
21 Steps to Direct Mail Success

By Hugh Chewing

The key to success is to avoid making mistakes. And with direct mail, getting the basics right accounts for 95% of all successes.

You can find other articles about effective direct mail testing, copy and design in the *Direct Mail Resource Center*, and in my free blog, *Direct Mail Insights*, but let's now focus on key—but often overlooked—elements of a successful direct mail campaign.



Here are 21 essential elements steps that you'll want to incorporate in every direct mail campaign.

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1. **State the campaign's objective clearly.** Get everyone focused on the same goal before launching the campaign. Generating a lead is quite different from closing a sale with a prospect or cross-selling to a customer. Each effort has its own expectations and everyone needs to understand how to measure success.
2. **Start with a budget.** Every direct response campaign is measured by its results. Know how much you can spend to meet these expectations, and before you mail, establish how much money you'll have to follow up on your initial tests. It doesn't do you any good to achieve breakthrough results unless you have the resources—time, money and personnel—to exploit your success.
3. **Establish a mailing schedule.** Knowing that even the best plans will change, I schedule mailings twelve months out. Holidays, annual events, anniversaries, etc., often inspire donor and customer mailings, and these dates can become the core of your schedule with other "To Be Announced" mailings planned around them. For acquisition mailings, schedule follow-up mailings

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45-60 days after the test is in the mail—or the number of days it will take to receive, process and analyze the returns plus the time required to produce the follow-up mailing. Without a schedule, project dates quickly begin to slide and things just don't get done. A schedule is one of your strongest planning tools.

4. **Do the math first.** There is no reason to spend money on a direct mail campaign if the results needed to turn a profit are unrealistic. We all enjoy a challenge, but, for example, a 20 percent break-even response on an acquisition mailing isn't realistic. Do the math first and avoid any mailing that has little chance of success. (See [How to Use a Pre-Event Routine for More Profitable Direct Mail Testing.](#))
5. **Focus on the mailing lists.** The creative portion of the mailing may be the most fun, but it's not the most important. Turn your attention to selection of the mailing lists. Nothing will play a greater role in your success or failure than list selection. No matter how good the copy or offer, you're not going to sell lawn mowers to Eskimos. Work with a list professional who has experience in your market and will take the time to learn about your company, its competitors, the mailing's offer and your past mailing results.
6. **Show the benefits.** No one really cares what your gadget does or how worthy your organization is. What they care about is how they will benefit from responding. The benefit can be tangible or intangible, but fulfilling the prospect's needs is far more important than anything you're selling. Show how your offer meets the prospect's needs and you'll make the sale.
7. **Don't reject a promising test based on price alone.** Just because a test cost 50 percent more than the control doesn't necessarily mean you need to increase response by 50 percent or more. Rather than ask how much the test costs, ask, "What response does this test need to beat my control?" (See link provided above in #3.)
8. **Test new offers.** The offer is what you promise the recipient and what you ask in return. And your offer is second only to the mailing list in terms of its effect on the campaign's success. If you're looking for breakthrough results, test the offer. (For ideas on offer tests, see [17 Ways to Improve Your Direct Mail Offer.](#))
9. **Test enhancing your mailing package.** You're more likely to increase net profit by adding to the package than you are by eliminating a component. Test new package components that promote the premium, display testimonials, emphasize the guarantee, and add credibility to the organization or letter signer. "Bells and whistles" like address labels and peel-off stickers for the prospect to move to the response form still work and often give you a big bang for the buck. (The one component you probably don't want to add is a brochure. If you use a brochure now, see what happens when you drop it. It's likely a drag on results.)
10. **Hire a professional direct response copywriter.** You may have someone within the organization who, because of his or her intimate involvement with

the group and the sincerity of his or her beliefs, can produce a letter that outperforms copy written by a professional direct mail copywriter. But these people are few and far between. Hire a professional direct response writer. It will be money well spent. And recognize that copywriting for general advertising and direct response copywriting are two different skill sets.

11. **Now is the time to test.** Don't wait until your control stops working before testing new lists, offers, formats and copy. If you do, cash flow will come to a halt and you'll feel like you're standing in a hole trying to dig yourself out. It's not a career-enhancing move.
12. **Test, test and test** are the three most important rules of direct mail; yet mailers regularly claim they can't afford to test. In truth, you can't afford *not* to test. Even the best mailing packages fatigue. There are a finite number of prospects who will respond to any mailing, and each time you mail your control, fewer and fewer people remain in this pool of names. To remain competitive, you must continue to test new lists, offers, formats and copy. Even the few direct mail letters that remain the control year after year are "tweaked" with subtle changes to maintain response. A successful direct marketer is always pushing for better results, and this can be achieved only with a disciplined testing program.
13. **Test the big things.** When you're looking for breakthrough results, test the lists, offer, format and copy. Testing minor copy revisions on page 3 or changing the paper stock of the reply form or the color of the return envelope will make a difference only to large-volume mailers. To everyone else, it's a waste of money.
14. **Maintain control of the package design.** Don't surrender control of the package's design to the graphic designer. Direct response isn't about looking good or winning awards. It's about getting results. Understand how people read direct mail and design your layouts accordingly. It may not look "award winning" and the designer may not agree with your choice of type, but readability is more important than pretty. (See [How to Use Graphic Devices to Boost Direct Mail Response Rates.](#))
15. **Focus on the letter.** Brochures explain while letters sell. There are exceptions, but more often than not, including a brochure will depress results. And, if you don't make the outer envelope interesting, no one will see your great letter copy. Focus on the letter, the response form and the outer envelope.
16. **Ask for the sale.** In direct response, your purpose is to convince the recipients to take a specific action. Whether it's to buy a product, make a contribution or generate a lead, you need to tell the recipients exactly what you want them to do. Then remind them. And tell them once again. To make the sale, you have to ask for the order.
17. **Test before you adapt.** We can learn from the mistakes of others and we can learn from their success, but every organization is unique, so don't assume that

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what works for your competitor will work for you. Test it first.

18. **Put the needs of your donors or customers first.** You're not the only one writing to your customers, and more often than not, even your multiple buyers/donors won't remember your name. In every communication, remind even your most frequent donors/buyers what your organization is, why it's important to them and how they benefit.
19. **Give the copywriter all the information he or she needs.** Several clients have told me that they don't want to prejudice my thinking by sharing package samples or past results. But are you paying the copywriter to be creative or to beat your control? We live in an "age of skepticism," and the more information the copywriter has, the better the job he or she will do. Besides, an experienced copywriter can often discover new concepts buried in old package samples and research material.
20. **Respect your test results.** In direct response, we don't need to decide what lists, offer or copy works best. With proper testing, the customer will tell us what works. Before adopting any major change to your mailing package, double-check the list work for the test, review package samples and confirm your postal receipts. But once everything checks out, don't second-guess the test results.
21. **Deal with the back end before you mail.** When accepting orders via phone, everything comes down to one telephone call. And if the person answering the phone isn't trained, professional and polite, you'll not only lose the order, you'll lose the customer. And if you're directing respondents to a landing page, make certain that its contents and look match that of the mailing piece. Confirm your inventory and work through the entire ordering process to ensure that it gives the customer a good experience. And be certain that procedures are in place to credit telephone and online respondents to the mailing's results.

Getting the basics right goes a long way toward achieving direct mail success. Yet including these essential steps in your direct mail campaign won't guarantee success, but they will greatly increase your probability of achieving a successful mailing.