List, Offer, Copy – Still As Valid Today As It Was 50 Years Ago

Direct marketing is often called a game of dollars – getting the basics down and understanding where to put in the time, money and effort where it will do the most good and return the results you need. Success is often a matter of a fraction of a percent response, which can represent thousands of dollars in sales. Properly aligned priorities and careful execution will yield profit, misplaced effort and sloppiness in execution can cost you. If you keep the basic priority for effort at List, Offer, Copy, Design, your direct mail has the best chance for success. This long-held tenet of direct mail success is just as valid today as it was in the 50s, despite all the technological advances, postal regulations, automation schemes, computer models and more that have been introduced since then. The following shows you the basics and why they are still important.

The List's the Thing
The best product in the world, described in flowing, persuasive prose in a beautiful package will not sell if it is presented to the wrong audience, period. The list of recipients is the key to moving units, triggering responses, filling seats, and making money. Put the greatest effort into choosing, culling, maintaining, updating, specifying, selecting, aggregating, deduping, merge/purging your list, and your response rate will reflect it. Clean accurate data is the bedrock of a successful program, driving not only your initial mailing, but dictating your remail schedule, your test results, your fulfillment order, your list rental program, and more. Without clean data, you may as well toss 30% of your materials in the trash, that's certainly where they will end up anyway.

Selection is the basic starting point – the more you know about the product or service, the better you can select the list. Your testing program will direct your list selection to a great degree, but if you're just starting out and have no test data, that's the place to start. Test lists are small segments of much larger lists that on their surface seem to fit the customer profile you've developed as part of product development. Small segments of many lists that fit the profile will give you the response data needed to narrow down the list of lists to those that actually fit the customer profile adequately to mail in volume.

Testing
If you are only testing lists, mail the same piece, with the same offer, copy, design, timing and other elements fixed, to the small segments and the list data should be the only variable. Read this response data approximately 3 weeks after drop date, and you'll know which lists really work and which ones don't. Once that data is in, review your segment descriptions, and match them back up to your response data, see if there is a common theme among the respondents that may not have been anticipated. Lists that don't pull well at all, the lower 25%, can be safely dropped for the moment. Lists in the middle 50% should be examined carefully, and the selection criteria aligned more closely with those in the top 25%. The top 25% can be mailed in volume. That top 25% represent the set of characteristics that you want to emulate for future mailings, providing the offer and copy don't change.

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For non-profits, this universe from which to select your tests is usually pretty strongly defined, composed of either members, potential members or some peripheral group in or around your industry. Publications, member lists from affiliated or peripheral organizations, meeting or tradeshow attendees, customer lists from affiliate members all offer fresher data to test than your house prospect list, and there are many options beyond those to investigate. If your program is band new and you're starting from scratch, try anything that seems reasonable – your assumptions are not as valid as actual test data (see related article on research data).

Once you've assembled a set of data-validated characteristics from your list test, have some reliable selection criteria, and a realistic universe from which to draw the continuing working lists, the search is on to locate new lists that match those criteria as closely as possible. Get creative when sleuthing out where those might come from. If money is tight (when isn't it?) you can offer to swap lists with other interested parties. You can negotiate partial swaps, ask for a net name arrangements with larger list sources are viable once you've formed a relationship with them, and there are a number of other approaches to procuring lists at less than full rate. All they can do is say "No."

You've cobbled together a set of lists you feel will work based on your test data, now it's time to make it efficient to mail. The Merge/Purge process is the one that not only allows you to mail only one piece per name, but the results of the purge according to priorities you set tells you where your "good" sources of lists are, how much cross-over there is between list sources, who really supplies the majority of your "new" names, and a lot of other useful data. Be sure you work closely with your data processing house to achieve the merge/purge results you want.

Clean It Up
Now that you have a reliable, efficient collection of the right number of names based on your test data, it's time to do some cleaning. Good data is not only the right names, but involves address hygiene, salutation and gender correction, updated mailing addresses, zip-plus-four appending and other list cleaning chores, most of which can be done electronically through data processing software. All this is done to be sure your carefully designed, well-written piece reaches its destination. Your mail house will likely offer a number of list hygiene options, or know of a data processing company that can perform these functions, at a per/thousand rate. Take advantage of as many as you feel you need to get your data squeaky clean. At the very least, address standardization, genderization, NCOA (National Change of Address) update, zip+4, and postal presort should be applied, to help boost your postal discount and save some money.

The Offer
You've got good data, good names in sufficient quantity, and clean, accurate addresses, it's time to focus on what you're selling. The offer is the heart of the direct mail piece. It sums up in a few sentences what the recipient gets in exchange for a response, and explains what that response is. A carefully crafted offer can make or break a mail piece's response rate, but not the whole program. The phrasing and framing of that offer needs careful consideration. It should be compelling, not easily obtained elsewhere, priced well to trigger a response, relevant to the recipient, easy to understand and fulfill quickly, not overly complicated, and engage the audience. A tall order for a few sentences, but that's where the magic happens. Offers should

be tested just as rigorously as lists. There are likely fewer variables with offer tests - there are only so many ways to price a product or service profitably - but how it is framed or presented has almost endless variation. Offers shouldn't be misleading, overly promissory, or impossible to understand. Confusion leads to "no response" from the audience, so keep it straight and simple as possible. Test price only, to find the peak acceptable price that the market will bear. Test premiums, test combinations or bundles of products, test FREE samples offers, test "'til forbid" offers (Record clubs raised this to high art in the 80s with "Buy one, get 12 more for a penny for the rest of the year unless you cancel" types of offers), test as many as you think reasonable to whittle that offer down to its most crystalline, efficient, effective best. Usually in offer tests, one or two clearly outperform the rest, either for clarity or price. Those can be subject to future testing as the product develops, evolves or extends to further refine the winning offer.

"Copy" Does Not Involve Toner
Now you know who the product is suited to, under what circumstances they will purchase it (or attend it, or select it, or vote for it, whatever the desired response is). Now it's time to figure out what aspect of the product really lights up the boards, what angle to approach the audience regarding the product, and what benefits and features will make it move off the shelf.

Copy should be a persuasive description of the benefits to the buyer of the product or service, priced so that it almost appears too good to be true, seemingly so enticing that the buyer can't seem to do without it. Copy, be it long, short, poetic or workmanlike, formal, informal, playful or serious, is the grease that lets the direct mail engine turn smoothly right to a response – it drives the reader to the desired action, either buy, register, attend, mail back, enter, provide information, or dial.

Copy should be tested if you're promoting a new product, rebranding an existing product, have minimal data or purchasing history for the audience, or are trying a totally new package. Copy length might also drive a format test, just for the sheer space needed for some of the long copy, a letter package might be required to contain it, as opposed to the more popular postcard, with its limited real estate but bold colors and low cost.

Talk To Me!
Copy should speak directly to the recipient – sounds obvious, but you'd be surprised how often when reviewing packages, the copy only contains the directive tense "you" in the last line, if that. Speak to the reader and they will put themselves in the listening position and process your copy as if you were speaking to them. Now it's personal, now it's direct, now you've got their attention. Make sure all your copy answers the questions for the reader, "What's in it for me?", and it will sell. Copy that is benefit-laden, sings smoothly to the reader, offer undeniable benefit after compelling benefit and puts a couple of "early closers" in there is very likely to pull well – all the ingredients are there. All other things being equal, good tight copy will out-pull sloppy, flaccid prose every time.

A word about length – there are no real "rules" about copy – except if it works, use it. Copy should be long enough to tell the tale to the reader, and not a word longer. If it takes you two

pages to wax poetic about the latest sewage eradication technique using industrial solvents, so be it. If you test it against stronger, shorter copy and it loses – dump it! It's that simple.

Copy is a subjective element, much like design, where everyone has an opinion, and in most cases each is just as valid as the next. Many hours are spent nationally each year in the editing and polishing stages, buffing and selecting just the proper word, arguing among creative types about whether it should be stream or creek or river or brook. If your package has been tested extensively enough that you can test a single word choice to make a definitive call, you've got other things to worry about – don't waste time arguing, put something in the mail!

Design – Last But Not Least

Lastly, the design of the package, and its importance to the response rate, should be discussed. Design gets more time spent compared to the effect on response than any other element. Sometimes this is for the reason mentioned above about copy – it's subjective and everybody has a way they envision the piece looking. The only hard and fast rule about design for direct marketing is that it function properly. Is the postcard insides printed right side up? Does the response device fit easily into the reply envelope? Does tab "A" reach to fit into slot "B" without blocking the address block? It has to function. It also should be producible by machinery currently available in mail production facilities. There are as many formats as there are imaginative marketers out there, and any or all of them could work under the right circumstances – the only way to truly know which one is best is to . . . you guessed it, test! Test a letter versus a self-mailer, versus a magalog, versus a postcard, versus a card in a deck, versus a dimensional, versus a doormat (no longer postal legal). Test odd shapes, test multiple pieces versus just one. Design should make sense to the reader who's never heard of you or the product or service.

Since we mentioned in the beginning that direct mail is a numbers game, here's where good design can earn its stripes. Mail the most expensive package and test each element, removing each and remailing until the response drops. The fewest pieces that doesn't negatively affect response is the winner – you want to test the Cadillac initially, and scale back 'til you're mailing the VW beetle in mass quantities. Good design shouldn't be noticeable, it should just work to convey the message the copy is proposing.

Now you have your priorities aligned with success – list, offer, copy, design. Focus on your direct mail in priority order, and your packages will be lean, tight, effective and profitable. That's what we're all shootin' for! Enjoy!

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