Email and Direct Mail Workflows

With Best Practices and Tips for Integrating Direct Mail into Email Marketing Campaigns

ABOUT POSTALYTICS

Postalytics is committed to improving our customers impact on pipeline and contribution to revenue. A part of this commitment is to share best practices from acknowledged industry experts. We are excited to publish this collection of high value email and direct mail workflows that represent both the knowledge we've observed from our early clients, as well as Nancy Harhut's decades of experience in leading multi-channel marketing efforts.

ABOUT NANCY HARHUT

Laying the Groundwork

The following stats, facts and tips support the wisdom of integrating direct mail into email marketing campaigns, as well as provide some best of breed guidelines for effective ways to accomplish this.

Adding Direct Mail to Email Campaigns Makes Good Economic Sense

- Using the two channels results in an up to a 35% lift over a single channel—IWCO
- Sending direct mail after email increases effectiveness by 40%—Canada Post
- 57% of millennials have made purchases based on direct mail offers—USPS

Advantages that Direct Mail Adds to a Campaign

- People spend more time with physical advertising than digital—Temple University, USPS
- People have a stronger emotional response to physical ads and remember them better—Temple University, USPS
- Because direct mail is tactile, it’s harder to ignore
- You can use QR Code® barcodes, near field communication (NFC), or augmented reality (AR) to link your direct mail piece to your digital campaigns
- Direct mail comes in a variety of sizes and formats that can be used to attract attention
- Direct mail offers additional real estate in which to deliver your marketing message

5 Tips for Combining Direct Mail With Email

1. Consider delivering critical information in both channels to reinforce the message and increase the likelihood it’ll make an impact
2. Have each communications build on the last
3. Use direct mail to emphasize a key message or break up the expected routine
4. Ensure both email and direct mail adhere to the same graphic standards and reflect the same voice so each piece reinforces and extends your brand promise
5. Use direct mail to initiate a conversation with people whose email addresses you do not yet have, or who have repeatedly not responded to your emails
Recommended Flows for Common Marketing Campaign Goals

The following six suggested campaigns illustrate how you can combine both direct mail and email to strategically accomplish key marketing goals.

**Workflow: Skim the Cream Lead Generation**

**GOAL:** Generate leads from paid or acquired email lists. Converting prospects into leads can be challenging. Factors that influence success include the quality of the prospect, the competitive environment, the fit of your solution, and the timeliness of your campaign.

**APPROACH:** Since these are prospects, start with email, which allows you to “skim the cream” with this more affordable channel. Then, use direct mail in your campaign to try to quickly convert holdouts on your list.

**SUGGESTED CAMPAIGN:**

**WEEK 1**  
**1-3 Email Introductions**  
Flag the target’s presumed need or pain point and introduce your company/product/service as the answer—perhaps with an offer

**WEEK 2**  
**Postcard or Letter Package**  
Start with the prospect’s needs and introduce your company’s solution—perhaps with an offer

**WEEK 3**  
**1-2 Emails Recapping Message**  
Recap the earlier message, and introduce new support points

**WEEK 4**  
**1-2 Emails with Social Proof**  
Reference the fact that others like the target have already responded and recap the offer

**WEEK 5**  
**Last Chance Postcard**  
Design to drive urgency, perhaps with a more attractive offer

**WEEK 6**  
**Last Chance Email**  
Further increase the need to act, perhaps with a more attractive offer

**NOTE:** As prospects convert, move them out of flow. After week 6, the remaining prospects may be “rested” and set aside for a future effort.
Workflow: The Stay Top of Mind Cadence

**GOAL:** Optimize sales outreach or stay-in-touch communications. Being in the right place at the right time can lead to new business. Sometimes it’s not easy to predict when someone is ready to buy or repurchase, so the best course of action is to remain top of mind.

**APPROACH:** Because your goal is to capture consistent mindshare from targets over a certain period of time, one approach is a series of evenly spaced communications that embody both email and direct mail channels.

**SUGGESTED CAMPAIGN:**

**WEEK 1**

**Postcard Recap**
Recap the key customer benefits of your product or service as well as your contact info

**WEEK 2**

**Email Case Study or Story**
Present a case study or customer story/quote relevant to the target

**WEEK 3**

**Letter Check In**
Mail a letter from key executive as a “surprise and delight” tactic—check in on the target and their needs

**WEEK 4**

**Email Offer**
Offer helpful content (white paper, guide, webinar, etc.)

**WEEK 5**

**Email Additional Offer**
Email #4 Responders: Welcome them to ask questions and make a new offer.
Email #4 Non-Responders: Reiterates offer of helpful content

**WEEK 6**

**Direct Mail Offer or Invite**
Present special offer or invitation

**NOTE:** The duration of this campaign may be compressed or extended given your particular circumstances.
Workflow: The New Lead Nurture Stream

**GOAL:** Nurture warm, new leads that are not yet ready to engage. Warm leads are precious and deserve special treatment on their journey to becoming customers. Communicate with them in a way that makes them feel valued and that highlights your value to them.

**APPROACH:** Make a good first impression and then continue to underscore it in both email and direct mail. The intention is to be present where needed, and to be helpful without being overbearing.

**SUGGESTED CAMPAIGN:**

**WEEK 1**

**Email Acknowledging New Lead**
Immediately acknowledging the new lead and explaining helpful info is on its way to them in the mail.

**WEEK 2**

**Letter Introducing Benefits**
Mail a letter introducing all the benefits of doing business with your company.

**WEEK 3**

**Email an Action**
Further qualify how you can help the target—drive them to a survey or a poll on a landing page. Visiting the page triggers a thank you email.

**WEEK 4**

**Postcard Benefits Recap**
Recap the benefits of doing business with you.

**WEEK 5**

**Email Testimonial**
Feature customer testimonial and link to relevant case study.

**WEEK 6**

**Email & Direct Mail Offer**
Present offer—deliver a one-two punch designed to prompt engagement.

**WEEK 7**

**Email Follow Up**
Remind non-responders of special offer and send thank you email to people who took advantage of offer.

**WEEK 8**

**Email News**
Send relevant news related to your product/service, or email with topical commentary the prospect finds useful.

**NOTE:** When someone is ready to engage, remove them from this flow. Continue nurture campaign after week 8 if ROI is there, or move leads to different flow. Alternatively, send email driving to preference center where they select how, when and about which topics to be contacted.
Workflow: Seal the Deal Onboarding

**GOAL:** Welcome and onboard new buyers. After a customer buys, they enter the honeymoon period with your company. Cement the relationship, ward off second thoughts, lay the groundwork for a positive experience, and gain referrals or endorsements.

**APPROACH:** Make your customer feel welcome and feel your presence, send a welcome package through the mail. It will get noticed, can be shared, and will serve as a reminder of the new relationship. During this campaign, validate the choice the customer made, and provide easy, clear onboarding information.

**SUGGESTED CAMPAIGN:**

**WEEK 1**

**Email Teaser & Direct Mail**
Ask customer to watch their mailbox for a welcome gift from you, then send direct mail package containing thank you and initial onboarding information.

**WEEK 2**

**Email Links**
Provide links to additional information that will get customer up to speed.

**WEEK 3**

**Letter from Executive**
Mail a letter from key executive at your company. Thank customer again for their business and inquire how things are, offering assistance if needed.

**WEEK 4**

**Email FAQs**
Send FAQs that new customers have at this point, and request a testimonial and/or referrals. When the customer provides them, trigger thank you email.

**WEEK 7**

**Email Survey & Send Postcard**
Send survey link to new customers. Completion triggers thank you and low scores trigger follow-up. People who don’t respond get reminder postcard.

**WEEK 26**

**Postcard Anniversary**
Design postcard acknowledging the “half anniversary” along with an offer.

**WEEK 53**

**Letter Anniversary Thank You**
Celebrate one-year anniversary thanking customers for their business and loyalty with a direct mail letter.

**NOTE:** For particularly involved or complicated products and services, the onboarding process may extend beyond four weeks. For other products, the process may be shorter and simpler.
Workflow: **Raise the Dead Cold Lead Touches**

**GOAL:** Reactivate cold leads. Cold leads are frustrating, because they demonstrated interest at one point—yet failed to convert for reasons that are typically unknown. However, there is often life in a percentage of them.

**APPROACH:** Because they likely ignored your last emails, start with a short letter in an envelope. This will get past any B2B gatekeepers as well as attract more attention than an email might. Follow up with a series of emails interspersed with direct mail to create a double-barrel effort to reactivate these leads.

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**SUGGESTED CAMPAIGN:**

**WEEK 1**

**Letter with Special Offer**
Mail a letter and reintroduce the benefits you provide and extend a special offer

**WEEK 2**

**1-2 Emails about Mailing**
Reference the mailing and elaborate on its content

**WEEK 3**

**1-2 Email Highlights**
Highlight success stories of customers similar to them

**WEEK 4**

**Postcard Offer**
Postcard with last chance at offer

**WEEK 5**

**1-3 Emails Asking for Response**
Tell email recipient they’ll be removed from your list this week if you don’t hear from them

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**NOTE:** Once a lead responds, remove it from this flow. If people request to be removed, you must honor that request. However industry stats show an average 5-15% reactivation success rate with Week #5’s tactic.
Workflow: Prime the Pump For Events

GOAL: Communicate with registrants for an event. Registrants (and even invitees) for an event you’re participating in, can be well-qualified prospects. You will want to communicate with them—early and often. Expose them to your brand, get them familiar with it, and prime them to connect with you at the event. However, you may not have access to their email addresses.

APPROACH: Send direct mail to drive people to a landing page to capture details about them, like their email address. Then create a concentrated, multichannel campaign to engage them before and after the event.

SUGGESTED CAMPAIGN:

WEEK 1
Letter Introducing Event & Email
Mail a letter with company info and invite them to visit you at event. Provide landing page URL to capture info. Email submissions will trigger thank you email.

WEEK 2
Postcard Reminder
Remind non-responders to visit the landing page.

WEEK 3
Email About Upcoming Event
Recap why people should visit your booth/attend your session/meet with you at the event.

WEEK 4
Postcard & Email Reminder
Send postcard for recipient to bring to event with information like showroom floor plan and where to find you. Send reminder email the day before event.

WEEK 5
Postcard Thank You & Email Info
Thank those who connected with you at the booth. Email follow-up info to those you did not see.

WEEK 6
Email Recap
Recap key points from the event and make a special “event offer/discount” to recipients.

NOTE: The campaign assumes you’d begin contacting people a month before the event because anything less may not provide enough time to build familiarity and anticipation. If desired, start the campaign earlier, and then heavy up on contacts as the date draws closer.
Direct Mail Tips and Techniques

Following are some key best practices for acquisition, customer deepening and retention direct mail, as well as 10 steps to more effective direct mail creative.

Top 3 Direct Mail Acquisition Best Practices

- **Remember the 40/40/20 Rule.** 40% of a mailer’s success will come from the list (targeting the right prospects at the right time); 40% from the offer (compelling and relevant offers are the best); and 20% from the creative (the copy and artwork must be attention-getting and motivating).

- **“Eye Magnet Words”** like announcing, introducing, new, now and free have been scientifically proven to attract above average readership. And the words easy, quick and improved have been shown to lift product sales. Use them.

- **The Principle of Social Proof** states that when people are uncertain about what action to take, they do what others like them do. Therefore use techniques like customer testimonials or stating the number of satisfied customers a brand has. This will increase the mail piece’s response.

Top 3 Direct Mail Cross Sell/Upsell Best Practices

- **Use what you know about customers**, their past behaviors and their preferences to inform subsequent communications and frame new sales opportunities — always taking a programmatic approach vs. a series of unrelated one-offs

- **Leverage the Principle of Consistency.** Social scientists have shown that once someone makes a decision, they will want to act in ways that are consistent with it. Remind customers that they have already made the decision to buy from you. It increases the likelihood they will buy again.

- **Don’t try to sell another product or service.** Instead, sell a solution to a problem, because that’s what people buy.

Top 3 Customer Retention Best Practices

- **Use the power of exclusivity.** Offer “customer only” discounts, “charter membership” opportunities, “not available to the general public” sales. Having this kind of “preferred access” deepens loyalty and spurs additional purchases.

- **Communicate on a regular basis.** Reinforce the customer’s smart decision to buy your product. Inform customers of news, product enhancements, etc. before the general public.

- **Surprise and delight.** Provide unexpected offers or services (ex: send a birthday message and percentage off coupon). Show and tell your customers that you appreciate their business.
10 Direct Mail Creative Best Practices

1. Balance the rational and the emotional in your messaging

2. Identify the prospect’s main buying barrier and build in the argument to overcome it

3. Write a headline and lead sentence that really grab the reader

4. Be personal, relevant and target-focused

5. Keep layouts clean and copy easy to read (avoid thick paragraphs)

6. Remember specifics out-pull generalities

7. Make sure heads, subs and copy blocks track

8. Maintain a visual hierarchy that guides the reader through the piece

9. Use reverse type sparingly (in body copy it reduces readership)

10. Pop a strong, single call to action