FRANKLIN MADISON DIRECT

Direct Mail Agency Checklist

Looking to scale your customer acquisition strategy beyond digital channels? Or perhaps you need to optimize your existing direct mail program? In either case, chances are high that you are in the market for a direct response agency to help you deliver on your growth objectives.

To find and select the right direct response partner for your brand, it is important you have a full understanding of their capabilities and the value they can bring to your business. As you begin to vet potential direct mail agencies, use this checklist to guide your conversations throughout the selection process and help you identify the perfect match for your growth goals.

Full-Service Agency

Executing a high-performing direct mail program is a heavy lift. Partnering with an agency that can handle everything in house, from strategy and targeting to execution and analysis, will immediately set your campaign up for success.

- [ ] Research
- [ ] Testing
- [ ] Data
- [ ] Creative
- [ ] Production
- [ ] Analytics and reporting

Data Science

Agencies who employ a data agnostic approach have access to a variety of industry-leading data sources to build high performing and scalable models to effectively reach your best audience.

- [ ] List building / targeting strategy
- [ ] Custom modeling capabilities
- [ ] CRM segmentation
- [ ] Append services
- [ ] Contact strategy optimization
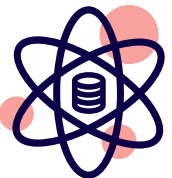
UPWARDS OF 70% OF YOUR CAMPAIGN SUCCESS RELIES ON THE STRENGTH OF YOUR MAILING LIST.

Data Security & Privacy

Direct mail agencies process mounds of sensitive information including personal data, financial records, health records, and more. Sharing your first-party data with your agency is a critical step to list building and modeling. Ensure your data is secure by validating the agency's data processing practices, privacy policies, and certifications.

- [ ] Documented data security protocols
- [ ] AICPA SOC2 Certification
- [ ] HIPAA Seal of Compliance
- [ ] CCPA Compliance

Data Integration

Running a coordinated digital campaign across social, email, display, CTV, and more, ensures you maximize your budget spend, audience reach, and campaign performance — both online and offline.

- [ ] Dedicated digital team
- [ ] Digital certifications and credentials
- [ ] Ability to seamlessly integrate across a variety of digital platforms
- [ ] Performance reporting

INCREASE YOUR RESPONSE RATES BY 133% WITH INTEGRATED DIRECT MARKETING PROGRAMS

Testing Strategy
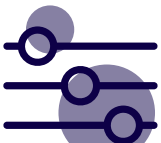
The only surefire way to advance the performance of your mail campaign is with a regular testing program. Partner with an agency whose testing methodology quickly and accurately identifies the winning combination that will help you acquire more customers and reach your ROI, faster.

- [ ] Sophisticated, proven testing approach
- [ ] Ability to test multiple elements simultaneously
- [ ] Risk-averse approach
- [ ] ROI scenarios and ramp plans to set short term and long term KPI expectations

Mail Tracking

Real-time, granular direct mail delivery data can provide you with actionable insights to adjust if needed. It also allows you to identify what days of the week perform best, prepare your CX teams to satisfy impending needs, and synchronize your digital strategies.

☐ Detailed delivery reports

☐ Automated alerts

☐ Cloud-based accessibility

Support & Speed

A consistent, reliable agency team sets the foundation for an efficient program and trusting relationship. Confirm your agency team will be dedicated to working in collaboration with your internal staff and its members will not shift based on internal demands.

☐ Dedicated support team

☐ Personalized account management

☐ Achieves timelines and deadlines

☐ Highly responsive and flexible

☐ Quality assurance practices

Experience and Expertise

Direct marketing is not brand marketing, and you need a partner that understands the difference. Direct mail strategy and successful campaign management should be at the core of their business. Ask them to establish credibility with testimonials, referrals, or case studies demonstrating mail campaigns that consistently achieve maximum response and ROI.

☐ Agency history, mission, values

☐ Direct marketing (direct mail and digital) experience

☐ Case studies and testimonials

☐ Track record of launching and scaling programs

Performance

Direct mail analytics and attribution can take many forms. Identify what key metrics will define success, and how your agency will track, analyze, and share those results with you. Real-time dashboards, accurate reporting, and customized information focused on your most critical metrics is essential to optimizing your program.

- [ ] Performance and KPI reporting process
- [ ] Attribution approach
- [ ] Analytics dashboards with transparency
- [ ] Insights to optimize performance

Payment Terms

Review your Statement of Work thoroughly. Verify your total campaign costs, agency fees, and payment terms. Some agencies require payment up front, charge hourly fees and even retainers to ensure they are paid, even if you are not mailing. Others keep fees low and tether their earnings to the success of the program by working according to a cost-per-piece model. Some even allow your campaign to generate sales before your final balance is due to help with your cash flow.

- [ ] Contracting and terms
- [ ] Retainers and hourly fees
- [ ] Charged by cost per piece or line item
- [ ] Payment schedule and balance

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