



eBOOK

6 Step Guide to Direct Mail Marketing

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Reach Customers Where They Are with Direct Mail Marketing

The home continues to be central to our lives and where decisions that really matter are made. That makes direct mail the ideal channel to break through to your target.

Like any marketing channel, you need to know how best to use it. That's why we've created this six step guide. To help you connect with existing customers and top prospects, it covers the basics of the direct mail process from start to finish—with valuable tips to guide you through a successful campaign.

Smartmail Marketing™ Expert Partners

As a Canada Post Smartmail Marketing™ Expert Partner, we work with businesses to effectively manage and optimize their direct mail campaigns from beginning to end—including their strategy, design, printing and delivery to Canada Post.



Smartmail Marketing
EXPERT Partner

The content in this guide is adapted from Canada Post's [Essential Guide to Direct Mail](#).





The 6 Step Direct Mail Workflow

All direct mail campaigns follow a similar workflow. In this guide, we'll walk through the basics of these six steps so you know what to expect and can prepare what you need to meet your campaign deadlines.

1

Strategy & Planning

2

Targeting & Analytics

3

Creative Design

4

Printing

5

Mail Preparation & Delivery

6

Measurement & Insight



Before we get started on your direct mail campaign, WCD will work with you to develop a detailed workback schedule based around your desired “in home” target—the date you would like the direct mail piece to be in your customers’ hands.



STEP 1

Strategy & Planning

The first step to a successful direct mail campaign is nailing down your campaign strategy. Planning ahead will simplify and speed up your decision-making process and will also help guide your creative and print partners (that's us!) in recommending the best possible solutions.

Use this checklist to get started:

**What is your main objective?**

Create brand awareness? Acquire more first-time customers? Increase repeat customers and strengthen loyalty?

**What do you want your audience to do?**

Attend an event or sign up for an e-newsletter? Make a purchase or donation on your website? Visit your store? Take action on social media? Talk to sales?

**What is your offer/message?**

How will you get your target to act? Direct mail does better when it includes a simple message and a relevant offer to excite your customers.

**Will your campaign be integrated?**

Will you be doing direct mail on its own, or will it be integrated into a harmonized mix for better results?

**What is your budget?**

Knowing this will help narrow your choices, from paper quality to mailer formats to the size and scope of your campaign.

**What data do you have?**

Evaluate your data so you have a good understanding of your targeting capabilities, which will factor into your results.



STEP 2

Targeting & Analytics

If you're just starting out with direct mail and don't have an existing database (or yours is in its early stages), you may turn to external sources for your targeting—a common practice with many businesses. In this case, you'll use what you've learned researching your target audience to develop a list. Working with our team, we'll apply those insights to generate your list using a Canada Post list rental.

Your Ideal Customer

To find new customers, you have to be able to define who you're looking for. Start by developing an ideal customer profile by asking these questions:

- What are the demographics of my best customers (age, income, education)?
- Are my customers clustered in specific geographical areas?
- How might pain points influence their buying habits (i.e. lack of time)
- Are there any life stage and/or lifestyle traits that my customers have in common?

Now that you know the characteristics of your ideal customer, you're ready to put your data to use to acquire customers, to generate awareness or to build loyalty.

How can we target your ideal customer using Canada Post's list-building tools?



Geography

City, province or region
Neighbourhood or postal code
Specific addresses



Interests & Behaviour

Shopping patterns
Hobbies
Nutrition and diet, etc.



Demographics

Gender, age and education
Income, occupation, family size



Lifestyle & Life Stage

Renters vs. owners
Restaurant frequenters, etc.

These are just a few of hundreds of attributes you can use to build customer profiles with Canada Post's targeting tools. [Click here](#) to explore a full list.



The 3 Types of Direct Mail Targeting

Canada Post offers a full suite of Smartmail Marketing solutions to help you achieve your campaign objectives.

1

Neighbourhood Mail | One to Many

2

Postal Code Targeting | One to Few

3

Personalized Mail | One to One



Neighbourhood Mail

Neighbourhood Mail connects you to every home and apartment in specific neighbourhoods or regions across Canada. As an example, a local restaurant might send menus to the surrounding community.

Postal Code Targeting

Postal Code Targeting uses postal codes to reach a desired audience. The location of a potential customer plays a key role in determining who is most likely to buy from you. Chances are, people who live in the same neighbourhood share similar demographics, life stages, aspirations, preferences and behaviours. This is where the targeting attributes we mentioned on the previous page come into play.

Personalized Mail

Winning loyal customers comes down to being relevant to the individuals you're targeting—whenever and however they choose to interact with you. Personalized mail works well for both building loyalty within an existing customer base or for acquiring new customers with mail that's personally addressed to them.

If you're not sure what type of direct mail targeting will best reach your campaign objectives, our Smartmail Marketing™ experts can provide further insight.



STEP 3

Creative Design

A perfectly timed, well-written piece that has a clear and relevant message with a compelling call to action is the key to a successful direct mail campaign. If you're designing your own direct mail piece, we recommend following the 40/40/20 rule—40% audience, 40% offering and 20% creative execution.

40% Audience

Before all else, consider who you're mailing to and what information you'll need to reach them. A well-defined target profile will help you write and design creative that resonates with the demographics, geographics, lifestyle and more of your customer.

40% Offering

The key question your audience will be asking is, "What's in it for me?" Consider what action you want your customer to take, why they should do it and how you'll reward them for doing it. It might be a promotion or discount, an invite to a special event, free expert advice, information to solve a problem, etc.

20% Creative Execution

When creating your direct mail piece, your creative, message and format all play a key role in making your piece stand out. Beyond that, you'll also want to consider the paper quality, weight and finish of your piece. Adding special elements like inserts or cards can make it difficult to ignore.

[Click here](#) to learn about common direct mail formats.

**Piece designed by WCD Creative Services for Edmonton City Club.*





Tips for Designing Your Direct Mailer

While you'll need to take your brand into account, there are several rules of thumb for direct mail design that are proven to increase the value of your mailer.

1

Avoid Clutter | Design your mailer for easy skimming.

2

Use Simple Visuals | Bright colours and a big, bold font will stand out.

3

Show Faces | Images of people can help reinforce your key messages.

4

Use Action Words | Avoid passive voice and verbs that lack power.

5

Use a Strong CTA | Make it clear, concise and easy to understand.

6

Use Tracking | Promo codes, URLs and others can help measure success.

Need help with design?

You don't have to be an expert to design a great direct mail piece. WCD Creative, our in-house design agency, is a certified Smartmail Marketing™ Expert Partner and specializes in designing award-winning integrated direct mail campaigns that get results.

[Click here](#) to learn more.



**Piece designed by WCD Creative.*



Size and Weight Requirements

Depending on the service and format you're using, there are specifications you must follow to adhere to Canada Post's mailing guidelines when designing your direct mailer. Working with a Canada Post partner like WCD will help ensure those requirements are met.

Neighbourhood Mail Specifications

	LENGTH	WIDTH
Standard Neighbourhood Mail dimensions	30.50 cm (12 in)	15.24 cm (6 in)
Oversize maximum dimensions	30.50 cm (12 in)	28 cm (11 in)

- Minimum paper thickness 0.18 mm (0.007 in)
- Ensure your Neighbourhood Mail piece does not contain an address

Postal Code Targeting Specifications

	MACHINEABLE		SPECIAL HANDLING	
	LENGTH	WIDTH	LENGTH	WIDTH
Min. Dimensions	140 mm (5.6 in)	90 mm (3.6 in)	100 mm (3.9 in)	70 mm (2.8 in)
Max. Dimensions	245 mm (9.6 in)	156 mm (6.1 in)	380mm (14.9in)	380mm (14.9in)

- Mail pieces must have a unique 2D barcode or a "non-personalized address" generated from a data file

Personalized Mail Specifications

	STANDARD		OVERSIZED	
	LENGTH	WIDTH	LENGTH	WIDTH
Min. Dimensions	140 mm (5.6 in)	90 mm (3.6 in)	140 mm (5.6 in)	90 mm (3.6 in)
Max. Dimensions	245 mm (9.6 in)	156 mm (6.1 in)	380mm (14.9in)	270mm (10.6in)

- Minimum paper thickness 0.18 mm (0.007 in)



STEP 4

Printing

Before WCD can print your direct mail piece, there are a few critical steps we'll guide you through to ensure your mailers get where they're going and capture attention when they get there.

Data Validation

Taking your mailing data, our team will help you verify that all addresses are complete and in a standard format that's acceptable for Canada Post mailing. Just like an email subscription list, clean data has no duplicates. We'll run your data through software that will automatically clean your list, update the address formatting and flag any outliers in the data that need special attention.

Select Your Paper

Your choice of paper, envelope and card stock will reinforce the tone of your campaign and reflect your brand overall. These choices help convey qualities such as simplicity, trendiness, luxury, sustainability or budget-friendliness. Consider:

Thickness: Consider getting some samples so you can see and interact with your mailer the way your prospects and customers will.

Colour: Colour plays a big role in creating emotional engagement. Cool colours can be relaxing and reassuring while bright colours like red and yellow can attract attention and stimulate action.

Finishes and effects: There are numerous creative options to explore including foiling and embossing, die-cuts for different shapes and cut-outs to stand out in the mailbox.



**Piece designed by WCD Creative.*



STEP 5

Mail Preparation & Delivery

With millions of pieces going through the mail stream daily, it's important to prepare direct mailers properly to avoid issues or delays. Our team will manage mail preparation for you, but having a basic understanding of the process will help expedite things and ensure your campaign gets out the door smoothly.

Create a Canada Post Business Account

We always recommend our customers sign up for a free Canada Post Business Account. Having an account will give you instant access to tools and savings on postage, and it will expedite the process for future campaigns.

Don't have an account? [Create one here.](#)

Create a Statement of Mailing

Before Canada Post can accept your direct mailers, you'll need to have a Statement of Mailing (SOM). To create the SOM, you'll need information like:

- Size and weight of your pieces
- Number of items you're mailing
- Distribution routes you want to reach (for neighbourhood mail)
- Household type you want to reach (for neighbourhood mail), and more...

Smartmail Marketing™ Expert Partners like WCD will create your statement of mailing for you, and will manage any other special criteria for your direct mail campaign.

Time For Delivery!

Once your pieces are printed and properly prepared for mailing, our team will organize them in Canada Post bins, properly label them and then deposit the mailer with Canada Post for delivery on your specified drop date.





STEP 6

Measurement & Insight

Today's direct mail campaigns are driven by data. With customer journeys changing and touchpoints getting harder to predict, it's important to keep checking what works best. Just like digital marketing, direct mail responds well to testing, allowing you to manage your campaigns and control expectations and results. Consider small-batch testing your campaign and quickly scale your best results to a wider audience.

Tracking and Attribution

Make sure that any point of contact included in your direct mail piece is unique and trackable. There are many ways you can follow and credit the success of your direct mail campaign. Try any of these:

-  **Coupon and promo codes:** These can drive traffic in-store and online. Use exclusive codes for each direct mail campaign for full attribution.
-  **MURL:** A smart and easy way to track response is to drive to a marketing URL and landing page with promo-specific content. This ensures that traffic is directly attributed to your mailing.
-  **PURL:** A personalized URL is a unique landing page created especially for each recipient of your direct mail campaign.
-  **Social media:** Include sharing icons in direct marketing channels and encourage customers to share the offers with others in their network, #greateoffer.
-  **Email and phone number:** Provide dedicated toll-free numbers, email addresses or other points of contact.
-  **Augmented reality:** Apply this technology to print. Recipients are encouraged to scan certain areas of an ad to access additional content like videos or images
-  **QR codes:** Quick and affordable, these codes can be scanned with a mobile device to drive to a landing page or video.



Wrapping It Up

The success of your direct mail campaign doesn't begin and end with dollars. Define success in human terms—the value you will create to achieve the response you want. Focus measurement on this customer-centric definition based on a clear understanding of the role direct mail needs to play in your customer journey.

More Insights & Learning

Take advantage of further insights and expertise available to you:

- Keep up with our latest [blogs](#)
- Explore Canada Post's [resources](#) on Smartmail Marketing™
- Subscribe to [news and updates](#) from WCD

Get Started Today!

Have questions? Ready to get started with your direct mail campaign? Our experts are here to help. Click the link below to get started, or ask to speak to one of our sales representatives by calling 1-800-267-2555.

GET STARTED WITH DIRECT MAIL