How to be More Effective

with Personalization & Variable Data

Variable Data is a tool you can use to personalize printed materials, like direct mail, with unique details for each member of your audience.

Addressing people by their first name, mentioning a relevant-to-them goal, or citing how much they donated to your organization last year can all help your nonprofit's marketing materials feel like they're speaking directly to each donor.

"...get more creative with how you customize your materials."

With a little insight into how Variable Data is set up & implemented, & **by learning best practices for organizing your data to work with personalization**, you'll be able to get more creative with how you customize your materials.

Let's dive in!

Studies have shown that personalized mail has better open rates, better response rates, & is seen more favorably by most people. According to the DMA (Data & Marketing Association) **"Targeting customers on a 1:1 level increases response rates up to 50% or more."**

Variable Data was used to produce these programs for an Auction Event – each printed with a unique bidder number.

WHAT IS VARIABLE DATA?

Variable data is information that changes from piece to piece. In mailing, this mainly focuses on the name & address of the recipients on your mailing list. However, this is just the tip of the iceberg.

You can use variable data for a variety of other creative things, as well.

Almost any information you have collected about your donors can be used to personalize. One example is to use **tiered ask amounts** based on donors' past giving. Tailor your asks based on what type of donor they are *(Major or General)*, or suggest they give the same amount as their last donation – or calculate a slight increase; *"Last year you gave <<Last Gift Amount>>, this year would you consider giving <<Slightly Increased Gift Amount>>."*

Another example is to customize your message to better fit a particular type of recipient's role in the story. Let's say your organization offers classes to the public – one segment you want to mail to includes people who have taken a class, but haven't given a donation.

Rather than sending them a message about how a previous donation helped, you might include a variable paragraph about how classes like the one they took are made possible by donors. Then call on them to help others receive the same assistance that they did.

Variable data doesn't have to be limited to text. Photos & other graphic elements can be personalized as well! If you are mailing to people all over the state of Oregon, consider using a variable photo within your layout to feature a landmark local to each recipient's home.

Your donors along the Oregon Coast will connect better to a photo of Haystack Rock, while those local to Southern Oregon might respond better to a photo of Crater Lake. Tailoring pieces like this helps your donors feel seen as individuals.

Things you can personalize with variable data:

NAMES

PLACES

DATES

NUMBERS

ORGANIZATIONS

ASK AMOUNTS

PHOTOS

GRAPHICS

SIGNATURES

PARAGRAPHS

The sky is the limit when it comes to variable data & the different ways you can personalize your mail piece to better speak to your donors. **The most important part is planning ahead.** Read on to learn more about how to prep for personalization success!

HOW DOES VARIABLE DATA WORK?

Variable data uses a spreadsheet of information with each recipient listed on their own row. Variable data software uses the titles of the columns in your spreadsheet to match with the corresponding <<tags>> within your text.

For example, anywhere within your text that you want to insert the recipient's first name, you would use the tag <<First Name>> as a placeholder. The column of first names in your spreadsheet would also be named "First Name."

For direct mail, all the address information needs to be set into individual columns – street address, city, state, & zip. You can add more columns with additional information, based on the content you want to be variable.

In our example of personalizing the last gift amount & a slightly increased ask, you would simply add two new columns for each of these amounts on your spreadsheet.
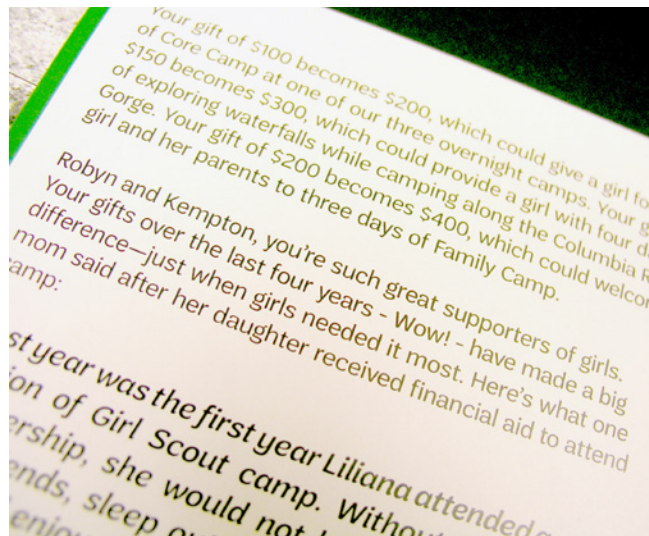
	A	B	C	D	E	F	G	H
1	First Name	Last Name	Address 1	City	State	Zip	Last Gift Amount	Gift Ask
2	Jane	Doe	123 Main St	Hillsboro	Or	97124	50	75
3	John	Smith	456 ABC Road	Hillsboro	Or	97124	100	150
4	Tedd	Bear	789 South Court	Beaverton	Or	97007	500	750
5								

The columns for "Last Gift Amount" & "Gift Ask" hold the variable information for these tags.

VARIABLE PARAGRAPHS

There may be larger sections of text you want to make variable – such as a paragraph or P.S. line tailored to fit each type of donor.

In this case, it's best to format those lines in a separate text document, rather than in the spreadsheet cell. To do this, type the name of the text document in the cell. The variable data software will know to look for that document name, & flow its contents into the layout.

	A	B	C	D	E	F	G
1	First Name	Last Name	Address 1	City	State	Zip	Donor-Type Text
2	Jane	Doe	123 Main St	Hillsboro	Or	97124	major.txt
3	John	Smith	456 ABC Road	Hillsboro	Or	97124	general.txt
4	Tedd	Bear	789 South Court	Beaverton	Or	97007	nondonor.txt

The file name in the "Donor-Type Text" column tells the software which text file to flow in.
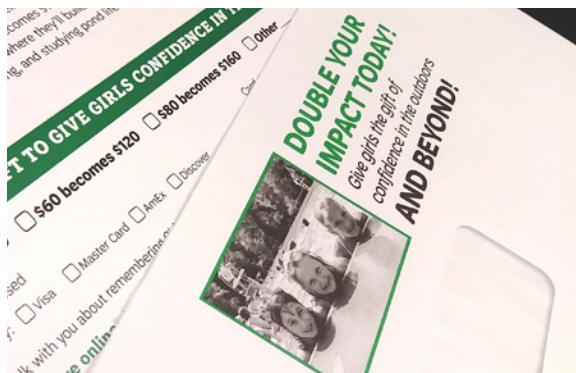
VARIABLE PHOTOS

Photos act similar to text documents – include the name & extension of the image file you want to use in the cell of your spreadsheet *(such as haystack.jpg)* & the software will place the correct photo into your layout!

	A	B	C	D	E	F	G
1	First Name	Last Name	Address 1	City	State	Zip	Location Photo
2	Jane	Doe	123 Main St	Cannon Beach	Or	97110	haystack.jpg
3	John	Smith	456 ABC Road	Medford	Or	97502	craterlake.jpg
4	Tedd	Bear	789 South Court	Portland	Or	97214	multnomahfalls.jpg

The file name in the "Location Photo" column tells the software which image file to use.

WHAT IS A SEGMENT?

A segment is a subset of your list, wherein contacts are grouped together by common attributes – *such as donor type, age group, or shared interests.*

Separating your contacts into like-groups allows you to tailor your messages to these groups & make them more relevant to the individual. The more personal your messaging is, & the more it speaks to the recipient's relationship with your organization, the more effective your piece will be.

Age 25-35

$50k + Annually

New Donors

Age 35-45

$100k + Annually

General Donors

Age 50+

$150k + Annually

Major Donors

Segments look different for each organization. Some common segments for nonprofits are **Major Donors, General Donors, Lapsed Donors, & Special Prospects.**

Depending on how people engage with your organization, there might be other categories that make sense for you to target. For example, a school might segment based on alumni, current students, & faculty.

Review the data & records you have available & identify the common ways that people interact with & support your organization to see which segment groups make the most sense for your list.

Identify what your donors are motivated by & segment them together based on what messaging will work best for each group.

SEGMENTING ON BUDGET

One common misconception about segmenting, is that if you create separate language for each category of your donors, you'll have to create *(& pay for)* separate mailings for each. *This doesn't have to be the case.*

A year-end appeal is a great example of how you can create one piece for all your audiences, & use variable data with segmenting to create personalization without going over budget. You'll only need to design one version of your appeal – taking care to make sure the layout works with all versions of variable elements.

For example, let's say your appeal tells the story of someone your organization helped in a special way. You know the story will resonate with all donors, but you want to highlight different parts of the story for each of your segments.

For your major donors, you want to tell them how much their large contribution made a direct impact. And for general donors, you want to let them know how much donors like them contributed in total.

By making this slight language change with variable data, you won't need to create different versions of your appeal.

The USPS doesn't care about the contents of your piece; just that every piece has the same weight & size. Variable data allows you to make customizations to the same letter – resulting in a piece that feels more relevant to the person reading it.

When donors see themselves as part of your story, they feel a deeper connection to your organization, & a bigger sense of being part of your mission.

Once that sense of loyalty & stewardship is developed, you can use other engagement tools to discover even more information about your donors that you can use to personalize your messaging.

TIPS FOR PERSONALIZATION

Follow these quick tips for setting up variable data in your layouts to avoid some of the most common personalization mishaps.

GIVE VARIABLE TEXT ENOUGH ROOM.

Make sure there is enough room for all your variable text options to flow into your layout. The best way to do this is to **see how the piece looks with the longest piece of each variable added.**

Does it cause any overflow text to leave the page, or disrupt another element of the design? Likewise with names or organizations – make sure the space allotted in your layout will accommodate the longest of your recipient's information.

DATA PRINTS AS IT APPEARS.

The way information appears in your spreadsheet is the way it will appear in your letter. This includes things like text set in ALL CAPITALS, or dates formatted as xx/xx/xx rather than Month Day, Year.

Not only can this result in your final pieces not looking how you intended, but it can be distracting for your reader & throw them out of the narrative.
Double check that all text in your spreadsheet is formatted exactly how you want it appear in the letter.

CROP VARIABLE PHOTOS TO FIT.

Ensure that all of the variable photos used are the same size & orientation.
While photos can be variable, the box that they go in must stay the same. Think of it like changing photos in a picture frame on a wall – you can't stretch the frame to fit each photo differently. The photo itself must be trimmed to the correct size.

Crop each photo to the size you want it to appear. Verify that each photo looks how you want it to when it is set in the layout – the variable data software cannot make any adjustments once the photo is placed.

TARGET ACQUIRED.

Personalization works. We hope this guide helps you feel more confident in your ability to get creative with Variable Data in your printing. With the right information & donor insights, you'll be able to create truly customized interactions – *without the custom effort!*

LOOKING FOR MORE?

Get personalized help with all of your variable data needs. Schedule a consult with us today!

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