



AN INTEGRITY  COMPANY

BEST PRACTICE

DIRECT MAIL



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Direct mail is often considered the workhorse of lead generation campaigns — and for good reason. Nearly every consumer with an address is targetable through direct mail, creating an opportunity to start a direct dialogue with prospects about your product or service. This guide provides best practices to help your message drive action and results.



THE 40/40/20 FORMULA FOR DIRECT MAIL SUCCESS

There's a long-standing formula designed to help ensure optimal direct mail results: 40% of success can be attributed to the offer or key message, 40% to the audience and 20% to the creative or format.

- **Offer (40%):** Take time to think through what you are offering as an incentive for your prospect to take action. A few questions to ask include:
 - » Is the offer relevant to the prospect?
 - » What value does it bring to them? What problem or issue does it solve?
 - » How is this offer unique or better than other offers that already exist?
 - » Is there something free that I can provide as an addition to draw the prospect's attention?
- **Audience (40%):** Make sure your direct mail is reaching the right audience. Understanding what data is available can help improve performance. In direct mail, there are three basic types of data: Demographic, Behavioral and Attitudinal. Each has value and can be used to better target and communicate with prospects.
 - » Demographic: Data related to core statistical classifications of a population, including age, gender, race, income, etc.
 - » Behavioral: Data based on a set of actions taken by a consumer
 - » Attitudinal: Data that reflects consumer sentiment (how they feel)

Understanding what data is available and the current relationship you have with



each prospect can help shape the timing, message and offer — and all can play a part in driving response. Having information on your audience can help increase the relevance of your message. The higher quality of your list, the higher you can expect your returns to be.

- **Creative (20%):** Though often less important than your offer and audience, the creative execution you choose can have a significant impact on results. Direct mail creative typically comes in two formats — self-mailers and closed pack. Both have unique strengths that we highlight below:

Format	Strengths	Weaknesses
Self-mailers (Postcard/brochure)	Simple notifications Awareness/reminders Lower cost	Limited space Lower response rates Limited personalization
Closed pack (Letter/envelope)	More personalized Includes multiple elements More detailed information	More costly Longer to produce Requires opening



Self-mailers, or postcards, are a very common format and serve a great purpose. They can be used to easily remind prospects of key information. Think of a postcard as a mini outdoor billboard with limited information, strong graphics, and a clear offer and call to action.

Closed-pack mailers, or letters, typically outperform self-mailers. They often feel more official and contain more information. This can be especially helpful when you're marketing products that are complicated or require more thought. They can also include multiple components, including brochures, business cards or reply cards. However, prospects need a compelling reason to open the mailer and read what's inside.

LeadCENTER for Direct Mail Campaigns

Not sure how to launch your first direct mailer? LeadCENTER makes it simple with pre-approved materials, personalized with your information. No need to worry about layout design, printing or the mailing process - it's all handled. Get started at LeadCENTER.com

ADDITIONAL DIRECT MAIL BEST PRACTICE TIPS

There are additional best practices to consider with direct mail. Following these tips can increase performance:



- **Be Clear:** Avoid forcing too much information into one single message. Make sure that the primary message — and the action that you want prospects to take — is focused and clear.
- **Get It Opened:** Proven ways to help your piece stand out and get opened include:
 - » **Weight** — Prospects are more likely to open the mail if they can feel something inside, such as a card, magnet or booklet.
 - » **“Information You Requested”** — When prospects believe the piece they’re receiving is connected to a request they have made, they’re more likely to be interested in what’s inside.
 - » **Compel Them to Continue** — It takes most prospects just three to five seconds to decide if a piece of mail is relevant to them or not. Provide evidence on the outside that’s compelling enough for them to want to continue.

Stay Compliant

It's your responsibility to follow compliance rules — your business depends on it. Use the guidance as follows for all mailings, with additional rules for Medicare and Life.

All Insurance Mailers:

- Don't use superlatives such as best, lowest cost, highest rated, safest, the most doctors, etc. unless they are true and can be substantiated.
- Don't use images or phrases that look official and have the potential to mislead consumers into thinking the material is from an official government entity.
- Don't use phrases or images that may be perceived as a "scare tactic" or intended to cause a sense of rush/urgency.
- Don't use superlatives/absolutes
- Sources must be cited and within 2 years

Medicare:

- Disclaimers should be in a font size equivalent to or larger than Times New Roman 12pt.
- Always include an agent disclosure next to phone numbers: "You will reach a licensed insurance/sales agent."
- Use this disclaimer if capturing permission to contact: "By providing the information above, I grant permission for a licensed insurance agent to call me regarding my Medicare options, including Medicare Supplement, Medicare Advantage, and Prescription Drug Plans. This is a solicitation of insurance."
- Avoid using the word "free." You may use when describing offers (like Free Medicare Plan Comparison) but include the phrase "at no obligation" in same sentence or close proximity to the reference to free.
- Don't use the word "free" to describe zero dollar premium or any other cost sharing.
- Do not show an image of the Medicare ID card without prior approval from CMS.

Life

- Disclaimers/Disclosures cannot be buried or in fine print. Should be 12pt font and located at the bottom of advertising materials.
- Don't use the term "Plan" to describe Life and Wealth products. These should be referenced as Policies, Contracts, Coverage, etc., but not a "Plan," which implies that the individual is part of a group/collective coverage like in Health products.

- **Use Emotion:** Emotion activates the brain much faster than rational thought. Creating an emotional connection with prospects in a direct mailer can motivate them to take action.
- **Put the Consumer First:** The objective of direct mail isn't to say everything — it's to convince the prospect to take an action based on the value you can provide to them. Make sure your message focuses on the value or benefit that consumers can expect to receive. Remember that YOU are asking THEM to do something. Make that request as clear and simple as possible.
- **Bold Key Phrases:** Identify the key parts of your message that are most important and relevant to your prospect. Then, make sure those phrases are bolded. This will help prospects quickly read and absorb the main points of your message. Selectively using color can also be an effective way to emphasize key points and draw attention.
- **Add Credibility:** Additional sources of proof can help convince prospects of the benefits and value that you can deliver. You can add credibility to your message by including:
 - » Awards or Recognition
 - » Experts or Endorsements
 - » Customer Testimonials
 - » Case Studies
- **Close With Postscript (PS):** A Postscript, or PS message, can be an important part of any direct mail effort. It should reinforce the key purpose of the mailing and remind prospects of the action you want them to take. The most effective PS statements are generally 25 words or less. Remember, this will be the last thing your prospect reads before taking action — make it memorable!
- **Test, Learn and Optimize:** Because direct mail is a trackable response channel, you can isolate variables or elements of the mailer and explore ways to lift future performance. Try to limit the elements that are tested in any given piece. That way, you can easily identify which factor has the most impact.

As a highly targetable channel, direct mail offers you a strong way to approach and engage potential and current prospects and clients. Using the tips we've outlined here can help you develop solid direct mail strategy and execution — and in turn, help lift performance and maximize your results.