

Direct mailing campaign checklist

A quick guide on how to execute a direct mailing campaign

Step 1

Set out clear objectives for your campaign

- What do you want to achieve?
- How are you going to achieve it?
- How will you measure success?

Step 2

Your customers

- Determine which customer groups you want to mail, ie those most likely to convert to sales
- Ensure that the customers on your list have not 'opted-out' of being contacted.

The Information Commissioner's website www.ico.gov.uk provides useful information and guidance notes on direct marketing and the Data Protection Act.

Step 3

Timing and frequency of the campaign

Once you have clearly identified customers for your campaign, you need to decide:

- the day you wish to send out your mailing (bear in mind how long it will take to arrive, depending on which class of postage you use)
- when you'll make the follow-up phone call
- a reasonable mailing quantity for you to follow-up on.

Step 4

Create your letter

Ensure your customers' details are correct on your database, so that they will be accurate when you do a mail-merge with your letter template to generate your letters. You should be able to find a section on 'how to do a mail-merge' in most word programming software applications, including Microsoft Word.

- **Salutation**
 - Personalising your letter is the best approach. This will be determined by the level of your relationship (Dear Mrs Harrison or Dear Andrea).
 - The initial greeting will set the tone of the letter and is one of the first things that will form an impression.
- **Main copy**
 - Keep it short, relevant and to the point.
 - Make it relevant to that particular customer.
 - You can use the letter templates* we have created, which are available online at www.paymentshield.co.uk/toolkit
- **Signature**
 - If possible, sign your letters. Alternatively, have your signature scanned in and a jpeg generated. This can then be positioned within the letter template.
- **Call to action**
 - Make sure it is easy for your customer to contact you via a prominent phone number and email address.

Before starting any marketing campaign you should satisfy yourself that your material meets all regulatory requirements.

*Paymentshield cannot accept any liability for changes you make to these documents.



Step 5

Send your mailing

- Stick to the timings you have set out in your objectives.
- Give your customers the chance to opt-out from future marketing communications.

Step 6

Follow-up and measurements

- Ensure that you follow-up your mailing by calling the customer within the deadline you have given yourself (should be 3-5 days).
- Before making the call, have the customer's details and your sales aids to hand.
- Evaluate your campaign's success against the objectives you had at the beginning of the campaign.

Useful websites

www.mpsonline.org.uk

Mailing Preference Service (MPS)

It lists postal addresses of those who have chosen to 'opt out' from receiving unsolicited sales or marketing mailings. You can cross-reference their list with your own to check whether your customers have registered with them.

www.dma.org.uk

The Direct Marketing Association is the leading voice for the Direct Marketing Industry, and has detailed information on the Data Protection Act.

www.asa.org.uk

The Advertising Standards Authority is an independent body set up by the advertising industry to police the rules for non-broadcast advertisements, sales promotions and direct marketing that are laid down in the CAP Code.

www.fsa.gov.uk

Independent body that regulates the financial services industry in the UK.