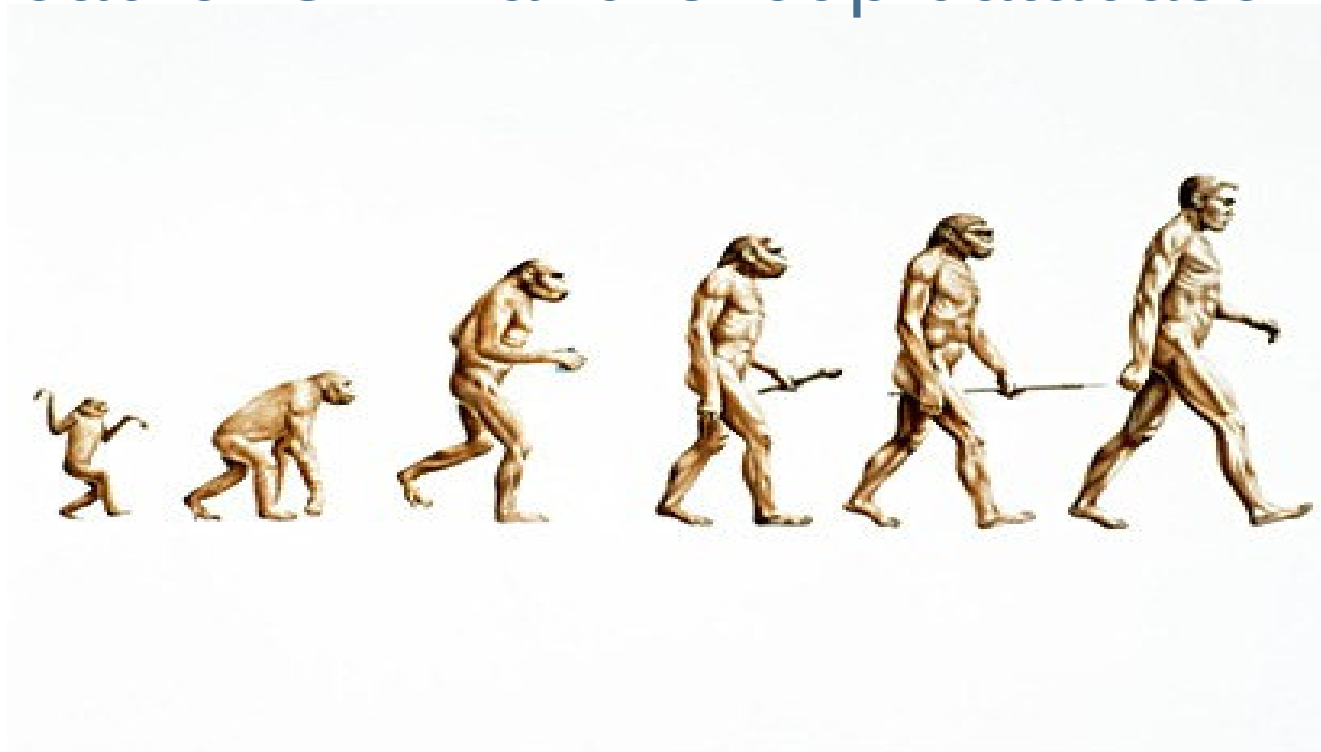


# The evolution of the customer journey by Michelle de Souza Head of CRM and Group database



# The market place presents an increasing challenge

- In response to the economic downturn. Increasingly, organisations are looking to curtail expensive acquisition campaigns to concentrate on generating more income from existing contacts on their database.
- Organisations are under intense competitive pressure, and must redefine their approach to reflect radical shifts in channel effectiveness and customer behaviour.
- Many media channels used have reached the point of saturation.

# So what does that actually mean for you and me ?

- Fundraising is a key skill, unique to and at the heart of the voluntary sector's success. In an increasingly competitive funding environment the required skill set is becoming more complex, with an increasing emphasis on enterprise and income generation in addition to core fundraising skills.
- .....increasingly reliant on database analytical skills !!

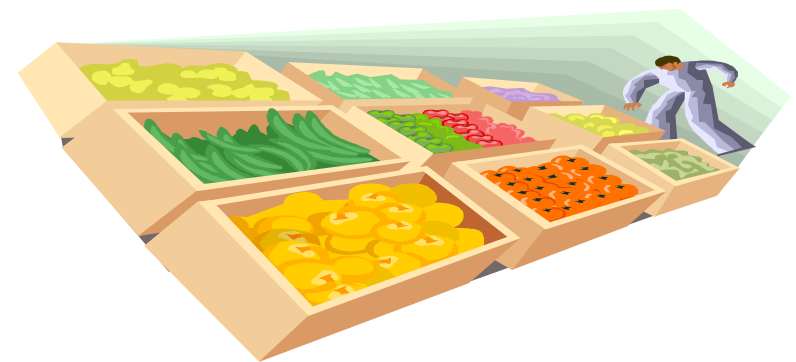
# Danger ahead !

- A greater awareness of Data Protection legislation amongst the general public is removing large numbers of a finite audience in an already over-crowded market place.
- In the last 7 years 19.8m individuals have **removed** themselves as a marketing prospect via the electoral roll.
- Mailing/telephone preference(MPS & TPS) are increasingly used by disaffected consumers.

# A word from the wise

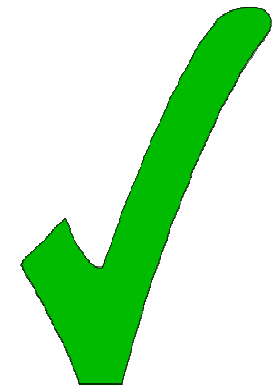
## Ingredients for a successful CRM program - you will need to.....

- 1) Give supporters /customers what they want!
- 2) Develop a one to one relationship with the individuals on your database.
- 3) Communicate across channels, effortlessly



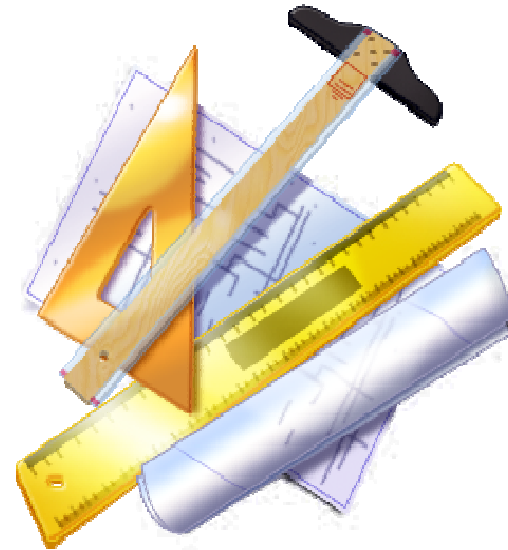
# What is the right response?

Employing CRM in a **responsive sense** will provide an organisation with tools to drive marketing programs that engage with individuals in a manner designed to enhance customer satisfaction and brand reputation, enabling the right offer to be made at the right time through the right channel



# So what sort of tools do I need?

- A customer centric system
- Dynamic classification process that produces meaningful lifecycles.
- Software that allows you to discriminate across data-sets
- Business rules that allow you to cross-sell different products to existing audiences without damaging existing relationships
- A way of harnessing the above to enable NPD to be driven by data insight
- Multi-dimensional data analysis that allows you to measure degrees of success and failure



# A customer centric database

- That will allow you to create an interaction history, across all communication channels, that creates a two-way memory of every marketing message and the supporter's response to that message.





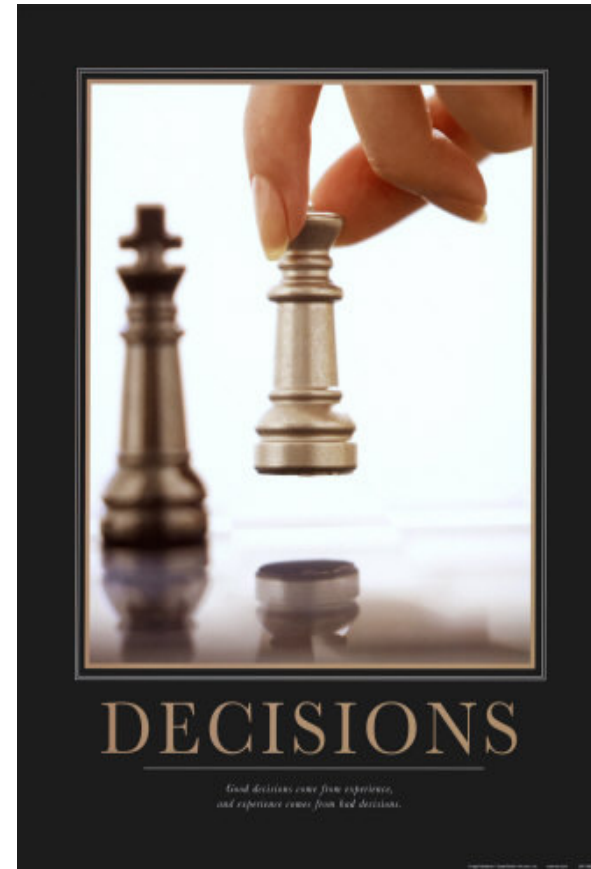
## Colour the data with additional data-sets held on the system

- ACORN
- OCEAN
- Wealth screening
- Deprivation indices
- Limited qualitative segmentation
- DOB
- Insurance renewal dates



# The Rules

- Is it acceptable to send two offers at the same time?
- What period should you leave between mailing times?
- Is there a limit to the amount of contact an individual can receive?
- When should you ring-fence names
- How do you test in a dynamic environment.



# Insight

- Which indicators are important?
- How do you weight transactional versus geo-demographic information?
- What if you have more than one product competing for the same audience?



# NPD and your database

Use the database for.....

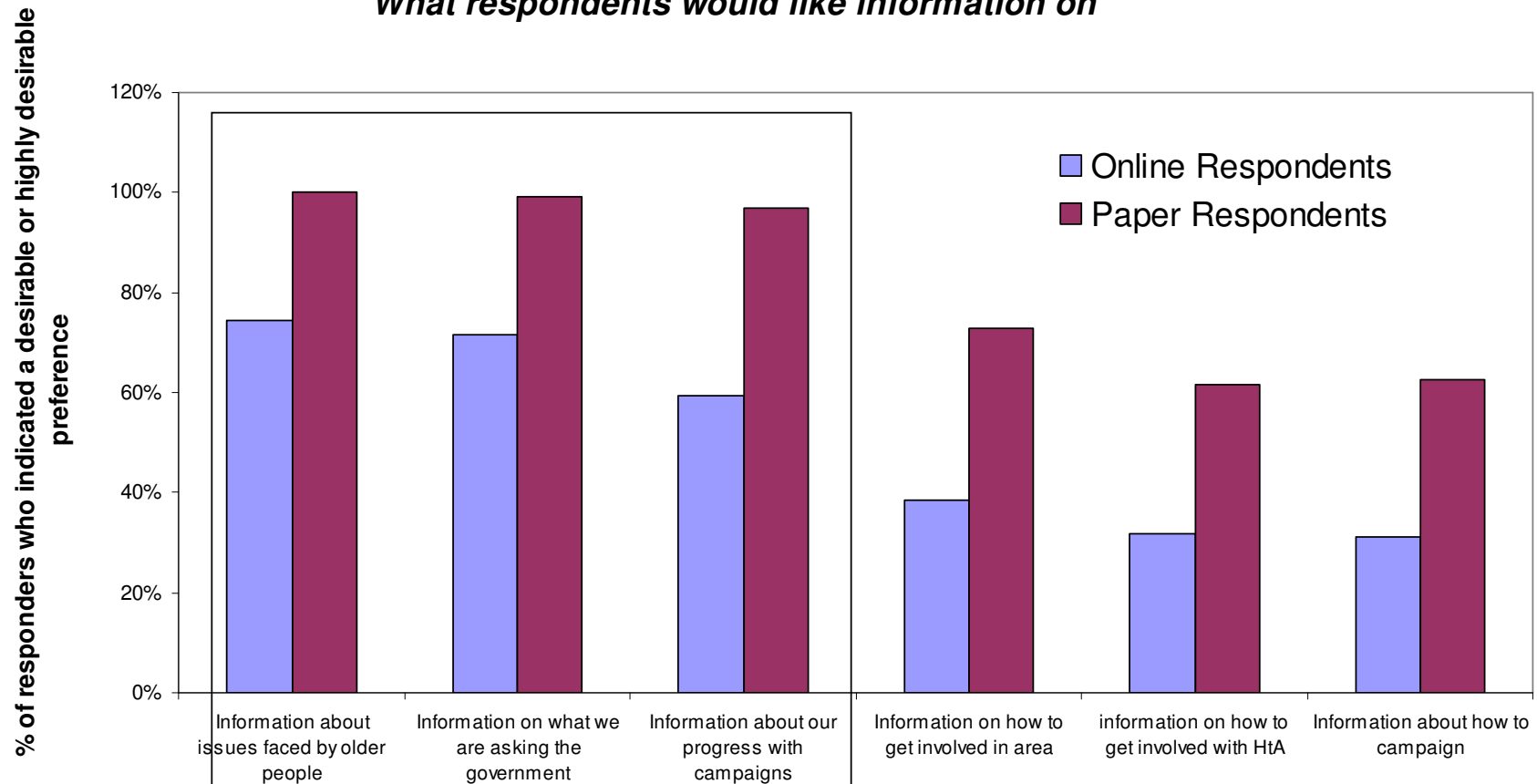
- ✓ Research
- ✓ Insight
- ✓ Sign-posting
- ✓ Product testing
- ✓ Post campaign analysis



# Analysis

Campaigners would prefer info on what we are asking the government, issues faced by other people and information on progress with our campaigns

*What respondents would like information on*

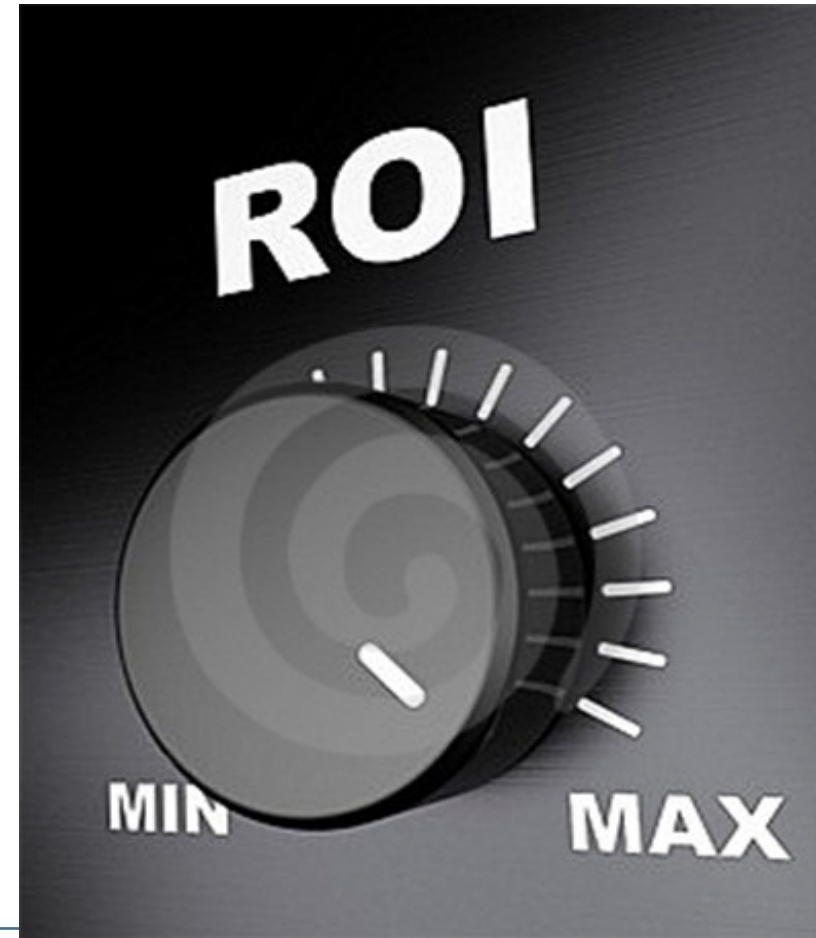


# Measurement of degrees of success or failure

Measurement through analysis

.....

- Level of multi-product ownership
- Life time value of an individual
- Retention/attrition levels.



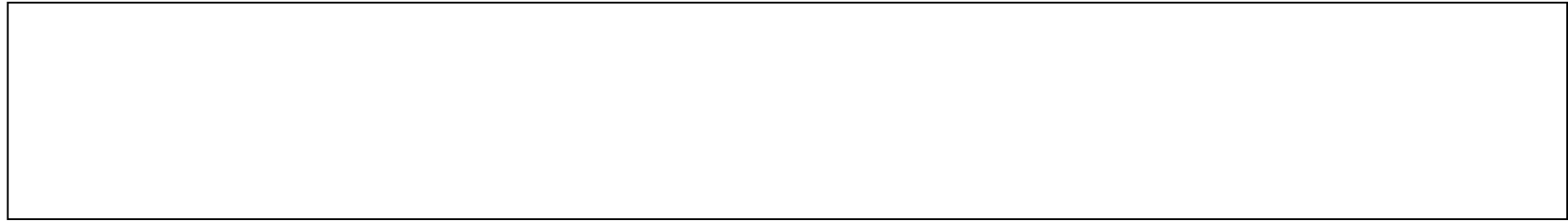
# Two Charities and a Merger?

- Age Concern and Help the Aged formally merged in April 2009.
- Bringing together a core data set of 4 million viable names, with approximately half a million new names added every year.
- The majority of the data has been migrated to one system
- Anticipate brand launch to take place in March 2009

## Classification – “Horses for courses”

1. We have 22 separate products/categories.
2. Each has a different life-cycle length that is relevant to the product and market dynamics. Shortest 2 stages, longest 9 stages.
3. Hold financial and non-financial data





Examples of analysis I run  
across the system will be shown  
during the presentation

Any Questions?