

Diagnostic: Direct Mail

Read each of the following statements and rate your program according to the scale below. Don't spend too much time thinking about each statement; your first instinct is usually the best one. If you're not certain, make your best guess or go with your gut instinct. If you don't think it applies, or if you feel neutral about it, rate it as 3.

Strongly agree = 5 Agree = 4 Neutral = 3 Disagree = 2 Strongly disagree = 1

1	Direct mail is a core aspect of our organization's annual giving strategy.	
2	There is a good understanding of direct mail best practices and an appropriate level of direct mail expertise accessible either within or outside of the organization.	
3	It's clear who is primarily responsible for managing the direct mail program and individual direct mail projects.	
4	Collaboration among key stakeholders related to direct mail is positive and productive.	
5	There is a central calendar of direct mail appeals that is maintained and shared with relevant staff and volunteers throughout the year.	
6	Detailed project schedules outlining key steps in the production process are used to manage all direct mail campaigns.	
7	The annual fund's direct mail plans and messages are well coordinated with the organization's other fundraising (and non-fundraising) channels and other communications.	
8	Direct mail appeals are well segmented by constituency type, gift history/potential, interest, affinity and individual preferences.	
9	Direct mail appeals are personalized as much as possible for key segments and donors.	
10	Writing within direct mail appeals is captivating, compelling, and effectively structured, and adheres to best practices in direct response fundraising.	
11	The visual and graphic design of direct mail pieces is high in quality and consistent with institutional branding.	
12	Prospect lists for direct mail campaigns are easily accessible and contain the data necessary to segment and produce effective appeals.	
13	Envelopes are thoughtfully designed with the goal of increasing open rates.	
14	There's a good understanding of postal guidelines and postage rates that helps to minimize the cost of mail delivery..	
15	Inserts and buckslips are strategically used and tested for effectiveness.	
16	Reply devices are personalized and included in all direct mail appeals that make donating simple and easy for donors.	
17	Fulfillment processes are in place to ensure accurate and timely gift processing and delivery of acknowledgements and receipts.	

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| 18 | Direct mail results are consistently tracked and analyzed, and used to inform future strategies. |
| 19 | A/B testing is done on a regular basis and used to improve the efficiency and effectiveness of future direct mail appeals. |
| 20 | Peer programs are looked at regularly as a source of new ideas, as well as benchmarking of strategies and results. |

Total: _____