Marketing Made E-Z --- continued...

In our last issue, we prepared to mine our database for prospects that are ideal for a new Long Term Care product. We determined that the LTC is a good fit for clients who already carry life insurance, are between the ages of 35 and 60, and have an annual income between $35,000 and $80,000 a year.

Our first step was to bring the relevant columns into our Summary view. In Volume 16, we used the Customize Layout Button to bring the Total Life Premium, Age, and Income columns into the Summary view.

Now that we have the columns we need in our Summary view, we can effectively mine our database for the prospects who match our search criteria. Our next step is to refine the data using the Filter tool in CDS until we see only the ideal prospects.

Filtering “On-the-Fly”

Using the Filter tool to make temporary changes to a Summary view is called filtering “On-the-Fly”. Summary views, by definition, give you a summary of the information contained in your database. When you filter “On-the-Fly”, you tell CDS to show you a summary of data based on your criteria. With the Filter tool, you have the ability to display data, as you need it, when you need it!
The Filter dialogue window is where filters are made (defined) by choosing what data is to be filtered and telling CDS how to filter it. The Filter dialogue window is the same whether you launch it to filter “On-the-Fly”, as in our example, or if you build a permanent filter for a dynamic report, set, or mass mailing.

You will use the Filter dialogue window to define the three components of a filter –

1. The Column Name of the column containing the raw data to be filtered.

2. The Value, or data in the column that will be filtered.

3. The Operation that will determine which data is kept in view and which data is eliminated.

Note that, in our example, the column name - Total Life Premium - is already selected. If we had clicked the Filter cursor on the Age column heading, the Age column would be selected in the Column Name pull-down window.
With the **Total Life Premium** column already selected, we can input a value to filter on. The **Value** field is blank, or set to null. Contacts who carry life insurance will have some data entered in the **Total Life Premium** field, whereas the contacts without life insurance won’t, as they are not paying a premium. We want to see only the clients who have some data/value entered in the **Total Life Premium** column so we will leave the **Value** set to null and in the **Operation** box, select **Greater than**.

With the **Column Name** set to **Total Life Premium**, the **Value** set to null and the **Operation** set to **Greater Than**, click the **Add** button and the filter criteria are entered in the **Filter Criteria Window**.

The **Filter Criteria Window** reflects the choices made for **Column Name**, **Value**, and **Operation**—

- The first line is the **Column Name** — **Total Life Premium**.
- The symbol in the second line reflects the **Operation** choice. In this case - > - which means **Greater Than**.
- Following the symbol is the **Value** selected to filter on. In this case, no value is apparent as we set the value to null.

This **Filter Criteria** tells CDS to show us only the contacts with a value in the column **Total Life Premium**.
Quick Review:
- With the **Column Name** selected, enter the **Value** to be filtered.
- Select the filter **Operation**.
- Click the **Add** button.

With the Filter Criteria selected – Click the **OK** button.

The Filter Criteria window will disappear and you will see the Contact Summary screen again but only the contacts with a value entered in the Total Life Premium column will be included in the view.

After filtering, the Summary view only shows contacts with Life Insurance.

All of the clients with no value entered in the Total Life Premium column have been filtered away.
Next, we’ll filter on the age column, selecting only the clients who are between the ages of 35 and 60.

- Click on the Filter button to activate the Filter Cursor.
- Move the Filter Cursor over the Age column header and left click.
- The Filter dialogue window will open again, this time with the Age column selected in the Column Name window. (Note that the filter criteria for the Total Life Premium column are still visible in the Filter Criteria window.)
- With the Age column selected, enter the number 35 in the Value window.
- In the Operation box select the Range operator.
- Click the Add button.
- The new criteria will be added to the Filter Criteria window.

Now add the second part of the range operation –

- Enter the number 60 in the Value window.
- With the Range operator still selected, click the Add button.
- The second half of the Age range criteria will be added to the Filter Criteria window.

The Filter Criteria Window now reflects the new filter choices – The Age column will be filtered on a Range between (and including) the Values of 35 and 60.

Note that the filter criteria for the Total Life Premium and Age columns are visible in the Filter dialogue window. This means that the filter will work for both columns at the same time.

- With the Age filter criteria selected – click the OK button.

The contact Summary screen will reappear showing only those contacts between 35 and 60 years old with some form of Life Insurance.
Now we'll use the same process to filter on the income data for the remaining clients.

- Click on the Filter button to activate the Filter Cursor.
- Move the Filter Cursor over the Income column header and left click.
- The Filter dialogue window will open again, this time with the Income column selected in the Column Name window. (Filter criteria for Total Life Premium and Age are visible in the Filter Criteria window.)
- With the Income column selected, enter the number 35000 in the Value window (a comma will be added in the criteria window).
- In the Operation box select the Range operator.
- Click the Add button.
- The new criteria will be added to the Filter Criteria window.
- Enter the number 80000 in the Value window.
- With the Range operator selected, click the Add button.
- Click the OK button.

Now the Summary screen shows us only the data that we want to see – all clients in our database between the ages of 35 and 60 that carry some form of Life Insurance and have an annual income between $35,000 and $80,000 a year.

Our Summary list has been narrowed down to see only the data we need to develop our marketing plan. From here, these filtered contacts can easily be added to a set that can be used for a group mailing or scheduling activities.

When you ‘Filter on the Fly’ in the Summary screen, you can quickly return your Summary view to an unfiltered view by using the Unfilter button.

If you decide to filter your Summary view on different criteria or just decide to return to your original Summary view, simply click the Unfilter button and your original Summary view will return.

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Sort

CDS also makes it easy to sort the data in the Summary view in either ascending or descending order. For instance, if you wanted to target a specific set of clients for a mailing based on Zip Code but didn’t want to build a filter –

- Use the Customize Layout button to bring the Zip column into the Summary view.

- With the Zip column in the Summary view, click on the Sort Ascending button.

- Your cursor will turn into the same cursor with the hand we saw when clicking on the Filter button.
- Move the Sorting Cursor to the Zip column header and left click.
- The Zip column will be sorted in ascending fashion.

Now you can search for matching zip codes easily.

- With the Zip column in the Summary view, click on the Sort Ascending button.

Using the sort tool, contacts sharing the 91754 Zip Code are grouped together and can be easily tagged for mailing or adding to a set.

- The Sort Descending button allows you to sort a given column in the opposite direction – lowest to highest or Z – A.

The Sort Descending button.
You can also sort data in a **Summary** view by clicking your mouse directly on a column header. When accessing the **Contact Summary** view, CDS sorts the information by last name, in ascending order. If you want to reverse the order and see your contacts that start with “Z” first, position your cursor over the **Last Name** column header and left click.

Finally, you can right click anywhere on a column and select **Sort Ascending** or **Sort Descending** from the pop-up menu.

You can Filter and Sort virtually any Summary screen in CDS including Dynamic Reports, To-Dos, Smart Pad Notes, Investments, Policies, Sets – you can even filter your Summary list of filters!