



PBS SUSTAINER LEARNING CENTER SAMPLE TELEMARKETING DATA REQUEST

Today's Date: [recommended 3-4 weeks prior to data due date]

To: Database Manager

CC: Supervisor

Fr: Fundraiser

Estimated Quantities Needed: [2 weeks prior to data due date / 4 weeks prior to start date]

Data to Telemarketing Firm: [Minimum of 2 weeks prior to start date]

Start Date: [TBD]

Re: Data Request for Upcoming Telemarketing Sustainer Conversion & Upgrade Campaign

Please include the following segments:

1. Sustainer Upgrade

Current sustainers whose monthly donation is between \$5-50. (Suppress new, upgraded or downgraded in prior three months).

2. Lapsed Sustainer

Donors who were sustainers 3-27 months ago but are no longer sustainers.

3. New Donors Low Dollar

Joined 0-12 months and Highest Previous Contribution is between \$1-\$99.99. Includes both no additional gift and additional gift donors.

4. New Members High Dollar

Joined 0-12 months and Highest Previous Contribution is between \$100-\$999.99. Includes both no additional gift and additional gift donors.

5. Multi-Year Low Dollar

Multi-year joined 13-24 months (gave within 0-12) and Highest Previous Contribution is between \$1-\$99.99. Include both no additional gift and additional gift donors.

6. Multi-Year High Dollar

Multi-year joined 13-24 months (gave within 0-12) and Highest Previous Contribution is between \$100-\$999.99. Include both no additional gift and additional gift donors.

Exclude from all segments:

- No Mail or Phone Appeal codes
- Do Not Call codes
- Major Gift Prospects
- Deceased
- Has No Valid Address

- Foreign addresses
- Major Gift Donors
- Board members
- Staff members
- Other station standard suppressions (i.e. Vehicle Source Gift)

Output & Delivery:

Please include the following fields for each record:

- Salutation
- Last name
- First name
- ID
- Phone Number (include blank fields for phone append)
- Address line 1
- Address line 2
- Address line 3
- City
- State
- Zip Code
- Addressee
- Email Address (if you want callers to confirm on close)
- Most Recent Contribution Amount (MRC)
- Most Recent Contribution Date
- Highest Past Contribution Amount (HPC)
- Highest Past Contribution Date
- First Gift Date
- First Gift Amount
- First Gift Appeal
- Acquisition Attribute (identify TV or Radio if joint licensee)
- Gift total for last 12 months
- Amount of current sustainer monthly donation
- Type of sustainer payment (check, EFT, credit/debit card)

Data can be posted on the [Station or Vendor's] FTP site and email notification to [TM account manager].