

AN ALLEN PRESS SEMINAR

allen★press

# BLUEPRINT FOR SUSTAINABLE PUBLICATIONS

BEST PRACTICES & INNOVATIVE SOLUTIONS

## Evolution of a Retention Campaign

Cathy Johnson, Director  
Membership & Database Services  
Newspaper Association of America

# About NAA

- NAA is a non-profit organization representing the \$55 billion newspaper industry
- Primarily corporate newspaper memberships
- 4,300 individual Federation members
- TIMSS user since 2005

# Where We Were, 2005

- Overestimating total Federation membership by as much as 10%
- Overestimating retention rates by as much as 5-10%
- No reliable benchmarks for year-to-year comparison

# Step 1 - Reliable Numbers

- Created a standard query to give us consistent membership levels by expire month



Ad Hoc Query

View: Order Detail and Customer Info    Query    Clear    Limit Sample Selection in Grid to: 200    Save Query

Simple Query / Advanced Query

| Field Name          | Operator                 | Value      |
|---------------------|--------------------------|------------|
| Cycle End Date      | Greater Than or Equal To | 07/23/2007 |
| Fulfill Status Code | Not Equal To             | c          |
| Line Status Code    | Equals                   | a          |
| Market Code         | Equals                   |            |

Extra Filter: (ORG\_ID = 'NAA' or ORG\_ID IS NULL or ORG\_ID='') AND (ORG\_UNIT\_ID = 'NAA' or ORG\_UNIT\_ID IS NULL or ORG\_UNIT\_ID='')

Search Results (200 of 2001) - Sampling

| Product Code | Ship Master Customer ID | Ship Label Name     | Ship First Name | Ship Last Name | Ship Job Title    | Ship Company Name |
|--------------|-------------------------|---------------------|-----------------|----------------|-------------------|-------------------|
| FED1         | 000000100335            | Mr. Steve Trolinger | Steve           | Trolinger      | President         | Community Publish |
| FED1         | 000000101586            | Mr. David Stringer  | David           | Stringer       | Publisher         | Norman Transcrip  |
| FED1         | 000000101586            | Mr. David Stringer  | David           | Stringer       | Publisher         | Norman Transcrip  |
| FED1         | 000000101926            | Mr. Ray Stafford    | Ray             | Stafford       | President & Publ  | El Paso Times     |
| FED1         | 000000101926            | Mr. Ray Stafford    | Ray             | Stafford       | President & Publ  | El Paso Times     |
| FED1         | 000000102429            | Mr. Andrew Bickford | Andrew          | Bickford       | President & CEO   | Independent Publ  |
| FED1         | 000000102429            | Mr. Andrew Bickford | Andrew          | Bickford       | President & CEO   | Independent Publ  |
| FED1         | 000000102605            | Mr. David Rounds    | David           | Rounds         | VP of Circulation | San Jose Mercury  |

Limit to Sample Data    Print Report    Excel    WordMerge    Export

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- Weekly Expire and Actives Report (WEAR) now gives us quick look at membership levels week-to-week and year-to-year

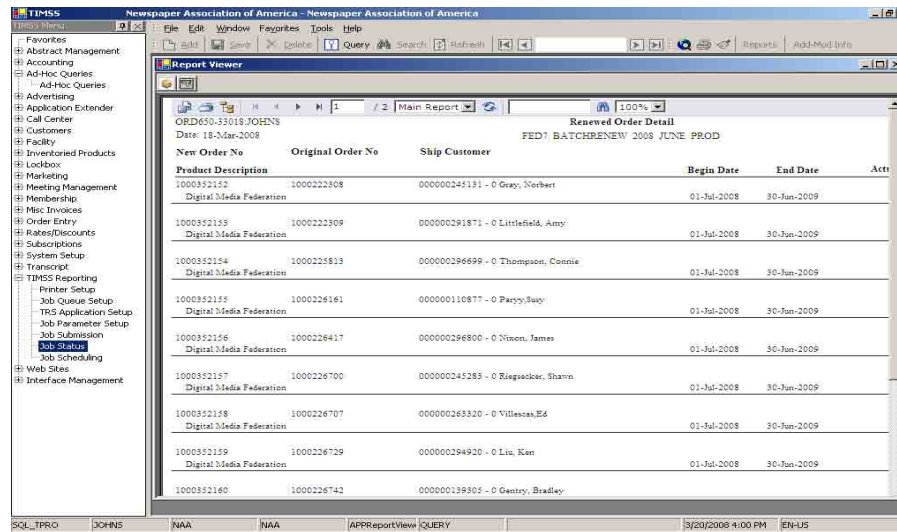
The screenshot shows an Excel spreadsheet titled "WEAR Master Spreadsheet.xls". The data is organized into columns for years (2007 and 2008) and months. The rows represent different federations and their membership counts. The total membership for all federations is shown at the bottom of the table.

|           | AD   | AE          | AF          | AG          | AH          | AI          | BW          | BX          | BY          | BZ          | CA          | CB          | CC          |
|-----------|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <b>1</b>  | <b>TOTAL MEMBERSHIPS FOR ALL FEDERATIONS</b> |             |             |             |             |             |             |             |             |             |             |             |             |
| <b>2</b>  | <b>WEEKLY EXPIRE ACTIVES REPORT</b>          |             |             |             |             |             |             |             |             |             |             |             |             |
| <b>3</b>  |  |             |             |             |             |             |             |             |             |             |             |             |             |
| <b>4</b>  | 3/20/2007                                    | 3/26/2007   | 4/2/2007    | 4/9/2007    | 4/17/2007   | 4/30/2007   | 5/8         | 2/4/2008    | 2/11/2008   | 2/19/2008   | 3/3/2008    | 3/14/2008   | 3/17/2008   |
| <b>23</b> | March-08                                     | 170         | 192         | 202         | 206         | 210         | 215         | 160         | 154         | 143         | 133         | 126         | 125         |
| <b>24</b> | April-08                                     |             |             |             |             |             |             | 99          | 86          | 79          | 68          | 65          | 65          |
| <b>25</b> | May-08                                       |             |             |             |             |             |             | 100         | 100         | 100         | 99          | 90          | 88          |
| <b>26</b> | June-08                                      |             |             |             |             |             |             | 72          | 72          | 70          | 70          | 70          | 68          |
| <b>27</b> | July-08                                      |             |             |             |             |             |             | 76          | 75          | 74          | 73          | 73          | 73          |
| <b>28</b> | August-08                                    |             |             |             |             |             |             | 91          | 91          | 91          | 91          | 91          | 91          |
| <b>29</b> | September-08                                 |             |             |             |             |             |             | 94          | 94          | 94          | 94          | 94          | 94          |
| <b>30</b> | October-08                                   |             |             |             |             |             |             | 122         | 122         | 122         | 122         | 122         | 122         |
| <b>31</b> | November-08                                  |             |             |             |             |             |             | 79          | 79          | 79          | 79          | 79          | 79          |
| <b>32</b> | December-08                                  |             |             |             |             |             |             | 3047        | 3057        | 3046        | 3044        | 3042        | 3042        |
| <b>33</b> | Other 2008                                   | 20          | 29          | 17          | 70          | 83          | 95          | 0           | 0           | 0           | 0           | 0           | 0           |
| <b>34</b> | January-09                                   |             |             |             |             |             |             | 166         | 167         | 167         | 169         | 168         | 168         |
| <b>35</b> | February-09                                  |             |             |             |             |             |             | 171         | 210         | 236         | 272         | 286         | 287         |
| <b>36</b> | March-09                                     |             |             |             |             |             |             | 49          | 54          | 62          | 74          | 312         | 315         |
| <b>37</b> | April-09                                     |             |             |             |             |             |             | 6           | 13          | 20          | 32          | 35          | 35          |
| <b>38</b> | May-09                                       |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 9           | 11          |
| <b>39</b> | June-09                                      |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 0           | 2           |
| <b>40</b> | July-09                                      |             |             |             |             |             |             | 1           | 1           | 1           | 1           | 1           | 1           |
| <b>41</b> | August-09                                    |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 0           | 0           |
| <b>42</b> | September-09                                 |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 0           | 0           |
| <b>43</b> | October-09                                   |             |             |             |             |             |             | 2           | 2           | 2           | 2           | 2           | 2           |
| <b>44</b> | November-09                                  |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 0           | 0           |
| <b>45</b> | December-09                                  |             |             |             |             |             |             | 0           | 0           | 0           | 0           | 0           | 0           |
| <b>46</b> | <b>TOTAL</b>                                 | <b>4969</b> | <b>4970</b> | <b>4914</b> | <b>4974</b> | <b>5001</b> | <b>5006</b> | <b>4661</b> | <b>4671</b> | <b>4657</b> | <b>4423</b> | <b>4665</b> | <b>4668</b> |

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# Step 2 - Creating Renewal Efforts

- Conduct a test renewal run
- Verify accuracy of every name



The screenshot displays the TIMSS software interface for the Newspaper Association of America. The main window shows a 'Renewed Order Detail' report for the date 18-Mar-2008. The report lists several digital media federations with their respective new and original order numbers, ship customer names, and renewal dates from July 2008 to June 2009.

| New Order No | Original Order No | Ship Customer                        | Begin Date  | End Date    | Act |
|--------------|-------------------|--------------------------------------|-------------|-------------|-----|
| 100032122    | 1000223808        | 000000245181 - O Gray, Herbert       | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032123    | 1000223809        | 000000291871 - O Littlefield, Amy    | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032124    | 1000225813        | 000000196699 - O Thompson, Connie    | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032125    | 1000226161        | 000000110877 - O Pappy, Susy         | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032126    | 1000226417        | 000000296800 - O Nixon, James        | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032127    | 1000226700        | 000000245285 - O Riegelsdorf, Stanni | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032128    | 1000226707        | 000000263320 - O Villaseca, Ed       | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032129    | 1000226729        | 000000194920 - O Liu, Ken            | 01-Jul-2008 | 30-Jun-2009 |     |
| 100032180    | 1000226742        | 000000139505 - O Gentry, Bradley     | 01-Jul-2008 | 30-Jun-2009 |     |

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- Developed Crystal query to create custom invoices and lists

**Newspaper Association of America** 2007 Federation Membership Dues  
RENEWAL INVOICE – FIRST NOTICE

Federation Membership Dues Invoice for: **Order Number: 1000102020**  
 Mr. Jeffrey A. Wilson

Please continue my membership in the following Federation(s):

|                                 |                 |
|---------------------------------|-----------------|
| Research Federation             | \$95.00         |
| Smaller Market Federation       | \$95.00         |
| <b>*** Total Amount Due ***</b> | <b>\$190.00</b> |

Your Federation membership dues include a subscription to Newspaper Marketing magazine, access to Federation-specific E-Papers and E-newsletters, as well as access to Federation Members Day areas of www.naa.org.

**PAYMENT METHOD**  
 This invoice obligates acceptance of payment in order for your membership to be processed in a timely manner.

Check enclosed (make check payable to NAA in U.S. funds only)  
 Please charge to:  Visa  MasterCard  AMEX  
 Credit Card Number: \_\_\_\_\_  
 CVV Code: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
 Cardholder's Name: \_\_\_\_\_ (print name as it appears on credit card)  
 Cardholder's signature: \_\_\_\_\_

Save Time and Renew Online!  
[www.naa.org/fed/renewal](http://www.naa.org/fed/renewal)  
 In e-mailing your business e-mail address, alert the Federation you wish to receive an e-mail payment. It's that easy!

Call Membership Services:  
 (800) 638-9122 or (763) 902-1838

Fax your invoice to:  
 (763) 902-1831

Mail your invoice with payment to:  
 Newspaper Association of America  
 2007 Federation Membership  
 P.O. Box 7976  
 Baltimore, MD 21278-0796

**EXPAND YOUR NETWORK!**  
 Join an additional Federation to increase the membership of 2007. Each Federation has 10 members for the price of \$1,000. This will give you access to the expertise, knowledge and skills of the industry professionals. Federation membership dues are \$95 annually per Federation per individual.

**NO LONGER WITH THE COMPANY?**  
 Federation membership dues are non-refundable. If you are no longer with the company, please notify the Federation in writing within 30 days of the end of the membership year. If you are no longer with the company, please notify the Federation in writing within 30 days of the end of the membership year.

**THANK YOU FOR YOUR PROMPT RESPONSE!**  
 In order to register at the Federation you (or the Publishing Conference host) at the deadline, the dues and/or dues fee must be received by the deadline. Please verify that the information below is correct and indicate any changes directly on this form.

Mr. Jeffrey A. Wilson  
 Publisher  
 Athens Banner-Herald  
 PO Box 912  
 Athens, GA 30603-0912

ID Number: 102869  
 E-mail: jef1\_wilson@nashern.com  
 Phone: (706) 548-0122  
 Fax: (706) 354-1477

20070401



- Crafted extensive grid to manage schedule

|    | A  | B     | C                   | D                            | E                            | F       | G                    | H       | I                   | J       | K                   | L        | M             |
|----|--|-------|---------------------|------------------------------|------------------------------|---------|----------------------|---------|---------------------|---------|---------------------|----------|---------------|
| 1  | 2008 Federation Membership Renewal Timeline                          |       |                     |                              |                              |         |                      |         |                     |         |                     |          |               |
| 2  |  |       |                     |                              |                              |         |                      |         |                     |         |                     |          |               |
| 3  | ACTION ITEM  | STAFF | 1-11-08             | 2-29-08                      | 3-31-08                      | 4-30-08 | 5-31-08              | 6-30-08 | 7-31-08             | 8-31-08 | 9-30-08             | 10-31-08 | 11-3          |
| 4  | Proforma - Edit  | Cathy | 10/11/07            | 11/15/07                     | 12/6/07<br>12/8/07<br>thru   | 1/8/08  | 2/8/08               | 3/10/08 | 4/10/08             | 5/9/08  | 6/10/08             | 7/11/08  | 8/8           |
| 5  | Proforma - Review List   | Cathy | 10/11/07            | 11/15/07                     | 12/12/07                     | 1/10/08 | 2/12/08              | 3/14/08 | 4/14/08             | 5/13/08 | 6/12/08             | 7/15/08  | 8/1           |
| 6  | Proforma - Production  | Cathy | 10/11/07            | 11/15/07                     | 12/12/07                     | 1/17/08 | 2/19/08              | 3/18/08 | 4/15/08             | 5/14/08 | 6/13/08             | 7/16/08  | 8/1           |
| 7  | E-Mail - It's Coming!  |       | 10/18/07            | 11/16/07<br>11/13/07<br>thru | 1/7/08                       | 2/4/08  | N/A                  | 3/20/08 | 4/14/08             | 5/12/08 | 6/12/08             | 7/14/08  | 8/1           |
| 8  | Invoice #1 Mailed<br>Color: Yellow                                   | Kylee | 10/18/07            | 11/20/07                     | 12/19/07                     | 1/24/08 | 2/29/08              | 3/19/08 | 4/17/08             | 5/16/08 | 6/17/08             | 7/18/08  | 8/1           |
| 9  | Reminder #1 (E-Mail)   |       | 11/5/07             | 12/7/07                      | 1/21/08                      | 2/21/08 | 3/20/08              | 4/2/08  | 5/5/08              | 6/3/08  | 7/3/08              | 8/5/08   | 9/2           |
| 10 | Invoice #2 Mailed<br>Color: Green                                    | Kylee | 11/29/07            | 12/28/07                     | 1/28/08                      | 2/29/08 | 3/28/08              | 4/28/08 | 5/29/08             | 6/27/08 | 7/29/08             | 8/29/08  | 9/2           |
| 11 | Reminder #2 (E-Mail)   |       | 1/7/08              | 2/4/08                       | 2/4/08                       | 3/19/08 | 4/15/08              | 5/14/08 | 6/16/08             | 7/15/08 | 8/14/08             | 9/16/08  | 10/1          |
| 12 | FED & NM E-News Last Issue<br>N/A: pull expires for months<br>listed | Corey | 1/1/08<br>(Jan/Feb) | 2/5/08                       | 3/4/08<br>(Mar/Apr)          | 4/1/08  | 5/6/08<br>(May/June) | 6/3/08  | 7/1/08<br>(Jul/Aug) | 8/5/08  | 9/1/08<br>(Sep/Oct) | 10/7/08  | 11/4<br>(Nov) |
| 13 | Invoice #3 Mailed<br>Color: Pink                                     | Kylee | 1/8/07              | 2/1/08                       | 3/3/08                       | 4/2/08  | 5/2/08               | 6/2/08  | 7/3/08              | 8/1/08  | 9/2/08              | 10/3/08  | 10/3          |
| 14 | Email - The End is Near!   |       | 1/23/08             | 3/3/08<br>to ABCD<br>2-12-08 | 3/19/08<br>to ABCD<br>3-5-08 | 4/2/08  | 5/1/08               | 6/2/08  | 7/1/08              | 8/4/08  | 9/1/08              | 10/1/08  | 11/           |
| 15 | Reminder #3 (Phone Call)   |       | 1/29/08             | by 2/21/08                   | by 3/21/08                   | 4/18/08 | 5/20/08              | 6/18/08 | 7/21/08             | 8/19/08 | 9/18/08             | 10/21/08 | 11/1          |
| 16 | Drop Postcard Mailed   | Kylee | 1/30/08             | 3/3/08                       | 4/1/08                       | 5/1/08  | 6/2/08               | 7/1/08  | 8/1/08              | 9/1/08  | 10/1/08             | 11/3/08  | 12/           |
| 17 | E-Forum Drop   | Jamie | 2/15/08             | 3/13/08                      | 4/14/08                      | 5/9/08  | 6/14/08              | 7/11/08 | 8/14/08             | 9/12/08 | 10/14/08            | 11/14/08 | 12/1          |
| 18 | NM Cancellations   | Jamie | 2/14/08             | 2/14/08                      | 4/14/08                      | 4/14/08 | 6/14/08              | 6/14/08 | 8/14/08             | 8/14/08 | 10/14/08            | 10/14/08 | 12/1          |
| 19 | Email - Last Chance  |       | 2/19/08             | 3/19/08                      | 4/16/08                      | 5/16/08 | 6/16/08              | 7/17/08 | 8/15/08             | 9/16/08 | 10/17/08            | 11/14/08 | 12/1          |

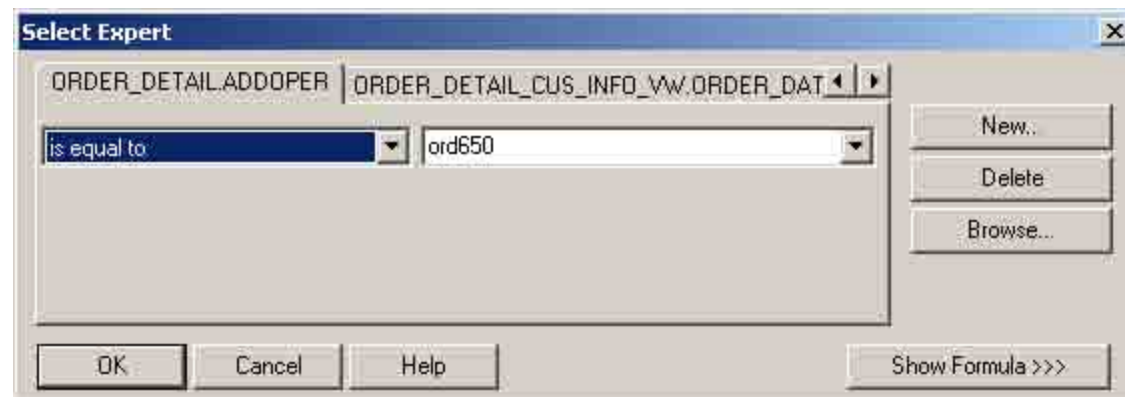
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## Step 3 - Collecting Response Data

- Use Market Codes to segment first year members from previous renewers during batch renewal process
- Manually add Market Codes to track response by retention effort
- Manually add Order Method codes to track response method

# Step 4 - Reporting

- Developed a Crystal Query linked to our database which evaluates orders created through the monthly batch process.



- Track renewal and cancel rates by product, expire month, and first year vs. previous renewers.
- Track response data based on effort number and response method.
- Identify non-renewers for follow-up

- Weekly renewal reports summarize results

Microsoft Excel - Renewal\_Rates\_December\_Expires.xls

File Edit View Insert Format Tools Data Window Help

Type a question for help

Arial 10

BL4

|    | A                                       | B      | C         | D               | E          | F            | BK | BL | CK                         | CL        | CM              | CN         | CO           | CP     | CQ |
|----|---|--------|-----------|-----------------|------------|--------------|----|----|----------------------------|-----------|-----------------|------------|--------------|--------|----|
| 1  | December 2007 Expire Group              |        |           |                 |            |              |    |    | December 2007 Expire Group |           |                 |            |              |        |    |
| 2  | Renewal Rates as of 2/11/08 (Post Drop) |        |           |                 |            |              |    |    | Renewal Rates as of 2/5/08 |           |                 |            |              |        |    |
| 3  |   |        |           |                 |            |              |    |    |                            |           |                 |            |              |        |    |
| 4  |   | Active | Cancelled | Not Yet Renewed | Total Base | Renewal Rate |    |    | Active                     | Cancelled | Not Yet Renewed | Total Base | Renewal Rate |        |    |
| 5  | FED1                                    | 552    | 128       | 0               | 680        | 81.18%       |    |    | FED1                       | 550       | 98              | 32         | 680          | 80.88% |    |
| 6  | FED1PLUS                                | 76     | 11        | 0               | 87         | 87.36%       |    |    | FED1PLUS                   | 76        | 8               | 3          | 87           | 87.36% |    |
| 7  | FED2                                    | 393    | 153       | 0               | 546        | 71.98%       |    |    | FED2                       | 393       | 108             | 45         | 546          | 71.98% |    |
| 8  | FED4                                    | 489    | 136       | 0               | 625        | 78.24%       |    |    | FED4                       | 489       | 102             | 34         | 625          | 78.24% |    |
| 9  | FED5                                    | 403    | 137       | 0               | 540        | 74.63%       |    |    | FED5                       | 401       | 87              | 52         | 540          | 74.26% |    |
| 10 | FED6                                    | 264    | 69        | 0               | 333        | 79.28%       |    |    | FED6                       | 261       | 55              | 14         | 330          | 79.09% |    |
| 11 | FED7                                    | 486    | 169       | 0               | 655        | 74.20%       |    |    | FED7                       | 483       | 115             | 55         | 653          | 73.97% |    |
| 12 | SMF                                     | 110    | 37        | 0               | 147        | 74.83%       |    |    | SMF                        | 110       | 28              | 9          | 147          | 74.83% |    |
| 13 | INTL                                    | 13     | 9         | 0               | 22         | 59.09%       |    |    | INTL                       | 13        | 4               | 5          | 22           | 59.09% |    |
| 14 |   | 2786   | 849       | 0               | 3635       | 76.64%       |    |    |                            | 2776      | 605             | 249        | 3630         | 76.47% |    |
| 15 |   |        |           |                 |            |              |    |    |                            |           |                 |            |              |        |    |
| 16 |   |        |           |                 |            |              |    |    |                            |           |                 |            |              |        |    |
| 17 | <b>Market Codes</b>                     |        |           |                 |            |              |    |    | <b>Market Codes</b>        |           |                 |            |              |        |    |
| 18 | 2008RENEW01                             | 1495   | 54%       |                 |            |              |    |    | 2008RENEW01                | 1495      | 54%             |            |              |        |    |
| 19 | 2008RENEW02                             | 819    | 29%       |                 |            |              |    |    | 2008RENEW02                | 818       | 29%             |            |              |        |    |
| 20 | 2008RENEW03                             | 453    | 16%       |                 |            |              |    |    | 2008RENEW03                | 453       | 16%             |            |              |        |    |
| 21 | 2008COMPEDUC                            | 6      | 0%        |                 |            |              |    |    | 2008COMPEDUC               |           | 0%              |            |              |        |    |
| 22 | Other/Unknown                           | 13     | 0%        |                 |            |              |    |    | Other/Unknown              | 10        | 0%              |            |              |        |    |
| 23 |   | 2786   |           |                 |            |              |    |    |                            | 2776      |                 |            |              |        |    |
| 24 |   |        |           |                 |            |              |    |    |                            |           |                 |            |              |        |    |
| 25 | <b>Order Method</b>                     |        |           |                 |            |              |    |    | <b>Order Method</b>        |           |                 |            |              |        |    |
| 26 | Fax                                     | 305    | 11%       |                 |            |              |    |    | Fax                        | 305       | 11%             |            |              |        |    |
| 27 | Mail                                    | 1991   | 71%       |                 |            |              |    |    | Mail                       | 1991      | 72%             |            |              |        |    |
| 28 | Phone                                   | 355    | 13%       |                 |            |              |    |    | Phone                      | 354       | 13%             |            |              |        |    |
| 29 | Web                                     | 102    | 4%        |                 |            |              |    |    | Web                        | 29        | 1%              |            |              |        |    |
| 30 | Other/Unknown                           | 33     | 1%        |                 |            |              |    |    | Other/Unknown              | 97        | 3%              |            |              |        |    |
| 31 |   | 2786   |           |                 |            |              |    |    |                            | 2776      |                 |            |              |        |    |

Ready NUM

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# What We've Learned

- 54% of our renewers pay from the first invoice
- 75% of our members mail in checks, despite our best efforts to push them to the Web

- 75% of previous renewers stay with us. Only 50% of first-year members do so.
- 25% of our memberships are outside our traditional December renewal base



# What We've Done Since

- Changed our business rules so that memberships expire on an anniversary cycle, not just in December.
- Developed a mid-year retention process to address this group of members



- Started December retention process sooner
- Modified our schedule to provide enough time for check requests to be processed



- Initiated more outreach to first-year members including customer care calls to ensure benefits are being used.



- Cut off benefits sooner
- Tracked cancellation reasons - even if anecdotally
- Created more targeted marketing efforts



# Post Script

- In June 2008 NAA completed a Strategic Planning Process
- New organizational focus but fewer staff to implement initiatives
- Impact on 2009 retention efforts TBD