COMMUNICATION PLANNER
Job Aid

WHAT IS A COMMUNICATION PLANNER REPORT?

The Communication Planner Report is a tool for WFAA staff to build lists for the purposes of planning events or estimating counts for a specific communication. The report includes contact information, so it may be used to produce lists for mailings, emails or phone calls.

If you choose to use this list to communicate to a group of constituents, you must also submit the final list used via the List & Report Request Form. This will allow BI to tag the constituent records to show they received the communication. Please make sure to complete this step, as it helps us understand which communications a constituent received and more generally how frequently we communicate with our constituents. This helps us continue to refine our marketing and communications strategy.

If you use this to create a solicitation mailing, please work with BI in advance in order to create an appeal. This will streamline gift processing and allow you to track the results of your appeal.

HOW TO ACCESS THE COMMUNICATION PLANNER REPORT

This report allows you to select alumni from and donors to a specified unit or department. It also allows you to select Alumni-only for a particular unit or department. Once the list is exported, you can refine the list by region, county, city, state, giving history, and ratings. This report will apply ABE Solicit Codes based on the source of the communication. This feature ensures that no contact information is surfaced if the constituent does not wish to receive a certain type of communication or communications from specific areas on campus or WFAA. This feature will not exclude anyone who meets the criteria selected in the parameters, but it will suppress the relevant contact information.

1. Log in to ABE CRM.
2. On the navigation bar, click **WFAA Reports**.
3. Click the **Communication Planner.**
4. Select **Donors to Unit** and **Donors to Department**
5. Select **Alumni from Unit** and **Alumni from Department** (You can only select one unit and one department. If you'd like a list for multiple units/departments, you will have to run the report more than once or submit a BI list request)
6. Select **Region** and **State** (You may select "International" to include international mailing addresses in the output file. If you want to see all alumni and donors for the specified unit/department, use the "Select All" box for both Region and State.)

7. Select **Who is Communication from**? (Applies appropriate solicit codes based on the "brand" on the communication. For cross-branded communications, you may select multiple options.)
8. Select **Intent of Communication** (Applies additional solicit codes based on special types of communications (invitations, solicitations, magazine/newsletter)
9. Select **Other Solicitcodes** (Provides additional solicit codes to select if applicable. For example, some schools and colleges have multiple magazines/newsletters)
10. Select **Include Double Majors** (If "yes" is selected, the output will include alumni with majors to the department even if they did not graduate from the unit selected.)
11. Select **Include Minors** (If "yes" is selected, the output will include alumni with minors from the department selected)
12. Select **Include Certificates** (If "yes" is selected, the output will include alumni with certificates from the unit/department selected)
13. Select **SpouseLink** (If "yes", spouses will be merged and will output together on one row. If "no", the spouses will be listed individually on the list.)
14. Select **Include Spouse even if they do not qualify?** (If "yes", the spouse of the main constituent will be included even if s/he is not a donor to or alum from the unit/department selected. Select "yes" to get an exact count of total number of people who would be invited to an event or if you'd like to invite all spouses to an event regardless of their qualification.)
15. Select **Alumni Only** (If "yes", the report will exclude donors who aren't alumni from the unit/department selected.)

    Helpful hint: If you are creating an email list for alumni of a department, select "yes" to Alumni-only and "no" to Spouse Link. Names with their email addresses will be listed individually. You will have to remove anyone without an email address – this can be done by sorting or filtering on the Email Indicator or Email Address columns.

16. Click **View Report**.

HOW TO INTERPRET A COMMUNICATION PLANNER REPORT

What is included in the report fields?

Donor Alum	Indicates whether the main constituent was included because they are a donor, alumnus, or both. If you want to restrict your output to just the alumni for the unit/department selected, filter on this column to include only "Alum" and "Both" or by re-running the report and selecting "Alumni only" from the parameter options.
Address, Phone and Email	Outputs the primary for each type of contact information. The address is the in-season address (if someone has a seasonal address).
Full International Address	When selecting the International option, the report now returns the full

	international address block in this field
Mail Indicator, Phone Indicator, Email Indicator	Displays if this type of contact information is unavailable, due to solicit code restrictions, missing data, bounced email, etc.
Household Giving Totals	WFAA standard definition for Household Giving. This calculation is based on recognition credit and includes gifts, pledges, deferred gifts, and informational gifts. It includes gifts that may have come from companies, foundations, and donor-advised funds that are soft credited to an individual in the household. "Household" is defined by the current spousal relationship.
Household GCR (Gift Capacity Rating)	Estimates a prospect's ability to gift of a certain size, payable over a 5 year time frame. See Capacity overview for more detail.
MG (Major Giving) Likelihood Score	The predicative model score that indicates a prospect's likelihood to make a major gift. See Likelihood overview for more detail.