

Segmenting Your Members and Donors

NiUG Conference 2009 - Jay McCormack



Segmenting with IQA

Demographic Segmentation using Gender

All Males

Create a new query with the following specifications:

Name	All Males
Objects	NetContact
Filters	Gender = Male Is A Company = No

All Females

Create a new query with the following specifications:

Name	All Females
Objects	NetContact
Filters	Gender = Female Is A Company = No

Behavioural Segmentation using Event History

Attended an Event in the Last 12 Months

Create a new query with the following specifications:

Name	Recent Event Attendance
Sources	NetContact Activity
Filters	Is A Company = No Activity Type = MEETING Transaction Date within 12 Months

You should get 5 distinct records

Didn't Attended an Event in the Last 12 Months

Create a new query that uses the above query with the following specifications:

Name	Not Recent Event Attendance
Sources	NetContact Recent Event Attendance
Relations	Custom – Netcontact.iMIS ID does not exist NetContact1.iMIS ID Netcontact1.iMIS ID = Activity.ID
Filters	NetContact.Is A Company = No

You should get 99 distinct records

Response Management

Creating Source Codes

Add the following items to the 'SOURCE_CODE' general validation table:

Code	Description
2009INV1	2009 Conference Invite 1
2009INV2	2009 Conference Invite 2

Entering Transactions

Do the following transactions in the billing module:

	1	2	3	4
ID	101	221	110	184
Name	Douglas Hunt	Henry Wilson	Wayne Courtland	Betty Sparks
Event	TM2107	TM2107	TM2107	TM2107
Source Code	2009UPG1	2009UPG1	2009UPG2	2009UPG2

Segmentation Module

Identifying Staff

Create a new query with the following specifications:

Name	All Staff
Sources	NetContact
Filters	Member Type = Staff

You should get 1 record

Create a Segmentation Job

Create a segmentation job with the following specifications:

Name	Event Invitations
Type	Contact
Universe	None
Status	Active
Inactive Date	None

Create 3 segments as follows:

Segment Name	Population	Priority
X – Staff	All Staff	1
Recent Attendance	Recent Event Attendance	2
Not Recent Attendance	Not Recent Event Attendance	3

Populate the Segments and review the results in each segment. Identify how many people in each segment.

Advanced and Time Permitting

Create a new query with the following specifications:

Name	All People
Sources	NetContact
Filters	Is A company = No

Create a segmentation job with the following specifications:

Name	Segmentation Test
Type	Contact
Universe	All People
Status	Active
Inactive Date	None
n-Select	3 Segments Using All results

Create the segments and then populate the segments and review the results in each segment.