

## Using Recommended Filters to Improve Segmentation

Not all donors are created equal!

Segmenting donors allows clients to better understand who their donors are, why they give, and how to best communicate with them. Segmenting also allows clients to approach donors in a more personalized, meaningful way.

Segment	Number
<b>Total Contacts</b>	
<b><i>Recommended Filters</i></b>	
New donors last 30 days	
Donated Last Year But Not Yet This Year (LYBUNT)	
With donations	
Without donations	
With an email address	
Without an email address	
Active donors	
YTD Donation Total Greater or equal \$500	
Donated Some Year But Not Yet This Year (SYBUNT)	
<b><i>Create three possible new filters</i></b>	
YTD equal or over <Org's determined Major Gift>	
Recurring Donors	
Create custom fields to create and save filters (Example: audience members in a student arts org vs. participants or their parents; alumni vs current family; program interest area; generational affiliation)	

- I. Run the filters recommended in the table.
- II. Discuss critical next steps for the two or three segments likely to have biggest impact on YE giving, based on client capacity to implement.
- III. Design communication timeline for all designated segments.
- IV. Create tasks in the system to reflect the recommended timeline.
- V. Write donor-centric content for each specific filtered segment.
- VI. Create email blasts using the content provided by the coach and using recipient lists based on the filters.