8 Steps to Successful Direct Mail

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Direct mail can be a powerful component in your omni-channel marketing efforts.

Now that it's become more dynamic through retargeted direct mail, Informed Delivery® notifications and Informed Visibility® tracking, direct mail can create action with every interaction. But for small-to-medium-sized businesses, creating direct mail can seem daunting if you don't know where to start. In this white paper, we'll show you how you can successfully integrate direct mail into your omni-channel marketing, helping you answer key questions like:

- **Whom should I target?**

- **What's the right message to send?**

- **What's the most cost-effective way to use direct mail 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 for each step.

By the time you've finished this white paper, you'll be ready to create personalized direct mail that will complement your digital efforts, reaching the right people at the right time.

Step 1

Establish Your Objectives

Before you put time and money into direct mail, 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?

- What other marketing efforts do you have in place that you hope to bolster with direct mail?

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

- Are you hoping to attract 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 customer segment that might benefit from your product or service?

- Are you aiming to attract customers specifically to your website, social media accounts or other digital resources using the power of direct mail?
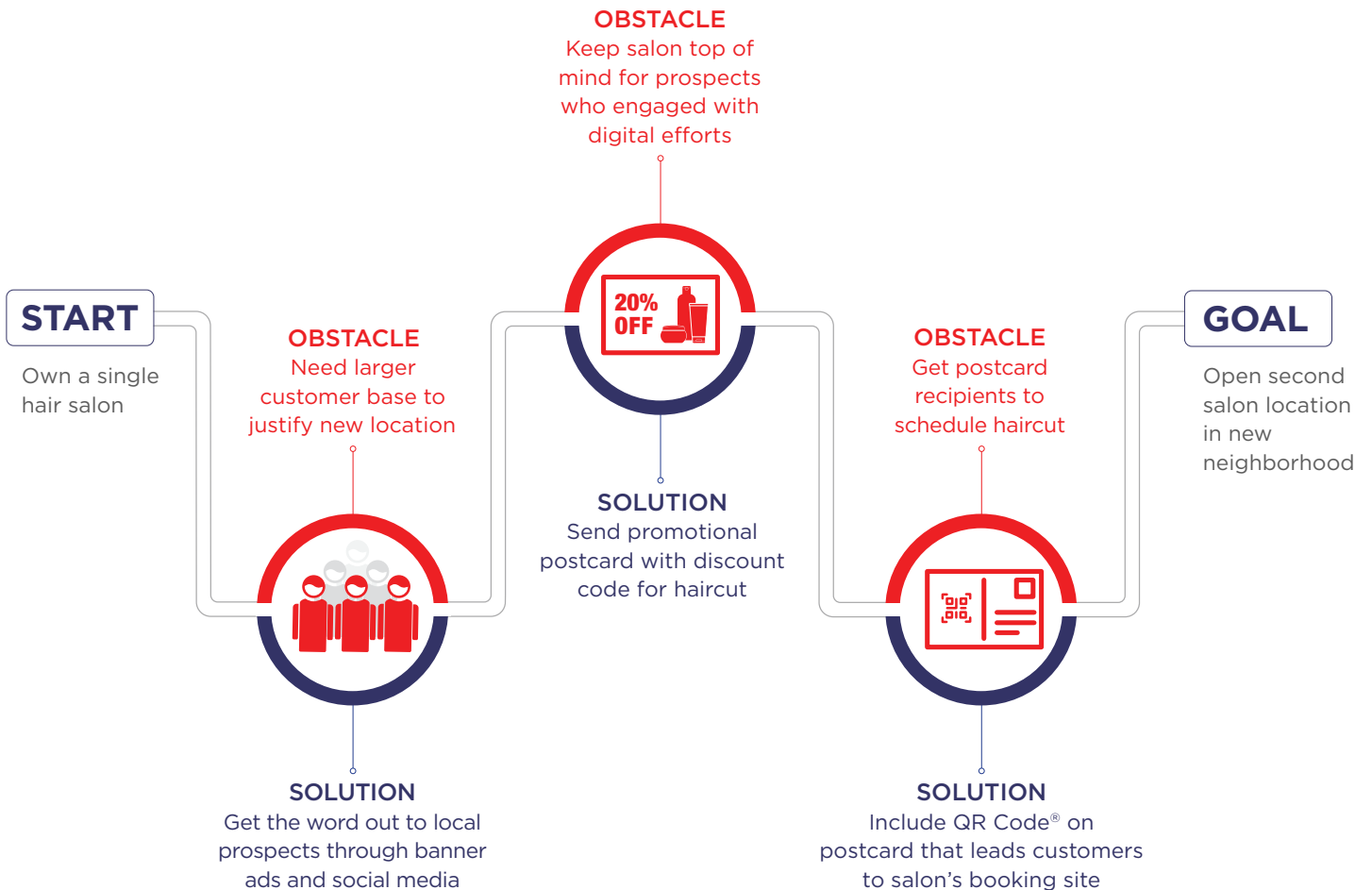
Example

A hair salon owner wants to expand to a new, 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 in order to generate enough revenue to cover the costs. She identifies several steps she needs to take to accomplish her goal, and direct mail plays a key role in the process.

First, she uses banner ads to target prospective customers who live in the area where the new salon would be located and follows locals on the salon's social media platforms. Anyone who engages with these efforts is then sent a promotional postcard with a QR Code® leading to the booking area of the salon website, where they can schedule a haircut at a discounted rate.

The result? More customers from a larger geographic area, which helps her justify making the move. Once the new location opens, she again turns to direct mail to help get the word out.

Step 1

OBSTACLE
Keep salon top of mind for prospects who engaged with digital efforts

START
Own a single hair salon

OBSTACLE
Need larger customer base to justify new location

20% OFF

OBSTACLE
Get postcard recipients to schedule haircut

GOAL
Open second salon location in new neighborhood

SOLUTION
Send promotional postcard with discount code for haircut

SOLUTION
Get the word out to local prospects through banner ads and social media

SOLUTION
Include QR Code® on postcard that leads customers to salon's booking site

Checklist

As you get started in assessing how direct mail can be used to enhance your marketing efforts, keep in mind these key tips:

- ☑ **Define your ultimate goal.**

- ☑ **Examine your existing marketing efforts to see how direct mail can be used to complement them.**

- ☑ **Target people who have shown some form of interest in your business on other channels.**

- ☑ **Find ways to drive people to your company's digital presence through direct mail.**

- ☑ **Follow up to keep your business top of mind.**

Step 2

Understand Your Audience

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

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

To better reach their customers, marketers need demographic, psychographic and behavioral information.

Demographic information includes details like gender, age, marital status, ethnicity and income. Psychographic information adds a layer on top of that, telling you about your prospects' hobbies, habits, values, opinions and attitudes. Are they vegetarians or meat eaters? Are they into fitness and health? Scrapbooking? Do they like camping? Vacations in Vegas? Behavioral information, as you may have guessed, deals with actual customer behavior. For instance, what social media platforms do they use? What websites do they visit? Do they engage with your company's social media accounts?

Here are a few suggestions for gathering customer data:

- **Look at previous email offers and promotions, and review site content to determine what's prompted people to act. A discount for taking part in a survey? A promo code sent via email? A new product announcement?**

- **Check out your social media sites. Analyze which content is most liked and by whom. If you've advertised on Facebook®, you've already created customer profiles, but by digging in a little, you can see who is engaging with your business and how they feel about your products to make your profiles even better.**

- **Look at review sites. How are customers describing your product? How does it make them feel?**

- **If you have a few customers you think would be willing to help, ask to interview them— perhaps offering an incentive. Find out about their families, hobbies, concerns and work. Incentivized surveys can also be helpful for gathering relevant information on your target audience.**

- **See which customers are following your social media accounts. Are there any common themes in the type of content they're posting on their own accounts? Make note of any commonalities.**

PRO TIP

To learn more about your customers, post a survey on social media or on your website. Give people an incentive to fill it out, whether by entering their names in a drawing or providing 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 actual purchase. You want to identify ways to reach them at various points on this path. See the illustration on the next page for details about each step of the journey.

Feature positive reviews or testimonials in the direct mailpieces you send to customers.

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 identify what people like most, whether it's the friendly staff, modern technology or attention to patients' comfort. This information can be invaluable when crafting personalized messaging for different customer segments.

The office also coordinated its digital and direct mail efforts, using data gathered from users' activity online to follow up with personalized direct mail. For example, if a customer had been browsing cosmetic whitening treatments on the practice's website, the office would then send a postcard detailing the benefits of the procedure and perhaps offering a one-time discount.

Finally, the dental practice harnessed the power of Informed Visibility® to track their direct mail marketing efforts and see when customers are receiving mailpieces. For example, once the dental office saw that people had received the postcards on cosmetic teeth whitening, they could then time the launch of complementary social media and email efforts.

AWARENESS

At this initial stage, people are just becoming aware that your product or service exists. This may be achieved through PR, digital and print advertising, direct mail or word of mouth. Postcards announcing your store launch, for example, can help get the word out.

1

INTEREST

At the interest stage, people are learning more about your company and products. You can build interest with email, online ads and direct mail promotions. The key here is to provide people with the details they need to sway them to the consideration phase. Sending out a mailpiece that details the eco-friendly processes your company utilizes, for example, may pique interest among certain customer segments.

2

CONSIDERATION

This is when the customer actually begins researching your company, whether by reading blog posts, talking with friends or browsing your company site. If you notice a customer has browsed your product page but not yet clicked deeper to explore specific items, for instance, you may want to mail them a postcard highlighting some top products, with a QR Code® leading them to a discount.

3

PURCHASE

Make this experience as seamless as possible. If you're sending mailpieces to customers who previously signed up for a wine subscription, you might consider including a QR Code® that leads to checkout for another subscription. This makes the buying process quick and easy. Show customers you care, even after they've made a purchase—by mailing a thank-you note, for example. For first-time customers, including a one-time discount code or promo in this note can drive loyalty.

4

RETENTION

This occurs when a customer likes your product and keeps buying it. You achieve this by providing good support after the actual purchase. For example, after a customer buys one of your products, you can send a mailpiece highlighting other items they may like based on their unique purchase history.

5

ADVOCACY

In this stage, satisfied customers spread the word about your product. Facilitate this by highlighting positive reviews and testimonials in your campaigns or on your website, encouraging repeat customers to do the same. Consider how you can retain your best customers while spreading the word to new ones. To show your appreciation to people who have written positive reviews, for instance, you could send a mailpiece with a custom referral code that can be shared with others.

6

Checklist

When assessing your customer segments, consider the following key points so you can craft your messaging in a way that resonates with each group.

Demographics

- ⊘ **Age**
- ⊘ **Gender**
- ⊘ **Education level**
- ⊘ **Income level**
- ⊘ **Place of residence**

Psychographics

- ⊘ **Personality**
- ⊘ **Values**
- ⊘ **Interests**
- ⊘ **Opinions/attitudes**
- ⊘ **Lifestyle**

Behavior

- ⊘ **Engagement with print/digital ads**
- ⊘ **Engagement with website**
- ⊘ **Engagement with direct mail**
- ⊘ **Engagement with social media**
- ⊘ **Response to promos/sales**

When considering these demographic, psychographic and behavioral factors, think about the journey your customers take in purchasing goods and services. Then identify ways you can engage each customer segment at the various steps on that journey.

Step 2

Step 3

Create Your Mailing List

Once you understand what you want to accomplish and have pinpointed the customer segments you're going to target, you need to figure out how to best reach them. This is where mailing lists come into play. It's crucial to find the right mailing list for each campaign.

House Mailing Lists

You may already have house mailing lists. These include the names and addresses of existing customers. If you don't have any mailing lists right now, it's time to start developing some. Encourage customers to provide contact information online—whether as a way to gain access to gated content, as part of an incentivized survey or in an informational newsletter signup form. You may also ask for contact information when encouraging users to sign up for promotional emails or coupons.

Consider your own house mailing lists more valuable than any others. And remember, approaching your current clients with a new product, sale item or service will often prove more successful than targeting a whole new population.

Be sure to segment your house mailing list based on your clients' demographic, psychographic and behavioral data. Creating separate house mailing lists for different customer segments will allow you to personalize your messaging, speaking directly to people's unique needs and goals.

Retargeted direct mail can be a great way to build out your house mailing lists while reaching your online customers offline. By allowing you to match users' IP addresses to physical addresses, retargeted direct mail makes it easy to gather clients' addresses you do not have.

For example, if a customer begins to book a hotel room on your site but doesn't complete the reservation, you can link their IP address to their mailing address, then send them a mailpiece showcasing the room and special amenities or offering a discount code. Coordinating your direct mail and digital marketing efforts in this way helps keep your business top of mind for both existing and prospective customers—all while building out your valuable house mailing lists.

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

Purchased or Rented Mailing Lists

If you want to reach new customers, you'll most likely need to buy a mailing list. Hundreds of companies sell mailing lists. You can buy mailing lists of new homeowners, gaming enthusiasts, accountants, radiologists, pet owners, frequent travelers, new parents and so on.

Getting the right mailing list for your purposes is critical. The quality of a mailing list is at least 40% of the reason that a campaign succeeds or fails.[1]

Working with a mailing list broker can be an ideal solution. Bringing together the owners of mailing lists and the direct mailers looking for mailing lists, brokers get paid a commission from the owner—not the person renting the mailing list. A strong broker will use their expertise to develop a highly targeted mailing list designed for your specific audience and messaging.

How to Make the Most of Working With a Mailing List Broker

- Find out when the mailing list was last updated.

- Find out if and how the information on the mailing list was verified.

- Find out who has used the mailing list in the last 12 to 24 months.

- Find out when the addresses on the mailing list were last processed through the Postal Service National Change of Address (NCOALink®) service; this should be done at least every quarter.

- Ask about the source of the mailing list and how it was developed.

- Ensure that you're working with a qualified broker by checking the Data & Marketing Association (DMA) and the Better Business Bureau (BBB).

- Find out why the broker recommended a certain mailing list.

- Make sure that your broker specializes in your market, or at least has experience in it.

- Develop consistent communication with your broker as they develop your mailing list to ensure it meets your expectations.

- See if your broker recommends using a specific set of mailing lists or options rather than a ready-made mailing list.

- Find out what data sources the broker recommends, so you can focus on the most effective mailing lists for your business's specific needs.

Step 3

[1] "4 Keys to Direct Mail Success," Mail Shark, 2019.

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 may not yet have a solid relationship with an accountant.

To reach these companies, the company researches their options for a mailing list broker using the DMA, checking reputations on the BBB. Ultimately, the company chooses a broker with a strong business-to-business (B2B) small-business background.

The accounting firm also works from their house mailing lists, identifying clients who run small businesses and may know other companies in need of a reliable accountant in the area where the new office will be located. The house email list comes in handy here as well; the business emails current customers an announcement about the new location and asks for referrals in the new area, incentivizing with a discount. The accounting firm also uses their website to bolster their house mailing list, matching users' IP addresses with their physical addresses in order to identify anyone from the area of the new office location.

Finally, this company turns to their followers on social media, using retargeted direct mail to target people who explored or engaged with small-business accounting content on the firm's social media. By sending direct mail immediately afterward that focuses on small businesses' unique accounting needs, the firm increases chances of conversion while keeping their company top of mind.

Checklist

Make sure to consider all of the possible sources that can be used to create your segmented lists.

- **Existing house mailing lists: These can be a great starting point. Be sure to go through each existing list to check for needed updates.**

- **Email lists: Make use of your email lists as well. For example, email an opt-in for direct mail to customers already signed up for your digital newsletter, enticing them with the prospect of exclusive, mail-only promos and discounts.**

- **Site visitors: Asking people to provide their address in order to access gated content on your site is an easy way to build out your mailing lists. Also consider asking for users' physical addresses when they sign up for your digital newsletter.**

- **Social media followers: Coordinate your direct mail efforts to complement users' behavior on social media. If you notice customers engaging with certain content, follow up with an email providing more product details or a one-time promo code, with the option to sign up for more discounts and announcements by providing their addresses.**

- **Paid mailing lists: As discussed above, mailing list brokers have the ability to craft very targeted mailing lists so you can better reach certain audiences.**

Step 4

Decide on Messaging for Each Segment

Now it's time to think about the key messages you want to convey through your campaign and how they will help you meet your overarching goals. You know what customers you want to target, but now you need to figure out exactly how to do this in a way that's engaging, attention-grabbing and actionable—and personalized to each customer segment.

Consider the following questions before beginning to craft your campaign messaging:

- **What are the main pain points of each of your targeted customer segments, and how can your company help?**

- **What are your competitors' offerings, and how do they compare to your own?**

- **What kind of content are your target audiences consuming? Are they viewing blog posts related to a certain subject? Do they prefer educational, informative content or product-related content?**

- **What action do you want these customer segments to take as a result of your campaign? For example, do you want them to visit your website, come into your store or engage on your social media platforms?**

- **What will most compel your target audiences to act—while still keeping your business profitable?**

- **What is the end goal of this campaign?**

Remember that a successful marketing campaign will involve messaging across various channels—both online and offline. Direct mail can be used to complement social media efforts, for example: If a user is viewing a certain product on your website, you can follow up with a postcard providing more information on the item, or even a discount, encouraging the customer to act.

Make It Enticing

Will beautiful pictures of your resort property be enough to entice customers to book their vacation? Or could you afford to offer them one night out of seven free during the off-season?

Personalization can help make these kinds of offers more enticing. If a customer has viewed a specific property on your site, or "liked" an image of it on social media, you may want to send a postcard highlighting the amenities and features of the property or offering a one-time booking promo.

You'll need to do some calculations to figure out what makes the most sense for your business and how your messaging will help meet the goals you've laid out for each of your customer segments.

Help Your Customers Respond

A strong call to action is the cornerstone of a successful marketing campaign. By coordinating direct mail and digital efforts, you can create a highly effective omni-channel campaign that helps customers do what you would like them to do.

For example, if you want them to call a certain number to set up an appointment, you may want to send a mailpiece after you observe them browsing the services page on your website. Or if you observe that a customer has left certain products in their online shopping cart, it may be useful to follow up with visually engaging direct mail that reminds them of these items.

Aside from using mail as a follow-up to customers' online activities, you can also use it as the starting point. For example, you may send prospective customers a postcard detailing a new product promotion with a QR Code® that they can scan, leading them to your online store.

Each of these examples points customers to a clear-cut action—calling your business to schedule an appointment, revisiting an online shopping cart, browsing products on your site. The takeaway? Being clear about the actions you want people to take, reaching clients through multiple channels and coordinating direct mail and digital campaign efforts increase the chances of a response.

Step 4

Example

A bicycle shop sends out a direct mail postcard for 10% off a tune-up. The mailpiece includes a QR Code® linking to the shop's website, encouraging customers to set up an appointment for the tune-up. The call to action is clear, incentivized with a discount and prompts people to explore the company site.

And it doesn't stop there: When customers come into the store for their tune-up, shop employees can then ask for their contact information so the store can send them emails about new promotions. At the shop, employees may give customers a brochure about a race the shop is sponsoring. In the race registration materials and on race day itself, participants may be asked to upload race photos tagging the shop's social media channels.

Checklist

Drawing inspiration from the example above, think about all of the channels and platforms you use to interact with your customers—and the ones you could be using. Then think about how you lead customers from one channel to another, focusing specifically on the ways you can coordinate direct mail and digital efforts. Below are some key channels to consider.

- ☑ **Social media**

- ☑ **Word of mouth**

- ☑ **Digital ads**

- ☑ **Direct mail**

- ☑ **Brick-and-mortar stores**

- ☑ **Emails**

- ☑ **Websites and apps**

- ☑ **Online videos**

- ☑ **Blog posts**

- ☑ **Live chat**

Step 4

Step 5

Create Your Mailpiece

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

If you have the budget, you can hire an advertising agency or mail service provider to help you with some or all of the necessary steps: deciding on a format and mail type, writing and designing your piece and making sure it meets USPS® requirements. The company you partner with for these services may 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 sending out an effective piece.

However, if you'd rather design the mailpiece yourself and are budget-conscious, we'll show you how. Even if you decide 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 used in various ways, whether you include a QR Code® that links to an exclusive sale or provide a discount code for people to use in your online store. Plus, recipients don't even need to open an envelope to read your message, making it easy to reach people sorting through their mail. A recent study shows that postcards have a 12% response rate to house mailing lists—more than that of letter-sized envelopes, at 10%.[1]

Self-mailers are simply sheets of paper folded and sealed so they can be mailed without an envelope. They give you more room to present information than a postcard, and are cost-effective, easy to print and easy to assemble. Plus, they require less handling than a letter. Self-mailers can be very simple, such as a sheet of stock paper folded in half, or more complex, such as a large sheet folded in ingenious ways—for example, with a tear-off coupon, order form and 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 are much better at illustrating points and driving emotional decisions than mere facts.

[1] "Response Rate Report: Performance and Cost Metrics Across Direct Media," ANA | DMA, November 2018.

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Flats are larger than a letter-size mailpiece and much more versatile: A flat can be an envelope, self-mailer, brochure or single large card. USPS® handles flats separately from other mail. They are the only type of mailpiece that can be used with USPS Every Door Direct Mail® (EDDM®).

Catalogs are more expensive to produce but deliver good response rates. 42% of catalog recipients reported reading catalogs, and another 25% reported glancing through or saving catalogs for later.[1]

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.

For each of the formats we've discussed, you can explore ways to make your piece engaging and drive digital engagement, such as QR Codes® and augmented reality (AR) filters.

Deciding on a Mail Type

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

First-Class Mail®: The maximum weight for a parcel is 13 ounces or less; for a letter, 3.5 ounces or less. 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 is typically delivered in one to five days.

USPS Marketing Mail®: Your mailpiece must weigh 16 ounces or less, and you must be mailing at least 200 pieces or 50 pounds of mail. Delivery times usually range from three to 10 days. USPS Marketing Mail is often the best choice for direct mail because postage prices are lower. Discounts for nonprofits are available but require specific authorization.

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

USPS Every Door Direct Mail service, or EDDM: This allows you to reach customers in targeted neighborhoods using an online mapping tool without having to provide names or street addresses. You can choose from different postal routes based on the demographics you're looking to target. USPS then delivers to every address on your selected routes.

Step 5

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[1] "2018 Statistical Fact Book: The Ultimate Source for Data-Driven Marketing Insight," ANA | DMA, 2018.

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 after they see your headline. Research direct mail headline writing online; you'll find lots of examples of headlines that grab readers' 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 wordplay so there's no chance of customers misunderstanding.**

- **Make your offer concrete. Use numbers if you can: "Now you can make healthy, delicious dinners in 30 minutes or less " 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 authentic, record 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 can 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 looking for "the catch." Use numbers and statistics if you have them, to prove that your product works. Use quotations from experts or testimonials from satisfied customers. Offer them a free trial or a money-back guarantee.

Don't Forget to Help Your Customer Respond

As discussed earlier, a strong call to action is key. This can be similar to the "Learn More" or "Add to Cart" button on a website. Help your customers respond. For instance, you may want to include language like "Text this number to make an appointment" or "Scan this QR Code® for details."

Step 5

Creating Your Design

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

Here are a few tips:

- **Avoid trying to put too much on one page. This can make your piece 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 to ensure a clean design.**

- **Don't try to emphasize everything. Let the design show your reader what your main point is.**

- **Remember who your customer segments are. For instance, if someone has been viewing a certain product category on your online store, you'll want to send mailers that highlight these items and keep the products top of mind. Or if you're targeting customers who live in a rural area, you may want to use imagery that reflects this, speaking to their day-to-day needs and desires.**

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.

Working With a USPS® Mailpiece Design Analyst

As you're designing your mailpiece, you'll need to find out how USPS requirements will affect your mailing.

You may want to meet with a USPS Mailpiece Design Analyst (MDA). MDAs are specially trained postal employees who can provide advice and evaluate whether mailpieces are automation-compatible and machinable, and whether they qualify for automation-based prices. These specialists can answer all kinds of questions about mailpiece design, including reply mail design.

Mailpiece Design Analysts can:

- **Review mailpieces for adherence to USPS standards.**

- **Evaluate mailpieces for automation compatibility.**

- **Answer technical mailpiece design questions.**

- **Test paper mailpiece samples for acceptable thickness, flexibility, rigidity, background color, etc.**

- **Guide you in using the Automated Business Reply Mail (ABRM) tool to create your own artwork.**

- **Assess the readability of your mailpiece.**

You can reach the USPS MDA Support Center at 855-593-6093 or mda@usps.gov. The hours of operation are Monday through Friday, between 7:00 am and 5:00 pm CST.

Step 5

Example

Here is an example of an effective direct mailpiece for the bicycle shop discussed previously. With an easy-to-read font, clear and conversational messaging and a simple design, the postcard immediately grabs customers' attention, enticing them to schedule a tune-up.

Checklist

Once you're ready to create your mailpiece, analyze customer psychographic, demographic and behavioral data to get started brainstorming your ideas for design and copy. Focus on how you'll appeal to each of your customer segments, and draw out any ideas you have for design.

- ⊘ **What are your segments most concerned with? Affordability? Convenience? Speed? Top-notch quality? Ethical, eco-friendly manufacturing processes?**

- ⊘ **Where do your customers engage the most with your brand? Should your mailpiece lead them to your website? Social media account? Information for an in-store event?**

- ⊘ **What kind of design and layout would most appeal to the customers you're targeting?**

- ⊘ **What tone and style of copy would most appeal to your clients?**

Step 5

Step 6
Work 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. Ensure the printer produces quality work by asking for samples, and always check references before making a final decision.

Here are some questions to consider when evaluating printers:

- **Do they have a reputation for delivering jobs on time?**

- **How large is the shop? Are there other presses available that 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 aspects of the job out to someone else (e.g., for color separations)?**

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**

- **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**

Give 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.

Approving Bluelines

After the printer has prepared your materials, 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 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 the 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 or 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.

Example

A restaurant owner solicits bids from three print shops, providing them with specifications. One print shop has a great price, but they have missed the restaurant's printing deadlines in the past, 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.

Step 6

Proofreading Checklist

Before you send your file to the printer, read through this list to ensure everything is clean, concise and error-free.

- ☑ **Proper spelling, grammar, punctuation**

- ☑ **All mailing addresses correct**

- ☑ **All hyperlinks work and direct customer to the right place**

- ☑ **All phone numbers and physical addresses correct**

- ☑ **Consistent formatting (e.g., same fonts used for similar elements)**

- ☑ **No missing or duplicate words, sentences or paragraphs**

- ☑ **Consistent spacing between lines, words and letters**

- ☑ **No orphans (single word or part of a word that appears by itself at the bottom of a page or column) or widows (single word or part of a word that gets pushed to a new column by itself); both can make your design look awkward**

- ☑ **If more than one page, all pages in order**

- ☑ **Text flows correctly from one page to the next and one column to the next**

- ☑ **Graphics and logos spelled correctly and placed correctly, with no overlap with copy and no cut-off letters**

Blueline/PDF Checklist

Once the printer sends a blueline or PDF for you to approve before printing begins, use the checklist below to ensure key elements of your design are in order.

- ☑ **Photos, charts and graphics placed correctly**

- ☑ **Colors appear as intended**

- ☑ **Every word spelled correctly**

- ☑ **Headlines and text placed where intended**

- ☑ **If there are page breaks, words carry over from one page to the next as they should**

- ☑ **Lines break correctly**

- ☑ **No stray marks**

Step 6

Step 7

Prepare Your Piece for the Post Office™ Facility

Now that your mailpiece is printed, it's time to get mailing!

Is Bulk Mail Right for You?

If you're hoping to send out mail at bulk-mail prices, some key factors to consider are listed below. For further information, read more about USPS Marketing Mail®.

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

Bulk prices are lower than "single-piece" prices. With single-piece mail, 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 carrying out large mailings. Why? Because they don't want to 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™ 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 and USPS Marketing Mail).**

- **Pay postage using precanceled stamps or a 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. 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 or 200 pieces (or 50 pounds) for USPS Marketing Mail.**

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.**

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—from creating your mailpiece to dropping it off at the Post Office™.

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.

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 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.

Checklist

Make sure you bring these items with you when you're ready to drop off your mail at the BMEU or entry post office:

- **All of the mailers you'll be sending out to customers.**

- **Your signed and dated postage statements, if you're using hard copy. You can also complete and send your online postage statement electronically.**

- **Supporting documentation (your tally sheet or printouts from presort software).**

- **Payment 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 payment, you can affix a meter strip to your postage statement to pay for the additional postage.**

Step 7

☑ **Payment for your annual mailing fee (if you haven't already paid it).**

If you want a copy of your postage statement for your records, bring two copies of your postage statement with you to the BMEU or entry post office—one to keep and one to turn in with your mail. You can also register for online services and submit your postage statements electronically.

The Postal Service uses this documentation to verify the prices you have claimed on your mail.

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 USPS® Marketing Mail®, 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, 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 out any problems 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.

For More Information

Check out the Business Mail 101 section of the USPS website for detailed help.

Example

A nonprofit 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 some of the steps they took:

1. Obtained a mailing permit and paid an annual USPS Marketing Mail mailing fee

2. Paid their postage using a postage meter

3. Worked with an MDA to ensure their mailpiece met size, shape and weight requirements

4. Presorted the letters by ZIP Code™ into trays

5. Contacted their local BMEU about the best time to drop off the mail

6. Arrived at the Post Office with all of their mail, signed and dated postage statements, supporting documentation (printouts from presort software) and a payment method in case they needed to cover any additional postage due

Step 7

Checklist

Consider these questions when deciding which mailing solution is best for your organization.

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

✓ **If you do qualify for bulk mail, what will it cost you in labor and expenses to take care of the mail-preparation steps listed below? How does that price compare to the price break you'll receive for using bulk mail? 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 key steps you would need to take:**

- **Obtain a mailing permit and pay an annual mailing fee for each class of mail (First-Class Mail and USPS Marketing Mail).**

- **Pay postage using precanceled stamps or a postage meter or permit imprint.**

- **Design a mailpiece that meets size, shape and weight requirements.**

- **Ensure that your addresses are accurate.**

- **Presort your mail.**

- **Take your mail to a BMEU.**

✓ **If you want to purchase mail-preparation software, what will it cost? And how much will it save you on labor?**

✓ **What would it cost to pay a lettershop or presort bureau to do some or all of the work? Check with some vendors in your area to find out what services they offer and what they charge.**

Step 7

Step 8

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.

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 efforts.

Preliminary Testing

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

For 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 different prices, a sample of names from two different mailing lists or responses from different geographic areas. You could test different envelope designs or different calls to action.

Test one element of a mailing (e.g., price, mailing list or copy) at a time, and keep the rest of the package consistent so you can be sure of what is causing any changes in the results.

How to Tell Whether Your Campaign Is Making a Difference

Marketers may use several different methods for tracking response. Here are a few of them:

- **In your direct mailpiece, ask respondents to go to a personalized URL (PURL), scan a QR Code® or use an online discount code. If they follow through, 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.**

- **Use a contact phone number that is associated only with the campaign.**

- **Simply have your salespeople or receptionist casually ask customers how they heard about you.**

Measuring Success

Before you begin your campaign, it's a good idea to estimate what kind of results you expect to see and consider whether you'll need to change any elements of the mailing to reach these goals. Consider running a pilot campaign to assess which messages resonate with your customers.

Before diving in, take the time to establish the key performance indicators (KPIs) that will be most helpful for your business. A few KPIs are discussed below.

Key Performance Indicators

Response rates for direct mail can vary widely, depending on your product, industry, target market and campaign quality. On average, you can expect a response rate of 5% to 9%.[1] 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.

Marketers who send out direct mail that's more dynamic—in other words, coordinated with digital efforts—saw a 63% increase in response rates.[2]

Start by assessing customer activity through your campaign's trackable QR Codes®, PURLs, coupon codes and phone numbers. What resonated most with your customer segments? QR Codes® that linked to the product web pages of items they viewed online? Postcards that built excitement around in-store events promoted on social media?

Evaluating whether customers are following through on the targeted calls to action included in your mailpieces—whether you asked them to visit your online store or scan a QR Code®—will help you determine the success of your direct mail.

Conversion rates are another important measurement, showing how many customers acted on offers included in your mailpieces.

Did people take advantage of the discount code included on the postcards you sent out? Did they sign up for your newsletter? (Looking at conversion is particularly important for businesses with longer sales cycles, as high response rates don't always translate to high conversion rates.)

Customer acquisition cost (CAC)—all of the costs involved in bringing in a new customer through your omni-channel campaign, including your direct mail efforts—should also be calculated. You can do so by dividing all of the costs spent on acquiring customers by the number of customers acquired.[3] Having a solid grasp of your CAC will help you optimize the return on your campaign.

While there are many ways to measure the success of your omni-channel direct mail campaign, these are a few of the most important. For help in determining your overall return on investment (ROI), which should take into account all of the elements discussed above, check out the USPS® free marketing impact calculator.

1 "Response Rate Report: Performance and Cost Metrics Across Direct Media," ANA | DMA, November 2018.

2 "Direct Mail Conversion Research," USPS, February 2019. Please note: All statistics were based on a survey of 75 marketing decision-makers.

3 "Customer Acquisition Cost: The One Metric That Can Determine Your Company's Fate," Neil Patel, April 2015.

Step 8

Example

A newly opened garden supply store is trying to attract more customers for spring planting supplies. They would like to run a campaign targeting one of their customer segments, offering discounted terra cotta plant pots for everyone who scans a QR Code® included on a postcard mailed to them. The QR Code® leads to the company's online store, where customers can make use of the discount when placing an order. Before beginning the campaign, the store calculated an estimated ROI and determined that they needed to offer a discount on a less valuable product—hanging plastic planters—to achieve the results they were after.

The store then ran preliminary testing on direct mail, using two different design layouts. The store tracked the response rate for each of the designs to see which led more customers to the online store, as well as the conversion rates to see how many people from each test group actually ordered the product using the discount provided. After seeing that one postcard design significantly outperformed the other, the company decided to use it for a full-scale campaign.

Checklist

Before you get started measuring the success of your campaign, make sure you fully grasp each of the steps you will take:

- **Determine what tests you will carry out to see how well campaigns are working and what direction you should take with new ones.**

- **Figure out how you will track customers' response to your campaign.**

- **Estimate what kind of results you expect from your campaign.**

- **Establish the KPIs you will use to measure the success of your campaign.**

- **Calculate your ROI.**

Step 8

Next Steps

Direct mail has become a valuable asset in omni-channel campaigns. It's hyper-targeted, integrated and dynamic. With it, every interaction can create action. By coordinating digital and direct mail efforts, you can reach your target consumers—whether by sending a follow-up postcard after a customer leaves items in their online shopping cart or targeting customers with complementary digital ads after sending out a mailpiece.

Now that you've made your way through all eight steps, you should be well on your way to creating personalized direct mail. Happy mailing!

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