

## 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:

The screenshot shows the 'Education' tab in a constituent record. It displays a table with columns: Educational Institution, Affiliated, Date from, Date to, Class of, Status, and Primary education. The entry for Clemson University is highlighted, showing it is affiliated, the class of is 1977, and the status is Graduated. Below the table, there are fields for Level (Undergraduate), Program (BS), Reason (Graduated), Status (Graduated), Dates attended (1977), Graduation date (1977), and Class of (1977). Additional information includes 'College of Business, Business Administration, Major'.

Educational Institution	Affiliated	Date from	Date to	Class of	Status	Primary education
Clemson University	✓			1977	Graduated	✓

Level: Undergraduate  
Program: BS  
Reason: Graduated  
Status: Graduated  
Dates attended: 1977  
Graduation date: 1977  
Class of: 1977  
Additional information: College of Business, Business Administration, Major

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

The screenshot shows the 'Education' tab in a constituent record, specifically the 'Involvement' section. It displays a table with columns: Type, Name, Position, Start date, and End date. The entries include Student Club, Speakers Bureau, Fraternity/Sorority, Sigma Phi Epsilon, Student Club, Tiger Brotherhood, Student Club, Student Government, and Student Club, Blue Key.

Type	Name	Position	Start date	End date
Student Club	Speakers Bureau			
Fraternity/Sorority	Sigma Phi Epsilon			
Student Club	Tiger Brotherhood			
Student Club	Student Government			
Student Club	Blue Key			

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

Category	Attribute group	Value	Start date
Subscriptions		Botanical Gardens	7/1/2023
Volunteer/Board Involvement		CAFLS Alumni Board	
Volunteer/Board Involvement		Clemson Corps Board Member	
Mentor/Career Volunteer		College of Business - Tiger Ties Mentor	2/5/2014
Constituent Origin		CRM Conversion	
Volunteer/Board Involvement		University Union Board	
Ethnicity		White	
Perfect Donor		Yes	

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

**Mr. David C. Lockwood III 1984**

Individual    Lookup ID: **T17391**

Constituencies: **Alumnus** Donor at some time    Tribute Donor    Event registrant    Prospect    Major donor this year

**Personal Information**    **Contact Information**    **Addresses** (1 of 9)

**Mr. David Carr Lockwood III**  
 Nickname: David  
 Maiden:

**Primary phone**  
 +1 (803) 360-9922 (Personal)

**Primary email**  
 david.lockwood@colliers.com (E-...)

Post Office Box 11610  
 Columbia, SC 29211-1610  
 Home (Current)

Show less

Relationships    **Group Member**    Relationship Tree    Extended Relationships    Relationship Maps    Com...

**Current group memberships (2)**

Group	Group type	Group constituencies	Member is pri
David and Lesli Lockwood	Household		✓
Clemson University Board of V...	Committee	Committee	

**Previous group memberships (0)**

Group	Group type	Member from	Member to
-------	------------	-------------	-----------

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

Clemson Clubs (1)    Recalculate    Add    Filters    More

Code Type	Code Value	Manually Entered?	Address Type	Is Primary Addr
Clemson Club	Fort Hill Clemson Club		Home	✓

- 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

← Communications | Summary | Contact | Personal Info | Relationships | **Revenue** | IPTAY | Online Info | Me

Giving Summary | Revenue History | **Recognition** | Recognition History | Gifts | Tributes | Accounts

⌵ Expand all ⌵ Collapse all

⌵ **Recognition programs (4)** + Add | More ▾

Program	Level	Member since	Status
<b>Matthew J. Watkins</b>			
Annual Giving Club	Century Club	9/7/2015	Active
Consecutive Giving Years	Member	1/1/1977	Active
South Carolina Botanical Garden	Camellia	10/10/2011	Active
Friends of the Brooks Center	Century Club	5/4/2016	Lapsed

⌵ **Declined recognition levels (0)** + Add | More ▾ Lapsed

Recognition level	Date declined	Reason
-------------------	---------------	--------

⌵ **Named recognition history** | More ▾

⌵ **Recognition defaults from Mr. Matthew J. Watkins 1977 (0)** + Add | More ▾

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:

[Home & Training](#) | [Constituents](#) | [Marketing and Communications](#) | [Revenue](#) | [Events](#) | [Memberships](#)

### 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.