Tips for Requesting Communications Selections

How to request a selection: (Suggested checklist of task to complete prior to submitting a request).

- Review existing selections in the system. Found in Cadence > Marketing and Communications > Selections > Search (Note: Only MarCom, Phonathon, Donor Giving, Donor Relations, and Gift and Data relations).
- Should always choose majors on the Education Record which is subdepartment in CADENCE.
- Have a list for validation before the request is made (Give a sample record) Example: Matthew Watkins T85003
- Provide an estimate of how many may be on the list.
- Reference Solicit Codes.
- Review and validate segment list.
- Provide turnaround time. (Note: IT allows 3 business days if data is in the system)

Hard to find DATA

- Education Major*
  1. Can pull from Alumni List Search in Cadence under Constituents.
  2. Users must specify if the requester wants Primary v. Historical 'Class of".
  3. Under Constituent Record > Education Tab >Click chevron next to Institution and next to Additional Information to verify Major as shown below:

- Student Involvement. Found under Constituent > Education Tab > Involvement.

- Volunteer/Board Involvement: Found under Constituent > Attributes Tab

- VIP "Groups" found under the Relationships Tab>Group Members Sub Tab

- Alum versus Alumnus Non-Degree (Note: Alumnus Non-Degree must be specifically requested.)
- Region Codes (Clemson Club): Go under Contact, scroll down.

- Whenever cities are included + state
- Specific Designation ID or Appeal ID (i.e. B1234)
- Spouse/Households
- Revenue/Recognition
- Employment Data (Employment History): Found under Relationships > Employment History
- Preferred Salutation (versus Preferred Name): Preferred Salutation is located under Personal Info > Name Formats w/ Green checkmark next to the default setting use. Shown below.

| Name formats (8) ⊕ Add ▼ Filters ⊡ More▾ | | | |
Name	Type	Primary addressee	Primary salutation
Mr. Watkins	Joint Formal Salutation		
Mr. Watkins	Single Formal Salutation		
Mr. Matthew Jay Watkins	Single Formal Addressee		
Matt	Single Informal Salutation		
Matt Watkins	Joint Informal Addressee	✅	
Mr. Matthew Jay Watkins	Joint Formal Addressee		
Matt Watkins	Single Informal Addressee		
Matt	Joint Informal Salutation		✅

- Recognition Programs/Levels: Found under Constituent > Revenue Tab > Recognition > Recognition Programs

Add text that when users ask for donors to something, by default we pull recognition.

Validation Process

- Have a list for validation before the request is made (Give a sample record) Example: Matthew Watkins T85003.
- Provide an estimate of how many may be on the list.
- Exclusions – (DME template default removes Do not contact, students, bad address)
- Review and validate segment list.

a) After creating a segment in Cadence under Marketing and Communications > Acquisition and Segmentation > Segments using the selection(s) IT provides users can review using the Current Members tab shown below:

Segments

1889 CGS Members in the DC Metro Area

Segment type:	Constituent	Is in use:	Yes
Category:		Groups:	
Code:	01082	Description:	1889 CGS Members in the DC Metro Area
Quantity:	32		
Current as of:	12/22/2023 7:40:16 AM		

KPIs | Marketing Efforts | Current Members

Current members of this segment (32) Filters | More▾

Lookup ID	Full name	First name	Middle name	Last name	Title
T64654	Jane E. Hipp	Jane	Elizabeth	Hipp	Mrs.
T47097	Mitzi M. Gar...	Mitzi	McManus	Gardiner	Mrs.
T87976	David P. Roc...	David	Patrick	Rochester	Dr.
T411546	Terrance C. ...	Terrance	C.	Coakley	Mr.
T253590	Suzanne F. M...	Suzanne	F.	Martin	Mrs.

b) Current Members list defaults up to 500 but goes up to 2000 under Current Members Tab.

c) Please see this documentation Email Deliverability Troubleshooting on why someone still might not appear on the list.