



Trinity Direct

# Donor Enhancement Packages

Strategies to Analyze Your  
Donor Files

**Trinity Direct**

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# Donor Enhancement Packages

- What Is It?

- In order to help donors understand donor behavior, Trinity Direct has partnered with Experian to offer demographic enhancement packages.
- Precisely target your best prospects and donor segments based on demographic and lifestyle knowledge.
- Better identify cross-sell and up-sell opportunities
- Define unique characteristics of your best and most profitable donors.
- Anticipate likely future behaviors and donation trends.
- Customize marketing messages for improved target audience relevance

# Donor Enhancement Packages

- How Does It Work?
  - Enhancement Packages' match rate reveals trends in your database by identifying the number and percentage of records on your file that match each enhanced data element.
  - They reach over 215 million individuals and 110 million living units that are routinely updated.
  - By learning more about your donors and their habits, you can identify what offers, what message, what channel and timing works best for them.

# Donor Enhancement Packages

- What enhancements are available?
  - Date of Birth, Age, Income, Gender, Ethnicity, Marital Status, Presence of Children, Dwelling Information, Discretionary Spending Income, Lifestyle data and more!
  - Trinity Direct has created “bundles” to help you determine how to best analyze your file.

# Donor Enhancement Packages

- What will it tell me about my donors?
  - How much are they worth?
  - Who are my most affluent donors to whom I could target my major giving campaigns?
  - What is the age of my donors and how does this affect my planned giving campaigns?
  - Which donors are most likely to need special services, such as trusts?
  - Which donors have the greatest growth potential?
  - Which donors have the financial resources available?

# Donor Enhancement Packages

- Why has Trinity Direct partnered with Experian for this project?
  - To enable our clients, both large and small, to take advantage of value pricing
  - To provide our clients with comprehensive analysis and strategic application of data

# Donor Enhancement Packages

- What packages are available?
  - There are 4 basic packages available
    - Bronze Bundle
    - Silver Bundle
    - Gold Bundle
    - Platinum Bundle
  - Each Bundle has a “Plus” Option
    - Additional demographic information for a more robust analysis

# Donor Enhancement Packages

- Bronze Bundle (\$25/M)
  - Gender, Age, InSource Estimated Income, Home Owner, Length of Residence
- Bronze Plus Bundle (\$35/M)
  - Date of Birth, Exact age, New Estimate Income, Probable Home Owner, Address Type/Dwelling Type, Dwelling Unit Size, Presence of Children, Additional Adult HH Member Name, Genders of Adult(s) in HH, Individual Education, County Geographic Income Percentiles, National Geographic percentiles

# Donor Enhancement Packages

- Silver Bundle (\$70/M)
  - Gender, Age, InSource Estimated Income, Home Owner, Length of Residence, *P\$ycle Net Worth Indicator*
- Silver Plus Bundle (\$75/M)
  - Date of Birth, Exact age, New Estimate Income, Probable Home Owner, Address Type/Dwelling Type, Dwelling Unit Size, Presence of Children, Additional Adult HH Member Name, Genders of Adult(s) in HH, Individual Education, County Geographic Income Percentiles, National Geographic Percentiles, *Net Worth Model*

# Donor Enhancement Packages

- P\$ycle Net Worth Indicator
  - Segments households based on savings, borrowing and investment patterns
  - Looks at socioeconomic factors that have the greatest impact on donor financial behavior
    - Wealth Market
    - Upscale retirees
    - Upper Affluent
    - Lower Affluent
    - Mass Market
    - Midscale Retired
    - Lower Market
    - Downscale retirees

# Donor Enhancement Packages

- Gold Bundle (\$95/M)
  - Gender, Age, InSource Estimated Income, Home Owner, Length of Residence, *Discretionary Spending Index*
- Gold Plus Bundle (\$100/M)
  - Date of Birth, Exact age, New Estimate Income, Probable Home Owner, Address Type/Dwelling Type, Dwelling Unit Size, Presence of Children, Additional Adult HH Member Name, Genders of Adult(s) in HH, Individual Education, County Geographic Income Percentiles, National Geographic Percentiles, *Discretionary Spending Index*

# Donor Enhancement Packages

- Discretionary Spending Index
  - Provides marketers with the cleanest, most comprehensive up to date information
  - They reach over 215 million individuals and 110 million living units that are routinely updated from public and proprietary sources
  - Analyzes Net Worth, but takes it to the next level by applying the discretionary spending model. They may have a high net worth, but how much of that is disposable SPENDING income?
  - Avoid the expense of marketing to donors without adequate means to respond.

# Donor Enhancement Packages

- **Platinum Enhancement Bundle**
  - This bundle utilizes the TrueTouch and Mosaic Applications
  - CPM is based on match rate

# Donor Enhancement Packages

- Platinum Enhancement Bundle
  - TrueTouch
    - A powerful targeting solution that incorporates key dimensions of your audience, message, channel, and timing for optimal contact strategies
    - Classifies American households into 25 markets with well-defined lifestyles and interest, socio-economic characteristics and purchase motives

# Donor Enhancement Packages

- Platinum Enhancement Bundle
  - TrueTouch
    - Input to process \$1.50/M
    - Channel Receptivity \$40/M
      - Radio, Email, Direct Marketing, Internet, Magazine and Newspaper Ads
    - Contact Strategy \$120/M
      - Includes All elements PLUS phone append
    - TrueTouch Data (all) \$105/M
      - Includes All elements excluding phones
    - Touchpoints \$40/M
      - What makes them purchase
    - Impacts \$50/M
      - Lifestyle classifications
    - Timing \$30/M
      - When they like to be reached. (Time of day, weekend vs. weekday)
    - Channel Dominance \$40/M
      - How they prefer to be reached (email, direct mail, phone, or a combination thereof)

# Donor Enhancement Packages

- Platinum Enhancement Bundle
  - Mosaic (Household level data) \$45/M
    - Mosaic Household data is built using InSource household level data and the wealth of Experian data assets.
    - More than 600 variables evaluated, from which 300 were selected to identify similarities in donor behavior, expenditures and attitudes
    - Some elements include: Demographics, Socio-economics, dwelling characteristics, location, behaviors and interests

# Donor Enhancement Packages

- Conclusion
  - Valuable research tools now available to help you further analyze your house file and apply your knowledge to locate the best responders with the highest level of spendable discretionary income
  - Trinity Direct's partnership allows you to take advantage of pricing savings
  - Trinity Direct's staff is able to help with the analysis and aid in the decision process to finding your best donors

# Donor Enhancement Packages

- For more information please contact:  
Trinity Direct @ 973-283-3600 or visit us  
on the web at [www.trinitydirect.net](http://www.trinitydirect.net)
- Ask your Trinity Direct Broker or Manager  
for any additional information you may  
require.

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