Market & Industry - 2014 Projects

At any moment there are literally dozens of projects under way at Merkle Response. Some projects are small in scope, cost and time whiles others are large in scope, require significant financial commitment and take a considerable amount of time to execute. I wanted to share some information with you regarding a few of our larger 2014 projects.

Arch-e – Many of you are already familiar with our image archive and retrieval system. The current version of Arch-e has been in use since 2006. In 2014 we will be releasing a fully web-based version of Arch-e. The new application will be browser-based, allowing for a consistent experience using the application across most standardized computing devices. Plans include full functionality within Internet Explorer, Chrome, Safari, Firefox & Opera browsers, running on standardized Windows, OS X, iOS & Android hardware/software platforms. Accessing images can be achieved any time and from anywhere that an internet connection is available.

Scanning Software – We will be upgrading our scanning software in 2014. We are remaining with our current vendor, just upgrading to a different platform. This upgrade will position us to offer several new services including; Remote Deposit Capture (RDC) – which allows our clients to scan checks at their office and the images are transmitted to Merkle for data capture and 2-D Barcode Recognition – which will read a small box like this that contains the information currently contained in a traditional scan line, only taking up less room on the document.

Upload Express – This proprietary software application was designed to expedite and automate file processing for both internal Merkle staff and our clients. Clients will be able to access this application via the web and post acknowledgement files, sustainer files etc. to Merkle for processing. Upload Express will contain a number of edits to verify that every record is able to be processed before creating the file. Any "bad" records will be displayed for the client for immediate correction or deletion. This solution is another example of our focus on streamlining the donor acknowledgment process.

These projects reflect our willingness to invest back into the business as well as our commitment to continue to deliver leading edge solutions to our clients.

If you would like to know more about any of these projects please feel free to contact me at (301) 797-4099 or bsayre@merkleinc.com.

Customer Service News

At Merkle Response Management Group our Account Management strategy is a solid differentiator for us in the markets that we serve. It works and it has proven to strengthen the relationships with our clients and improve the services that we deliver.

What are the components of our Account Management Strategy?

Dedicated Account Managers– We believe that having a dedicated resource that is available to you at all times is critical. Your Account Manager is your voice within our organization. Their main purpose is to provide excellent customer service to you and to act as the liaison from your organization to all areas of RMG.

Executive Level Relationship Manager– Each client has an ELRM. Your dedicated Account Manager has the ability to not only escalate items to the Manager of Client Services but to other Directors and even the President of RMG. Each Executive at RMG plays a role in our Account Management Strategy.

Service Level Pledge– We take our service pledge to you very seriously. Our goal is to return emails to you within one hour and voice mails to you within two hours. Our pledge also contains key escalation points for you in the event your dedicated Account Manager is in a meeting or away from the office.

Weekly dashboard Report and Weekly, Scheduled Conference Call– Our weekly call and dashboard reporting is a vital part of our Account Management Strategy. While the report and the call does not replace our daily communication methods, this call was developed to provide you with key metrics that are important to your organization. It also allows us to focus on strategic items such as best practices and new technology advancements, and allows us to discuss in a more formal setting items that we can improve on. It also is a great method for tracking deliverables.

Net Promoter Score– Each year we conduct a Net Promoter Score to determine our overall performance with our client base. In 2013, our Net Promoter Score was 79% and was a record for RMG.

Quarterly Account Review/Goal Alignment
RMG likes to meet with our clients quarterly for an account review. We want to make sure our goals are consistently aligned. This meeting typically includes your Account Manager, the Manager of Client Services and the Director of Client Engagement. It is an opportunity for us to discuss trending, new services, and other strategic items. It also allows us to understand your organizations goals for the upcoming quarter and helps us in planning.

I strongly encourage your organization to allow us to utilize our full Account Management Strategy. Please contact me directly if you have any questions or would like to learn more about any of these services at Kgrove@merkleinc.com.

Merkle Response in the News

Bill's article on how he got started in the business: http://www.bizjournals.com/baltimore/print-edition/2013/12/27/how-i-got-started-with-bill-sayre.html

Service Spotlight ~ Encryption

Encryption **IS** a great tool. It's a great preventative measure for data security, and a requirement of many industry regulations and standards. There are legal references to data protection that require encryption.

Information is power! It's what allows you to collect more money, build and grow your business, and meet your organization's objectives. Every agency is supported by a group of donors that are entrusting you with their personal information and expecting it to be protected.

The potential costs due to identify theft and fraud alone could outweigh the costs to purchase and implement encryption technologies. Standardized encryption tools, such as PGP by Symantec (Merkle RMG's standard), are cheap to acquire, easy to implement, and hard to circumvent. The only requirement is to create a key & exchange it with your vendor (that's typically a once-a-year occurrence that takes a few minutes), and you have the process of encrypting/decrypting every file you receive.

Encryption won't fix every risk factor, but the overall reduction in risk outweighs the potential outcome of fraud and identity theft. Merkle is here to help! If you have questions about encryption, need some feedback on best practices, want some examples of how to balance efficiency and the need for encryption – give us a call.

New Client Wins

JOHNS HOPKINS
M E D I C I N E

SURFRIDER
FOUNDATION

HEALTHTRANZ
PAYMENT SOLUTIONS
Division of U.S. Merchant Systems

M+ Murphy
Medical
Center

PBM PEOPLES
BANK MIDWEST
People You Know. People You Trust.

Cross International
Delivering Food, Shelter and Hope to the Poorest of the Poor

Reminder

Merkle's font size requirement for a scanline to be "readable" by our equipment is 10 point or larger.

Merkle RMG Holidays

Memorial Day – Monday, May 26, 2014

Best Practices

The list has been rented, names de-duped, a killer package designed...but has anyone checked to see of the response document actually fits inside the return envelope?

You would be surprised at how many times the response document or label mailing is too tall or too long to be inserted into the envelope. Some packages are designed to fold for insertion but many more are simply fractions of an inch too large. In many cases, the donor attempts to fold over the envelope flap leaving it bulky and uneven. This increases the likelihood of machine jams and cut documents or checks during extraction, which then requires Merkle staff to tape the document back together before processing the donation. Due to the additional time needed for this step, our ability to meet bank and data commitments may be impacted.

USPS News

Did you know that RMG tracks the deliverability of our USPS pick up locations by placing seeds in the mail for your organizations? Each month, my team selects clients and we mail from different drop off locations and then track the time it takes to receive the envelopes back at RMG.

We not only track first class mail but BRE mail as well. We are compiling month's worth of data on average deliverability time so we can help our clients make informed decisions about the postal facilities they should be working with.

We believe as many of you do that the average length of deliverability absolutely has an effect on the donor experience. We want to get the acknowledgment in the mail as quickly as possible and having this type of data at your fingertips can allow us all to make USPS location decisions much easier and less time consuming than testing different locations. After collecting five months of data, the average deliverability time from mail date to receipt date at RMG for the following USPS locations is below:

Baltimore MD—3.5 days
Brentwood (DC) - 6.5 days
Merrifield VA—4.7 days
Hagerstown MD—8.2 days

I encourage you to contact your account manager and we can provide this detail to you.