

INSIGHT

in a rapidly changing world

7 NOVEMBER 2016



Plenary 

Nuts & Bolts 

Strategy 

Q&A 

Session Time	Speaker Name	Session Title	Session Summary	Stream
9.30 - 9.35	Jim Baggett - Chair Insight SIG	Introduction		
9.35 - 9.45	Mark Mina - Account Director, fast.MAP	Pre- Conference Survey	Mark will be presenting the results from the pre-conference survey.	
9.45- 10.30	Tariq Ezzibdeh - Data Propositions & Visualisations Manager, Barclays Vanessa Mais - Head of Citizenship O&T, Barclays	Generating Value out of Data for Charities (Hackathon)	Vanessa and Tariq will be discussing how Barclay's have been using their experienced staff and technology to assist charities understand their data and drive insight from it, from deriving fundraising options, to analysing service provisions, and visualising global changes. They will chat through how what tools they used, why they choose to do this and the impact for the charities, Barclays's and the staff involved.	
Session One				
10.30- 11.20	Grant Hecht - Director/Head of Analytics, Marketing Metrix	Salvation Army Econometrics Model Case Study	In this talk I shall be: - Showing how econometric modelling techniques were used to forecast the number of new prospects based on a number of different factors which include external factors, media spend/mix and lag effects. - Showing how the model equations were used in a forecasting tool that shows the optimum proportion to spend on each channel. - Giving some practical tips on technique, discussing some of the pitfalls to avoid when modelling and giving some handy tips on how to use the models to optimise your campaigns.	
	David Dipple, Adroit Ross Swain, Adroit	It's not Time Series! - An alternative look at time based analysis	Whenever time based analysis is envisaged the analyst's <i>Cri de Coeur</i> is to use time series analysis; but, in many cases this this approach fails to find anything interesting as effects can be too short lived and based around a singularity rather than a trend. Classical time series prefers trends over time so that statistics such as moving averages can be used to summarise the behaviour. If we consider what happens with a one off ad or marketing campaign the overall effect can be a short lived hiatus which then trails off quickly over time. Here we present an alternative approach that has been successfully used to answer these types of questions.	

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10.30-11.20	Jon Kelly - Director of Analasys, Wood for Trees Richard Dixon - Director of Public Affairs, Concern Worldwide	Who is Your Audience?	Last year Concern Worldwide embarked on a journey to understand more about the core audiences. Who were the talking to, and who were they not. Together with Wood for Trees they will explain how they went about this and describe a pioneering view on the supporters using data already available to them. Using an existing market segmentation (in this case MOSAIC) we are able to analyse each group to size the current and potential value within each audience group and develop strategies to engage with them.	
	Tim Willett, Head of Funding Strategy, RNLI Richard Marbrow - Group Manager, Corporate Governance, ICO James Culling - Head of Individual Giving, Legacies & Membership - Parkinson's UK David Cole - MD, fast.MAP	The Great Debate; Opt in Vs. Opt out	The data protection landscape for the charity sector in the UK is changing. The General Data Protection Regulation (GDPR) came into force in the EU on 24th May 2016, giving charities until 25th May 2018 to implement it. Charities will need to comply with additional demands such as screening against a newly created Fundraising Preference Service. Also the decision to opt consumers into receiving mail or rely on permitted opt out mechanisms is being still hotly debated. This panel of experts will discuss the crucial elements of data protection that charities need to consider and give their views on how their organisations plan to incorporate the new elements of the GDPR into their marketing strategies.	
Session Two				
11.20-12.10	Stuart McCoy - Data Strategy Consultant, DMI	Rethinking our Models, or 'How Not to Kill Anyone with Logistic Regression'	With plenty of case studies from the NFP and commercial sectors, Stuart will cover some important facets of building response models that are rarely addressed but which could significantly uplift your campaign performance, retention and long-term value. Are you simply modelling past fundraising strategy without ever uncovering new types of donors? Does your organisation have propensity models with <i>twenty or thirty</i> variables? Which important drivers of response are often ignored? When do 'robust' statistical models fall down? With clear, practical take-aways, this session outlines the ways in which propensity models can sometimes misinform the future and how to best answer what is a tricky yet vital question: 'What is it that we are modelling?'	
	Clare Bamberger, Chief Development Officer, Insight-Ful Jennifer Hanraads, Chailey Heritage Foundation	Using Insight to Inspire a Creative Campaign to Increase the Number of Legacy Prospects and Pledgers	When insight gets in front of creative fundraisers some of the most innovative ideas can appear. Hear how a number of charities including a membership organisation, a disability and a medical charity came up with really innovative creative fundraisers by starting with the insights. This session will explore how to present insight in a way that inspires and how insight can and should frame creative brainstorming at your organisation.	

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11.20-12.10	Elaine Lee - MD, RBL Charlie Hulme - MD, The Donor Voice Sam Butler - National Fundraising Manager, St John's Ambulance	Can Insight save Telemarketing and Face to Face Channels? Panel Session	Telephone and face to face fundraising have had bad press recently, and always had some negative associations for the wider public. But they can also be an amazing way to connect people with a cause through personal, two-way conversations. In this panel sessions experts in telephone and face to face fundraising will discuss whether, and how, insight can help us to reinvent these two channels to become powerful donor-centric ways to fundraise.	
12.10-13.00	Duncan Locke - Senior Performance Analyst, PGIR & RFU	Analysis in Elite Sport – The use of data to understand and improve performance	The smallest of margins often differentiate between successful and unsuccessful teams in professional sport. With the evolution of technology has come an ever increasing ability to acquire data to better understand and enhance performance. Utilising this data in the pursuit of tactical, technical and physical gains is now an inherent part of the coaching process and performance cycle. However, with data comes risks with regards to quantity, quality and relevance; understanding your data sets pertinence to performance is critical to maximising it's benefits in a fiercely competitive and highly pressurised environment.	
Lunch				
Session Three				
14.00-14.50	Cristina Gil Sevilla - Fundraising Insight Unit Manger & Rob Green - Senior Development Manager, RNIB	Move to a Segment of One – Next best Action	RNIB have fundamentally transformed the way we think about donor management. Where once we managed donor 'pools', we now manage single donors. We no longer deliver the best journey for 'recent cash donors' to receive, we deliver what's best for 'Mrs Smith' to receive personally, according to her socio-demographic profile and her unique history of interactions with us. This is the power of this new approach that RNIB is now using to support significant investment in Individual Giving from 2016-17. We use this ground breaking analysis tool to maximise the value of our supporter base and support an ambitious strategy. We can now identify the most effective channels and offers for our supporters and have identified synergies between products ripe for development. All whilst radically streamlining the data selection, analysis and decision making time tables, saving staff time. We have transformed our strategic planning, annual budgeting and forecasting within Individual Giving. For 2016-17 we plotted all donor journeys and delivered to business leads detailed journey scenarios and revenue forecasts. We discovered new ways to maximise our donor potential, increasing volumes and income whilst reducing costs.	

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14.00-14.50	Alexandra Ho - Consumer Market Research Manager, CRUK	Attitude to Gratitude – Semiotic Study (Award Winners)	Objective: Cancer Research UK wanted to understand whether gratitude could play a part in making the supporter journey more rewarding... and generate a 5% uplift in recognition and appreciation in 2 years as a result of it.	
	Abi Markey - Owner, Supernova		Approach: We realised very quickly that consumers alone wouldn't answer the brief. We needed an approach that enabled them to feed into the process but not lead it. Through a blend of deep semiotic analysis and qualitative crafting, Supernova created a set of 8 gratitude pillars to disseminate through the organisation. Impact: As a result of this work, the CRUK consumer market research team have run workshops with product teams to help them assess product communications against the guiding principles. Product teams are now using the 8 principles handout during all creative development sessions with agencies.	
	Bob Francis, NSPCC Greg Marshall, NSPCC	How the NSPCC is tracking the happiness of its supporters	The happiness and engagement of supporters is critical, especially in the new fundraising world. This session looks at how the NSPCC has tracked the engagement and satisfaction of its supporters and how it uses the insight to drive improvements in the NSPCC's communications. Please note this session was presented at the IOF Insight Group September Networking session.	
14.50-15.40	Roger Lawson, Roger Lawson Consulting	Can New Measures help us Fundraise in new ways? - Panel Session	In response to the UK's current 'fundraising crisis' some commentators have suggested that one failing has been short-term thinking driven by rising income targets. In order to change how we operate as fundraisers perhaps we need new measures that engender long-term thinking and put the supporter's wishes at the heart of our planning. This panel of experts have been exploring how we might create and adopt new measures and will share their latest thinking on how these might re-shape how we fundraise.	
	Adrian Salmon - Senior Consultant, Grenzenbach Glier			
	David Cole - MD, fast.MAP			
Steven Dodds - Founder & Planning Partner, Harvest				
Richard Spencer - Director, Promoderation				
Session Four				
14.50-15.40	Matt Champion - BI Manager, British Red Cross Andrew Lockett - Marketing Analyst, Wood for Trees	Response Uplift Modelling – Optimising prompt amounts through behavioural analysis (Award Winners)	Matt & Andrew will show how British Red Cross increased donation income by moving from a 'one size fits all' to a more personalised approach, through a careful testing & analysis programme that goes beyond just past donation behaviour.	

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14.50-15.40	Lee Gisbourne - Data Strategist, Qbase	Incorporating On-line Data Into Fundraising Insight	In this session, Lee Gisbourne will be discussing the advances in technology that are allowing charities to bring on-line supporter-level clickstream data into their insight programmes. He'll show you how you can bring web and social data into your Data Warehouse or Single Supporter View and he'll discuss some of the use cases and benefits this will bring. He'll also introduce you to the concept of Data Management Platforms and Demand Side Platforms, blended with marketing automation that will allow you to deliver personalised and consistent messages across all of your direct fundraising channels.	
	Keith Dewar - Group Development & Marketing Director, My Life Digital	Renewing Engagement, Commitment & Trust	Recent research in human engagement and commitment to a cause has uncovered some practical insights for organisations wishing to retain and deepen relationships with supporters and service users. Trust is a fundamental part of this and there are numerous examples of breaches of trust having a significant impact on support for organisations and their reputations. Drawing on academic research into commitment and engagement behaviours, combined with digital tools, this session will illustrate how the two areas can be exploited for retention and engagement. Impending data protection legislation and a practical response to it will also be included as part of the trust agenda.	
Tea Break				
16.10-16.55	Payal Jaine MD, DT1 Consulting	Unleashing your potential in Analytics in both good & challenging times	Payal will consider her own journey from a degree in mathematics to becoming Managing Director of Strategic Analytics at Barclaycard, and reflect on how opportunities in Analytics can be fully harvested to maximise value. Payal will share the critical success factors she has learned from the explosion of interest and investment into data and insight as a core business tool. From a constant focus on creating value for both the customer and the business, through to ensuring the outputs from analytics are embedded into the decision-making process at the company, she will explore the pathway to full potential in good times as well as tough.	
16.55 - 17.00	Jim Baggett		Closing remarks	