



Quickguide

Planning and Executing a Direct Mail Campaign

Get it done fast, right, and see results!

Quickguide: Planning and Executing a Direct Mail Campaign

Want fast and accurate quotes for a direct mail campaign? Would it be nice to WOW your boss by making the right call for the campaign strategy? Need to avoid wasting your time going in circles with vendors and team members?

This quick-guide is designed to help you do all of that. Keep it close as you prepare for your next direct mail campaign. Use it as a reference by accessing the linked resources, and as a checklist to walk through each stage and task step-by-step.

PREPARATION

"He who fails to prepare, prepares to fail (or have a really miserable experience muddling through)."

Define the Business Objective of the Direct Mail Campaign

Is it for sales, email list building, event attendance, fundraising, announcements, etc? How does it support business objectives such as revenue or customer retention? For example, is it the leading activity to hit 2nd quarter targets for sales of a new product line? Clear business objectives will guide you in developing the scope of the campaign and the associated goals. Document the business objective the marketing will support.

Who Are the Recipients?

- Create a description of the intended recipients. Note their buying habits, interests, and demographics. Use this information to communicate with your vendors the type of prospect that represents your target market. This along with your business and marketing objectives will help them make the best recommendations for your mailer.

What is the Promotional Offer?

- Offer - Is it a product, service, or request? What is the price or associated cost? What are the limitations to the promotion (quantity, time, age, location, etc)?
- Call to action (whatever you want the recipient to do next if they want to pursue the offer) - purchase, subscribe, enroll, donate, RSVP, phone call, attend.

Select the Type of Mailer

- What you choose depends on the amount of information needed to communicate the offer(s). How the recipient is expected to respond is a factor too.
- Postcards carry the least amount of information, but the sizes can vary widely. Letters carry a few pages and inserts. Self-mailers can deliver the most for their size.

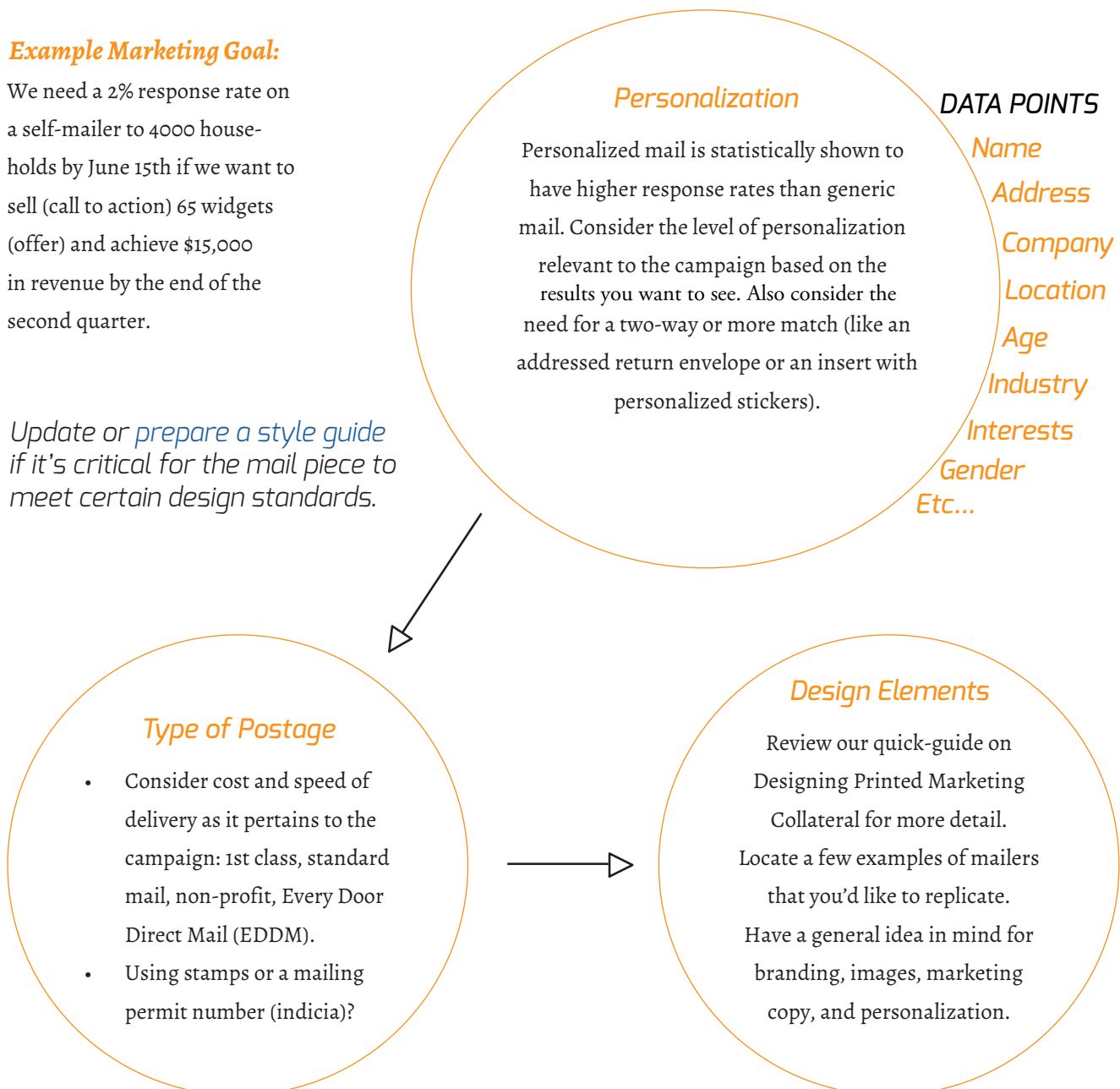
Define the Marketing Goals of the Campaign

Consider the following measures and outline how the campaign will support the business objective: Time frame to see results, number of recipients (reach), expected response rate, expected revenue or monetary value.

Example Marketing Goal:

We need a 2% response rate on a self-mailer to 4000 households by June 15th if we want to sell (call to action) 65 widgets (offer) and achieve \$15,000 in revenue by the end of the second quarter.

Update or [prepare a style guide](#) if it's critical for the mail piece to meet certain design standards.



Get a quote on the mailing list

- Can be an independant provider or through the planned printer/mailer
- Does the purchased list supply the needed data points for personalization?
- If applicable, ask how they assist with merging the purchased list with an in-house list and purge duplicates
- How will you handle the move update requirement by the USPS?

Get a quote on printing/mailing

1. Share the marketing plan you've defined up to this point so they can create an accurate quote
2. Ask for their recommendations to improve the strategy
3. Ask for alternatives that can help manage costs but not diminish the effectiveness of the mailer
4. Not sure how to pick the best vendor?



Assess potential ROI

To get the estimated return on investment, divide the anticipated revenue from the campaign (marketing goal) by the cost of the campaign (vendor quotes) and multiply by 100. The ROI is a percent that tells you how efficiently the investment is earning a return. A 10% return is low, and a 50-100% return is worthwhile.

Why forecast ROI?

- Investing marketing dollars efficiently increases profitability over time because you are getting your money back faster to reinvest for more growth. Use potential ROI as part of your evaluation criteria for deciding to do, not do, or alter a campaign. Also to evaluate two campaign options.

EXECUTION

"A strategy, even a great one, doesn't implement itself"

Acquire and/or update the database

1. If purchasing the list, notify the vendor to proceed with generating it for you
2. If using an in-house list, format the data according to the printer/mailers specifications
3. If applicable, proceed with plans for merging and purging lists. Also move update compliance.

Confirm the dates with your vendor

1. Document the timeline for the project by working backwards. Start with the date when the mail piece should land in the mailbox. Then calculate the mailing time, printing time when final proof is approved, time to prepare the proof, etc... up to when execution should begin.
2. Make sure you or your team are available to answer questions, and make decisions during the assigned timeframe.

Provide the elements needed to design the mail piece.

Deliver to the designer the agreed upon text, logo files, style guide, font types, and images as specified when setting up and confirming the quote.

Who will approve the proofs?

Approval by committee is not recommended. One or two people to review are sufficient. Have one person who is completely uninvolved in the project look at the initial drafts and provide feedback.

Review the Design Proof and Respond

The designers and printers queue projects to maintain efficiency. Delayed responses to proofs can cause your project to lose its original printing slot and alter the timeline for the campaign.

Sign-Off on the Final Proof

Do not request additional customizations at this point (or it can be expensive). The purpose of the proof (not design proof) is to make sure the design of the mail piece was successfully translated for the printing press. Look for formatting issues such as cut off text or images.

When approved in the agreed timeframe, the printing is officially underway and the mail will hit the post office within a few days.



Marketing gets prospects to your door, but it doesn't seal the deal. The sale is really what we are after. Sometimes we can focus so heavily on development of a marketing campaign we forget it's only half of the battle for new revenue.

Prepare the sales team or office staff to manage the expected response.

- Share an overview of the campaign and its promotion
- Provide instructions on how to proceed with those who respond
- Verify inventory and readiness of POS systems
- Prepare back up plans for a higher than expected response rate
- **Measure activity** - foot traffic, website traffic, phone calls, email messages, shopping carts started, etc
- **Measure outcomes** - sales, registrations, donations, etc
- Use these figures to determine the success of the marketing campaign separately from the sales closing ratio

REVIEW

"However beautiful the strategy, you should occasionally look at the results."
– Sir Winston Churchill

Conduct a post mailer review to acknowledge what worked well and challenges to address for the future.

When the appropriate timeframe for the response has passed, look at the total response and its associated monetary value.

Compute the actual ROI on the campaign to determine if it's worthwhile duplicating in the future.