

## Donor IQ® Datamart

Centralized data management to support advanced analytics

### Product Overview

Donor IQ® Datamart is designed to centralize the data for all of a direct mailers' clients and provide a foundation to support advanced analytics, scoring and triggered marketing activities. Many direct mailers have fragmented data which prevents answering basic questions about day to day activities, much less providing advanced analytics services for its clients. By centralizing data into Donor IQ® Datamart, a platform with tools which can deploy predictive models, automate management reports, and manage triggered marketing actions, a direct mailer can take full advantage of its data assets.

#### Data Hosting and Automation

EQDS works with the direct mailer to customize the Datamart to meet its specific needs. Each client is set up with standard data protocols and formats to automate the data transfer. The files are provided to EQDS by email or FTP and an automated system continuously checks if new files (solicitations, donations, and any other client data) are available to be loaded into the database. As part of the service, EQDS develops an ETL (Extract – Translation – Loading) interface for each individual client to standardize the loading of data into the system. As part of the loading process error detection logic is applied to each incoming file to ensure that abnormal data, formatting errors, or loading errors are detected and that both EQDS and the client are notified. At the end of the automation setup process, each client's data will flow into the Datamart in an automated fashion and the data will be standardized and normalized.

#### Data Clean-up

As data is loaded and standardized, various processes are initiated to clean up the data. EQDS develops custom processes to clean up client specific issues and can also apply industry standard address cleaning procedures. For example, duplicates can be identified and removed or merged (merge/purge), bad addresses are standardized (CASS), and change of addresses are applied (NCOA), among other standard cleansing routines. EQDS also generates reports to track and report on error conditions and provides notices on missing data, incorrect formats, or obviously miscoded information. EQDS has developed proprietary address and name matching algorithms which rely on complex vector analysis to identify the same individual across multiple data sources with name and address variations. For example, Adam Smith from 123 Main St. will be linked to A. Smith from 123 Main Street.

## System Features

Feature Name	Feature Description	What it Enables a Direct Mail Fundraiser to Do
Address/Name Consolidation	Proprietary name and address matching algorithms enable various spellings and abbreviations of names and addresses to be linked together	<ul style="list-style-type: none"> <li>Direct mail fundraiser can easily identify the full mailing and donation activity associated with an individual across all clients</li> <li>Reduces fragmentation in the database</li> </ul>
Data Access	Data is hosted by EQDS on a SQL server database. Direct mail fundraiser will be provided full access for extracts and setting up processes and reports.	<ul style="list-style-type: none"> <li>Multiple queries can be executed on the data at optimal speeds while EQDS can ensure the data is properly maintained</li> </ul>
Data Enhancements	NCOA, CASS address standardization and Address Mailability	<ul style="list-style-type: none"> <li>Ensure Mail arrives at expected destination.</li> <li>Reduce non-deliverable rate</li> </ul>
	Append Zip+4	<ul style="list-style-type: none"> <li>Improves mailability and insures address integrity.</li> </ul>
	Census data appended at zip code, tract, and block levels	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to query and analyze data with additional demographic information</li> </ul>
	Householding all individuals in the database	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to analyze not only individual donation performance but overall household performance</li> </ul>
Data Enhancements	Hundreds of model profiling variables and segmentation statistics are appended to every individual based on proprietary methods developed by EQDS.	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to better segment their mailing population and study how certain model profiles can improve overall performance</li> </ul>
Custom Triggered Marketing	Flexible and powerful rules engine which can deploy complex business rules to create automated extracts, automated emails, notifications, and many other system triggered events.	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to manage events and actions in a timely manner and to do more without increases resources.</li> </ul>
Pushed Reports	Weekly standard and custom reports which track a variety of business metrics. Examples include: (1) package, segment, and client performance (2) general database information, (3) custom reports, and many others. Current reports include: database summary report, database quality report, and the response rate report.	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to quickly see key details about the database such as number of records by client, number of clients, number of records by year and detect quality issues such as suspected missing files.</li> <li>Additional reports allow direct mail fundraiser to analyze performance (donations and amounts) by package code, mailing segment, and any other key differentiation dictated by direct mail fundraiser</li> </ul>
Model Deployment	EQDS and 3rd party models can be integrated, tested, and moved into production for automated scoring.	<ul style="list-style-type: none"> <li>Direct mail fundraiser can explore the impact of various models easily and improve overall mailing performance</li> </ul>
Custom Reports	Reports can be designed and emailed to report on anything from database volume to response rates to campaigns.	<ul style="list-style-type: none"> <li>Allows direct mail fundraiser to design and analyze performance according to their client's specification</li> </ul>
Custom Extracts	Extracts can be automatically and repeatedly created or created on an ad-hoc basis as needed.	<ul style="list-style-type: none"> <li>Allows users to "see" the data in the view most helpful to them</li> <li>Allows for additional reporting which is automatically produced by the user from the expected extract</li> <li>Allows for quick and repeatable analyses</li> </ul>