

Direct Mail Marketing — Workbook

This workbook turns the course into a real, mailed campaign you can measure. Each section maps to one course module and moves you from offer and format through list acquisition, production and USPS mailing, and finally the digital bridges and math that prove your return. Work the exercises and templates in order, and by the end you will have a costed campaign, a clean list spec, a filed mailing path, and a response tracker.

Strategy, Formats, and the Offer

Set realistic benchmarks, lock a mailable format that controls your postage, and build a single time-bound offer that drives response.

Worksheet: Campaign Brief and 40/40/20 Allocation

Define the one campaign you will carry through the course. Fill in each field; the allocation percentages should reflect where you will actually spend effort and budget.

Audience in one plain sentence (who receives this)

Single offer with specific value and deadline

Primary action you want (call / scan / visit / redeem in store)

Chosen format (4x6 postcard / jumbo postcard / letter / self-mailer)

Effort and budget on list (% of the 40/40/20 split)

Effort and budget on offer (% of the 40/40/20 split)

Effort and budget on creative and copy (% of the 40/40/20 split)

Target response rate you are aiming for

Exercise: Write the Offer and Headline

Draft the core of the piece. Make the offer impossible to miss in a three-second glance.

- State your offer in one sentence with a real dollar value or free item and an expiry date.

- Write a benefit-first headline that leads with the offer, not your company name.

- What risk reversal (guarantee or no-obligation framing) will you add to lower the barrier?

- Read it to someone for three seconds, then ask them to repeat the deal and deadline back: did they get it?
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Checklist: Format and USPS Category Check

Confirm your physical piece before you request print quotes, since the category sets your postage.

- Final dimensions chosen and written down (width x height)
- Confirmed which USPS category the size falls into (postcard / letter / flat)
- Stock and coating selected to match the offer's perceived value
- Piece weight estimated and within the chosen category's limit
- Space reserved in the layout for offer block, QR code, and return address
- Format locked so list size and postage can be priced against it

Lists and Targeting

Decide between targeted and saturation reach, brief a broker precisely, and clean the data so your mail arrives and earns discounts.

Worksheet: List Broker Brief

Complete this brief before contacting a broker or self-serve list tool. The tighter the brief, the tighter the list.

Audience description (the customer in plain language)

List type sought (house / response / compiled / saturation)

Geography (zip codes, radius, or metro)

Selects that matter (age, income, homeownership, recency, SIC code, business size)

Quantity of names wanted

Required data recency (how recently updated and verified)

Rental terms to confirm (one-time use, seed addresses, selects pricing)

Budget ceiling expressed as cost per thousand (CPM)

Exercise: Targeted List vs EDDM Saturation Decision

Choose the reach model for your campaign and justify it, since this determines list cost and postage path.

- Is your audience defined by behavior and demographics (favoring a targeted list) or simply by being nearby (favoring saturation)?

- If saturation, which carrier routes in the USPS EDDM tool fit your trade area and budget, and how many total addresses do they cover?

- If targeted, which list type and selects will you rent, and at what estimated cost per thousand?

- What does each path cost per deliverable piece once you add list, print, and postage?

Checklist: Data Hygiene Pre-Mail Checklist

Run every item before printing, and base your print quantity on the final deliverable count, not the raw list.

- All addresses standardized and validated through CASS processing
- NCOA run to redirect movers and suppress dead addresses
- Duplicates removed so each household gets one piece
- Opt-outs, do-not-mail requests, and competitors suppressed
- ZIP+4 and delivery-point barcode present for automation discounts
- Final deliverable count recorded as the basis for print order and postage

Production, Personalization, and USPS Mailing

Personalize at the right depth, choose the cheapest legal postage path, and file the mailing correctly through USPS or EDDM.

Worksheet: Variable Data Field Map

Map every variable element in your design to a clean column in your list, with fallback text so no piece prints a broken merge.

Variable field 1 (e.g. first_name) and its list column

Fallback text for field 1 if empty

Variable field 2 (e.g. nearest_location or segment_offer) and its list column

Fallback for field 2 if empty

Variable image or map logic (what changes and by which field)

PURL pattern per recipient (if used)

Depth of personalization justified by order value (name-only / segment / full VDP)

Proof check done on real records (yes/no)

Exercise: Choose Your Postage Path

Pick the cheapest legal path for this campaign and confirm you qualify for it.

- Does speed matter for this offer? If yes, lean First-Class; if no, consider Marketing Mail or EDDM.
- Do you meet the minimum quantity for the discounted class you want (e.g. 200 pieces for Marketing Mail)?
- Will you use your own permit and meter, or a print-and-mail vendor's permit, and which is cheaper all-in?
- What is your final cost per deliverable piece on the chosen path (print plus postage plus data)?

Checklist: EDDM Retail Filing Checklist

If mailing via EDDM Retail, complete each step before dropping bundles at the Post Office.

- Carrier routes selected in the USPS EDDM online tool with household counts noted
- Piece designed to EDDM flat size and weight rules (e.g. 6.25 x 9 or larger)
- Addressed to postal customer with correct postage indicia printed

- Quantity within the 5,000-per-ZIP-per-day retail limit
- Pieces bundled in stacks of 50 to 100 with a facing slip on each bundle
- USPS Form 3587 completed and postage paid online or at the Post Office
- Bundles dropped at the Post Office that serves the selected routes

Worksheet: Print and Mail Quote Comparison

Collect comparable quotes so you choose on all-in cost per deliverable piece, not headline print price alone.
Vendor or path name

Print cost per piece

Postage class and rate per piece

Data and hygiene cost per piece

Personalization (VDP) surcharge per piece, if any

All-in cost per deliverable piece (calculate)

Turnaround time quoted

Digital Bridges and Measuring Response

Make every response trackable, then compute response rate, cost per acquisition, and ROI, and test to lift returns over time.

Worksheet: Response Bridge Setup

Define the trackable paths you will print on the piece so every response is attributable to this mailing.
QR code destination URL (with UTM parameters)

Dynamic QR provider used

Call-tracking number assigned to this mailing (e.g. via CallRail)

PURL pattern per recipient, if used

Unique promo code for this campaign or segment

Landing page continues the offer and is mobile-friendly (yes/no)

Every code, link, and number tested on a real device (yes/no)

Exercise: Work Your Campaign ROI

After responses arrive, compute the three numbers by hand using profit, not revenue. Show your working.

- Response rate: responses divided by pieces mailed, times 100. What is it?

- Cost per acquisition: total campaign cost divided by customers acquired. What is it?

- ROI: net profit (gross profit minus total cost) divided by total cost, times 100. What is it?

- Does lifetime value change the picture, and would it justify a higher cost per acquisition?

Exercise: Design Your Next A/B Test

Plan one disciplined test for your next drop so your results improve over time. Change only one variable.

- Which single variable will you test (offer, list segment, format, or headline)?

- How will you split the list cleanly into two cells, and is each cell large enough to trust?

- How will you track each cell separately (different promo code or call number)?

- What response-rate difference would make you roll the winner into the next, larger mailing?

Checklist: Multi-Channel Integration Checklist

Coordinate the mailing with digital so the same audience gets reinforcing impressions.

- Email or retargeting ad scheduled around the mail's in-home date
- Informed Delivery campaign created to attach a digital ad to the physical piece
- Non-responders flagged for a planned second touch
- Promo codes and call numbers logged so responses are attributed by source
- Results recorded in a running test log for the next campaign

Your Action Plan

1. Write your one-sentence audience, single time-bound offer, and benefit-first headline.
2. Lock the physical format and size, confirming which USPS category it falls into.
3. Decide targeted list versus EDDM saturation, and brief a broker or select carrier routes accordingly.
4. Run CASS and NCOA hygiene and dedupe, then use the deliverable count as your print quantity.
5. Map your variable data fields with fallbacks and order a printed proof on real records.
6. Choose the cheapest legal postage path you qualify for and get all-in quotes per deliverable piece.
7. File the mailing (or EDDM Retail with Form 3587) and pay postage via your own or a vendor's permit.
8. Print QR codes, a call-tracking number, and a unique promo code, and test every one on a real device.
9. Mail the campaign and capture each response by its tracked source.
10. Calculate response rate, cost per acquisition, and ROI on profit, then plan one A/B test for the next drop.

