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# 10 STEPS TO HELP CREATE A SUCCESSFUL DIRECT MAIL CAMPAIGN

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# Direct mail can be a powerful marketing tool. But launching a direct mail campaign may seem daunting, especially if you're running a small- to medium-sized business and wearing a dozen other hats.

However, it doesn't have to be overwhelming. In this activity workbook, we're going to show you how to launch a successful direct-marketing campaign—and even have fun doing it. We've developed a 10-step process to help you answer questions like:

- Who should I target?
- What's the right message to send?
- What's the most cost-effective way to use direct marketing?
- How will I know if my campaign is working?

To help you visualize how these concepts work in practice, we're including hypothetical examples with each step. We also give you an activity to work through at each step so you can apply what you've learned to your own business.

By the time you've completed all 10 steps, you will be ready to create an on-target marketing piece and deliver it to mailboxes in the areas you want. And you'll be able to find out how well it's working for you.

Feel free to skip any steps if you already have that area mastered. Use this book in a way that makes sense for you.

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## STEP 1

# ESTABLISH YOUR OBJECTIVES: WHAT ARE YOU HOPING TO ACHIEVE?

Before you put time and money into a direct mail campaign, you need to think carefully about what you want to accomplish. First, step back and take a look at the big picture:

- Where do you hope to be in six months? One year? Five years? What does success look like for you?
- What are your biggest obstacles to getting there? Attracting new customers? Hiring qualified employees? Financing?
- What will it take to overcome those obstacles?
- What can you do today to get started?

Now, let's look more specifically at what you hope to achieve with your direct marketing campaign:

- Are you hoping to pull in new customers?
- Do you want your existing customers to come back more often?
- Is there a new service you're offering or a new product you're excited about?
- Do you have seasonal offers you want to spread the word about, say, a back-to-school special?
- Is there a specific segment of the community that might benefit from your product or service?

**EXAMPLE**

A hair salon owner wants to expand to a second, larger location in a trendy part of her city. But after gathering information on the costs of making the move, she realizes she needs to enlarge her customer base to generate more revenue. She identifies several steps she needs to take to accomplish her goal, and direct mail can play a key role in the process. She sends postcards to residents in her current neighborhood and the new neighborhood, asking them to come

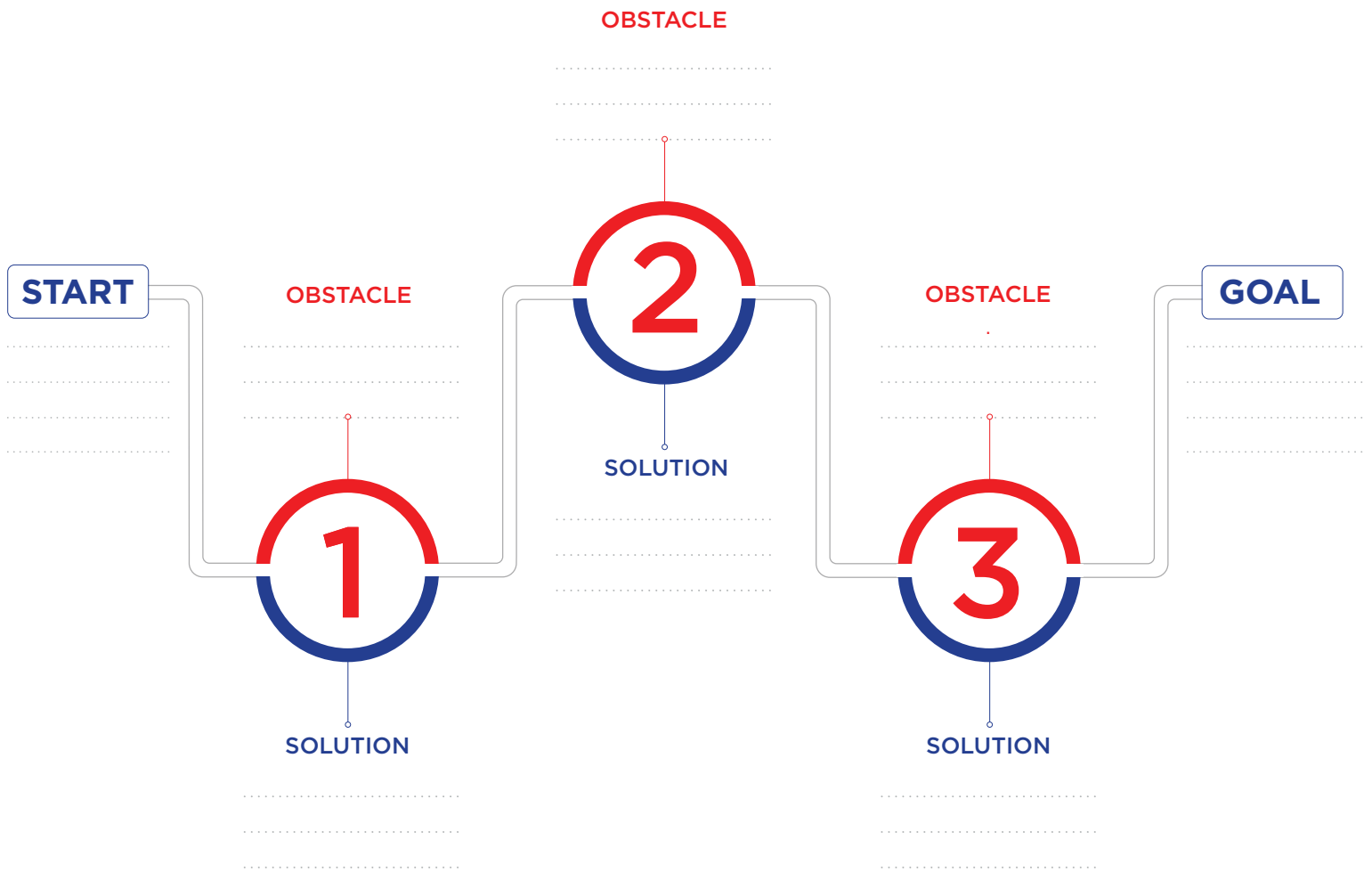
in for a free cut with the purchase of any color treatment. She repeats the offer three months later. The result is more customers from a larger geographic area, which helps her justify making the move. Once the new location opens, direct mail is an obvious choice for getting the word out to current customers and residents of the new neighborhood.



### ACTIVITY

If you need to spend more time clarifying your vision for the future, try thinking about your goals—and how to move past obstacles—using the map below. Look at the example on

page 4 for ideas. Put your goal or goals at the end, then label the roadblocks you're likely to encounter. Then think of strategies for getting around them.



### NOTES

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## STEP 2

# UNDERSTAND YOUR AUDIENCE: WHAT DO YOUR CUSTOMERS REALLY CARE ABOUT?

The next question you need to answer is who are your existing and potential customers? How much do you really know about them? What are their needs or problems, and how can you help them solve them? If they're current customers, what do they like or possibly dislike about your business?

Fortunately, we have more tools than ever available today to help us answer these questions. You don't have to be a big company to harness the customer data you need to make strategic decisions.

Marketers need two kinds of customer data to help them better reach their customers:

- Demographic
- Psychographic

Demographic information includes details like gender, age, marital status, ethnicity, and income. Psychographic information adds a layer on top of that. It tells you about your prospects' hobbies, habits, values, opinions, attitudes, etc. For instance, what social media platforms do they use? What websites do they visit? Are they vegetarians or meat eaters? Are they into fitness and health? Scrapbooking? Do they like camping? Vacations in Vegas?

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## SUGGESTIONS FOR GATHERING CUSTOMER DATA:

- Take a look at previous offers and your website content and analyze what prompted people to act in the past. Was it a discount code? A new product announcement?
- Look at your social media sites. Analyze which content is most liked and by whom.

If you've advertised on some social media sites, you've probably already had to create customer profiles. However, by digging in a little, you can see who is really engaging with your business and how they feel about your products or services. Then you can make your profiles even better.

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## SUGGESTIONS FOR GATHERING CUSTOMER DATA (CONT.):

- Look at review sites and analyze positive product reviews. How are these customers describing your product or service? What are the most popular benefits mentioned? How does the product make customers feel?
- If you have time and have a few customers you feel would be cooperative, sit down and interview them. Find out about their families, their hobbies, their concerns, and their work.
- Check out your customers' social media accounts to see if you find any common themes.

### TIP

**Post a survey on social media or on your website. You may want to give customers an incentive to fill it out: Perhaps enter their names in a drawing or provide a discount coupon.**

As you learn more about your customers' behaviors and shopping preferences, it may be helpful to create a customer journey map. This is a way of looking at how you are reaching your customers as they move along a path from

awareness of your product to purchase. You want to identify ways to reach them at various points on the path. See the illustration on page 9 for details on each step of the journey.

## EXAMPLE

A dental office sends a survey to customers after every appointment asking how their visit went. This allows the office to address any problems right away. And it lets them identify what people like most about their office: friendly staff, modern technology, attention to patients' comfort, etc.

volunteer work in developing countries, noting how a portion of spending on cosmetic procedures helps finance those trips. They've noticed that after these stories, they see an uptick in people willing to spend money on elective work, such as whitening.

The office also posts stories on their website and social media accounts about their staff's

**ACTIVITY**

Using the tools mentioned, gather as much data as you can about your customers and see how well you can fill in the blanks.

<b>DEMOGRAPHICS</b>	
AGE	
GENDER	
EDUCATION LEVEL	
INCOME LEVEL	
PLACE OF RESIDENCE	

<b>PSYCHOGRAPHICS</b>	
PERSONALITY	
VALUES	
OPINIONS/ATTITUDES	
INTERESTS	
LIFESTYLE	



**ACTIVITY (CONT.)**

Think about the journey your customers take in purchasing goods and services. Then identify ways you can engage them at various steps on that journey.



## STEP 3

# CREATE YOUR MAILING LIST

Once you understand what you want to accomplish and what type of customers you want to target, you need to figure out how to reach them. You need a mailing list.

## HOUSE LISTS

You may already have a house list. These are names and addresses of your existing customers. If you don't have one, start developing one. Encourage customers to provide you with contact information so you can send them special promotions. As an incentive, you might create a contest or drawing. Asking them to sign up for an informational newsletter can also work.

Consider your own in-house list more valuable than any other. Approaching your current

customers with a new product, sale item, or service will often prove more successful than targeting a whole new population.

To help you make the most of your house list, USPS offers Address Quality Analysis (AQA). This service helps you analyze the accuracy and deliverability of the addresses in your database—so you avoid wasting money on undeliverable mail.

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## PURCHASED OR RENTED LISTS

If you want to reach new customers, you'll most likely need to buy or rent a list. Hundreds of companies sell or rent mailing lists. You can buy or rent lists of new homeowners, gaming enthusiasts, accountants, radiologists, pet owners, frequent travelers, new parents—the list goes on. Getting the right list for your purposes is critical. An adage in the direct mail industry is that the quality of a list is at least 40% of the reason a campaign succeeds or fails.<sup>1</sup>

One way to navigate this area is to work with a list broker. List brokers bring together the owners of lists and direct mailers looking for lists. Brokers get paid a commission from the list owner, not the person renting the list. A strong broker will use their expertise to develop a highly targeted list designed for your specific audience and message.

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<sup>1</sup> The 40-40-20 rule of direct marketing, developed by direct marketing expert Ed Mayer in the 1960s, holds that 40% of success is a result of audience targeted (the list), 40% a result of the offer, and 20% a result of the creative effort that is, design and writing.

### HERE'S WHAT A QUALIFIED BROKER CAN DO FOR YOU:

- Provide advice in the list-selection process, although you will make the final decision.
- Help ensure data quality.
- Help identify relevant list criteria, such as age, gender, and purchasing habits.
- Recommend a set of options or lists instead of offering a ready-made list.
- Leverage established relationships with list owners and managers to help you get the best pricing.
- Recommend quality data sources to help you focus only on the most effective lists.

### KEY QUESTIONS A GOOD LIST BROKER SHOULD BE ABLE TO ANSWER:

- What is the previous usage of the list within the past 12 to 24 months, and who has used the list?
- When was the list last updated?
- Address files should be processed through the Postal Service national change of address (NCOALink®) service at least quarterly—when was it last done?
- What is the source of the list? How was it developed?
- Is the information verified?

### HERE ARE SOME TIPS FOR WORKING WITH A LIST BROKER:

- Check with the Direct Marketing Association (DMA) and Better Business Bureau to find a qualified broker.
- Determine how many names you want to order, when you need to receive the list names, where you want the names to be sent, and when you will mail out your piece.
- Ask for clear and specific reasons why your broker recommended a certain list.
- Maintain constant communication with your list broker when developing your list plan so you can refine it to be sure it meets your needs.
- Choose the right fit. Some brokers specialize in certain markets—real estate, finance, hospitality, etc. Choose the right one for your company.
- Negotiate. If a list looks perfect but is too expensive, your broker may be able to negotiate a different price or special terms that are more favorable.

**EXAMPLE**

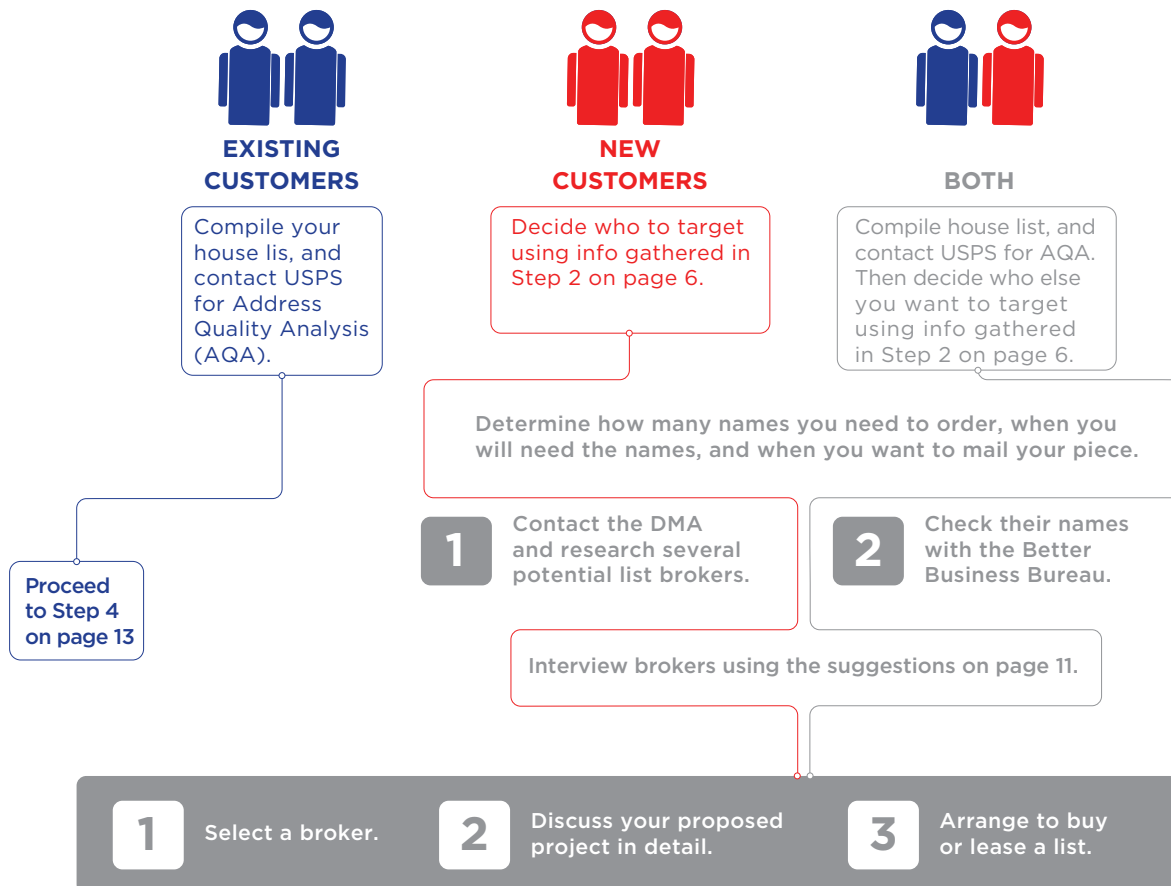
An accounting firm specializing in small-business issues has two offices in a large metro area and plans to open an additional office on the east side of the city. The company wants to reach both established businesses and new businesses that might not have a solid relationship with an accountant yet. So they are looking for a business-to-business (B2B) list.

They choose several potential list brokers from a DMA list and check their reputation with the Better Business Bureau. They narrow the choices down to three, read, all they can about these brokers online, and interview them about their qualifications. The company chooses a broker with a strong B2B small-business background and works with the broker to acquire an appropriate list.

**ACTIVITY**

Let this flowchart guide you as you work on putting together your mailing list.

# I WANT TO REACH...



## STEP 4

# CRAFT YOUR MESSAGE

Now it's time to think about the key message you want to convey about your company. Every business needs a unique selling proposition—something that sets them apart from the competition. You may already know exactly what this is. If you don't, answering these questions can help you articulate it.

- Why should your audience care about your product or service?
- What problem are you solving for them?
- How is your product or service different from that of your competitors? Do you offer better prices? Unique products? Better service? Convenient location? Faster delivery? Honest, reliable staff?
- What is your business's personality? Down to earth? Tech savvy and hip? Super friendly? Clean and healthy? Upscale and refined? Detailed and meticulous?

Think about the customer information you gathered earlier—what they need and want. Then think about your competitors and their strengths and weaknesses compared with yours. In what areas do you perform better than they do? Focus your message on those areas. And make sure you're signed up to receive promotional info from your competitors so you know how they're selling themselves.

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## EXAMPLE

A Mexican restaurant offers a healthier approach to traditional offerings: lighter sauces, traditional dishes reworked to incorporate lots of fresh veggies and fruits and vegan and low-carb options. The restaurant can't compete with other local

restaurants on price or speedy service, and their location isn't particularly convenient. So they emphasize healthy, high-quality food and friendly service. Their message: Satisfy your craving for delicious Mexican food without sacrificing your diet.

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## ACTIVITY

To help you figure out what differentiates your business, try filling out this form. Get as creative as you want with the answers. If the

word you really need is a whole sentence, not three adjectives, go for it. The right answers are the ones YOU come up with.

For customers who are looking for \_\_\_\_\_ (noun),  
our business provides \_\_\_\_\_ (adjective) \_\_\_\_\_ (noun).  
Unlike our competitors, we \_\_\_\_\_ (verb), \_\_\_\_\_ (verb),  
and \_\_\_\_\_ (verb). Our product/service is \_\_\_\_\_ (adjective),  
\_\_\_\_\_ (adjective), and \_\_\_\_\_ (adjective).  
We do our job \_\_\_\_\_ (adverb), \_\_\_\_\_ (adverb),  
and \_\_\_\_\_ (adverb). The best thing about our  
business is \_\_\_\_\_.

**STEP 5**

# DEVELOP YOUR OFFER

Now that you've figured out what makes your business stand out, let's talk about how to create a specific direct mail offer that will catch your customers' attention—and get them to respond quickly.

Having a well-timed, strong incentive that is relevant to your ideal customers is the key to higher response rates. You want to quickly entice them to take further action—for instance, to visit your website, your store, or your social media platforms. And keep in mind what your competitors are offering as you develop your offer.

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Here are some tried and true best practices for developing direct mail offers:

**MAKE IT ENTICING**

What can you offer that is compelling enough to prompt customers to act—while still keeping you profitable? Will beautiful pictures of your resort property be enough to lure customers to book their vacation? Or could you afford to offer them one night out of seven free during the off season? If your

tire store has excess inventory, maybe a 20% off deal would prompt customers to act now instead of two months from now. You'll need to do some calculations to figure out what makes the most sense for your business. We'll provide more information on making those calculations in step 10 on page 39.

**TELL YOUR CUSTOMERS HOW TO RESPOND**

A strong call to action is the cornerstone of a successful direct mailpiece. Tell your customers exactly what you want them to do. For instance, call this number now to make an appointment; go to this website to redeem your coupon; or scan this QR code to see more products. If you're creating a longer piece of

mail, such as a letter, use the call to action more than once. Naturally, you'll want to close your message with the call to action, but since not everyone will read to the end, find ways to intersperse it throughout your offer.

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## EMPHASIZE GUARANTEES

Guarantees increase inquiries for direct mailers because they help buyers overcome concerns that the product might not perform as advertised. For instance, a free 30-day trial is a great way to entice people to give your product a try. Chances are they won't cancel after 30 days.

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## USE TESTIMONIALS

Endorsements from satisfied customers can give you credibility and help spur sales. Of course, make sure you have written permission before using a testimonial.

**TIP**

**Feature positive comments from review sites in your direct mailpiece. Introduce them with: "Here's what people are saying about us."**

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## MAKE YOUR OFFER TIME SENSITIVE

Offering a promotional item or discount with a time limit or a bonus if customers act before a certain date encourages immediate action.

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## EMPHASIZE SPECIAL PRICES

Play up bargain prices, discounts, and easy payment terms prominently on your direct mailpiece.

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## ACTIVITY

Set aside some time for brainstorming about what you can offer customers to compel them to act. Be sure to think about these elements:

- What benefit are you providing? What problem are you solving for them?
  - What can you do to entice them to act immediately?
  - Would a discount or free sample help?
  - Why should they trust you? Can you offer them a guarantee? Provide testimonials?
  - What kind of deals are your competitors offering? What do you need to offer to stay competitive?
  - What specific action do you want customers to take? Have you given them explicit instructions?
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## STEP 6

# HOW AND WHY TO INTEGRATE PRINT AND DIGITAL

Direct mail has a powerful role to play in marketing, and studies have shown that a combination of physical and digital technology can drive even better results.

Omni-channel marketing provides a seamless experience to customers, regardless of which “channel” they use to reach your business: Physical store, mobile device, website, postcard, email, catalog, social media, etc. Omni-channel marketing done right means every aspect of the consumer experience should be consistent and complementary.

So how do you effectively link direct mail with the digital world? Here are some ideas:

- Provide an incentive for customers to visit your website or social media page. Offer a discount if they log on and fill out a survey (which provides you with valuable customer data). Once the survey is filled out, they receive a discount code, which they can use to immediately pay for goods or services.
- Use personalized URLs (PURL), which are website addresses personalized for each of your potential customers. For example, customer Sophie might receive a postcard asking her to visit [www.CustomerSophie.yourbusiness.com](http://www.CustomerSophie.yourbusiness.com). The website will be personalized with the customer’s name and

other information. When your customers visit the website, you’ll know your mailpiece worked. And you can then ask them to fill out a survey to help you provide more personalized products and services in the future.

- Include a QR code, a type of 2-D barcode that customers can scan using an app on their tablet or smartphone. Scanning the code can provide them more information and take them to a website or social media page. Consider giving them an incentive to use the code, such as a coupon or chance to enter a contest. If your QR code sends them to a social media page, including a “Buy It” or “Shop Now” button right on the social media post makes it easy for them to act immediately.

Smart marketers don’t rely on any single channel but incorporate many channels in a way that makes sense for their business and their customers.

For some engaging examples of mailpieces that integrate the digital and physical worlds, visit <https://irresistiblemail.com>.

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## EXAMPLE

A bicycle shop sends out a direct mail offer of 10% off a tune-up. That includes a QR code linked to the shop's website. When customers visit the website, they can schedule an appointment—and view the newest inventory of racing bikes. They can read a blog post about training for a triathlon and click on a link to the shop's online video channel to view a video of how to change a tire during a race. And when customers come into the store for their tune-up, the shop employees can ask for

their contact information so the store can send them emails about new promotions. The store employees also give customers a brochure about a race the shop is sponsoring. On race day, they ask participants to upload race photos to the shop's social media channels.

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## ACTIVITY

Think of all the channels you use to interact with your customers—and channels you could be using. Then think about how you lead customers from one channel to another in a seamless, enjoyable experience. Now, using the diagram below, draw arrows from one channel

to another and make notes on the arrows indicating what you can do to prompt your customers to move. Can you come up with any new, interesting ways to guide them? Are there entirely new channels you might want to add?

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**ACTIVITY (CONT.)**



## STEP 7

# CREATE YOUR MAILPIECE

Now comes the fun part: Putting your actual mailpiece together.

If you have the budget, you can hire an advertising agency to help you with some or all of the steps you need to go through: Deciding on a format and mail type, writing and designing your piece, and making sure it meets USPS® requirements. They'll even mail it for you. If your business lacks in-house expertise in graphic design or copywriting, it probably makes sense to hire professionals so you can feel confident that you're mailing out an effective piece.

However, if using a contractor is too costly or you would rather do the work yourself, we'll give you some tips. Even if you do want to contract out the work, it's a good idea to read this section so you'll be able to work more effectively with the agency you hire.

## DECIDING ON A FORMAT

Direct mail can come in many shapes and sizes, each with its own advantages.

**Postcards** are affordable and can be easy to track, whether by asking customers to bring the actual card in to the store for a discount or using a special ordering code to purchase online. And recipients don't even have to open an envelope to read your message. According to the DMA, consumers prefer postcards over other types of direct mail, with 50.9% of recipients saying they find postcards useful.<sup>1</sup>

**Self-mailers** are simply a sheet of paper folded in half and sealed so they can be mailed without an envelope. They give you more room to present information than a postcard but are cheaper to print, easier to assemble, and require less handling than a letter. They can be as simple as a sheet of stock paper folded in half or more complex,

such as a large sheet folded in ingenious ways—with tear-off coupon, order form, and preformed business reply envelope all in one.

**Letters** are perceived as professional and personal. Research shows that highly targeted customers tend to respond to long direct mail letters. A letter gives you more space to tell your story, and stories illustrate points and drive emotional decisions better than mere facts.

**Flats** are larger than letter-size mailpieces and more versatile: A flat can be an envelope, self-mailer, brochure, or single large card. Flats are handled separately from other mail by the U.S. Postal Service. They are the only type of mailpiece that can be used with [USPS® Every Door Direct Mail - Retail® service](#).

1. "6 Significant Statistics from the DMA on the Current State of Direct Mail," Eleventy Marketing Group, June 10, 2015. <http://eleventygroup.com/2015/06/10/significant-statistics-dma-direct-mail/>

**Catalogs** are more expensive to produce but deliver good response rates. The demographic for catalogs is roughly 70% female, 50+, married, and a homeowner.<sup>1</sup>

**Three-dimensional and other exclusive mailers** can be more costly, but they get noticed. Popular tactics include pop-up features and sound chips, eye-catching inserts with dimensional geometric die cuts, varnishes and finishes that create interesting textures, and unique mailing tubes. Some restrictions

may apply to this type of mailpiece. Work with a USPS Mailpiece Design Analyst (MDA) to be sure your idea will work. See page 24 for more information on MDAs.

Within each of the formats we've discussed, you can explore ways to make your piece more engaging and drive digital engagement, such as using QR codes. (See Step 6.)

For inspiration, check out <https://irresistiblemail.com>.

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## DECIDING ON A MAIL TYPE

USPS offers several economical choices for delivering your direct mailpieces. These include:

**First-Class Mail® service.** The maximum weight for a parcel or flat is 13 ounces; for a letter, 3.5 ounces. You must be mailing at least 500 pieces to qualify for lower commercial prices. First-Class Mail prices are the same regardless of how far the mail travels and include forwarding and return services.

If you mail at single-piece prices, there's no special payment method, no mailing permit, and no extra time required to presort the mail. You simply put a stamp on it and drop it in the collection box. First-Class Mail items have a two- to three-day service standard within the continental US. Mail that is brought to a facility close to the delivery point may be delivered within one day.

**Standard Mail® Service.** Your mailpiece must weigh less than 16 ounces, and you must be mailing at least 200 pieces or 50 pounds of

mail. Delivery standards are from three to eight days within the continental US. Mail that is brought to a Postal facility close to the delivery point may be delivered in fewer days. Standard Mail is often the best choice for direct mail because postage prices are lower. Discounts for nonprofits are available but require specific authorization.

Standard Mail is not forwarded or returned unless you request it and pay additional costs. It can't be used for international mailings.

**Every Door Direct Mail® (EDDM®) service** allows you to reach customers using an online mapping tool without having to provide names or street addresses. You can choose among postal routes based on demographics. The Postal Service™ EDDM service is designed to deliver to every address on your selected routes.

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1. Elaine Love, "How Print Catalogs Can Boost Company Sales," Business 2 Community, November 20, 2012.  
<http://www.business2community.com/strategy/how-print-catalogs-can-boost-company-sales-0337330#zY3gxVLOq5JARcWS.97>

## WRITING EFFECTIVE TEXT

**Grab them with a strong headline.** Headline writing is so important in direct mail that whole books have been written on the subject. That's because you have only a few seconds to persuade your prospects to keep reading. Research direct mail headline writing online and you'll find lots of examples of headlines that grab attention. We can't cover everything here, but these tips can help get you started:

- Always focus on the benefit to the customer—the solution you provide to their problem.
- Keep headlines straightforward. Avoid puns or word play so there's no chance of customers misunderstanding.
- Make your offer concrete. Use numbers if you can: “Drop 5 pounds in 3 days” or “Sleep better tonight—save 50% on mattresses now.”

**Keep your text simple and easy to understand.** Your customers are busy. If they have to struggle for even a second to figure out what you're trying to say, they'll stop reading. After you write, read your text aloud and listen for repetitive or confusing sections. If it doesn't sound clear, rewrite. Then have someone who's not familiar with your business read your text and see if they understand it.

**Write the way real people talk.** Imagine that you and your prospect are having a friendly conversation. Refer to your customer as “you” and your business as “we” or “I.” Use ordinary words, active verbs, and short sentences. Don't be afraid to use contractions (for example, “it's” and “can't”), because that's how people talk. To help keep it real, you might try recording yourself explaining your product or service as if you're talking to a friend. Then transcribe your recording. This won't be your final text, but it could help you capture the tone you want to use.

**Give them reasons to believe.** Try reading your text as if you were a pessimistic customer who's looking for “the catch.” Use numbers and statistics to prove your product works. Use quotes from experts or testimonials from satisfied customers. Offer them a free trial or a money-back guarantee.

**Don't forget to tell your customer how they can respond.** As mentioned above, a strong call to action is key. This can be similar to the “Learn More” or “Add to Cart” button on a website. Tell them exactly what you want them to do. For instance, “Text this number to make an appointment” or “Scan this QR code for details.”

## CREATING YOUR DESIGN

The layout of your direct mailpiece can be as important as its content. Layout involves the arrangement of text blocks, headlines, and graphics on the page. Generally, it should be well balanced, easy to read, and inviting.

Here are a few tips:

- Avoid trying to put too much on one page. Your piece may appear confusing and messy, and that could turn the reader off.
- Don't use overly fancy fonts or ALL CAPS for your text. Both can make your piece hard to read.

- Break up large text blocks with headlines, bullet points, graphics, or white space.
- Use no more than two or three colors and no more than two fonts for a clean design.
- Don't try to emphasize everything. Let the design show your reader what your main point is.
- Remember who your audience is. For instance, if you're selling to young people, don't make your piece look too formal or imposing.

If you don't want to design your piece from scratch, you can easily find templates online to guide you or at least give you some ideas.

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## MEETING POSTAL REQUIREMENTS

As you're designing your mailpiece, you'll need to find out how U.S. Postal Service requirements will affect your mailing. You may need to add or change elements to qualify for certain discounts.

Figure out whether you will need to use an Intelligent Mail® barcode (IMb®), a new Postal Service™ barcode used to sort and track letters and flats. Barcoding may entitle you to a lower postage price, but only if all the other requirements for automation postage prices are met.

However, the Postal Service™ recommends that, unless you are preparing a mailing for

automation prices, you do NOT put barcodes on the mailpieces. As long as the mailing address is correct, your mail will still be processed efficiently—and you won't need to worry about having the wrong barcode on your mail.

For more information, see <http://pe.usps.com/businessmail101/misc/barcodes.htm>.

You may want to meet with a Mailpiece Design Analyst (MDA). MDAs are specially trained postal employees who can provide advice and evaluate whether mailpieces are automation compatible and qualify for automation-based prices.

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Mailpiece Design Analysts can:

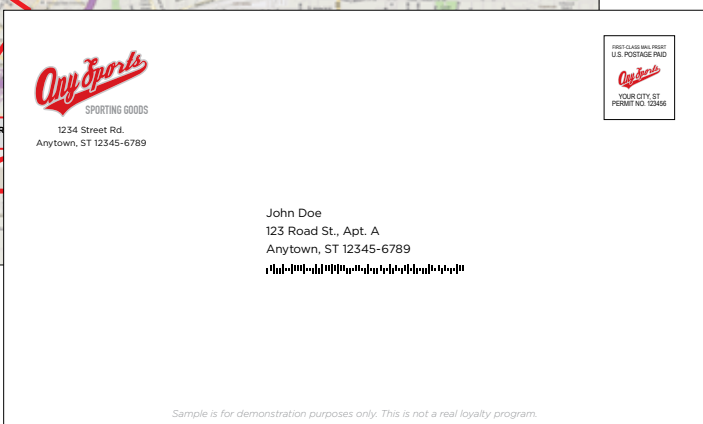
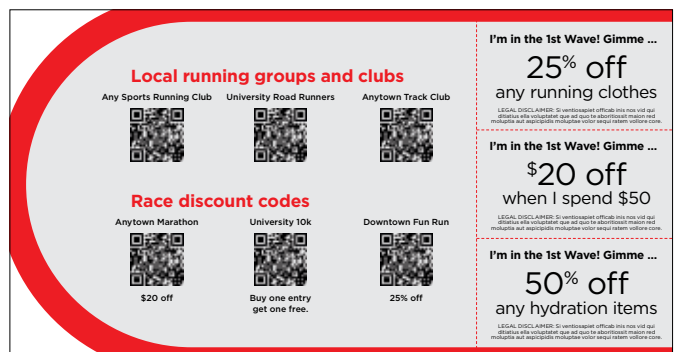
- Review mailpieces for adherence to USPS® standards.
- Test paper and mail samples for thickness, color, flexibility, and barcode tolerances.

- Analyze readability of actual mailpieces.
- Help with mailpiece design evaluations.

You can reach the MDA Support Center at [855-593-6093](tel:855-593-6093) or [mda@usps.gov](mailto:mda@usps.gov). The hours of operation are Monday through Friday, 7 a.m. to 5 p.m. CST.

**EXAMPLE**

Here is an example of an effective direct mailpiece.




Sample is for demonstration purposes only. This is not a real loyalty program.

**ACTIVITY**

Using this blank postcard sample, doodle in your ideas for design and copy.



**FRONT**

	<p><b>Any Name Here</b> <b>123 Street Road, Anytown,</b> <b>ST, 00000-0000</b></p> <div data-bbox="1247 583 1406 802" style="border: 1px solid black; width: 98px; height: 104px; margin-left: auto; margin-right: auto;"></div> <p> <b>Jane Smith</b> <b>123 Street Road, Anytown,</b> <b>ST, 00000-0000</b></p>
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**BACK**

**STEP 8**

# WORKING WITH A PRINTER

You should begin the process of choosing a printer before finishing your direct mailpiece design. Ask for bids from at least three printers, and, if possible, don't make your choice solely based on price. Make sure the printer produces quality work by asking for samples of similar work. Always check references before making a final decision.

Here are some questions to consider when evaluating printers:

- Do they have a reputation of delivering jobs on time?
- How large is the shop? Are there other presses your job could run on if the scheduled press has problems?
- Who do you have the most confidence in to do what is necessary to get the job done, particularly if problems arise?
- Who has been in business the longest? Will they still be in business if you want to rerun the job?
- Are they a full-service shop, or will they have to subcontract some of the job out to someone else (e.g., color separations)?

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## ASKING FOR BIDS

When getting written bids from printers, first make sure that you clearly indicate the specifications of your project. Specifications may include:

- Number of pages
- Dimensions
- Quantity
- Paper and cover stock
- Type of binding (if applicable)
- Number of colors in the text
- Number of colors on the cover
- Number of black-and-white photos
- Number of color photos
- Any special requirements

Tell the printer a firm deadline for when you must have the finished product, what materials you will be furnishing, and where and how they should ship the finished product. Let them know you are getting other bids, and ask how long the prices are valid.

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## APPROVING BLUELINES

After the printer has prepared your materials for the plate-making process, you'll be given a blueline and color proof, or you'll be emailed a PDF. A blueline is a photographic print of negatives that, unless changes are made, shows exactly how the final product will look.

Read bluelines meticulously. This is truly your last chance to fix mistakes before they become costly. This is not, however, the time to totally rewrite text or redo the layout. At this point, you're looking for major errors. Check the placement and positioning of photographs,

charts, graphics, text, and headlines. Check line breaks, page breaks, photos, and cropping. See whether the colors are exactly as you intended. Make a note of any stray marks, broken text, and any other items that don't look exactly as they should.

When you sign the blueline, you are giving the printer approval to proceed. Any changes made after printing has started will not only affect your budget, but can also throw off your mailing schedule.

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## EXAMPLE

A restaurant owner solicits bids from three print shops, providing them with their specifications. One shop has a great price, but the restaurant owner hears from a business associate that the printer has missed deadlines because of broken equipment, so that bid is rejected. The other two are similarly priced, but one responds late to the request for bids

and initially misunderstands the specifications. So the business goes with the on-time bidder, who also has good online reviews. The printer provides clear instructions on how to prepare files for printing. When the restaurant discovers a problem with the color on the blueline, the printer fixes it quickly and delivers the job on time.

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## ACTIVITY

Proofreading checklist: Things to check before you send your file to the printer

- Are all words spelled correctly?
- Punctuation used correctly?
- Any grammar errors?
- Are email addresses correct?
- If there are hyperlinks, do they work? Do they go to the right place?
- Are all phone numbers and addresses correct?
- Is the formatting consistent, i.e., are the same fonts used for similar elements?
- Are there missing words?
- Duplicate words?
- Missing paragraphs?
- Duplicate paragraphs?
- Is the spacing between lines, words, and letters consistent?
- Are there orphans or widows? A widow is a single word or part of a word that gets pushed to a new column by itself. An orphan is a single word or part of a word that appears by itself at the bottom of a page or column. Both can make your design look awkward.
- If there's more than one page, are the pages in order?
- Does the text flow correctly from one page to the next and one column to the next?
- Are graphics and logos spelled correctly and placed correctly?  
Do they overlap the copy? Are any letters cut off?
- Did you run a spell-checker?



## STEP 9

# PREPARE YOUR PIECE FOR THE POST OFFICE™

If you want to mail at bulk-mail prices, the mailing process is a bit more complex than you may be used to. Here are some key issues to consider.

## IS BULK MAIL RIGHT FOR YOU?

The term “bulk mail” refers to larger quantities of mail prepared for mailing at reduced postage. It includes the commercial First-Class Mail® service and Standard Mail® service that you would likely be using for your direct mail campaign.

Bulk prices are lower than “single-piece” prices. Single-piece means that you pay the full price; when you put a stamp on a letter, you’re paying single-piece postage. Many businesses pay single-piece postage even though they are doing large mailings. Why? Because they don’t do the extra preparation work—they either don’t have the time or it’s just not cost-effective for their business.

The Postal Service™ offers lower prices for bulk mailings because you do some of the work that otherwise would have to be done by the Postal Service (for example, sorting the mail by ZIP Code™ areas or transporting the mail to a destination postal facility).

To qualify for commercial prices, you must:

- Obtain a mailing permit and pay an annual mailing fee for each class of mail (First-Class Mail® service and Standard Mail® service).

- Pay postage using either precanceled stamps, postage meter, or permit imprint.
- Design a mailpiece that meets size, shape, and weight requirements.
- Ensure that your addresses are accurate.
- Presort your mail. Presorting means grouping mail by ZIP Code™ areas. All of the pieces going to the same destination get grouped into the same bundle or tray. You’ll sort to specific areas and then work your way up to more general areas. All leftover pieces are combined.
- Mail at least 500 pieces for First-Class Mail® service or 200 pieces (or 50 pounds) for Standard Mail® service.

You can also lower your costs if your letters and cards are compatible with USPS® automated processing equipment. To qualify for automation prices, your mail must conform to very specific criteria, including:

- An Intelligent Mail® barcode encoded with the correct delivery point routing code on each piece in the address block or in the barcode clear zone.



- An address list that has been checked and CASS Certified™ within the last 180 days. The Coding Accuracy Support System, or CASS™, improves the accuracy of delivery codes that appear on mailpieces.
- No polywrap, polybag, shrinkwrap, clasps, strings, buttons, or similar closure devices.

This is just a sampling of the requirements for automation letters and cards. Your local Post Office or business mail entry unit can help you decide if automation is right for you, and your USPS Mailpiece Design Analyst can help you design a letter or card to qualify for automation prices.

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## GETTING OUTSIDE HELP

If you don't want to do all the work yourself, you can contract with a presort bureau or lettershop. These businesses specialize in preparing bulk mailings. Some will do it all for you—everything from creating your mailpiece through dropping it off at the Post Office™ facility.

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## SOFTWARE VENDORS

Many companies sell “presort software,” which is special computer software that presorts your addresses, figures out how many mailpieces will qualify for which postage prices, and prints out a completed postage statement. Presort software

can cost anywhere from about \$100 (for simple packages) to thousands of dollars (for very sophisticated software). Look for software that is PAVE™ certified—that means it has been tested and approved by the Postal Service.

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## WHERE TO DROP OFF YOUR BUSINESS MAIL

All commercial business mail must be brought in to a business mail entry unit (BMEU). You cannot give business mail or permit imprint mail to a letter carrier or put it in a collection box.

You must take it to the Post Office™ location where you hold your mailing permit. For most

mailers, this will be your local BMEU, but if you're in a small town, you may have to take your mail directly to the retail window. Call first to find out exactly where you need to go and the best hours to bring your mail.

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## WHAT TO TAKE WITH YOU TO THE POST OFFICE™

Here's a short list of what to take when you're ready to drop off your mail:

- All of your mail (Count your containers!).
- Your signed and dated postage statements if you're using hardcopy. Or you can complete and send your online postage statement electronically.
- Supporting documentation (your tally sheet or printouts from presort software).
- A check or cash to cover any additional postage due (if your advance deposit account won't cover the cost of your mailing, or if you've put precanceled stamps or metered or PC Postage® indicia stamps on your mail). For precanceled stamp or metered mailings, in lieu of a check, you can affix a meter strip to your postage statement to pay for the additional postage.
- A check for your annual mailing fee (if you haven't already paid it).

If you want a copy of your postage statement for your records, you'll need to bring two copies with you—the original to turn in with your mail and the copy to keep. The Postal Service uses this documentation to verify the prices you have claimed on your mail.

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## WHAT HAPPENS AT THE POST OFFICE™

The clerk checks to make sure that you've prepared your mail properly. The clerk will open at least one of your trays to check your mail for:

- Eligibility of contents. (For Standard Mail® service, the clerk will actually open one of your mailpieces to check that the contents qualify for the price you're claiming.)
- Markings and endorsements.
- Proper sorting.
- Postage payment.

If you're paying with permit imprint, the clerk will check to see that there's enough money

in your advance deposit account to cover the cost of your mailing.

When you bring in your first mailing ever, the clerk will perform an in-depth presort verification. Don't be surprised if the first time you bring a mailing to the BMEU it needs a little fine-tuning. If your mail isn't presorted correctly, the clerk will point the problems out to you and tell you how to fix them. There's usually room right there in the BMEU for you to re-sort your mail and fill out a new postage statement.

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## FOR MORE INFORMATION

A great source of detailed information is the Business Mail 101 section of the USPS® website (<http://pe.usps.com/businessmail101/>).

## EXAMPLE

An organization plans to mail 10,000 letters to potential donors using bulk mail. They prepared carefully ahead of time, so the mailing went off without a hitch and arrived in customers' mailboxes on time. These are the steps they took:

- Obtained a mailing permit and paid an annual Standard Mail® service mailing fee
- Paid their postage using a postage meter
- Worked with an MDA to ensure their mailpiece met size, shape, and weight requirements
- Presorted the letters into trays by ZIP Code™ location into trays
- Contacted their local BMEU about the best time to drop off the mail
- Arrived at the Post Office™ facility with all of their mail, their signed and dated postage statements, their supporting documentation (printouts from presort software), and a checkbook in case they needed to cover any additional postage due

## ACTIVITY

Think through these four questions to decide on the best mailing solution for your organization.

**QUESTION 1.** How many pieces will you be mailing? If it's fewer than 500 pieces for First-Class Mail® service or 200 pieces (or 50 pounds) for Standard Mail service, you can't use bulk mail. You will pay single-piece prices and need not worry about presorting and other bulk mail requirements.

**QUESTION 2.** If you do qualify for bulk mail, what will it cost you in labor and expenses to take care of the requirements listed below? How does that price compare to the price break you'll receive

for using bulk mail? If you purchase software, what will it cost? And how much will it save you on labor? Keep in mind that some of these expenses won't recur if you do more than one mailing a year, and you'll probably gain efficiency over time. Here are the steps you would need to take:

- Obtain a mailing permit and pay an annual mailing fee for each class of mail (First-Class Mail® service and Standard Mail® service).



## STEP 10

# IS IT WORKING? TRACK RESPONSE AND FINE-TUNE YOUR CAMPAIGN

Your job isn't finished once you've put your pieces in the mail. To make sure you're getting the greatest return on your investment, you need to carefully test how well your campaign is working.

In fact, ideally you would do this on a small scale before you do a larger mailing so you can tweak different elements to get the best performance. Then you can use similar testing methods once the campaign is in full swing to see how well it's working. And continue testing with any follow-up direct mail campaigns.

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## PRELIMINARY TESTING

If you're doing preliminary testing, direct mail experts recommend sending your test mailings to at least 10% of your total prospects.

In direct mail, testing is a systematic way of trying different approaches to see which works best. For instance, you could test two different headlines and see which gets the best response. You could test a sample of names from two different lists. You could test different prices or test responses from

different geographic areas. You could test different envelope designs or different calls to action.

There is no single correct method of testing. Some experts believe that you should test only one element of a mailing (e.g., price, list, or copy) at a time and keep the rest of the package constant. Others believe that a variety of elements can be tested at one time. The key is to keep track of what was changed in a given test.

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## HOW TO TELL WHETHER YOUR CAMPAIGN IS MAKING A DIFFERENCE

Marketers have several ways of tracking response. Here are a few of them:

- In your direct mailpiece, ask respondents to use a PURL, download a QR code scanning app, or use an online discount code. If they do, you will know you got their attention. If you're testing different elements of a mailing list, you can change the discount codes so you know which mailpiece is performing best.
- Ask customers to “like” or “follow” you on social media.
- Include a coupon customers must bring to your store to receive a discount. Again, you can change a code on the coupon to track different variables.
- Use a contact phone number that is associated only with the campaign.
- Simply have your salespersons or receptionist casually ask customers how they heard about you.

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## MEASURING YOUR ROI

Before you begin your campaign, it's a good idea to estimate what return on investment (ROI) you expect and see if you'll need to change elements of the mailing to reach it. Then after the campaign is over, you'll need to check whether you hit the mark. (See “Activity” below.)

USPS has a free marketing impact calculator application that can help you determine your ROI on a direct mail campaign as a part of an omni-channel marketing effort. Contact a USPS® Sales Executive for information.

Response rates for direct mail campaigns vary widely, depending on your product, industry, target market, and campaign quality. On average, you can expect a response rate of 1% to 3%. But there are always exceptions. Nonprofits, for instance, sometimes see much higher response rates, while those selling

complicated, expensive products are more likely to see lower response rates.

### EXAMPLE

A newly opened garden supply store is trying to draw more customers in for spring planting supplies. They would like to run a direct mail campaign offering free bags of organic fertilizer for every customer who brings in the postcard mailed to them. Before starting, the store calculated an estimated ROI and determined that they needed to offer a less valuable product—free seeds—and switch to bulk mail postage to achieve a reasonable ROI. After making those decisions, the supply store did a test mailing using two different mailing lists. The postcards had different codes, depending on which list was used. After the response from one list was much stronger, they decided to use it for a full-scale campaign.

## ACTIVITY

Run through these calculations to determine your ROI. First, you'll need this information:

<b>TOTAL CAMPAIGN COSTS</b> Including labor costs, mailing lists, mailing costs, etc.	
<b>AUDIENCE SIZE</b> How many people are receiving the mailing	
<b>RESPONSE RATE</b> Percentage of those receiving the mailing who actually respond	
<b>CONVERSION RATE</b> How many responders actually buy something	
<b>PURCHASE AMOUNT</b> How much on average they spend	

Before you launch your campaign, these will be estimates. Afterward, you will plug in actual numbers. Now, use these equations to calculate your ROI.

<b>COST PER MAILING</b> $\text{Campaign cost} / \text{audience size}$	
<b>NUMBER OF RESPONDERS</b> $\text{Audience size} \times \text{expected or actual response rate}$	
<b>NUMBER OF BUYERS</b> $\text{Number of responders} \times \text{expected or actual conversion rate}$	
<b>REVENUE GENERATED</b> $\text{Average buyer purchase} \times \text{number of buyers}$	
<b>PROFIT</b> $\text{Revenue generated} - \text{campaign costs}$	
<b>COST PER RESPONDER</b> $\text{Campaign cost} / \text{number of responders}$	
<b>COST PER BUYER</b> $\text{Campaign cost} / \text{number of buyers}$	
<b>ROI</b> $\text{Profit} / \text{campaign cost}$	

