

Converting challenging issues and
“problems” into time saving automated
solutions since 1978...



Thoughtful and Organized Data Processing Services...

 info@comreginc.com

 [Merge / Purge](#)

 [CRM](#)


 [Email Broadcast](#)

 [Prospect Database \(PDB\)](#)

 [Reporting](#)

 [Custom Database Development](#)

 [Sample Client Roster](#)

 201-445-3000

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Ramsey, NJ 07446



Data Pre-Processing

- Conversion, validation and initial quality control screening
- Data Appending and Model scoring
- File Segmentation
- CASS-certified address standardization
- DPV and 48-month NCOA processing
- Suppression (e.g., deceased, prison, keyword scan, DMA)

Dupe ID Engine


- Advanced identification of duplicates
- Support for individual-, household- and business-level matching
- Suppression of client-supplied files
- Flexible prioritization for selection of surviving records including *N-per* control
- Automated and human review of reports (quality control screening)

Post-Processing and Output

- Selection of net project universe
- Creation of test cells (representative Nths and splits)
- Assignment of keycodes, finder numbers etc per client instructions
- Presorting per USPS specs
- Formatting to production specs
- Electronic delivery of data and reports

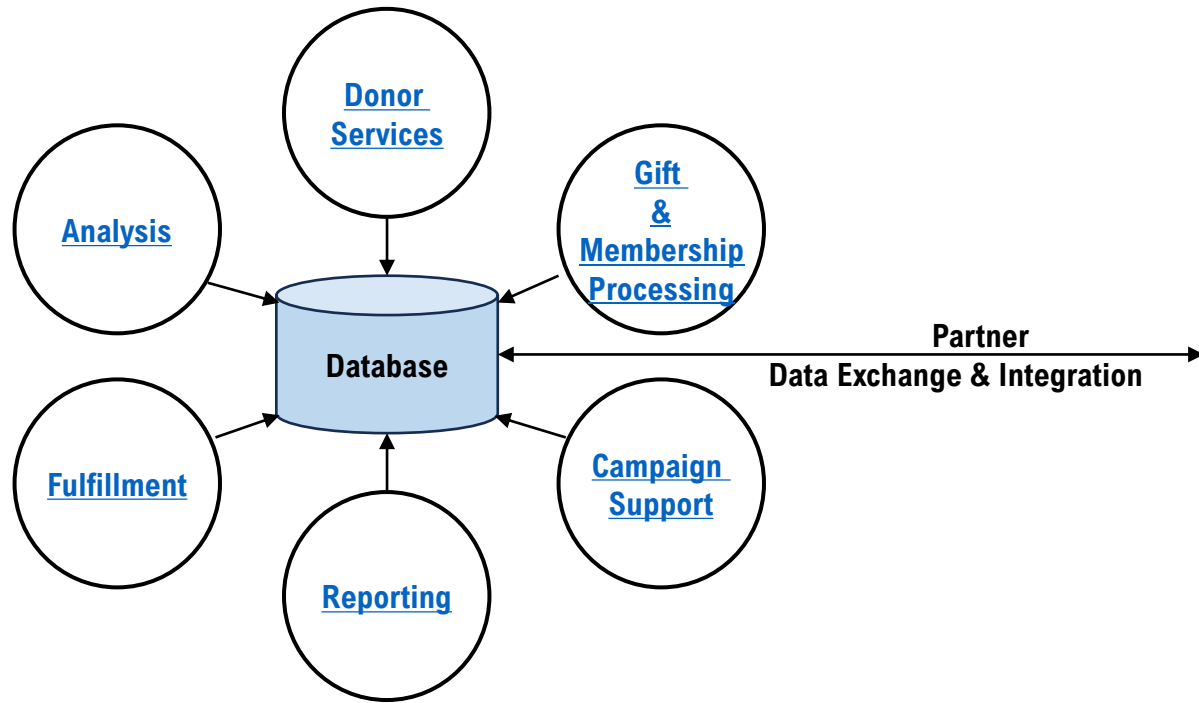
Getting Started

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CRM Profile



- Web donation platform
- Major donor & planned giving
- Marketing agency
- Demographic appends
- Data modeling
- Other (ad hoc-on demand)

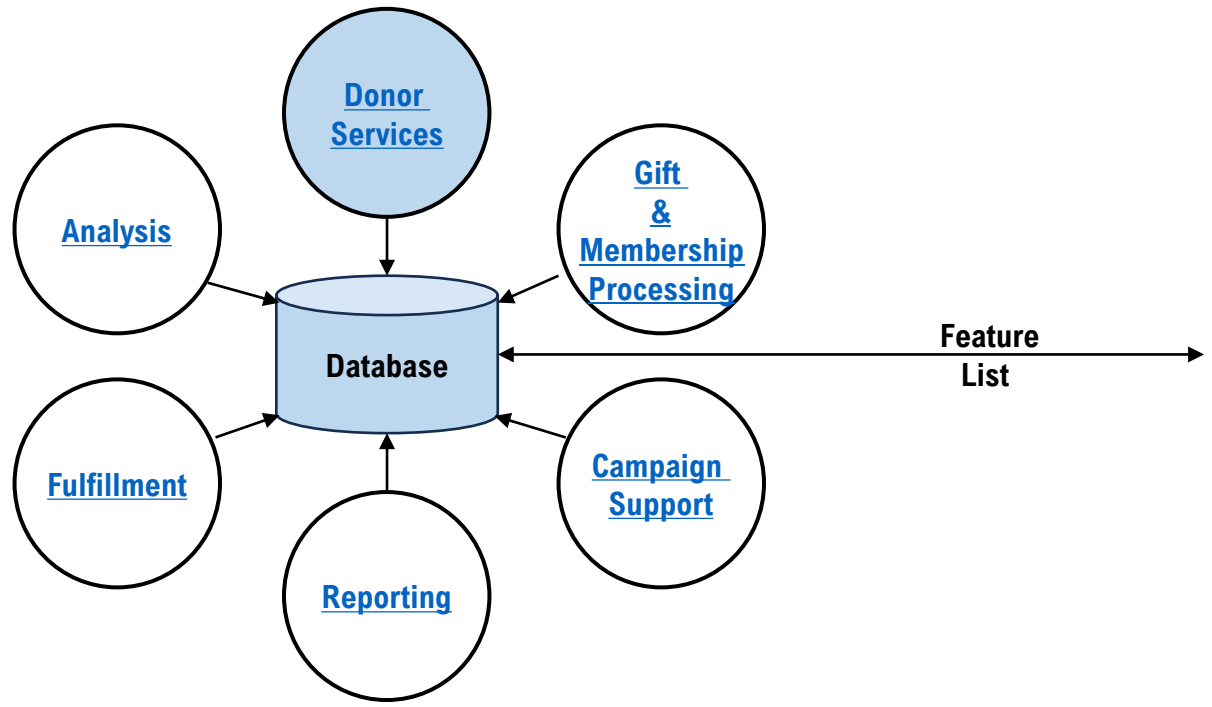
Features

- Response Files
- Project View
- Campaign Management
- Donor Services
- Fulfillment
- Analysis
- Counts
- Reports
- Maintenance
- DashBoard

User Access
Conversion

Home

CRM Donor Services

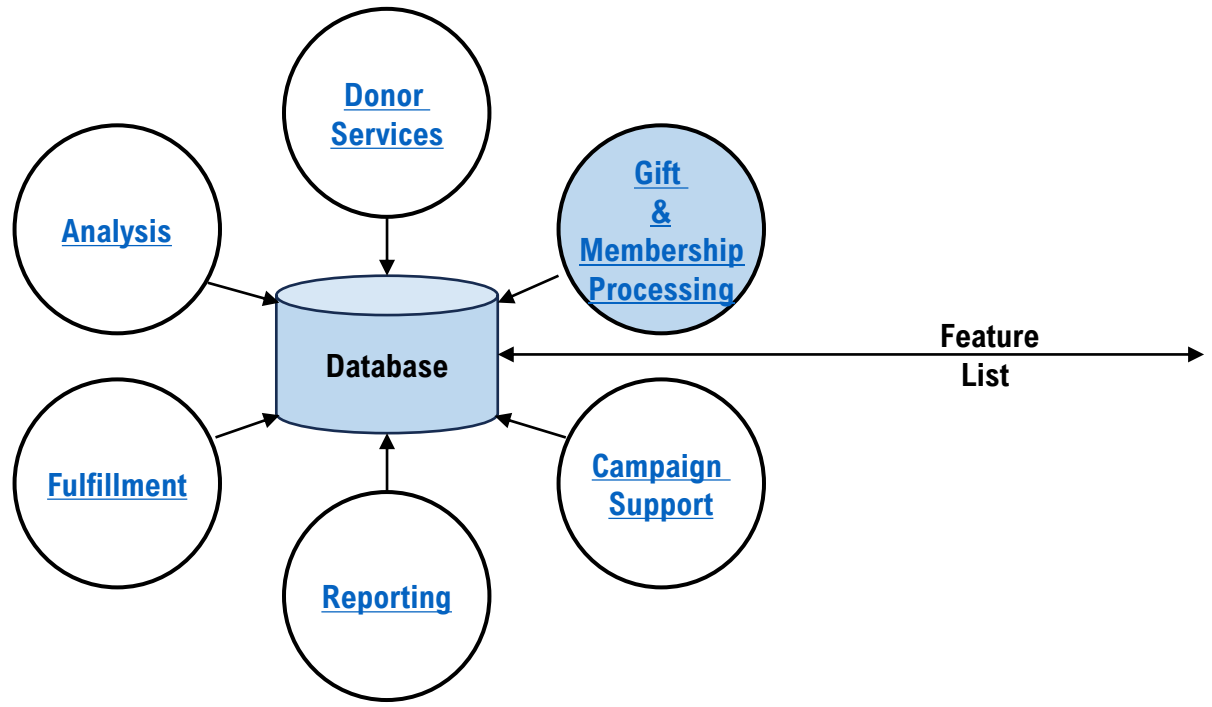


- Donor lookup
- Name & postal update
- Merge
- Status & preference “class code” update(s)
- Membership management – if required
- Honoree-IHO support
- Pledge
- Media capture & storage

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CRM Gift Processing

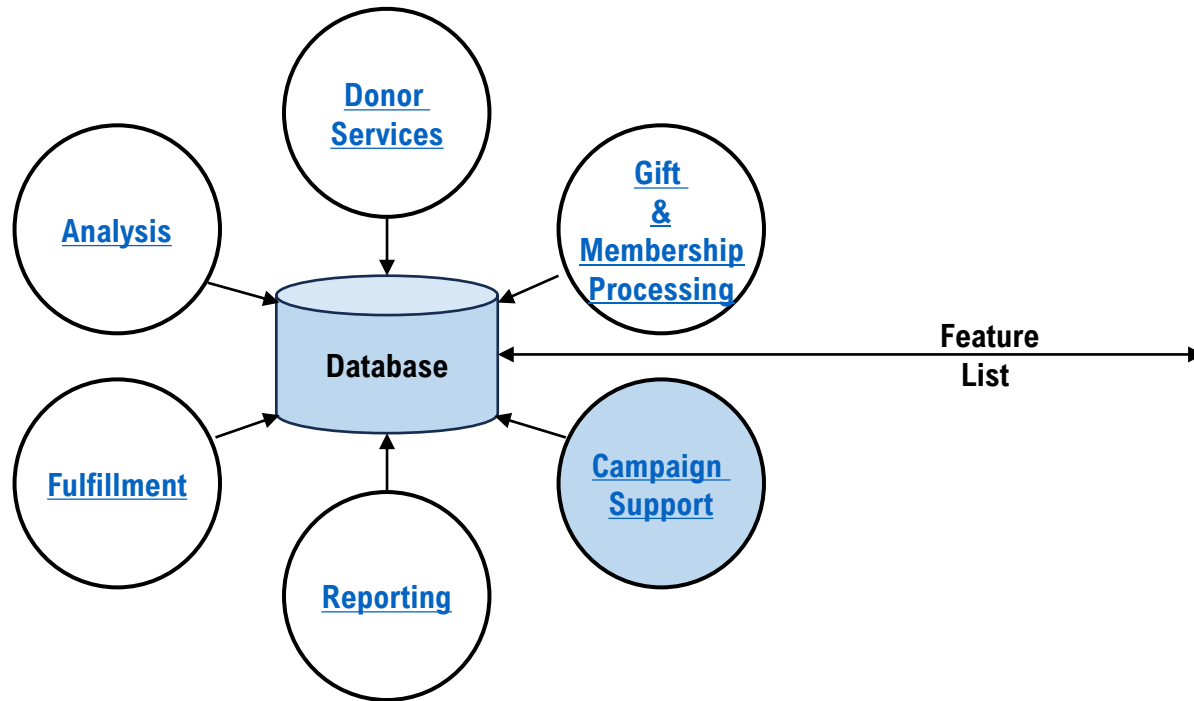


- Cager integration
- Automated response file processing
- Automated member level “set”
- Client defined file frequency
- Validation & QC
- Reconciliation reporting
- Donation edit (& entry)
- Multi channel support – TM, DM, OL

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CRM Campaign Support

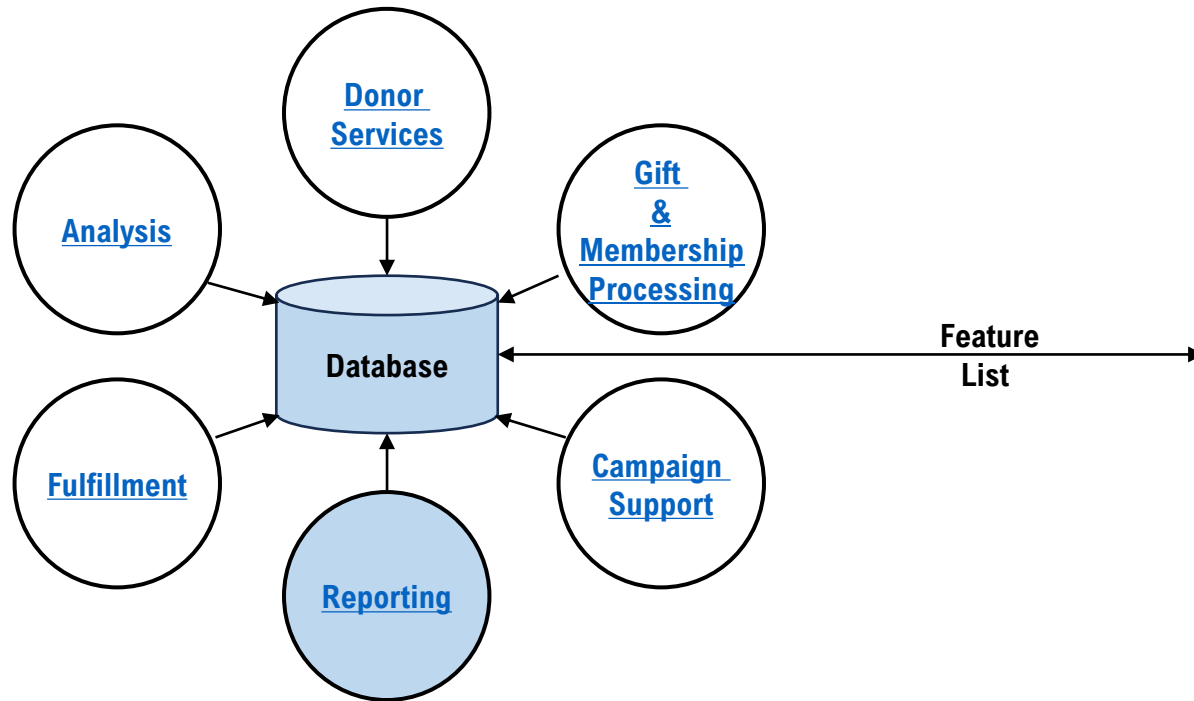


Count-Select-Mail file prep and output
Hygiene – CASS/NCOA/deceased/de-dupe/etc.
PDB (prospect database) for acquisition
Automated import of campaign profile data
(from Agency)

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CRM Reporting

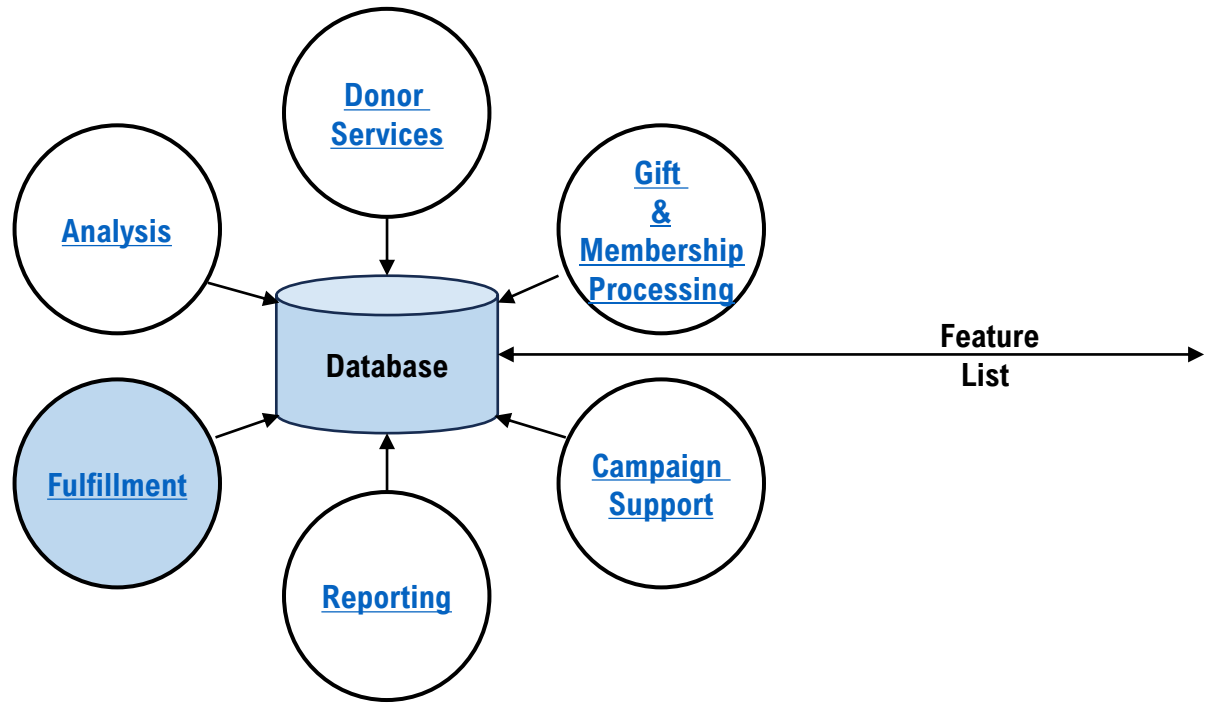


- Library of client defined reports
- Project level statistics
- Full file health and KPI-style statistics
- Custom “ad-hoc” reporting and data export(s)
- On-going development

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CRM Fulfillment

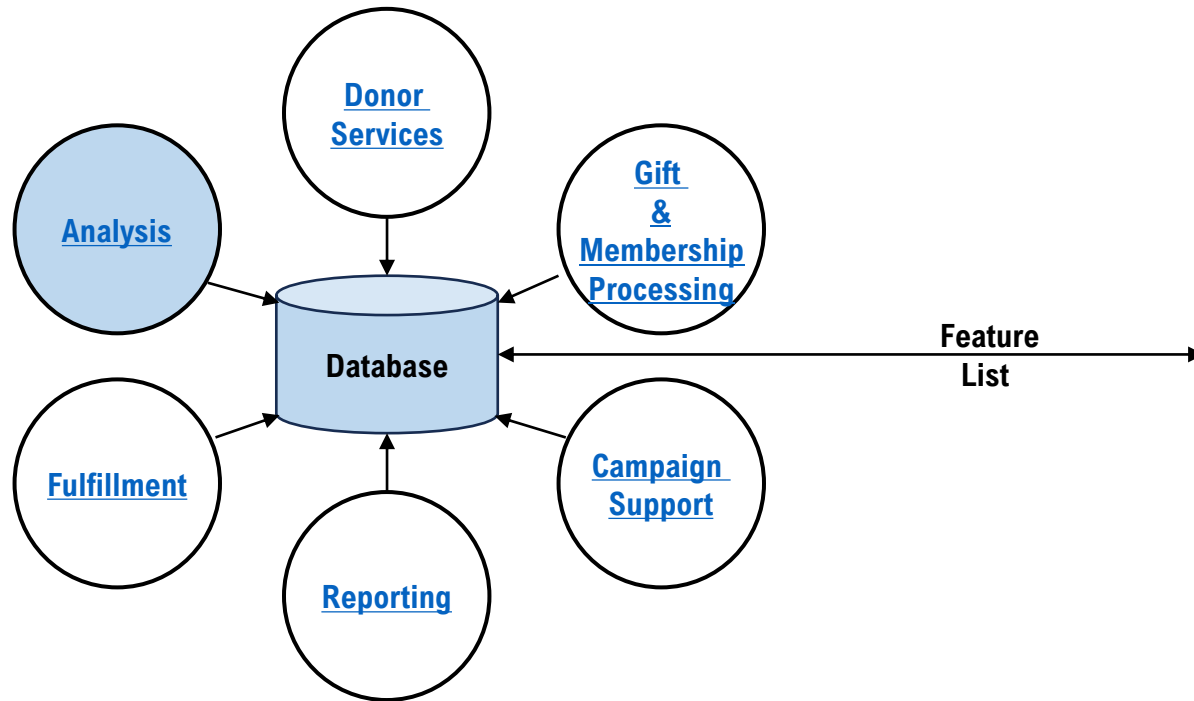


“Thank You” & “Welcome” data output
Back-end premium(s)
Cumulative giving recognition
Powerful & complex automation

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CRM Analysis

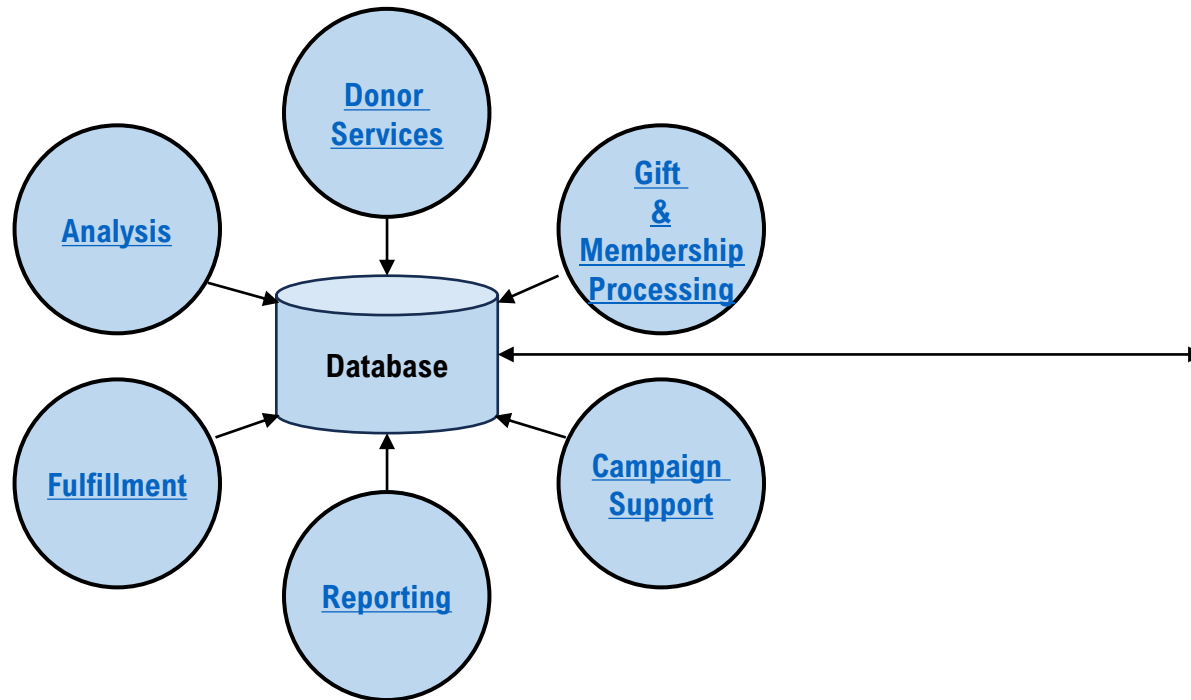


Data output for investigation & discovery
Drive strategic planning & decisions
Scoring
Support for all major modelers

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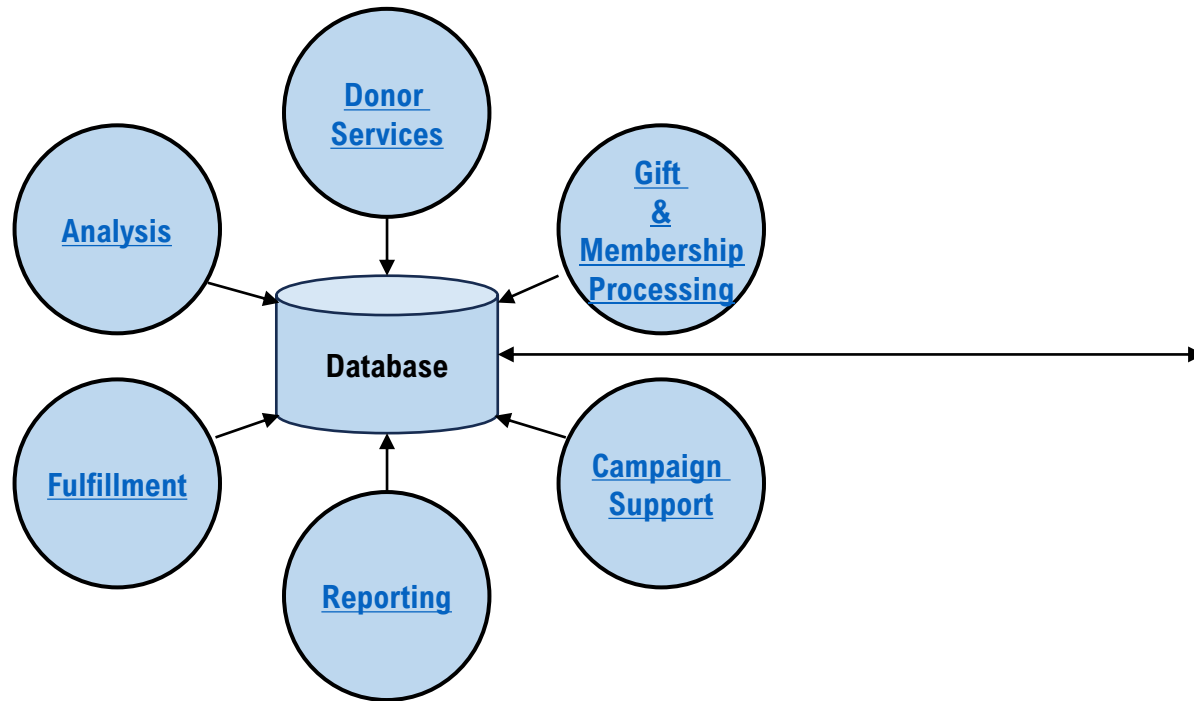
CRM User Access



Web interface – all major browsers
User PW required
Reset PW feature
IP address restrictive
All activities are logged
Multi-factor authentication available

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CRM Conversion



\$0 conversion cost
Multi-year retainer arrangement
Focus is on-going “mission-based” development
We work with your: agency, cager, partner(s)

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EBS Profile (Email Broadcast)

Operational Modes

Self



Client handles all aspects of the work

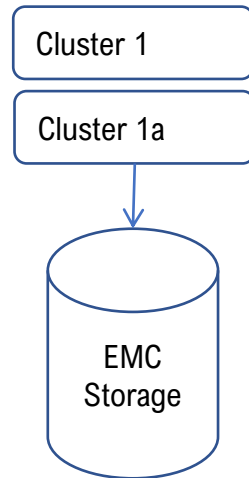
Full



Instruction based CR does the work

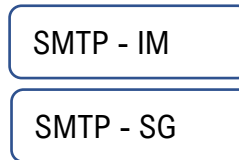
Web enabled
Secure https access

Application Architecture



Microsoft platform
Redundant web server and storage architecture

Broadcast Architecture



Redundant broadcast servers in co-location facilities
Multi email engine (Power MTA & Green Arrow) software

Historical Metrics

- 50+ active email clients
- 1,000+ email broadcasts
- 50 million +/- emails deployed
- Geographically distributed SMTP broadcast servers

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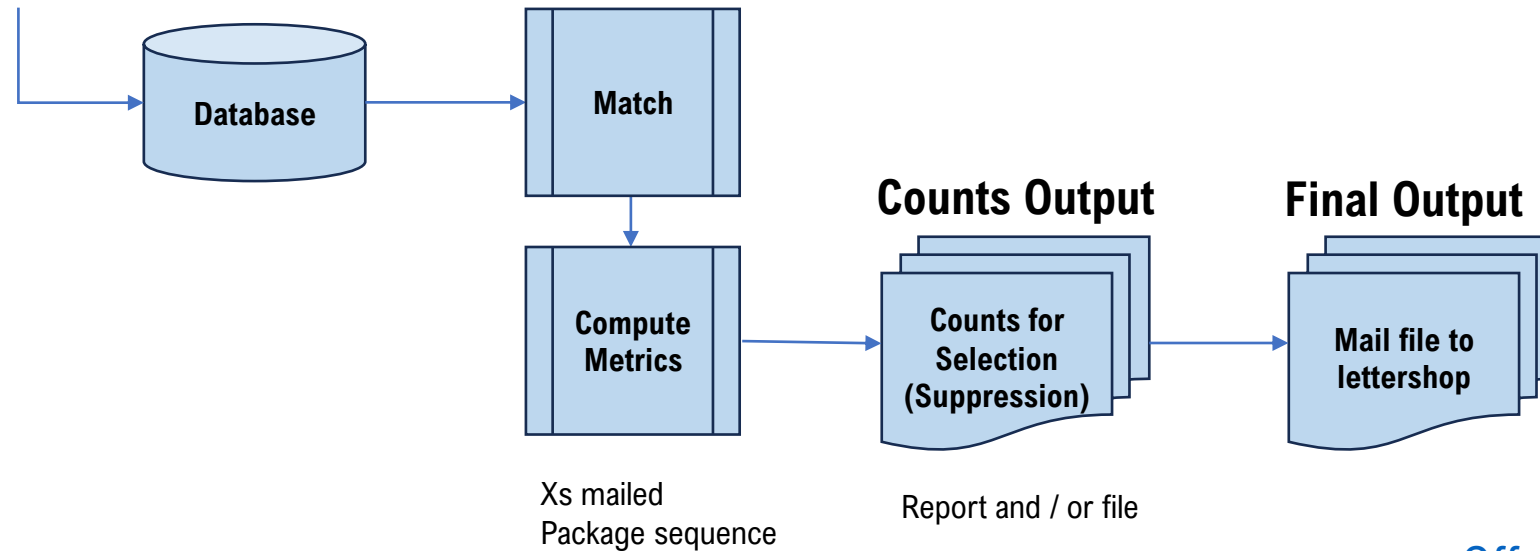
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PDB Profile (Prospect Database)

Input(s)

Historical “finder” files
List “net” names
Suppression



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PDB Offer Types

	Basic	Basic “plus”	Advanced***
“Rolling” Database (3+ years)	✓	✓	✓
Times Mailed	✓	✓	✓
Package Sequence		✓	✓
Projection(s)			
Response Rate			✓
Revenue			✓
Net			✓
Model & Decile(s)			✓
Cost			
1x Setup*	\$0	\$0	\$0
Per Project Run	TBD	TBD	TBD

Advanced*** under development

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PDB Getting Started



	Basic	Basic “plus”	Advanced***
Mail (promotion) History 3+ years recommended	✓	✓	✓
Product Code(s) and Category(s)		✓	✓
List ID, Name, and Type		✓	✓
Response Data – per mailing			✓

Mail – project #, campaign, and or mail date required; finder # and or name address required



Product – decode A=Label, B=Card, C=Calendar, and so on...

List – ID=00001, Name=Memorial Sloan Kettering, Type=Healthcare/Medical



Advanced*** under development

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Reporting & Custom Database Development

-  MS SQL Database Development
Reporting: custom, Power BI, etc.
-  APIs: dot Net framework, JSON result format, token access authorization
- In general:

We “consume” 1 to n data files (virtually any format / source)

 Organize
Create a useful result with a repeatable process
Frequency – client driven
-  Toolkit:
“massive” internal toolkit for intelligent, “learning”, and efficient data processing...

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Sample Client Roster Profile(s)

	# Names	m/p	CRM*	PDB	Reporting	Custom Development	Database/Warehouse
Client A	25 million+	✓	✓	✓	✓	✓	
Client B	15 million+	✓	✓		✓	✓	
Client C	1 million+	✓	✓		✓	✓	
Client D	38 million+				✓		✓
Client E	7 million+	✓			✓	✓	✓
Client F	48 million +	✓			✓		
Client G	11 million +	✓			✓		
Client H	11 million +	✓			✓		

CRM* indicates full CRM including database and web access

CRM* # Names excludes acquisition m/p volume

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