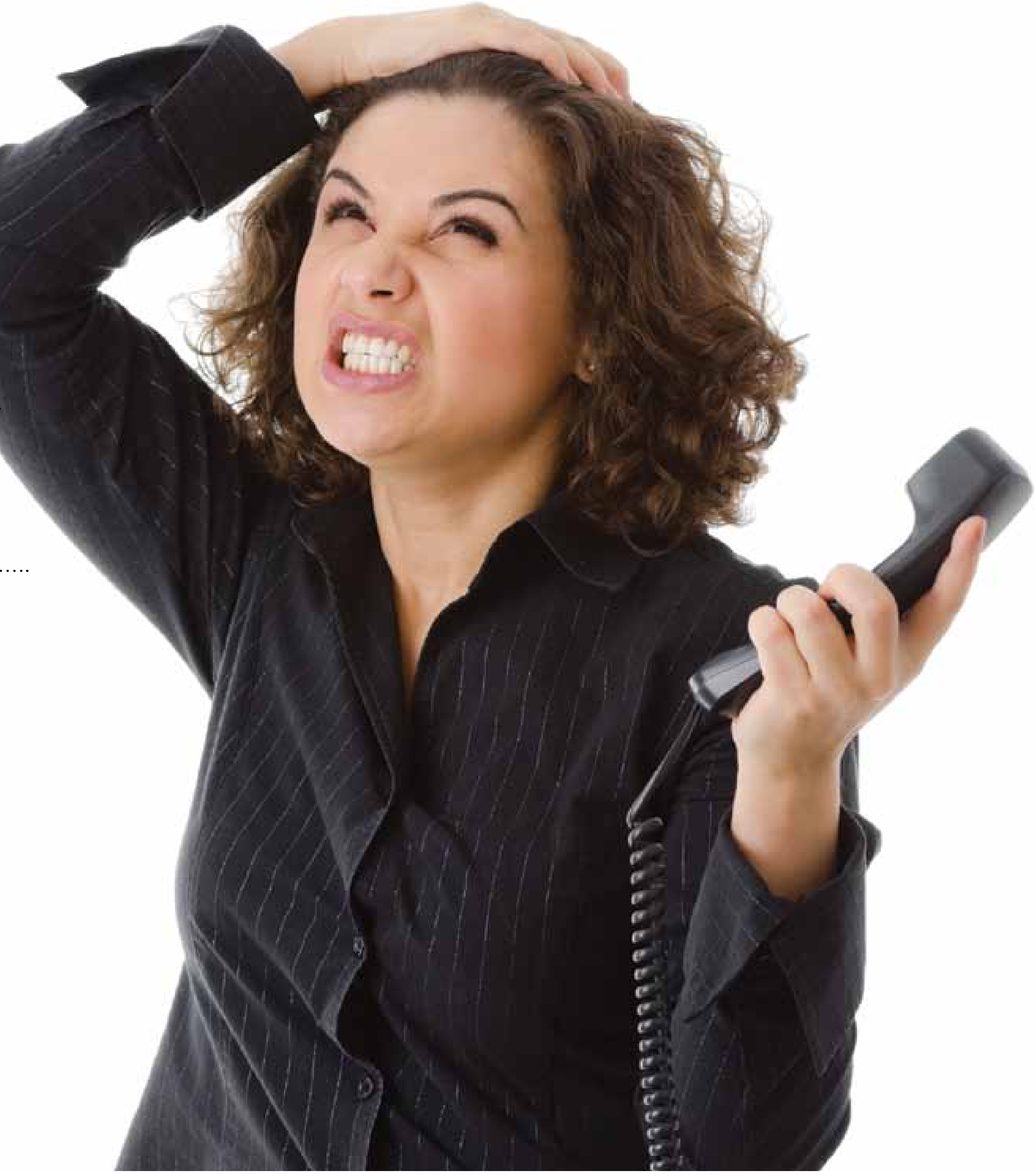
Our first exercise is to understand at a very basic level how customers are different. A value segmentation or RFM segmentation is a tool we use to stratify customers into deciles with decile 1 representing the highest performing and decile 10 representing the lowest performing customers. From this stratification, we can then arrive at value-based or RFM-based segments. Under each scheme, though, we can determine how relevant the 80/20 rule is (i.e. do 20% of my customers account for 80% of my business).

This analysis also helps to point out the migration and retention opportunities. For example, a sensitivity analysis using results from this segmentation analysis and a series of different migration (conversion) rates would determine the $ opportunity in migrating customers from a lower performing segment to a higher performing segment. Retention analysis would use somewhat the same approach by looking at a high performing segment and then determine the $ lost when looking at different potential defection rates. Of course, any sensitivity analysis which looks at a range of migration rates

▸ *Continued on page 18*

CONTACT CENTRES

The failure of CRM in the Contact Center



By Gideon Hollander

Perhaps "failure" is too strong a word. However, at the risk of being accused of sensationalism, CRM in the contact center has not lived up to its hype. It has, in fact, hurt the customer service experience by increasing call handle times due to the complexity of the interface. And while CRM was supposed to consolidate applications on the agent desktop, CRM has instead become "another application on the desktop."

So what went wrong?

Increasing average handle time

The fact is CRM was never built for the contact center. Its origins were to serve as a sales and marketing automation system, a function it did, and continues to do, very well.

With continued market pressure to increase its functionality and reach, the complexity level of CRM systems climbed alongside the feature/function race. What has become evident is that this complexity does not work well in a "real-time" environment. With current CRM systems, agents have to navigate through multiple screens to retrieve basic customer information. The complexity of the navigation is exacerbated by the lack of process guidance, requiring the agent to not only perform the tasks in the right sequence, but to also ensure compliance with any company or regulatory requirements.

This complex navigation becomes readily apparent when agents attempt to perform seemingly straightforward customer service-oriented tasks in the system.

The steps, for example, may go something like this:

STEP 1 The agent goes to the search screen to find the customer.
STEP 2 Then the agent navigates to another tab.
STEP 3 Then the agent opens a dialogue box to see the previous call notes.
STEP 4 Then the agent moves to another tab to see current services.
STEP 5 Then the agent opens each service in turn to see current bill payment status.
STEP 6 Then the agent closes these views and backs out of two screens.
STEP 7 Then the agent opens the ticketing module.
STEP 8 Then the agent keys in the service ID.

The agent must perform at least eight steps, all within the first few minutes of the call, just to simply "know your customer", before the actual call even gets underway. It's no wonder customers and agents alike experience frustration.

> *"While customer service of the past engaged customers on the company's terms, Social CRM allows you to serve your customers through channels which they choose and feel comfortable in.*

CRM provides consistent information in an inconsistent way

There is no disputing the power of the CRM data – as a centralized information repository, CRM works wonderfully. The issue with CRM systems in the contact center is the lack of guidance CRM provides for managing a customer interaction. While it is true that CRM is a fundamental line of business application, it is 'touched' differently through various channels: web self-service, voice, chat and social media- all of which require agent interaction with the customer data. However, the customer's experience differs vastly depending on how they interact with your organization so creating a consistent customer engagement across all communication channels has become critical. There is little more damaging to the customer experience than when the customer receives different, even contradictory, information depending on their communication channel.

Again, CRM systems do the job they were designed to do very well. In a contact center however, CRM systems are essentially being used for functions it was never intended to do. The lack of process guidance within most CRM systems is what contributes to the disjointed experience customers receive through the various communication channels. And with the emergence of the new mobile service channel, this problem will only be heightened, as you have a new self-service channel needing access to CRM data.

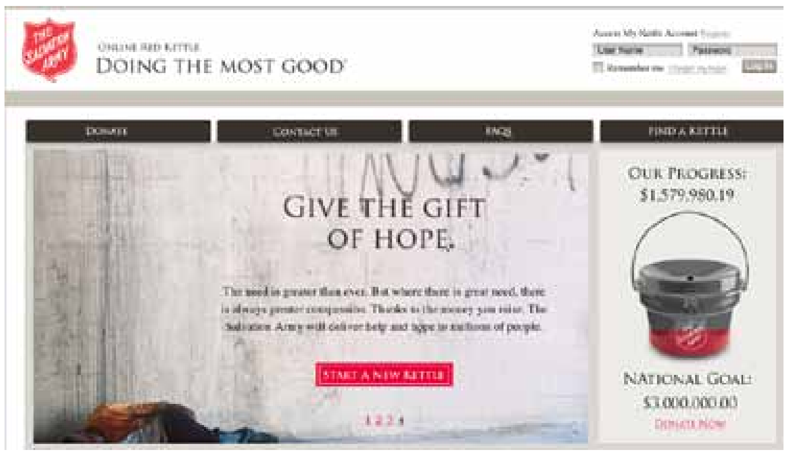
Providing an efficient and consistent customer service

New technology has emerged as of late that allows you to dynamically create new views and processes on top of your existing CRM system. These views and processes can be developed to work across the various communication channels, resulting in a more consistent customer service experience. This adaptive user interface layer allows an organization to assemble new CRM interfaces that mirror the optimal customer interaction process, all without requiring changes or customization to the CRM system itself. By doing this, the call handle times are significantly lowered, resulting in an improved customer service experience.

In addition to providing a streamlined interface, companies can now leverage process guidance technologies that allow all channels (web, mobile, voice, point-of-sale, chat, social media) to use the same process or interaction. By building these "write once, run everywhere" interactions, the customer will experience a consistent journey no matter how they touch your organization. This will allow your CRM system to be instrumental not only in your call center but across all your channels, including the all important self service channel.

Thanks to access to better technology, organizations are creating new, more efficient processes out of their existing CRM systems. And most importantly, they're finally starting to realize the benefits of what CRM promised: Reduced handle times and reuse across channels.

Gideon Hollander is the chief executive officer and founder of Jacada. Gideon is highly regarded for his strategic vision and innovation-centered leadership, and is focused on ensuring that Jacada delivers high quality, best-of-breed solutions. Prior to founding Jacada, Gideon was part of the research and development team at Comverse Technology. More information about Jacada is available at www.



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mission. The organization uses CRM to manage this lifelong relationship—to hopefully bring that constituent to their highest level of commitment—whether it be to make a large planned gift, volunteer at a local food bank, advocate on behalf of a health issue that hits close to them, or attend their university reunion.

Another area of divergence from the traditional CRM arena is the need for organizations to carry out business processes within revenue management and to handle more sophisticated fundraising practices (split gifts, planned gifts, pledges, giving circles and recognition programs). Additionally, all nonprofit organizations will likely want to harness the power of extending their CRM solution to track unique and specific data elements (i.e. program and mission-related data, such as tracking missionary activity in the field for a faith-based organization or tracking camp registrations for a youth development nonprofit). Lastly, all nonprofits are both legally and ethically bound to address the financial and legal regulations and expectations of being accountable and a good steward of a donor's resources.

Data tells a story

A complete view of a constituent record is crucial to understanding behavior, engagement details, and to provide insight into what he or she may do in the future. These are key principles for any organization doing large-scale direct marketing and multi-channel communication outreach. Many nonprofits start with traditional RFM (recency, frequency, monetary) segmentation for their appeals and campaigns but start to realize that harnessing the power of all of the constituent data and engagement allows them to more precisely target an ask, appeal, or program to their constituents, or to an acquired list of names of potential constituents. Data elements beyond giving (i.e. advocacy interests and petitions signed, volunteer history details, event attendance, team fundraising participation, etc) offer valuable insight. They also allow organizations to overlay data analysis and benchmarking trends to gauge what campaigns constituents are most likely to respond to, both now and in the future.

Through data analysis, we know that data tells a story. Although direct mail remains the dominant channel for new donor acquisitions as well, it has become increasingly common for new donors to give their first gift online. Online-acquired donors tend to give much larger gifts than mail-acquired donors. However, online-acquired donors tend to have slightly lower retention rates than mail-acquired donors. These statistics are pulled directly from Blackbaud's Annual *2011 donorCentrics™ Internet and Multichannel Giving Benchmarking Report*. This report allows organizations to view data-driven analysis and market trends, offering insight into the benchmarks and key performance indicators against which they can score their own performance. By using this data, nonprofit organizations also are able to strategically plan their own goals and objectives using these benchmarks, in an effort to maximize the effectiveness and outcomes of their outreach and campaigns.

Engaging your constituents

Finding new and creative ways to continually engage constituents is becoming increasingly important for nonprofit organizations, and CRM allows organizations to match engagement behaviors and preferences to the right channel and programs that will excite their constituent base. While the end game usually is to procure a large gift from that constituent, true engagement could mean so many more things. It could mean grooming that constituent to take on a committee leadership role, it could mean providing them with more support group services for a loved one with a disease or condition, or encouraging them to volunteer more or be an influencer within their network. Constituent engagement comes in many forms, and with social media channels, the traditional constituent engagement model sometimes needs to be flipped on its head. A constituent-driven engagement strategy means meeting them on their desired channels and being agile to respond to the ever-changing needs of a social society. Traditional CRM most often exists for the sole benefit of the sales and marketing division of the organization, while Social CRM makes the constituent as much of the picture as the organization itself.

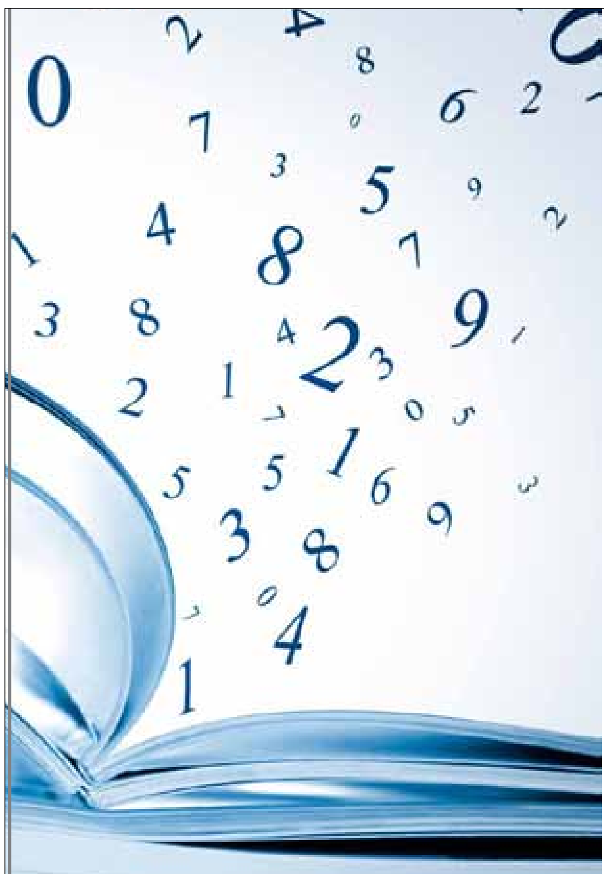
One great example of creative constituent engagement is The Salvation Army Online Red Kettle. Using a traditional form of fundraising (bell ringing), they were able to put the constituent in a bell ringers' shoes by enabling them to set up a virtual red kettle and engage social media and other communication channels to fundraise on their behalf. It was easy, accessible, and from my personal experience, it was a lot of fun to be a virtual bell ringer! This example shows how a traditional peer to peer "face to face" fundraising campaign is using a multi-channel engagement approach to reach new audiences and engage constituents to fundraise on behalf of the organization.

Donor stewardship and accountability

Accountability often strikes a deep chord with nonprofits. It brings thoughts of accountability from a financial perspective (issuing timely gift receipts, informing donors how their money was/will be spent) but also striving to be a timely and responsive steward of donor dollars and time—before the gift is even made. This means being accountable as a nonprofit organization to service these constituents by presenting them with programs and support opportunities matched to their needs and interests. Additionally, nonprofits continue to service their constituents through programmatic activities, education, support, networking, and other services after forming a relationship with that constituent. The most visionary nonprofits often talk about how they can "delight" their constituents—similar to how a for-profit corporation extends goodwill and customer service to surprise a customer and to hopefully influence future buying (donation and engagement) behavior. What is unique about nonprofits is the sheer number of choices in the nonprofit marketplace competing for the donor's dollar, time, and talent and how their constituents often have a personal connection and desire to be closely aligned to an organization based on their mission and values.

The core of nonprofit CRM is still knowing as much as you can about a constituent through a consolidated view of his or her history, behaviors, and interactions, but to take it to the next level, appending research and analysis data and data modeling score overlays gives a completely new level of visibility into who that person or organization is. The power of CRM in the nonprofit space is to provide this level of insight to help constituents reach that highest level of commitment—both to the benefit of the nonprofit organization and the constituent.

Tiffany Crumpton is the Senior Marketing Manager for CRM solutions at Blackbaud. In her current role, she defines the go-to-market strategy for CRM solutions – a suite of products that help nonprofits build lifelong relationships, raise more money, and improve operational efficiency.



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CONTACT CENTRES

AIR MILES Certifies as GOLD Contact Center Employer of Choice

CCEOC Inc. announced that the AIR MILES Reward Program Customer Care Centre once again achieved the prestigious Gold level Contact Center Employer of Choice® (CCEOC) designation for 2012. Over 550 employees from two sites located in Mississauga, ON and Toronto, ON participated in the certification assessment.

This is the 5th consecutive year the AIR MILES Customer Care Centre has attained CCEOC Certification. This qualifies them for the exclusive CCEOC 5 Year Achievement Award.

Through the Contact Center Employer of Choice® Certification Program, the AIR MILES Customer Care Centre has been able to address key areas of improvement that have had a sustained impact on culture, morale and performance. Being recognized as a certified Contact Center Employer of Choice® continues to help AIR MILES create positive employer branding and heightened awareness as a leading, people-focused organization.

Specific areas of focus for AIR MILES Customer Care included:

- Industry-wide recognition as a great place to work
- Improvement in the ability to attract, retain and engage top talent
- Identification of opportunities to reduce stress and improve associate engagement
- Development of pride and passion

"The AIR MILES Reward Program has been one of the most consistently high scoring contact centres in the program." said Jeff Doran, President, CCEOC Inc. "The management teams genuinely care about the employees and, as a result, employees are more satisfied, dedicated and engaged. This helps create a culture of continuous improvement, positioning AIR MILES as one of the best contact centres to work for in the country."

The results of the assessment provided management with new insights and solutions on how to address key challenges in the customer care environment. Through the assessment's in-depth reporting and trend analysis, management gained a deeper understanding of key employee motivation and satisfaction drivers. AIR MILES was able to address the data quickly, implement targeted solutions and measure its results. This was critical in achieving the Gold designation.

"We are honoured to receive the CCEOC Gold certification for the fourth year in a row", said Sharmane Good, Senior Vice President, Customer Care AIR MILES Reward Program. "Our front-line associates and all those who support them are vital to the exceptional level of service that we continue to deliver to our 10 million active Collector accounts."

The Contact Center Employer of Choice® award is the industry standard for recognizing and branding people centric contact centres. Contact centres of any size, type or geographic location can be assessed to determine their CCEOC standing. Certified contact centres include: FedEx, ING Direct, Scotiabank, Davis + Henderson, Albridge Solutions, CIBA Vision and Roche Diagnostics ACCU-CHEK, to name a few. Through a proprietary on-site and survey assessment, a contact centre can quickly determine if they meet the qualification standards. Once the designation is achieved, the contact centre is profiled on the official CCEOC corporate web-site www.ccemployerofchoice.com , receives a prestigious framed certificate and is promoted through various print and electronic media.

NICE takes top spot again in workforce management market

NICE has once again been recognized as the global market leader in the contact center workforce management (WFM) market by DMG Consulting LLC, with a market share of 23.7 percent, based on the number of seats. The DMG report, which was issued in May, shows that NICE's WFM market share is up from last year's 22.5 percent, placing NICE in first place for the fifth consecutive year.

"2011 was an outstanding year for the contact center workforce management market," said Donna Fluss, President of DMG Consulting. "End-user interest in WFM solutions is at an all-time high, coming from both first-time adopters who are finally looking to automate their labor-intensive manual processes, as well as long-time WFM users who are adding seats or replacing an existing solution that has been outgrown."

According to DMG's 2012 Contact Center Workforce Management Market Report, NICE was ranked as the top vendor for customer satisfaction, which was evaluated on the basis of nine categories, including product, implementation, service and maintenance, training, professional services, innovation, communication, pricing, and overall vendor satisfaction. NICE was the only vendor to receive a perfect rating of "completely satisfied" in any category. NICE received this perfect score for implementation, training, professional services, innovation, communication, and overall satisfaction.

NICE has tailored various WFM solutions as part of its commitment to help its customers achieve measurable ROIs. NICE solutions are helping its customers increase agent productivity, enhance agent performance through training, strengthen customer loyalty, and bolster inbound sales revenue.

"We are very pleased to once again be recognized as the leader in the workforce management market and to have widened the gap from the second-place vendor," said Benny Einhorn, Chief Marketing Officer at NICE. "In addition to having the largest share of the market, we also achieved top vendor status in customer satisfaction. The findings in this report are a reflection of the quality of our products and our commitment to the success of our customers."

Canada's largest wireless provider to deploy RightTime across all contact center locations to increase agent productivity and improve the customer experience

Knowlagent's leading intraday management solution for the world's 10 million call center agents, RightTime, is being rolled out to all of Rogers Communication's (Rogers) contact centers. Rogers is using RightTime to take advantage of agent downtime — delivering more training, coaching, communications, and other performance improvement activities to agents during idle time.

After a successful deployment in one of its sites in Ottawa, Rogers has moved forward with rolling out the technology across all of its contact centers. In only three weeks, Rogers saw a significant impact on first call resolution (FCR) due to increased speed and efficiency of training delivery. Each agent completed, on average, nearly nine courses in 10 weeks, which significantly reduced costs and minimized the impact to service compared to the alternative of hard-scheduling the sessions to occur in the same time period.

RightTime is helping Rogers' contact centers:

- Continue to improve FCR and other customer satisfaction metrics
- Deliver required training during agent idle time
- Increase throughput of training delivery by 400 percent, compared to manually scheduled sessions

"Rogers Communications is known for innovating to meet its customers' needs," said Matt McConnell, chief executive officer for Knowlagent. "Making use of previously unproductive idle time to focus on improving customer experience gives the company a sustainable engine for maintaining its edge in the quality of care delivered by its call center agents."

Knowlagent's RightTime technology allows telecommunications companies to meet the ongoing challenge of communicating time-sensitive and often complex information to their agents effectively in order to provide the highest quality service to their customers. The need to have highly knowledgeable agents is often at odds with call center pressures to maintain service levels. RightTime provides the ability to get essential information to agents without negatively impacting service levels or incurring the additional headcount costs of scheduling these updates to occur in shrinkage.

By integrating with automatic call distributors, RightTime is able to redistribute wait time intervals so agents can complete off-phone work from a prioritized task list during idle time, transforming this time into Active Wait Time. The result is improved agent productivity and performance.

Contact Centre Nova Scotia hands out Awards of Excellence

The CCNS Awards of Excellence Gala is a celebration of the contact center industry in Nova Scotia with a specific focus on agents and companies that deserve the highest accolades as determined by their peers and community. The Awards Gala provides the opportunity to participate in the event attended by government officials, members of CCNS, members of the vendor community and invited guests.

Awards in Order of acceptance:

Associate member of the Year:

Dramis - accepted by Dana Helpard

Environmental:

Xerox – accepted by Lori Murphy

Healthy Workplace:

Admiral – accepted by Annie Goodyer

Innovation Awards:

OLS : Dartmouth Site – accepted by Terry Miller and Anita Loppie
WCB: Integrated Service Associate team – accepted by members of the IS Team
Arrow: Brian Mackintosh
Xerox : Ewan McCord
Medavie: Melanie Seward
Eastlink : Donna Snow
TD : Ryan Stevens

Community Spirit Awards:

Staples: Rachel Baker
Xerox: Tara Lynn Kennedy
OLS: John Mooy
Medavie: Valerie Pegoraro
D+H: Erin Silver
Arrow: Andrew Turner

STAR Awards:

TD: Jordan Bonaparte
Admiral: Brandy Borden
Staples: Lisa Bush
OLS: Anne Dando
WCB: Cherice Duggan
D+H: Kevin Lloyd
Medavie: Kim Muise
Eastlink: Chad Roy
Arrow: Mark Stevens
Xerox: Aaron Symonds

MVP Awards:

Eastlink: Jennifer Daye
Admiral: Facilities and IT Team – accepted by Brad Doyle, Brandy Borden and Leonard Schmaus
Staples: Steve Gallant
Arrow: JoAnn Haire
OLS: Carolyn Mills
Xerox: Kim Naylor
Medavie: Patricia Walters
Register: Carrie-Dawn Weeks

Leader Awards:

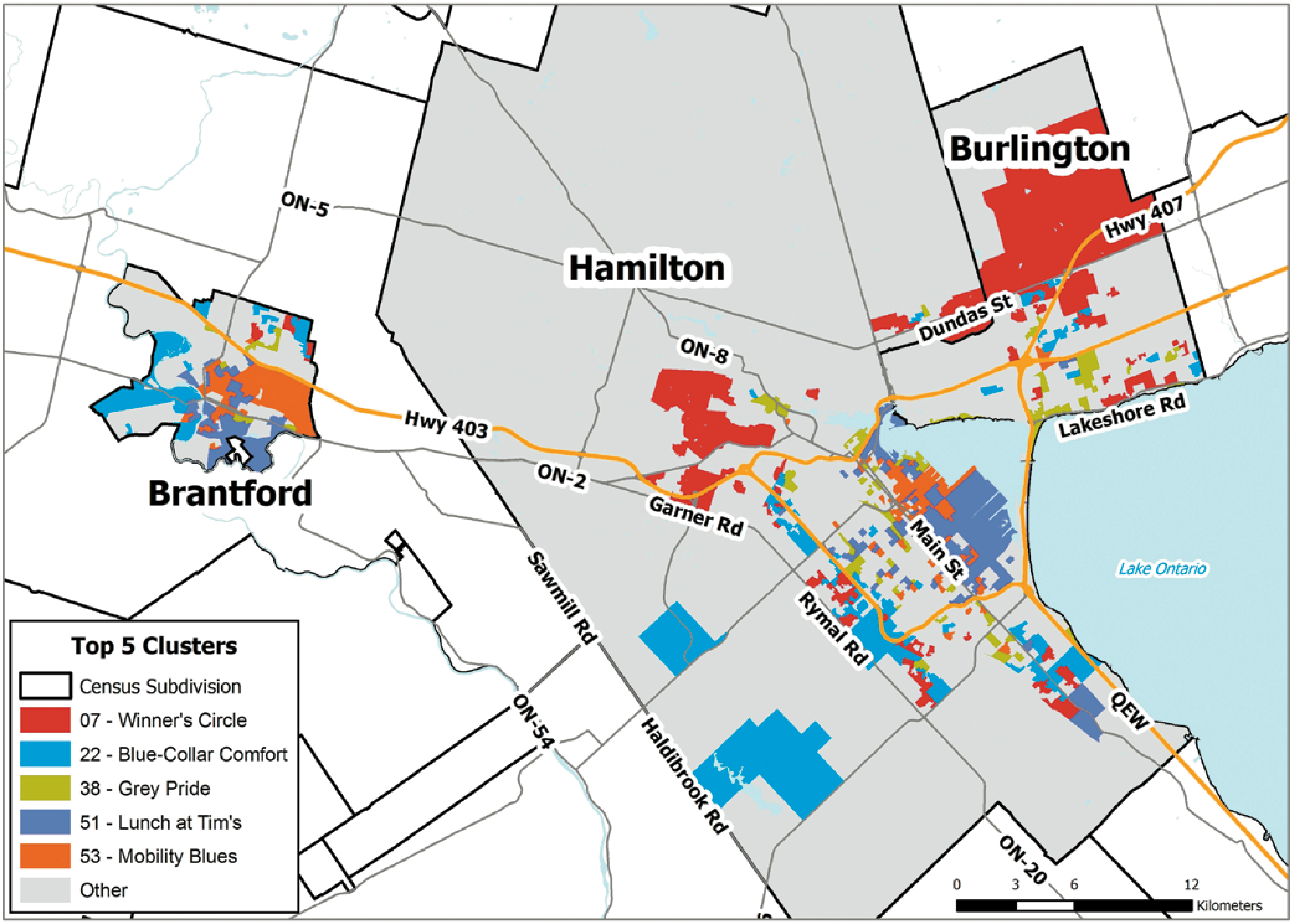
OLS: Dani Bramwell
Xerox: Rochelle Chisholm
Arrow: Tom Johnson
Staples: Jennifer MacKinnon
Medavie: Chantelle Myette
Register: Jeff Nickerson
Admiral : Alanna Van Niekerk

Employee Awards:

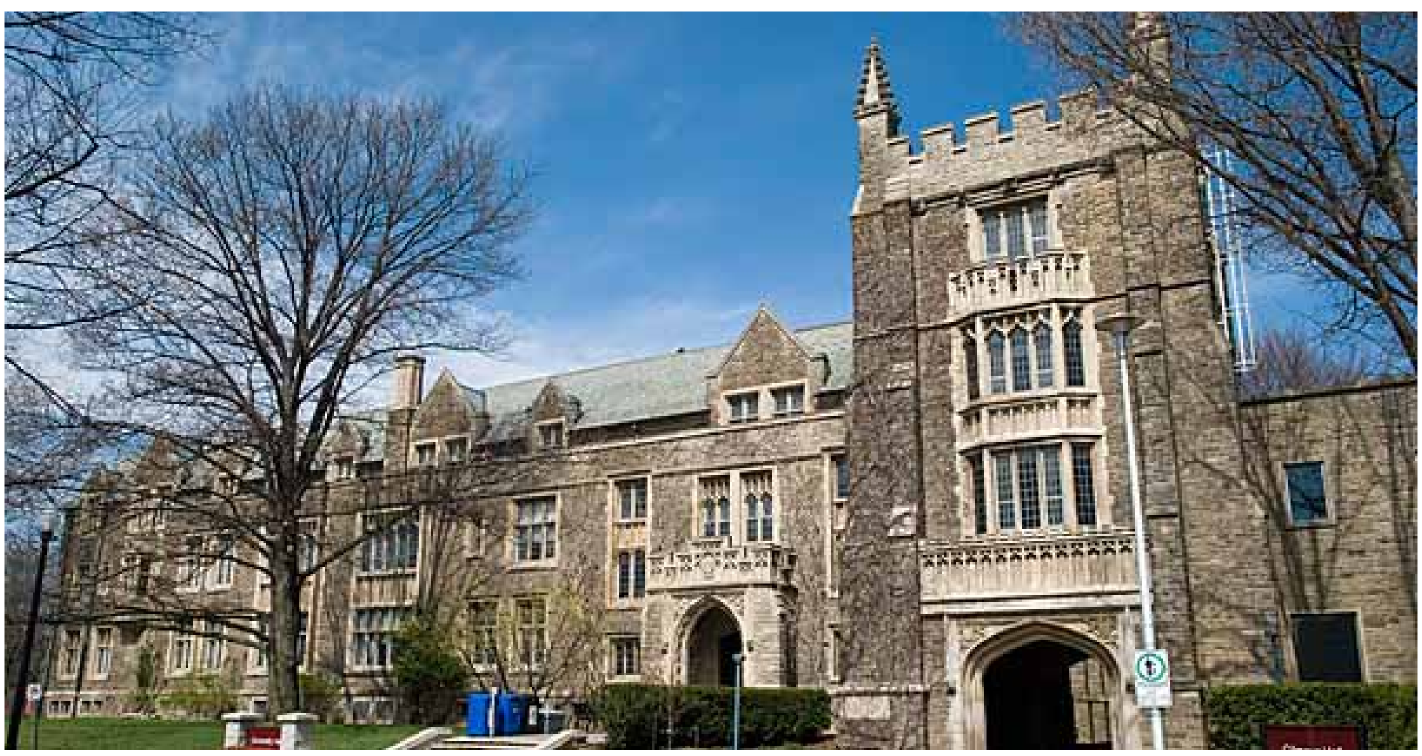
OLS: Marianne Armstrong
D+H: Tyler Conrad
Medavie: Terra Eldridge
Xerox: Brett Haley
Admiral: Allison Jost
WCB: Lois Marshall
Arrow: Kerri O'Brien
Staples: Greg Oursin

Regional Report:

HAMILTON & BRANTFORD



Source: Environics Analytics 2012, PRIZM C2



Regional Fast Facts

- Hamilton has a population of 519, 949 people as of the 2011 Census and a market (500 mile radius) of 120 million people.
- The largest industry group in Hamilton is manufacturing (42,525) and the top five employers are Hamilton Health Sciences Corp., McMaster University, City of Hamilton, Hamilton-Wentworth District School Board and ArcelorMittal Dofasco Inc
- With the U. S. border only an hour's drive away, Hamilton is within half a day's drive of key major urban markets in the United States.
- In 2009, McMaster University in Hamilton opened the McMaster Innovation Park (MIP), a premier research park offering collaborative space for researchers and entrepreneurs alike to co-locate, connect and commercialize; a place to transform ideas from vision to commercial opportunity.
- Inventor Alexander Graham Bell brought fame to Brantford when he invented the telephone here on July 26, 1874, and made the first-ever long distance call on August 10, 1876.
- The Grand River has played a vital role in the development of Brantford. In the nineteenth century, the river provided the opportunity and impetus for economic growth when barges brought new materials up and manufactured goods down the River to the Great Lakes and beyond.
- As railways and roadways replaced the river, Brantford remained a focal point of strong industrial expansion. Its key location and optimal transportation network continue to allow the city to fully service the North American marketplace, providing goods to areas throughout the world.

Regional Report: HAMILTON & BRANTFORD

Strong warehousing and manufacturing sectors support direct marketing suppliers in these Golden Horseshoe cities

By Amy Bostock

Hamilton's location at the western end of Ontario's Golden Horseshoe provides businesses with easy access to a network of highways, international rail lines, and the Port of Hamilton. Local air connections to international destinations are close by with John C. Munro Hamilton International Airport, Lester B. Pearson International Airport in Toronto and Buffalo Niagara International Airport just across the border in New York State. The Queen Elizabeth Way provides ready access to both the Greater Toronto Area, a regional market of over six million people, and Highway 401. Highway 401 is the Canadian link to the NAFTA super highway connecting Ontario with the I-75 serving Michigan, Ohio, Kentucky, Tennessee, Georgia and Florida and the I-90 connections to the eastern seaboard. With the U. S. border only an hour's drive away, Hamilton is within half a day's drive of key major urban markets in the United States.

"We're not only close to the U.S. border we're also close to Stoney Creek RVU," says Dan Schlottlander of Pegasus Direct. "This is really convenient for us, especially since we've been seeing a lot of our work shifting to outlying areas of Canada."

This shift in client base, he says, in due to a combination of factors.

"Some of it is because of relationships that start locally but then acquisitions happen and maybe the head office moves but the company still chooses to work with us."

Pegasus Direct, originally a traditional lettershop, made the decision about seven years ago to become more technological. They introduced colour variable image printing, invested in software, picked up a couple of local hydro and cable clients and moved into the transactional side of things.

"With the move into more transpromotional offerings, we

REGIONAL REPORT

also began to offer full project management – design, print and buying – which is unique for our area. It's not a big market here and we actually have a lot of competition, both locally and from Mississauga."

But Hamiltonians, he says, like to talk to Hamiltonians.

"Clients like dealing locally, which makes it less of a shark tank out his way. Even some of the outlying areas like Niagara would rather come to Hamilton than go to Toronto."

Hamilton doesn't have a lot of agencies, and since from a DM perspective, where the agencies are is where the work is, it limits the amount of work available.

"It would be nice to see more agency work coming out of Hamilton," says Schlottlander. "But overall we're happy to be a Hamilton-based business. The market is not big but that's a choice we made. We chose not to go head-to-head with the Toronto shops. We have a lot of friends in the Toronto shops and do regular work with them but we don't compete with them – that's just not what we want to be about.

"We're very much a 'value in relationship' type of vendor."

To differentiate themselves from the competition, Pegasus has continued to provide U.S. letter pre-sort – a rarity in today's Canadian DM market.

"About 10 per cent of work is still across the border and because of the economics, a lot of lettershops have stopped even carrying the U.S. letter pre-sort software. So we do work for shops across Canada who have dropped the software."

A community in transition

About 80 per cent of the work Pegasus does is local to Hamilton, with the not-for-profit sector representing the biggest chunk of their clients on the DM side.

"We find that the fundraising aspect is extremely prevalent here," he says. "Hamilton is a university, hospital and research city so there are a lot of needs to be met."

According to Schlottlander, Hamilton presents an interesting profile.

"It has always been a university town but it also has a history of poverty and social challenges," he explains. "As a result, there are a lot of needs in this city and a lot of organizations that are working diligently to meet those needs."

Pegasus is also doing its part for the community.

"Everyone knows us and we've been big sponsors of the community – that makes us top of mind whenever work comes up."

Brantford

Brantford is a vibrant community with a population of approximately 96,689(est.) people. Situated on the picturesque Grand River, the city is located in the heart of Southern Ontario, with direct access to Hwy. 403 and close proximity to other major highways, rail lines and three major Canadian ports of entry (Windsor, Toronto and Niagara Falls).

Brantford is known as the Telephone City, as it was here in 1874 where Alexander Graham Bell first conceived the idea for the telephone. Today,

So it makes sense that Extend Communications - a full service contact centre that handles everything from customer service to tech support to DM, to traditional answering service – would call Brantford home.

"We've been doing this for over fifty years," says Lina Masri of Extend. "We're family owned and operated and service over 800 different companies in a variety of sectors."

Business in the telephone city is booming, according to Masri, as companies that maybe saw a bit of slump in previous years begin to bounce back.

Many of them, like Extend, chose a shift in the type of business they do in order to remain competitive.

"The contact centre industry is evolving, tech is changing," she says, "and we're growing because we're changing with it – staying on the leading edge and providing our customers with alternatives for what they want to accomplish."

Being located on the 403 corridor, Brantford is ideally located, with easy access to neighbouring cities as well as the Buffalo and Detroit borders. Because of this, Brantford has attracted a lot of big industry looking to set up warehousing facilities.

Companies like Proctor & Gamble have opened up warehouses here – one of the few remaining cities that can still offer large spaces at competitive prices.

"The cost of living and doing business here is definitely cheaper than Toronto," says Masri. "We also have a larger talent pool to draw from since there isn't as much competition."

The influx of warehouses means more business for Extend and their 'virtual reception' services.

Although there are other call centres in the area, Masri says there is certainly enough work to go around. Often, area contact centres will even partner on projects.

"Within the contact centre industry here there seems to be a sense of camaraderie," she says. "It just seems that there is a stronger sense of cooperation than in the bigger cities."

FEATURE

What the numbers mean to you

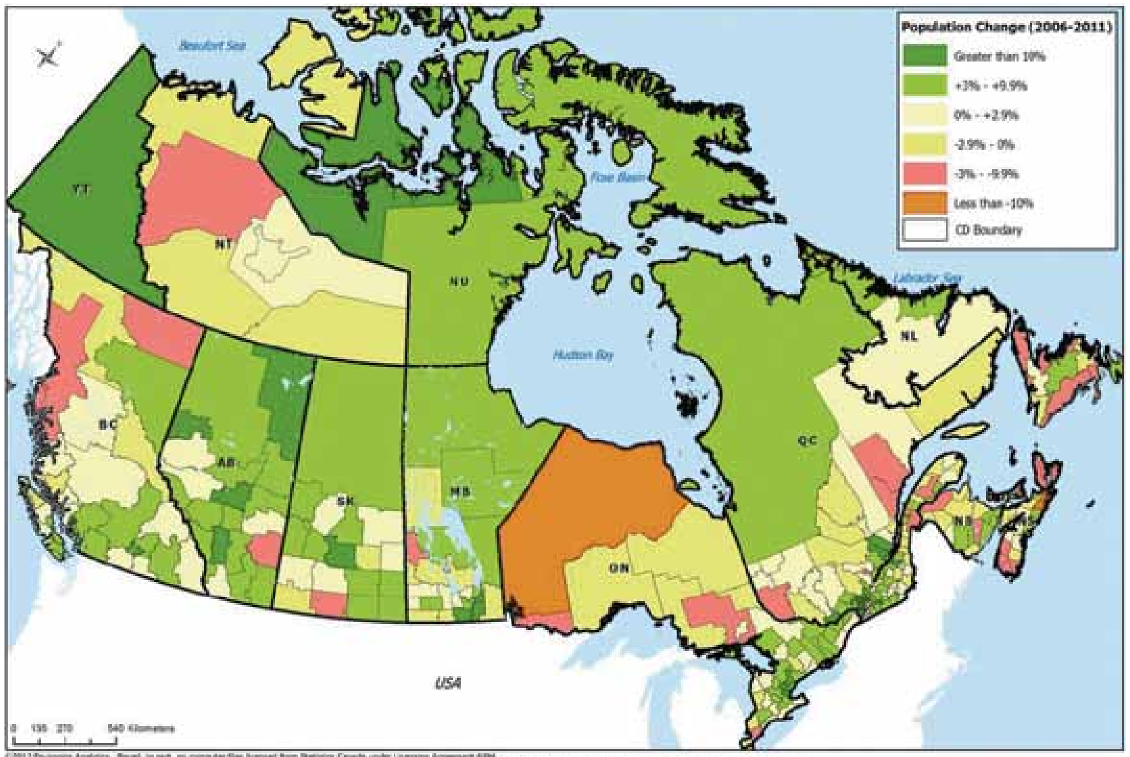
How direct marketers can use the new Census data to update their strategies and targeting

By Doug Norris

The initial numbers are in. According to the first releases of data from the 2011 Census, Canada is experiencing a growing population, an ageing populace, a westward expansion, and high growth in the suburban areas of the largest metropolitan areas.

Canada's census population reached 33.5 million in 2011, an increase of nearly 6 percent since the last census in 2006—and the highest growth rate among G-8 countries. The country continues to see its population shifting to the West, particularly to Alberta and British Columbia, which now make up 24 % of the population. But Saskatchewan has experienced a major turnaround in population growth and is now the country's third fastest growing province.

Meanwhile, the six largest metropolitan areas accounted for 46% of Canada's population–representing two thirds of growth during the period 2006-2011. At the other extreme, 18% of Canada's population lives in rural and small town areas, and these areas had very little growth. In fact, many experienced a population decline over the period.



A nation in motion

The latest data published by the Census give us an interesting snapshot of the nation. But when we look at the data over time, something closer to a movie appears, revealing major trends that are at play now and that are likely to affect the nation into the future. In Canada, the most dynamic trends have to do with age.

The new census data showed the continued ageing of the population. Today, over half of Canada's population is over the age of 40. This median age is in sharp contrast to 1981, when the median age was 30. Nearly 15% of the population today is age 65 or older, while about 17% of the population is under age 15. The similarity in the size of the younger and older populations reflects the long-term ageing of Canada's population. Fifty years ago, the 1961 Census showed that 34% of the population was under age 15 and less than 8% was over the age of 65. This ageing is expected to continue so that, in about 20 years, as much as one-quarter of Canada's population will be over 65.

Although the total population grew by 5.9% over the period 2006-2011, the growth varied widely by age, with the population age 60 and over growing by 18% compared to a growth of only 3% for the population under age 60. In fact the populations aged 5-14 and 35-44 actually declined in size over the 2006-2011 period. Somewhat of a surprise was the 11% increase in the population aged 0-4. This was the highest growth rate for this age group since the 1956 to 1961 period during the baby boom. This increase is likely not the beginning of a long-term increase in fertility rates, but rather a result of the larger number of women in their prime childbearing ages, who in turn were the children of the large group of Boomers.

The new census data also showed variations in age distributions across the country. Provinces east of Ontario are somewhat older than average, while Alberta and the Northern Territories have much younger populations. The oldest urban areas in the country are Parksville, B.C., and Elliot Lake, Ont., each with more than a third of their population over the age of 65. In the large urban markets, the central cities are generally somewhat older than the suburbs. However, the suburbs of many urban areas are rapidly ageing. For example, in the city of Toronto, the 65-and-over population increased by 7% between 2006 and 201. In contrast, the suburban population 65 and older increased by nearly 30%.

Over the next decade, Canada's population is expected to continue to grow at about 1% a year, adding nearly 350,000 people to the population annually. Immigration will play an increasing part in this growth. Regional growth patterns are expected to continue at the same pace, with higher growth in the provinces west of Ontario. Canada's population will continue to age, with the growth particularly high for those 65-79 years old as the Boomers reach retirement age. By contrast, those 15-24 and 45-54 can expect population declines.

What the trends mean for direct marketers

The new census data on population change provides businesses, agencies and not-for-profits evidence of how the size of markets have changed and strong indications of what they should do to remain responsive to their consumers and communities. Marketers have long recognized the correlation between statistical cause and economic effect: as business guru Peter Drucker succinctly explained it, "what has already happened will create the future." The new census gives researchers, planners and advertisers—everyone involved in direct marketing—solid data on how the consumer markets have shifted and offer a window into what the future might hold.

Because population size determines market size, the latest census data will play a role in everything from determining potential new sites to where business plans might need to be adjusted in the face of a declining population. For example, Canadian Blood Services uses census data, augmented with insights from PRIZMC2 lifestyle segments, to decide where to open new clinics to "tap" potential new blood donors.

At CARA, the food services company with over 700 restaurant locations, real estate planners know that one of the key attributes of a successful site is the volume of traffic around the location—and an increasing population is bound to have an effect on traffic volume. With such well-known restaurants as Swiss Chalet and Harvey's, CARA analyzes potential locations using demographic summary reports based on census data provided by ENVISION, a micromarketing platform from Environics Analytics. The platform also allows CARA to link the latest population data to lifestyle surveys, giving analysts important insight into how much a typical consumer spends on a restaurant meal and even the type of food local residents prefer. With the latest population data linked to lifestyle information, CARA analysts can identify the best locations for specific restaurant brands based on how neighbourhoods are growing and changing.

For direct marketers, the latest census statistics can give them a better understanding of their markets, allowing them to improve their targeting efforts. By calculating their sales according to the new CMA and provincial counts, they can determine their market shares for each area and recalibrate sales targets. And with more up-to-date information on the population of markets, cities and neighbourhoods, they can uncover areas that offer huge untapped opportunities.

The latest Census release also may cause some marketers to reevaluate the geography of their marketing plans. The increasing concentration of people in the western provinces and cities means new hot spots and places for expansion, larger direct marketing campaigns and targeting of new prospective consumers. In the western metropolitan areas of Calgary, Edmonton, Saskatoon and Kelowna—all of which grew at more than 10%—there are likely increased opportunities to attract young singles and couples. Not so long ago, areas around Saskatoon were quiet farmlands. Today, Saskatoon rivals Calgary as the nation's fastest growing CMA—with an 11.4% growth rate compared to Calgary's 12.6%—and new subdivisions are sprouting throughout the community. Direct marketers will need to track the new developments, determine the makeup of the new homeowners—using information from both StatsCan and private data vendors—and craft their messages accordingly. Even choosing the best channels has become more complex given the proliferation over the past five years of mobile devices, especially among highly educated segments of the population and young people at virtually all socioeconomic levels.

Although monitoring population change for large market areas is important, the new census data shows there is a great diversity of population change at a neighbourhood level within the urban areas. For example, although the city of Toronto's population grew by 4.5% percent over the last five years, according to the 2011 Census the total population in some of the city's older urban neighbourhoods has declined, perhaps the result of an ageing population. On the other hand new condo developments have resulted in a rapidly growing population in other neighbourhoods.

Challenges and opportunities

The shifting age structure of Canada's population will present marketers with both challenges and opportunities. For example, the declines in the size of the youth market will impact expenditures on alcoholic beverages, which typically increase among consumers 15-24 years old. The declines in the higher income population in their prime working ages (45-54) will adversely affect car purchases, which historically peak at ages 45-54.

On the other hand, the population aged 65 and over will grow by about 40% over the next decade and another 40% over the decade afterwards. Although average household expenditures are lower at older ages, some spending, such as charitable donations, actually increases with age and, because the number of people entering this age is so large, the total expenditure may be especially great. Clearly this growth in the 65-and-over population presents opportunities. However, marketers need to recognize that this growth results from the large Baby Boom generation, who are known to have different values and aspirations compared to today's seniors. The Boomers are far from a homogeneous group and marketers need to understand and identify relevant segments and how best to address them.

Direct marketers also can correlate the latest Census population data with reports on cities and communities hit hardest by the recent recession. In some of Ontario's industrial centres, populations grew only slightly or not at all: Windsor and Thunder Bay showed small population declines, while Greater Sudbury and St. Catherines-Niagara had increases of less than 2%. Barrie—the fastest growing CMA for the decade

▸ Continued on page 23

List Watch

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BusyBeaver.Biz, now available in Canada, helps to place sales, marketing, and research professionals at leading companies to reach decision makers, gain a deeper understanding of prospects, and identify more selling opportunities. BusyBeaver.Biz can assist with generating sales leads, access corporate profiles and contact information, and provide the most recent business information on the newest-formed companies. Canadian Business owners and professionals are performing online searches to find a variety of services at competitive prices. Employment, Entertainment, Credit, Office Supplies, Investments, and Real Estate continue to be some of the top searches performed by these Canadian business professionals. Contact Mark Traverso, mark@lighthouselist.com, (954) 489-3008 x209

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The Reader's Digest Association of Canada isn't just the publisher of Canada's most widely-read magazine. It publishes other award-winning magazines, produces newsletters, sells products and owns several branded websites. Now available for the first time, the Reader's Digest Inactives file offers marketers an opportunity to pull from a de-duped database of multiple Reader's Digest brands and products. Sources include: Product Buyers; Subscribers to Reader's Digest, Best Health and Our Canada; Newsletter Subscribers. For counts please contact listmanagement@cstonecanada.com. This file updates bi-monthly. For more information call Joanne MacKinnon 416-932-9555 x 173

Business 6.0 – Canadian Business & Executive Database

Canada has always been one of the most open economies in the world. Canada has continually been a key source of population growth and this is evident from the increased international flow of goods, services, capital and labor to and from Canadain recent years. Many of Canada's small and medium size enterprises have taken advantage of the opportunities that globalization presents. Business 6.0 provides American businesses this same opportunity with the introduction of the unique Canadian database. You can select by "new to file", phone/fax number, contact name, gender and ethnic owned businesses. Contact Mark Traverso, mark@lighthouselist.com, (954) 489-3008 x209

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MADD Canada (Mothers against Drunk Driving) reaches 20,609 English Donors

MADD Canada runs 2 – 3 direct mail campaigns per year and is willing to trade or rent these names to interested parties. MADD Canada's list reaches 20,609 Canadian donors that are committed to stopping impaired driving and supporting the victims of this violent crime. North American Direct Marketing Inc. exclusively manages this list. Selections available are FSA's, Gender, Recency & Donation Gift. Base rate is $160.00/M CDN. For more information, contact your list broker or call Jacqueline Collymore of North American Direct Marketing Inc. at 416-622-8700 or email Jacqueline.collymore@nadminc.com

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FEATURE

Solving the analytic team puzzle

By Regina Malina and Emma Warrillow

As marketing becomes more data-driven, CMOs and other marketing leaders are finding themselves dealing with a new type of resource – the analyst, with whom they often know little about. Analysts are generally a very different breed from the rest of the marketing team and organizations frequently struggle to determine where they fit in the corporate structure.

Good analysts are highly sought-after and companies must think carefully about how to hire, retain, grow/develop them, as well as deploy them effectively on the most strategic projects. This issue is further complicated for marketers by the fact that the need for analytic expertise may exist in a number of other areas of the business, in addition to marketing.

While we don't profess to be experts in organizational design, we've managed and worked with many analytic teams in our careers and have witnessed many things that work well and many that do not.

This article summarizes the thinking of some leading practitioners in the field and provides commentary based on our experience in the Canadian marketing arena.

What we have observed is that organizations can be placed on a continuum between a highly centralized model (where all analytics are performed by a central team) to a highly decentralized one where analysts work in pockets across the organization.

The model that's employed in analytics is often a function of the organizational structure and the way it views centralized services. If marketing decision-making is spread over different business units, analytics is likely to be so as well.

Analytics everywhere – decentralized structure

Jean Harris and Thomas Davenport have written extensively on the topic of putting analytics to work in business. They have studied a number of models currently being used at a variety of companies globally.

In a 2010 article they point out that the easiest and therefore most common structure has analysts working in a number of silos across the organization, supporting specific divisions and/or functional areas. One Canadian bank, for example, has groups of marketing analysts working in disparate divisions (investments, retail banking, credit card), and other function-specific number crunchers in fraud, risk, and operations, to name just a few.

More decentralized structures typically result in analysts who are close to the business and become subject matter experts in data analytics and needs of that division or function. This means that the analytical work is prioritized by the business itself, which typically appeals to marketers.

The challenges, however, can be many. Here are a few examples:

Companies may be hiring duplicate skills – and potentially not using employees to their full potential. For example, we have seen situations where two divisions have each hired statisticians to support their needs - and both end up splitting their time between statistics and other more mundane tasks. Organizations may be better served with one statistician and one potentially less expensive data analyst.

Many analysts find themselves working alone or in very small teams; this makes development more challenging, as analysts may find it difficult to connect with the appropriate mentors and learning opportunities.

Similar problems may be tackled in a variety of places in the organization resulting in duplicated efforts and the lack of a standardized approach. In addition, different approaches may yield different results calling everyone's work into question and confounding decision-makers.

Harris et al. makes the distinction between organizations with truly decentralized analytical teams and those with analysts placed within functional groups.

For marketing, the functional approach has all analysts in the marketing function working together, rather than in separate groups for each business unit. This approach leads to a greater chance of mitigating the challenges mentioned earlier.

Hanging together – centralized approach

"We must all hang together or most assuredly we shall hang separately" - Benjamin Franklin

On the other extreme end of the spectrum is a truly centralized model, where all analysts reside in a single group that holds all the organization's analytic expertise. Here, there is minimal duplication of effort and centralized prioritization and planning. Another Canadian bank we know is much closer to this side of the spectrum, illustrating a wide range of approaches even within the same industry.

For the analyst, this organizational approach may provide the ability to specialize, more opportunities for learning and development through information exchange, and a clear career path. A statistician, for example, may spend all their time building predictive models with other modellers, rather than dividing their time between modeling, segmentation and reporting. Analysts in these groups tend to have a better view of where their work fits in with the organization. Harris et al. report that "nearly half of all analysts working in centralized groups report a high degree of fit with the organization. By contrast, analytical talent deployed as consultants or concentrated in one functional area often feel like misfits."

The biggest challenge this model faces is how to keep analysts from becoming disconnected from the business-specific priorities and realities. Any good analyst knows that the best solutions come not only from great mathematics but also from an understanding of the nuances in the function-specific data and the key drivers of the business. Statistical techniques may be the same but the application may dictate the decisions that are made. This model, therefore, may yield analysts who feel a closer connection to their co-workers but also a greater frustration towards their business partners. Commonly, marketers operating in this structure complain "the analyst and I don't speak the same language".

For marketers, the centralized model may also mean that their needs are not prioritized over the voices in credit or inventory management, for example. This frequently results in the formation of "rogue" analytic teams being created, which undermine the corporate philosophy.

Other organizations have tried different variations on the models. One is the establishment of an internal consulting practice. This can yield similar benefits to the centralized model but adds the complexity of cross-charging business units for their services; this can mean the added onus on analysts to prove their value and showcase their work.

A final model that's outlined in our research of this subject is a Centre of Excellence model, where analysts are distributed throughout the organization but coordinated or connected in some way centrally. The central body may assist in the sharing of best practices, priority setting and setting the appropriate staffing mix. Harris et al. cite Capital One and Wal-Mart as users of this approach. This may result in a kind of "hub and spoke" approach, where the centre of excellence is the hub. In some organizations, there could be multiple functional area hubs as well (e.g. marketing) with spokes emanating to different product areas.

Aiming for a perfect solution: technology ensures feasibility, accountability ensures focused effort

As outlined above, both the centralized and decentralized approaches have their benefits and challenges. Is there a perfect solution that has the benefits of both models? "In practice," says Harris et al, "we've found that the ideal model depends more on a company's priorities, the maturity of its analytical capabilities and the need to balance analyst supply and demand."

Can a solution be found that allows

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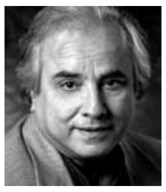

Direct & Personal

by Billy Sharma

Teva Harrison:

she is rich at heart.

The old idiom: "The apple does not fall far from the tree." is very true. Offspring do grow up to be like their parents. This is especially true in the case of Teva Harrison. Like her parents she too wants to give back.

She told me, "My grandmother, Ruth March, was a powerful influence on me. She studied Economics at Stanford, and went on to work with the United Nations, the International Association for Volunteer Effort, and she was repeatedly mentioned in the Congressional Record. She showed my sisters and me, that there was nothing that we couldn't do. I miss her."

For the last 8 years, Teva and her husband have been DJs together for the Giller Lite bash, an event that benefits Frontier College's literacy programs. For two years she sat on the Executive Committee of this event as Chair, Marketing and Publicity.

This year they also were DJs at Pongapalooza in benefit of First Book Canada.

She is also the lead raffle key-seller at The Walrus Foundation's annual gala, gives pro-bono speaking engagements and sits on a panel at Social Media Week. She is an important player in Collaboration For The Greener Good and speaker to a George Brown class on social media and online fundraising.

> *"We're always learning and adapting in this business. I've learned so much about telling a better story by listening to the data. I trust it to teach me when a good idea is really great or when an idea I love too much is actually lousy.*

Even as a child while others played the board game Monopoly, Teva was given a game called Volunteer.

Her husband, David Leonard, is a fundraiser too. He's the Director of Events and Special Projects at The Walrus Foundation.

They met by chance during 9/11.

She said, "I lived in Seattle in 2001, where I was programming for a little start-up film festival. In this capacity I attended the Toronto International Film Festival in September. Right in the middle of the festival, 9/11 happened.

"I spent mornings in the lobby of the Intercontinental with other Americans, watching the news, wondering what would happen. All travel was cancelled. I was originally scheduled to fly to NYC & Boston for meetings after the festival.

"The first day that I was meant to be in NYC, I met my husband for the first time. Everything changed. I realized that I no longer wanted to work in film. I moved to Canada, married David, and took my first job involving direct marketing. I haven't looked back, although I do miss the Pacific Ocean."

Not surprising for a person who is now the Manager, Supporter Development at The Nature Conservancy of Canada (NCC).

I first heard of Teva when she gave a Webinar for Canada Post on Monthly Giving. She spoke about generating new monthly donors not by the usual DM appeals but by using a combination of integrated online methods including blogs, twitter, facebook, magazine, radio and newspaper.

The results:

- Net revenue was up 24.4%
- Online giving to this program was up 32.9%
- Year-to-year donor growth was up 90.5%

I was so impressed that I immediately contacted her to find out more and now I have had the pleasure of finally interviewing her.

She is full of energy, radiates kindness and has a vey infectious smile.

"DM is a powerful tool to connect people to the causes that they will find most meaningful," she said. "I believe that people want to be a part of making the world a better place, locally, globally, or both. We make it really easy for people to be a part of doing good work."

But she didn't start as a fundraiser.

"I studied painting and drawing in school, but found myself more suited to arts administration. My early jobs were curatorial. I started out as a Program Director for the Olympia Film Society and Festival, which is an NGO in Washington State. A significant amount of fundraising was required to keep the organization afloat, which made my first job also my first fundraising job.

"I was really young when I worked in film, and that's not an industry known for a healthy work/life balance. Nobody told me to reserve time for myself, so I didn't. There were days I slept in the office, waiting for an important fax. That's just the pace of the work. In the NFP sector we all work hard, but we're acutely aware of the risk of burnout so we must work hard to keep a healthy balance.

"Marketing has always been part of my work. I started out in film, as a programmer for a rep house and cinema, and I have always been interested in finding and serving an audience.

"I came to direct marketing sideways through magazine circulation. When I first came to Canada, I took a great job promoting a trade publication. I was lucky to work with Eithne McCredie, a wonderful consultant who took the time to really explain to me what she was thinking with list selects. She also explained carefully why she believed one package would outperform another. She's the one who taught me that my biggest challenge would be to get an envelope opened.

"Charitable giving is so important. DM is a powerful tool to connect people to the causes that they will find most meaningful. I believe that people want to be a part of making the world a better place, locally, globally, or both. We make it really easy for people to be a part of doing good work.

"I have the opportunity to take all that I've learned about storytelling and finding an audience to promote the Nature Conservancy of Canada, a cause that I believe in deeply. The tools of DM can help us to reach and engage all Canadians, our government, corporations and individuals who would like to support a natural Canada.

Teva is more than just a fundraiser.

She admitted to me that, "I'm a multi-media artist and I am passionate about urban gardening. My backyard has been transformed into a tiny vertical farm. I get up early to run most mornings, as I'm training for my first half-marathon. Sometimes I run home from work, other times I bike or take the TTC.

"I always have a few books on the go, usually a mix of fiction and non-fiction. I'm currently enjoying Nudge: Improving Decisions About Health, Wealth, and Happiness, by Richard H. Thaler and Cass R. Sunstein, which I picked up to inspire my work. Another book I'm reading right now is a wonderful compilation of short stories by Etgar Keret titled Suddenly, a Knock on the Door.

"I read an amazing book a few years ago by Tom McCarthy called Remainder. It explores memory and authenticity in an absolutely captivating story. I found that I actually moved through and saw the world around me differently after reading it.

"I love to host friends and family, to cook ridiculous amounts of food while my husband mixes vintage cocktails, and to let the laughter and conversation take off.

"Toronto offers all kinds of great entertainment, from our excellent opera company and symphony to indie rock and international DJs. We never miss a new exhibit at the Art Gallery of Ontario. We have amazing parks in the city. I live near High Park and one of my favourite times is the week when the cherry trees bloom. I love biking down to Toronto Island with a picnic and some friends and spending the day on the beach. The challenge is really that there's not enough time to see and do everything that's interesting.

"I greatly enjoy writing copy. I'm a storyteller and I love the moment when an idea takes on a life of its own.

"We're always learning and adapting in this business. I've learned so much about telling a better story by listening to the data. I trust it to teach me when a good idea is really great or when an idea I love too much is actually lousy.

"I'm looking forward to seeing how the marketing landscape changes in the years to come and the opportunities that open up promoting land conservation!

"With my film background, one of my first projects when I arrived at the Nature Conservancy of Canada was to work on the production of the DRTV program: A Force for Nature. As an Executive Producer I engaged some amazingly generous Canadian stars as on-air presenters, worked with the excellent team over at Northern Lights on story and production, and had the unforgettable opportunity to travel across Canada shooting stories about the Nature Conservancy of Canada's conservation work. The show itself was a powerful promotional tool. It brought wide visibility to the organization, along with new monthly donors and a number of substantial bequests.

"In multi-channel integration we need to be flexible and creative, as we navigate the fast-changing market. New media will continue to evolve, which will give us opportunities to support our brands. The challenge will be doing so without diluting our messages. At the Nature Conservancy of Canada our approach is integrated, holistic and nimble.

"I'm a bit of a Pollyanna, always looking for the sunny side," she concluded.

There are many things I learned from her which echo what Gandhi once said: "Be the change that you wish to see in the world."

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

Continued from page 7

or defection rates should be reasonable. The reasonableness of these numbers, though, would have been confirmed through results and comments from key stakeholders that were gleamed from the upfront preparation stage.

Once these segments are determined, profiling of each of these segments helps to better understand the key customer characteristics that comprise a given segment. Profiles can be used in two ways. Strategically, the information can be used to develop communication and channel strategies which are more engaging to the mindset of that particular group. For instance, a particular profile of a high value customer may comprise the following characteristics:

- Older
- wealthier
- Tend to engage more in online media

A heavier online strategy speaking to the concerns of wealthier retirees or people nearing retirement would certainly be very appropriate here.

The second way is tactically where the information is used to create lists of customers that most resemble the profiled segment. Here, we target those low to medium value customers that tend to be older, wealthier, and more engaged online since these customers exhibit the characteristics of a high value customer.

Cohort analysis represents another type of unique analysis as its purpose is to explore new customer behaviour over a number of years. Typically, this kind of analysis commences with customers that were new five years ago and then tracks their spending behaviour in subsequent years. The same analysis is then conducted in subsequent years. Obviously, as we move forward in time, we have less tracking history with new customers. Through this kind of analysis, we can begin to discern retention, migration, and up-sell patterns amongst these new customers. At the same time, we may also find that there are unique behavioural patterns that are associated with a certain cohort group.

Depending on the nature of the industry, basket analysis is another form of analysis to better understand the "event" behaviour of the customer's purchase. The analysis can reveal that the mix of products purchased can vary between customers. For example, this product mix will in most cases vary depending on whether they are a high medium or low value customer. Migration opportunities can use the insights generated from this analysis by promoting products that are first relevant for the lower value segment and secondly that will migrate them to the higher value segments.

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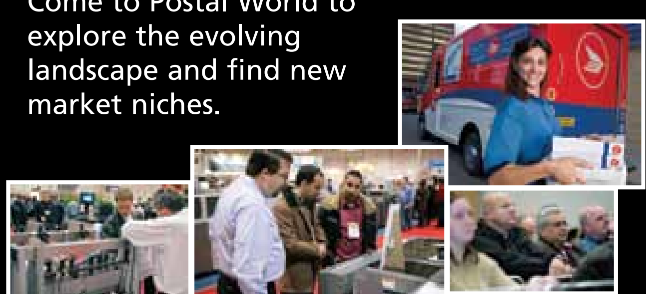

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New customers will also exhibit different product mix patterns when compared to older customers. As indicated above, the same migration type of migration analysis is conducted here by identifying those relevant products which should be promoted so that new customers are on a path towards becoming higher value customers.

Recommendations

With the completion of the preliminary analysis, the actual required work for this discovery exercise is now finished. It is now time to consolidate all this work into a comprehensive document. This document contains all the actual details concerning results which are used to support the many findings and insights generated from this exercise. But despite the comprehensiveness of the report, it is of no use if it does not clearly lay out actionable next steps. These actionable next steps are focused in two areas. The first area consists of the data strategy and what the organization needs to do to improve its information environment in order to more fully optimize the analytics discipline. The data strategy needs to be proactive in addressing not only the existing analytical needs but also any potential analytics needs due to the changing nature of analytics.

The second area focuses on what specific analytics activities should be undertaken in the first year and in what priority so that the company can effectively commence its analytics journey. The analytics strategy should be short-term in nature so as to provide an initial benchmark from which to commence this discipline. Keeping a shorter term perspective on analytics just simply recognizes the underlying fact that things can change very quickly within organizations. Obviously, this short-term focus will identify activities that will yield the quickest wins in terms of ROI but also activities that will generate much learning. It is this second component of learning which ensures that the longer term ROI is not being overlooked.

By having both a data strategy that optimizes the use of analytics complemented with a set of analytics activities that begin the organization's analytics journey, the organization has a roadmap or path in which to begin this journey. With this kind of mindset, investing in a data discovery exercise is an easy decision as long as this process is undertaken with the due diligence and discipline as outlined in this article.

Continued from page 16

people to benefit from sharing yet stay close to the business at the same time? Can we ensure collaboration regardless of how analysts are organized?

Perhaps the solution lies in the technology that offers new opportunities for information exchange every day. Interactive web meetings and presentations, internal online communities and video conferencing are a few examples of technologies that present us with an opportunity to create an effective analytical structure, keeping analysts "close" to each other and to their internal clients. Any organization can leverage these technologies without making significant structural changes.

The technology to support this, even in geographically disparate locations, is not new, but it has not been used effectively for this purpose. More critical than a central location or chain of command is the awareness of others doing similar projects and building a culture of sharing that is not always easy. We know one organization where an entreaty to build a knowledge exchange was met with "what's in it for me?" It's important for all employees to understand that sharing best practices and learning along the way will help them be more successful in their jobs, and be more visible in the organization (possibly resulting in more career growth). A more collaborative approach will ensure the most complex problems can be solved at a quicker rate.

Sometimes culture alone cannot make this happen. More often than not, sharing stops when people get busy. We therefore recommend formally assigning company-wide, cross-functional responsibilities to employees related to this analytic collaboration. Make it their job to organize analytical communities, document best practices, oversee cross functional analytical projects, increase awareness and trust in analytical work and capabilities (often an issue), exchange information regarding tools and vendor contracts, etc.

In practice, this means that people will have some functional and cross-company analytical responsibilities, potentially even leading to dotted-line reporting. This matrix organizational approach is necessary in order to formally demonstrate the importance of the information exchange within the analytics community. This approach makes people accountable versus seeing centralized information exchange as an extra-curricular activity. It ensures employees stay focused on keeping the conversation going. There will need to be at least one senior manager dedicated to leading the "Centre of Excellence". And to help all members succeed within this analytical organizational structure, accountability needs to be defined, e.g., the percentage of time required by the members and their key responsibilities.

(subhead)

Making it work: tips from our experience

We believe that by leveraging both technology and matrix accountability, you can greatly improve an organization's ability to utilize its analysts effectively.

Most companies find that when starting out, it is difficult to prove the case for a centralized analytics team or an internal consulting practice. Analytic teams usually spring up out of a business need identified within a specific business unit or functional area. For marketing leaders with a decentralized model (i.e. stand-alone marketing analyst teams), the following advice may help leverage this approach more effectively:

Create opportunities for knowledge sharing in the organization. Even in the absence of formal "Centres of Excellence" and central coordination, user groups can allow for best-practice sharing. These opportunities to showcase their work can also have the added benefit of making analysts feel valued within the organization.

Work to strategically source tools and databases so that you are not paying twice for tools. We have seen many organizations unknowingly deploy statistical software, like SAS, in multiple places in the organization.

Work with counterparts and other functional groups to facilitate temporary internal transfers to provide fresh ideas and growth opportunities.

For those working within a more centralized structure, you may want to insist upon the following:

Be clear about how prioritization will occur and how teams will be assigned to ensure you are getting the support you require.

Allocate defined analytical time to marketing - and not only when marketing projects reach priority status. This will help you resist the temptation to hire your own analysts and create a "rogue" team.

Ask "has this been done before?" and "what have we learned from similar projects?" to encourage the collection of resources to leverage the best practices laid out for them.

If size warrants, while encouraging cross-pollination to get new ideas, push for specialization of function and subject matter expertise, including asking for the same person to own and oversee the same projects from start to finish. For example, it is often beneficial to have consistency with the same analyst creating the experimental design for a campaign and completing the post-campaign analysis.

Overall, many different models can work effectively for organizations. The most feasible and appropriate model for your organization will depend on where it is in the analytical maturity life cycle, as well as company's size and priorities. Our view is that the best results will come from those that figure out how to share the analytical expertise and information, while keeping analysts close to the business and their internal clients.

Regina Malina is Director, Marketing and Brand Development, Intact Insurance and Emma Warrillow is Chief DiGGer, Data Insight Group Inc. This article was first published on the CMA website and written in association with the Customer Insights and Analytics Council.

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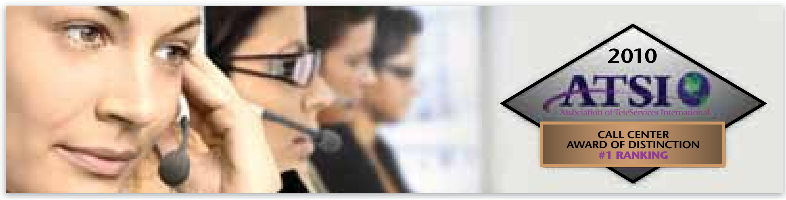

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Ryan Lee
Environics Analytics welcomes Ryan Lee as a software developer to help build and enhance the company's data-driven applications.

Lefty Papachristoforou
Environics Analytics has appointed Lefty Papachristoforou as a product manager to oversee the creation of new products and data-driven marketing solutions.

‣ *Continued from page 14*

1996 to 2006, with a 50% rise—saw its growth sag to a below-average 5.6% between 2006 and 2011.

The new Census data give marketers their first glimpse of a changing population. Subsequent Census releases will allow for an analysis of changing household composition, changing cultural diversity and many other population characteristics underlying the population shifts. All of this may result in new types of population segments that will be incorporated into EA's PRIZM segmentation system. This, in turn, will give marketers better insight into their customers and trade areas and can ultimately lead to improved marketing, merchandising and decision-making. With each new release, analytics companies like Environics Analytics will use that data to create more finely detailed profiles of consumers' demographics, lifestyles and behaviour—what they buy, watch, blog and think about—offering critical insights for any direct marketing campaign. When it comes to the Census, the numbers may speak for themselves, but direct marketers must translate those numbers into action if they are to be successful today and in the future.

One of Canada's leading experts on the Census, Doug Norris, Ph.D., is a Senior Vice President and Chief Demographer at Environics Analytics. He joined EA in 2006 after nearly 30 years with Statistics Canada, most recently as Director General of Social and Demographic Statistics. Currently, he assists companies, government agencies and not-for-profit organizations in using census and other statistical information for planning and marketing projects.

‣ *Continued from page 4*

attracts and how they interact with the company. The informed marketer then uses this information to better understand customer interests and preferred methods of communication, as well as how specific marketing efforts are driving the right kind of engagement.

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As an informed marketer, strategy and a holistic view of the customer are the crucial traits that will propel your marketing efforts to new heights. Fueling this is the customer data and technology tools that deliver insight into the specific messages and communications tactics that create one-to-one, engaged relationships that drive more revenue.

Troy Burk is the CEO and founder of Right On Interactive, a lifecycle marketing automation software company that helps organizations win, keep and grow business by building prospect and customer engagement. He can be reached at tburk@rightoninteractive.com.

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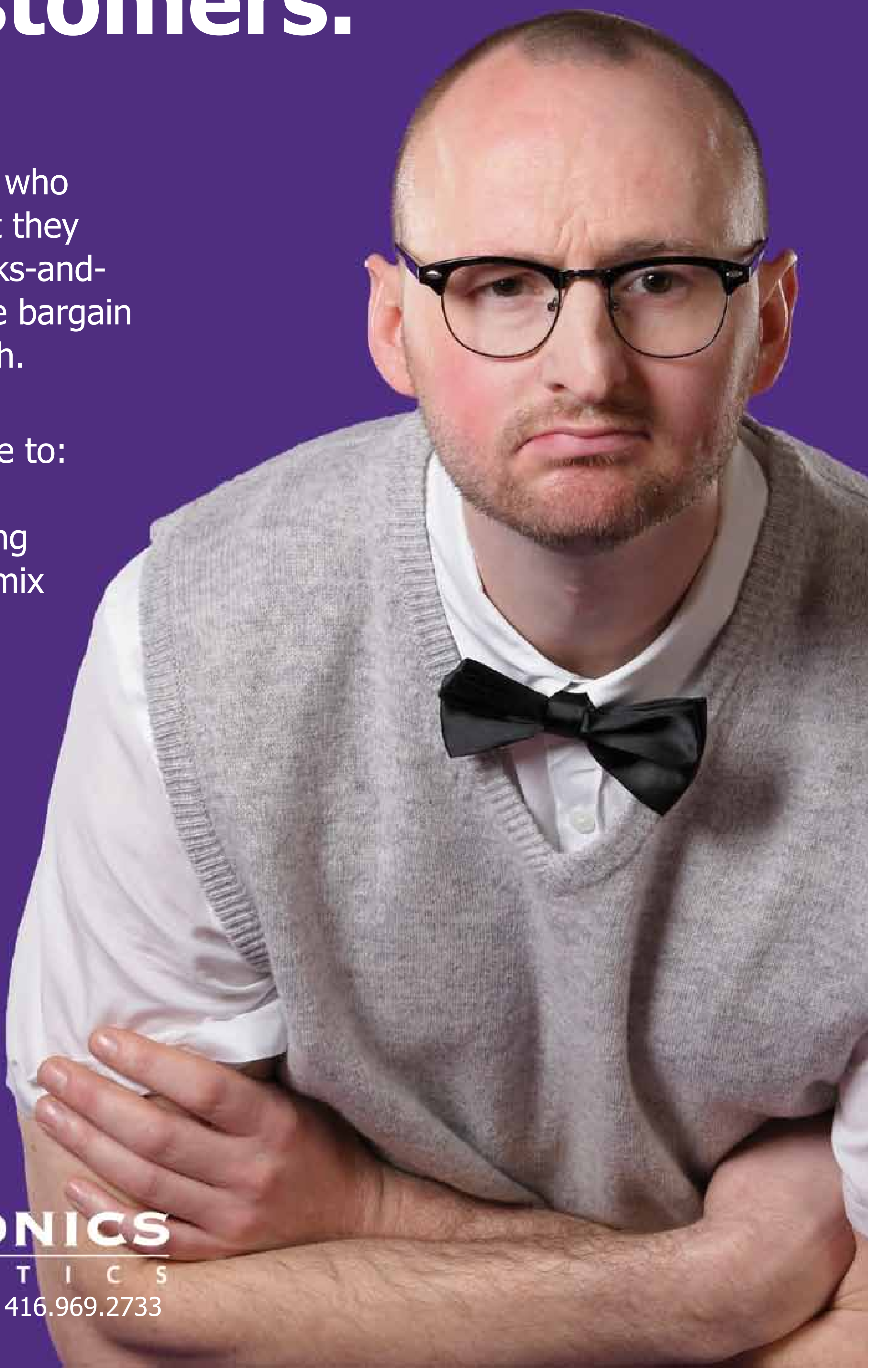

We can help you find out who your customers are, what they buy, whether they're bricks-and-mortar shoppers or online bargain hunters—or a little of both.

Use our data and software to:

- Track household spending
- Create your ideal retail mix
- Determine digital and offline behaviour
- Prioritize locations in a market
- Forecast sales

Know more.
Market smarter.

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