STRATEGY AND LIST BUILDING
CHEAT SHEET

1 | 40/40/20 rule: 40% for list and strategy. Compile a comprehensive customer profile that includes both demographic and psychographic information. **What does your ideal customer look like?**

2 | If you are managing the list on your own, carefully review and watch for duplicates, incomplete data fields and any red flags that could hinder mailing to the contact.

3 | If you purchase or rent a list and then send it to a printer, make sure you carefully review the list beforehand. Look at all of the data and filter only the columns that will be relevant to your printer (Name, Address, City, State and Zip).

4 | Set a singular goal for your mailing. **What is the goal of your mailing?**

5 | Direct mail is not a stand-alone vehicle. To maximize the success of direct mail, you need to incorporate it with other channels. **What other channels will support your mailing?**

6 | Most direct mail marketers set a frequency of two to four mailings to effectively drive the momentum needed for the desired results. **How many times will you mail?**

7 | Include social media and websites that drive the customer to learn more about you. QR codes, barcodes, coupons, unique identifiers and private URLs are ways to drive additional brand interaction and track your efforts. **How will you track your success?**

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