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*Direct Marketing Thoughts*

*(Relating to B2B Initiatives)*

The following “thoughts” arrived out of some casual conversation, some observation, and some probity based on sheer curiosity. I don’t think any of the following are things you don’t already know, but perhaps they might help as a handy memory jogger. If some points are not explained well or not in enough detail, email us or give us a call.

1. [Before anything is begun](#), be sure to identify the target audience as completely as possible: by Standard Industry Classification (SIC); by size of company; by revenue; by title or job function. And don’t forget geographic constraints if they’re important to product distribution
2. [If you’re ordering a list](#) from an outside source (trade pub, compiler, broker, etc.) be sure they supply a field layout with the file and, if possible, be sure that they supply titles with the names. If the supplier uses a coding system (size of company, revenues, etc.) it really helps to know what those codes are before the list is processed internally.
3. [When dealing with a list broker](#) ask for the data card for the file, what selects are available, up-charges for using selects, the currency of updates and compiling, when was the last time it was used and by whom, and try to negotiate a “Net Name” cost (“Net Name” means we only pay for those names that we don’t already have).

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4. If you are working with multiple files, be sure to provide a source code for each file, that can be extremely helpful in determining how valuable a particular file is when it becomes necessary to add or delete from a master file. (*See #6*) It would also be wise to conduct your merge/purge/de-dupe at this point. Make sure the people doing this use a scheme that is as inclusive as possible, without being too restrictive. This can get very tricky but it's better to lose a contact (or two) at the same address than have multiple copies of the same piece going to the same person. The "best alternative" is usually to use Last Name, Street Address, City, State, ZIP for the de-duping process.
5. Get a target count BEFORE a print run is ordered. If you have multiple targets, get the counts by segment if you intent to create targeted versions of your marketing piece.
6. When dealing with multiple files make sure the lettershop is setup to handle address standardization and other basic hygiene – like merge/purge, de-duping, and CASS certification (CASS stands for Coding Accuracy Support System and matches addresses for deliverability).
7. When creating the mail piece, be aware that there are definite requirements for size, shape, weight, and addressing area. If you unintentionally deviate from optimum efficiency, you'll pay the price with additional postage that may have been avoided. The USPS is "zero" tolerant in their specifications and a piece may end up being only 1/32" off the standard, or a fraction of an ounce heavier, and they will always charge the higher rate. If you really want to learn more about this, the USPS has a self-study course – called "MQC" for *Mailpiece Quality Control* – that teaches you how to develop pieces that are 100% automation compatible. (*NOTE: The MQC is available online from the USPS, as is the Direct Mail Manual (DMM) – the USPS Bible*)

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8. When in doubt on any USPS issues refer to the *Domestic Mail Manual* (DMM). It's available online and I have found that any item in dispute has at least two contradictory rulings you can turn to.
9. Once a piece and list have been delivered to the lettershop, processed, and entered into the mailstream, be sure the lettershop provides you with a 3602 along with the invoice. The 3602 is the "Official" postal form showing how many pieces were received by the USPS and entered into the mailstream. It also shows how many pieces went at what rate and the date the mail entered the postal system. This is an instant check against lettershop and postage charges. A critical use of the 3602 is to reconcile your bulk account and know exactly how much money is there (ideally you would have the lettershop run your file first to determine how much postage you'll need – but, of course, that can't always happen). In a worst case scenario, you can factor what you have in the account so you only put in what you estimate you'll need for the next mailing.
10. If you're running behind schedule, ask the lettershop to use facing slips that requests an "in-home" date of "X" – "X" with the ZIP sorted mail. If the lettershop is any good, they should also offer – or be capable of – calling critical ZIPs to notify the postmaster the drop is on the way and on-time delivery would be appreciated.

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11. [Remember to stay away from drops around major holidays.](#) People are either out of the office or have piles of mail on their desk when they get back. Drop at the wrong time and you windup in the circular file or lost in the avalanche the addressee received while on holiday. It's also wise to remember that from Memorial Day to Labor Day, not to mention School Spring Break schedules, vacation days take a tremendous toll on executive level targets, especially those with school age children.
12. [When scheduling drops,](#) don't forget that Direct Mail is a communications medium. You need message frequency against a defined market just as you do with radio, TV, magazines or newspapers. The conventional wisdom is a minimum of three (3) exposures (*Achenbaum Study, ARF*). *With that in mind, never rent a list for 1X use only.*

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