

Direct Mail

MASTER'S TOOLKIT

SERIES



Module 1

Strategy and List Building

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Today marks the beginning of your direct mail journey.

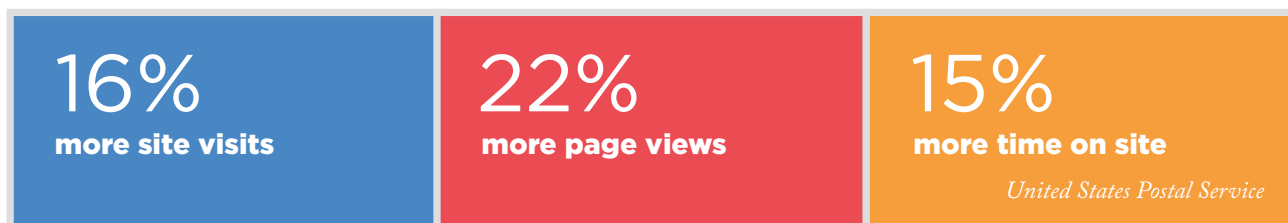
In five short weeks, you'll have all the tips and tricks needed to realize the potential of this productive marketing channel. Direct mail has the power to cut through a crowded digital ecosystem and engage customers or prospects in a memorable, one-on-one dialogue.

It's not about abandoning digital for print or vice versa: it's about using both offline and online to reach the customer through a multitude of channels.

PRINT CAN SIGNIFICANTLY INCREASE DIGITAL EFFORTS



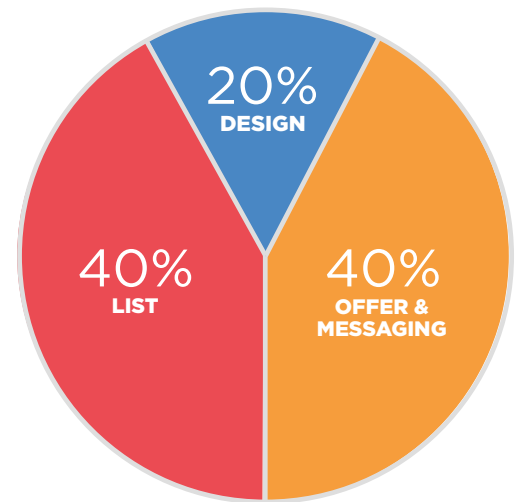
CONSUMERS ARE MORE ACTIVE WHEN THEY RECEIVE DIRECT MAIL FIRST



The 40/40/20 Success Rule

Many direct mail marketers talk about the 40/40/20 success rule: 40% of success relies on the list, another 40% for the offer and messaging, and 20% for the design.

Let's talk list.



List-Based Direct Mail

This form uses a list or a combination of lists that can be rented or purchased as well as acquired through customer and prospect records. Putting together a list that closely represents your ideal customer will increase your likelihood of success.

Every Door Direct Mail®

Every Door Direct Mail® (EDDM®) is a perfect way to spur growth in your business by saturating entire neighborhoods using carrier routes—all without the cost of purchasing mailing lists and permits. EDM® is ideal for businesses and individuals looking to gain the attention of basically, anyone (think “Local Postal Customer”).

Note: This toolkit will specifically address direct mail using lists. The principals for design, copy, and tracking still apply to EDM®. We will cover EDM® in Module 4.

The Planning Process

With 40% of the success of a mailer coming from the strategy and list phase, it's critical to get it right.

First, **set a singular goal for the direct mail piece**. Is it a lead generation campaign or direct response? You only have a few seconds to snag your prospect's attention, so you need to hone in on one specific goal and stick to it.

The List Means Everything

Before you rent or purchase a list you have to thoroughly understand your ideal customer. This is called profiling. Knowing about your best customer's basic **demographics**, such as age, sex and geographical location, is only the tip of the iceberg. The most complete understanding of your ideal customer's profile includes **psychographics** as well. This can include shopping and purchasing behavior, attitudes towards trends, products, marketing, media and lifestyle habits.



Targeting is the only way to ensure that you hit your business metrics and deliver a positive ROI.

Scrubbing

The final step in the list prep process is “data scrubbing.” Most list brokers and agencies guarantee the completeness of their list since they scrub on a regular basis. 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 the mailing. The average undeliverable rate is 8%.

- **Infographic: The List Process**

Resources

The USPS offers an address verification system called CASS Certification, which helps determine certain address problems and standardizes addresses to Postal Service formatting. Another helpful service is called NCOA or National Change of Address. This system uses the USPS database to check for people and businesses that have filed a change of address with the USPS within the last 48 months. If you use a mail house, they will automatically run your list through both services. Both are required when seeking discounted postage such as 1st Class Presort or Presort Standard (bulk) Mail.

If you purchase or rent a list and then send it to a printer or mail house, carefully review the list beforehand. Look at all of the data and send only the columns that will be relevant to your printer (Name, Address, City, State and Zip). Use clear column headings in your data, which removes any guesswork by the mail house.

What's Your Frequency?

After you know who you want to mail to, decide on a frequency. Our most successful clients mail to the same list two to four times to effectively drive the desired results.

Customers tend to respond to direct mail after they have had at least one interaction with your brand. This means that both frequency and a multi-channel approach are necessary.

Multi-Channel is Key

Use other channels to **create brand awareness**, and then deliver a high-impact message that cuts through the clutter and leaves a meaningful impression. Direct mail is not meant to be a stand-alone vehicle. To maximize the success of direct mail, you need to incorporate other channels. For example, if you are running radio spots, purchasing targeted Facebook ads and deploying multiple emails, direct mail is a perfect offline complement to **increase reach and brand frequency**.



Tracking

Finally, think about how you will measure and track the results of the mailer. Include social media and websites that drive the customer to interact with your brand online as well as offline. QR codes, coupons, unique identifiers and private URLs are all ways to drive additional action while also tracking your efforts.

Note: This is just the tip of the iceberg. We will do a deep dive of tracking and reporting in Module 5.

Additional Resources

- [Request a List Here](#)
- [The List Process Explained](#)
- [Building a Quality List](#)

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?**