

Direct Mail Formats

**A STRATEGIC APPROACH
TO **FORMAT SELECTION****

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“Which pulls better – a letter mailer or self-mailer?”

It’s one of the most common questions we get in direct marketing.

It’s right up there with “What is a good response rate?” and “Where do I find a good list?”

But like all questions in direct marketing, the answer to this one is “It depends.”

Both formats have their advantages and disadvantages. Which one you choose depends on many factors: your product or service, your target audience, your objective, your message and your budget.

In the pages that follow, I hope to help you answer that question as it applies to your marketing situation.

Bob McCarthy

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Introduction

All direct marketers agree that the two most important elements in any direct mail campaign are the mailing list and the offer.

So it's understood that using the right list and making the right offer are your best bets for success — both in terms of quantity and quality of response.

Still, it's the creative that gets all the attention. Understandably, the creative is the most visible part of the campaign — it's what everyone talks about — so it's going to generate the most discussion.

The first step in the creative process is developing the message. The second step is the presentation of that message ... which is where the format comes in.

Look beyond your personal preferences

It's only natural to have your own personal favorite formats. But as you will see in this report, that shouldn't be a factor in your format decision.

You need to stay focused on the strategy.

In this report, we have provided an overview of 11 direct mail formats and we've explained the strategic rationale for selecting one format over another.

Choosing the right direct mail format is an important decision in planning your direct mail campaign. In some cases, choosing a specific format will be clear and obvious. In other cases, you can go through the checklist and still not be sure. In those cases, we recommend testing.

Selecting a Format – First Steps

Direct mail offers many choices in formats — from a simple letter package or postcard to a multi-page booklet or even a dimensional package.

Whichever format you select, it must serve as the framework for your marketing message, corporate image, product positioning and long-term relationship building strategy.

At the same time, the format must meet the demands of your particular sales and marketing situation. More than anything else, your direct marketing application (or objective) will determine which format (or which group of formats) you should select.

Orders vs. leads

When selecting a format, perhaps the most important question you can ask is what is the application or objective of the mailing? Are you trying to generate orders or leads?

Some campaigns are designed to generate immediate orders (known as order generation). Others seek only to produce inquiries or qualified sales leads (known as lead generation).

With order generation campaigns, you're asking readers to make a financial commitment. This is a very high hurdle that requires a long and complete sales presentation, which means more text, more photos, more details, more everything.

Order generation campaigns usually call for a larger format — for example, a multi-page booklet or a direct mail package with a multi-page letter and brochure.

On the other hand, lead generation campaigns typically use free offers so that the prospect is asked to make less of a commitment and is more comfortable responding without knowing all the details. Therefore, lead generation formats tend to be smaller and simpler — perhaps a letter package, self-mailer or postcard.

Lead generation formats tend to be more creative and flashy. Because leads are easier to produce than orders, the creative team can usually take more risks with a lead generation format.

Direct Mail Formats: A Strategic Approach

Adapting to your audience

Before you select a format, think about the people who will receive your message. Which format would be most appealing to them and which format would they expect from your company?

If you're trying to reach senior business executives, a package with the look of a personal letter may be the best approach. Current customers also may respond best to a more personal communication from you.

For certain audiences or to promote certain products, your best choice might be a less formal, more creative format featuring eye-catching graphics, bold copy, perhaps even humor.

For products that appeal to multiple people within the same office or home, a mailer with strong "pass-along" potential (such as a self-mailer or postcard) may be a good choice.

Also, ask yourself how much your audience knows about your company's products or services. If it's a complex product or service, you may need more space to explain its features and benefits. If your audience is unfamiliar with your company itself, you may need to dedicate some additional text to building your credibility.

Words, pictures or both?

As you identify the most important selling messages for your product or service, think about the different ways those messages can be communicated. Are words sufficient or would you benefit from a photo of the product? Or maybe a photo of a typical customer using the product?

For messages best conveyed by words alone, a letter package may be your best choice. But for messages that can benefit from photos and graphics, a postcard, self-mailer or letter/brochure format may be more appropriate.

With some products, like clothing and food, photographs are essential to the sales effort. Customers need to see what they are buying.

And don't forget your budget

Just as direct mail formats vary in size and complexity, they also vary a great deal in costs — for design, printing, mailing and postage. Knowing the costs of each format is critical to your decision-making process.

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Generally, letter packages with multiple components are more expensive to print and mail than self-mailers which involve just one piece.

But there are other factors as well. Letter packages with extensive personalization are more expensive than generic letter packages. Self-mailers with multiple folds and perforations are more expensive than postcards. Oversized mailers may require additional postage.

Many of us who run small businesses — on a small marketing budget — tend to use letter packages if only because we already have the letterhead and envelopes in-house. Letter packages also don't require a professional designer. While this is understandable from a cost standpoint, it should not be your driving force in selecting a format.

If you have a relatively small target market, one key strategic question to ask is whether it is better to reach your target audience with one big, expensive splash or several lower cost contacts spread out over time.

Testing, testing ... 1 - 2 - 3

How can you be sure you picked the right format? Ultimately, the results of your direct mail project are the only true measure of your format selection.

And the only way to be certain your format choice was, and remains, the best choice is to test it ... against other formats.

But don't use response rates to compare formats. Because formats vary in costs, be sure to evaluate each tested format not by relative response rate or order rate, but by cost per response or cost per order.

Also be sure you test your formats using the same audience profile and the same marketing message. In order to have confidence in your test results, you need to keep all other elements the same.

An Overview of 11 Direct Mail Formats

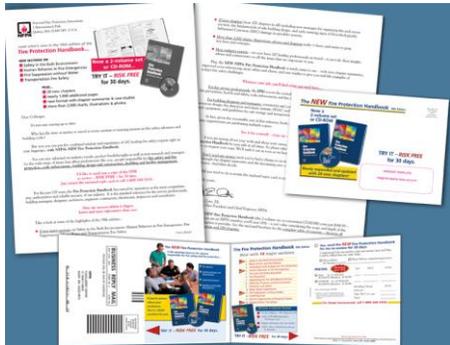
In the pages that follow, we have featured 11 direct mail formats with a general discussion of important points to consider in matching a format to your needs.

These brief discussions should provide a starting point for the format selection process.

It's important to remember that within each of these formats, costs will vary according to the design choices you make. Before you proceed with a final format selection, you may want to develop some preliminary designs and obtain actual cost estimates.

If you would like to discuss your choice of formats for an upcoming campaign, please call us at 508-473-8643.

1. The Order Generation Letter Package



The order generation letter package is considered to be the classic direct mail package because it was the format of choice for the pioneers of direct marketing – those early publishers and mail-order companies that introduced the concept of buying by mail.

This package is best designed for businesses that use direct mail to generate immediate orders.

It is not typically used for lead generation. Non-profits also use this format for fundraising.

The order generation letter package can be designed for a variety of envelope sizes. The size of the envelope will directly affect your postage rate.

The most common envelope types are #10, 6×9 inches and 6×11 inches – all three of which can be mailed at the basic “letter” rate. Larger envelopes will be mailed at the so-called “flat” rate which is about double the cost of postage.

Mailing components

This format has multiple components, including:

- outer envelope (#10, 6×9, 6×11, 9×12, 10×13)
- letter (often 2 to 4 pages long)
- brochure (ranging in size/folds)
- a reply form or order form or donation form
- reply envelope (business reply or courtesy reply)

Occasionally, this package may include additional inserts such as a premium sheet, an endorsement sheet or a testimonial sheet.

Why such long copy?

The rationale goes like this:

Because the goal is to generate an order (a financial commitment), the reader is likely to have many questions about the product/service, the company and the offer before taking action.

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Therefore, it is essential for the mailer to provide a complete explanation so the reader is completely comfortable with the buying decision.

This rationale applies to both product/service selling and fundraising.

Order generation offers

The offers used in an order generation campaign are multi-faceted. In other words, there are many elements to a typical order generation offer. Changing any one of these elements will effectively change the offer – and most likely, your response rate.

Let's look at a typical order generation offer:

It starts with the product or service being sold – and the price you're charging for that product or service. These two elements make up the core of the offer. Obviously, any time you change the product or service (you add or subtract features, for example), or you change the price, you have dramatically changed the offer.

But there are lesser elements that could also change your offer and your response rate. Some will have more impact than others:

- pricing discounts, combination rates, early bird specials
- incentives (premiums with order)
- shipping options
- payment options (bill me later is a game changer)
- response channel options
- trials (one week, one month, two months, with or without credit card)
- guarantees (30-day, 60-day, lifetime, unconditional, etc.)

Order generation messaging

The main characteristic of an order generation mailer (letter or self-mailer) is the length. They typically require long copy because in order to get people to buy your product or service, you need to answer all of their potential questions.

An order generation message would lead with a major benefit, but it wouldn't stop there. You would also need to include every other benefit you could think of to build your case. Often these benefits would be tied to specific features which helps to substantiate your claims.

At the same time, you will be looking for ways to build your credibility. This can be done through demonstrations, supporting charts, photographs, endorsements and testimonials.

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Order generation packages will almost always include multiple testimonials – often with photos and real names.

Finally, the offer itself needs to be presented in detail which also requires space.

Hint:

While envelopes can be any size, keep in mind that size will impact your postage. Standard #10, 6x9 and 6x11 envelopes are mailed at the so-called “letter” rate. Larger envelopes like a 9x12 or 10x13 are considered “flats” and will be charged almost double in postage.

2. The Lead Generation Letter Package



The lead generation letter package remains one of the most popular of all direct mail formats.

It's also one of the most familiar formats for readers. Since childhood, we have all written and received letters from friends, family and pen pals.

Because the letter is more familiar to us, it makes communication easier and more effective.

While less creative visually than other formats, the lead generation letter package does provide a more personalized communication. When done properly, the letter package can deliver a convincing one-to-one communication.

The lead generation letter package is typically produced in one of two ways – as a personalized mailer or as a marketing mailer.

A **personalized mailer** looks like a letter you might receive from your lawyer. It has a corporate looking return address in the corner, the name and address are typed directly onto the envelope (no label is used) and there is no teaser copy. Inside, the letter is professionally personalized and the reply card (if there is one) is personalized.

A **marketing mailer** is personalized too but not to the same extent. It may include a window envelope (with the name and address showing through the window), teaser copy on the outer envelope and possibly a generic letter. At least one piece of the package – the envelope, letter or reply card – needs to be personalized to reach the target prospect.

The lead generation letter package also provides complete flexibility in messaging. Thanks to laser printing technology, the entire text of the letter can be changed “on the fly” so prospects can receive individualized letters. The letter package gives you more flexibility to customize your message to individuals or segmented audience groups.

The lead generation letter package is popular for small business to do their own mailings because they already have envelopes and letterhead in stock.

In recent years, with increased acceptance of landing pages for response, there has been a tendency for many marketers to eliminate the reply card. This is understandable because the reply card is another element that needs to be printed – which costs money.

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(Personally, I'm not ready to drop the reply card just yet. Even if no one is using it, I believe the reply card helps to reinforce your offer and the need to respond.)

Mailing components

This format has multiple components, including:

- an outer envelope (usually a standard #10 but could be larger)
- a 1- or 2-page letter
- a reply form with a reply envelope or a business reply card

This format can be developed with various levels of personalization. Personalization can be placed on the outer envelope, the address box of the letter, the letter text itself and the reply form.

Lead generation offers

To be successful in lead generation, you need to understand the power of the offer. Lead generation offers have nothing to do with product or service you're selling. They have nothing to do with pricing, or discounts or two-for-one specials. Those are offers for other applications – not for lead generation.

The most successful offers for lead generation are informational offers (we call them lead magnets) – white papers, special reports, eBooks, tip sheets, etc. Higher level offers that require higher commitment would be free seminars, webinars, audits, reviews, demonstrations and consultations.

Informational reports (downloads) typically generate the highest response. Higher commitment offers generate fewer but more qualified responses.

Lead generation messaging

The messaging of your lead generation letter package can take different approaches.

The most common approach is to focus on the product/service being sold. You don't provide the complete story but you provide enough information to generate interest. Then you present your offer – a white paper, an eBook, an information kit.

Another approach (which we believe generates high response) is to focus on the offer. With this approach, you provide very little information about your product or service. Instead, you make the offer the centerpiece of your message.

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Many companies are uncomfortable with this approach because intuitively, they believe they need to push their product or service. But if the goal is to maximize response, you push the offer – and talk about the product or service after they respond.

Final note:

The “Johnson box” is the headline copy that appears at the top of the letter above the salutation. This technique is a great way to get your offer to the top of the letter. Use it often, but use it wisely.

3. The Marketing Survey Package



The marketing survey package is one of the best kept secrets of marketing.

While many companies use surveys for market research to gain general insight into a market, they can also be used very successfully for other applications.

Specifically, the marketing survey package can be used to generate leads, qualify leads, update a database, re-activate old leads or lapsed customers, and cross-sell or up-sell existing customers.

Every sales organization has access to multiple sources of demographic information about their prospect base. But demographics information can only take you so far.

The marketing survey package allows you to dig deeper – by drilling down into the actual needs, goals, infrastructure and buying process of your prospects. And the only way to do that is to ask. You would be surprised to see how much people are willing to tell you – if you ask.

The marketing survey is also the ultimate involvement device. Unlike a letter or other mailer which is usually scanned quickly by the reader, the survey needs to be read carefully – word for word – which engages the reader. Use this to your advantage by inserting key marketing information into your survey questions.

Keep the survey questions simple

When you create your marketing survey, be sure to keep the questions simple. Multiple choice is best. Don't ask for lengthy responses and don't ask for private information.

The length of your survey is always a concern. Too long and you lose people. Too short and you don't get enough information. Balance this carefully.

Incentives will increase response

We always offer a small gift (called premiums) for completing and returning the survey. Usually it's just a \$10 coffee card (or something similar), but depending on your audience, you could get more generous.

I'd be reluctant to make it too generous though. It's supposed to be a small token of appreciation for taking the time to complete the survey.

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Be careful with your letter

One of the most common mistakes people make with the letter in a marketing survey package is that they use the letter to try to sell the company and its products. This may be a natural impulse, but it puts the survey on the back burner and turns the survey into just another response device.

I say this a mistake because the goal of this package is to get people to complete the survey – not to sell the company. You'll have plenty of time to sell your company and products after they respond.

Let me put this another way: don't let the letter distract the reader from the real goal – which is to get the survey completed and returned.

Because the message is very simple and almost obvious – “we value your industry knowledge and experience, and would appreciate your feedback” – you could go without a letter and just add it to the top of the survey. I've done it both ways, but I haven't tested it.

Mailing components

The marketing survey package usually has multiple components, including:

- an outer envelope (usually #10 or 6×9 but other sizes as well)
- the survey (usually 1 to 4 pages in length – my preference is 2 pages)
- sometimes a letter (not required if part of the survey)
- a business reply envelope

The survey is usually pre-addressed and then positioned to show through a window envelope. By pre-addressing the survey, you ensure that all surveys come back with contact information.

What to expect

There is no way to predict response, but we have seen some of our highest response rates from marketing survey mailings.

What you need to understand though is that the responses you get are not necessarily leads and certainly not ready-to-buy leads. Many people answer the questions simply because you asked (and because you promised a gift) – not because they had any interest in what you sell.

But if you ask the right questions, the answers you get will help you determine if they are likely to buy from you (or someone else) down the road.

4. The Snap Pack



Image courtesy of Influence Direct

The Snap Pack is a very popular direct mail format for certain financial and insurance products.

It's most recognizable feature is the perforated dotted lines that appear on both sides of the outer envelope. Recipients are invited to tear open the envelope from either side.

Snap Packs are actually just a single sheet of paper that is personalized and folded into an envelope with perforated side openings. The paper sheet can be either 8.5x11 or 8.5x14.

Typically, the inside will include a short letter and a response device – sometimes a fake check – both personalized and perforated to allow for easy separation.

Key Advantages

As a format, the snap pack offers some very nice advantages:

- Personalization – it can be fully personalized to the individual recipient
- Engagement – the dotted line perforations on the side are hard to resist
- Price – because everything is done on one machine, snap packs are highly automated and very affordable

Most of the snap packs you see these days have a similar look – an official looking document, pronouncement of urgent information inside, a hard-sell letter with big claims on the inside.

These are “formula” pieces for many snap pack printers. They are fast and easy to produce which makes them appealing to clients.

Of course, this official-document look isn't for everyone. Many of the snap pack mailers we receive have a “junk mail” or deceptive appearance. Even if this approach produces the highest response rates (and I haven't seen any test results to show that), my guess is that many companies would never want to be associated with this creative approach.

That doesn't mean they wouldn't or shouldn't use snap packs. Snap packs can be used with more conventional creative approaches (although you don't see it very often). You still get the advantages – the personalization, engagement and price – but the messaging could be developed more in line with your own brand.

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5. The Postcard



Direct mail postcards are one of the most popular direct mail formats being used today.

Because of their simplicity, postcards are relatively inexpensive to design, print and mail (although except for the smallest postcards, postage is the same as regular mail).

Simplicity also helps with your messaging. Because you have so little room compared to other mailer formats, the postcard forces you to stay on message

and focus on the goal of the mailing.

Moreover, simplicity keeps the reader focused. There is no opening or unfolding involved. It's just front and back – and readers will see your message even if they end up throwing it away.

I recommend direct mail postcards all the time, but only if the application is right. Some direct marketing goals cannot be achieved through postcards.

Many shapes and sizes

The postcard can be produced in many different sizes and shapes. It's important to keep a close watch on your dimensions as they will impact your costs to print and mail.

Postcards can be broken down into the following categories – which are based on postage rate categories.

Postcard-Rate Postcards

Postcard-rate postcards are small postcards (between 3-1/2 x 5 inches and 4-1/4 x 6 inches) that are eligible for reduced first class postage. This is a special rate that only applies to small postcards and small double postcards.

Letter-Rate Postcards

Letter-rate postcards range in size from 4-1/4 x 6 inches up to 6-1/8 x 11-1/2 inches. These postcards have the same postage rate as a regular letter.

Flat-Rate Postcards

Flat-rate postcards are larger than 6-1/8 x 11-1/2 inches (including a standard 8.5x11 inches). These postcards pay a surcharge in postage – the same that is applied to all flat-rate mailers.

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Square Postcards

Square postcards are very popular these days because they are different and more eye-catching. But you will pay extra postage for these cards as they do not comply with mailing standards.

Odd-Shaped Postcards

Today you can find postcards that can be die cut to almost any shape or form. You are only limited by your imagination and your printer's ability to die cut. If you're planning these types of cards, check with your post office first. Chances are you can mail them (although they do say you cannot mail round postcards), but at additional cost.

All postcards must be printed on card stock. Have your printer check postal regulations if you have any doubts about thickness.

The postcard may be used for lead generation, but it is even more effective for traffic building at retail stores and trade shows. The postcard is also a cost-effective format for lead follow-up, lapsed customer reactivation and list maintenance.

The postcard series

For small target audiences, consider creating a postcard series with each postcard focusing on a different product benefit or application.

The postcards are then mailed at intervals over a short period of time to the same audience. Multi-touch postcard campaigns can provide effective brand building.

The pass-along effect

One terrific advantage of the postcard – in fact all self-mailers – is that it has the potential of being seen by others in the office or at home. We call this the pass-along effect.

Think about it: if you walk into a colleague's office and see a letter or envelope that looks interesting, you would never pick it up and read it. That would be rude.

But if it were a postcard, you might very well pick it up and read it because it is not perceived to be personal. This works to your advantage as a marketer because the postcard could get more eyeballs than just the target recipient.

Disadvantages of the postcard

For all of its advantages, the postcard does have some limitations.

The biggest disadvantage is space. If you have a complex product or service that requires extensive explanation, the postcard is probably insufficient for communicating your message.

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If you want your message to be private or personal, obviously the postcard is open for all to see.

Another disadvantage is that the postcard has no mail-back reply device. This is less of a concern today as many marketers are relying on landing pages to capture response. Other response channels – such as the phone, fax, email and walk-up – are still available.

Personalization

As discussed above, there is nothing really personal about a postcard. But you can employ personalization techniques to increase readership and possibly response.

Obviously your postcard needs to be addressed to someone so you'll need to place an address in the address box. If you have additional information about your prospect, you could easily insert a personalized message at the same time you address the postcard.

Variable Data Printing (VDP)

But the real potential for postcard personalization with the use of Variable Data Printing or VDP. VDP is a form of digital printing that allows you to print the postcard while inserting personalization. In effect, you are creating one postcard at a time.

With VDP, you incorporate a person's name into an image or other artwork on the postcard.

With a very specialized form of VDP, you can actually build your message with customized fonts so your recipient's name appears in the clouds or imprinted in the beach sand.

Final Note:

When designing your postcard, be sure to repeat your offer on both sides of your postcard. You never know which way the postcard will land.

6. The Double Postcard



At one time, the double postcard was a popular format for magazine publishers.

For years, all magazines used the standard Order Generation Letter Package to sell subscriptions. Mailers typically included a 4-page letter and a large colorful brochure. These worked for very well for publishers, but they were expensive to create, print and mail.

To reduce costs, some publishers began testing double postcards using free trials as a way to acquire new subscribers.

Double postcards proved to be an effective, low-cost format for generating those free trial subscribers. It can also be effective for any type of lead generation program where there is a free offer. There are several reasons for this.

The double postcard:

- provides just enough space to briefly explain the free offer
- could be mailed for the same postage as a regular “postcard-rate” postcard
- comes with a built-in reply card

Although still a useful format, the double postcard lost some of its luster when people started visiting websites and landing pages to sign up for free trials or request a free offer.

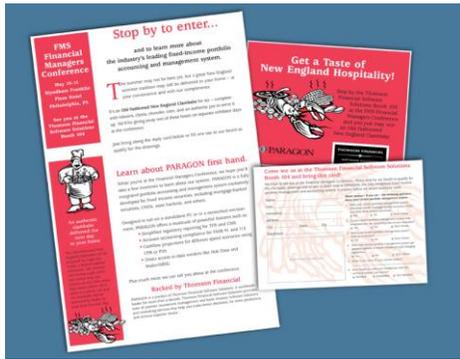
Description:

The double postcard is very much like a regular postcard except that it also includes a second card (a business reply card). It is printed as one large card, then perforated and folded.

To qualify for reduced first class postage, the finished (folded) size may not exceed 4-1/4 x 6 inches. To qualify for automation discounts, the double postcard must also be closed with a wafer seal or glue.

But double postcards are not for everyone. They work for magazine publishers, in part, because their product is clear and easy to understand, and because their offers (free trials or free subscriptions) are attractive and require very little commitment.

7. The Self-Mailer



The self-mailer is a single sheet of paper or card stock (of any size) that is folded one or more times to create a multi-panel flyer.

A typical self-mailer would be a 3 panel mailer (sometimes called a tri-fold) measuring 8 x 15 inches which folds twice to a finished size of 8 x 5 inches; or a 4-panel mailer measuring 8 x 20 which folds three times to a finished size of 8 x 5 inches.

The self-mailer may be printed on paper stock or card stock – and is mailed on its own without an envelope. If one of the panels is a reply card, the self-mailer would need to be printed on card stock.

If your mailer needs to include a built-in reply envelope, you'll need to consult with a specialized printer that can create combined order form/envelopes.

The size of the self-mailer can be as large or as small as you want with some restrictions from the post office.

The finished (folded) size of your self-mailer will determine your postage rate. Self-mailers that are no larger than 6-1/8 x 11-1/2 inches qualify for so-called letter rates (the same you would pay for regular mail). If the finished or folded size is larger, you will pay a surcharge, close to double the postage of regular mail.

You should also check with your printer to find out what limitations you may face with the paper dimensions of their own printing press. But other than that, you are free to test your imagination and creativity.

Folding options for self-mailers

Once the piece is printed, you can fold it as many times as you want. Keep in mind there are several ways you can fold a mailer.

You can “barrel-fold” your mailer so that when you open the front panel, it continues to roll out like a barrel.

You can “gate-fold” your mailer so that the finished mailer appears to have two gates that can be opened from the left or the right.

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You can “double-fold” your mail so that you first fold the mailer in half, then half again. This is a fairly common folding process that has one important disadvantage. Every time you fold, your inside spread gets buried deeper – and decreases the chances your reader will see it.

To qualify for automation and presorting postage discounts, the fold of the mailer must be sealed with a wafer seal or glue before mailing- so there are no open flaps.

The power of design

The self-mailer is a favorite format for some because it lends itself to splashier graphic design. This is best used when photos, illustrations and other graphics can contribute to communicating the message.

But be careful not to let the design take center stage though. Your message is the important element and your design should be used to communicate that message – not replace it.

Advantages of the self-mailer

Price is one of the advantages of the self-mailer. Because there is just one element to print and no envelope inserting required, this format is usually less expensive to print and mail than envelope formats.

However, you should expect additional design costs with a self-mailer.

A self-mailer is also perceived to be a non-personalized communication, which means it may get noticed (and even read) by individuals other than the addressee. This gives the format strong “pass-along” potential that could yield an expanded readership.

Applications of the self-mailer

The self-mailer has many applications. Smaller sized self-mailers are used for lead generation, brand-building and retail traffic building.

Larger sized self-mailers can be used to generate orders. They are often used for conferences, seminars and publications to convey a long-message sales pitch.

Final Note

When designing a self-mailer, think ahead of how the piece will fold. If the reply card is getting “buried” by the folds, this could decrease response.

8. The Booklet



The booklet is a very popular format for order generation promotions that require a lot of space on a limited budget.

Typically eight or more pages in length, this format is most commonly used for catalogs in which multiple products are put on display.

The self-mailer booklet is also used to promote conferences, seminars and other types of educational training.

This format gives the marketer the necessary space to deliver the more extensive sales presentation that order generation requires.

The booklet would not be a good choice for lead generation or any application that uses low-commitment offers because the extra space would be wasted.

Designing a self-mailer booklet

With any multi-page document, you need to recognize that not all pages will have equal exposure to the reader.

Therefore, when designing a self-mailer booklet, give careful thought to the “hot pages” that get the highest readership. These include the front and back covers, the inside covers and the inside spread (especially when a reply device is stitched into the center of the booklet).

Also, design each page and each 2-page spread as a separate and distinct space. Self-mailers are not newspapers. Do not expect that readers will continue from one page to the next.

In some cases, a separate reply form and/or envelope is included in the printing or inserted separately into the binding of the booklet.

Many sizes

The booklet can be produced in many sizes. The most common size is an 8-1/2 x 11, but you can produce smaller versions to fit into a 6x9 or #10 envelope. By reducing the finished size, you could reduce postage.

Page length starts at 8 pages (anything smaller would be consider a self-mailer), but you could have 12 pages, or 16, 20, 24 or more pages. Any length is allowed. Some catalogs are much larger. You just need to keep it in multiples of four.

Direct Mail Formats: A Strategic Approach

To qualify for postage automation discounts, this mailer must be sealed with a wafer seal or glue before mailing so that there are no open pages.

In spite of its large size, the self-mailer booklet can be very cost effective to produce. It is often printed on inexpensive stock, mailed without an envelope and sometimes folded down to letter size for maximum postage discounts.

Order generation offers

Whether you're producing a catalog or some type of conference promotion, the offers used to generate immediate orders are multi-faceted.

In other words, there are many elements to a typical order generation offer. Changing any one of these elements will effectively change the offer – and most likely, your response rate.

Let's look at a typical order generation offer:

It starts with the product or service being sold – and the price you're charging for that product or service. These two elements make up the core of the offer.

Obviously, anytime you change the product or service (you add or subtract features, for example), or you change the price, you have dramatically changed the offer.

But there are lesser elements that could also change your offer (and, as a result, your response rate). Some will have more impact than others.

- pricing discounts, combination rates, early bird specials
- incentives (premiums with order)
- shipping options
- payment options (bill me later is a game changer)
- response channel options
- trials (one week, one month, two months, with or without credit card)
- guarantees (30-day, 60-day, lifetime, unconditional, etc.)

Booklet messaging

The main characteristic of an order generation self-mailer booklet is the length. They typically require long copy because in order to get people to buy your product or service, you need to answer all of their questions.

An order generation message would lead with a major benefit, but it wouldn't stop there. You would also need to include every other benefit you could think of to build your case. Often these benefits would be tied to specific features which helps to substantiate your claims.

Direct Mail Formats: A Strategic Approach

At the same time, you will be looking for ways to build your credibility. This can be done through demonstration, supporting charts, photographs, endorsements and testimonials.

Order generation packages may include many testimonials – often with photos and real names.

Finally, the offer itself needs to be presented in detail which also requires space.

Personalizing your booklet

At a basic level, you need to personalize an outside panel for postal delivery. But you can do more than that.

You can create your cover with digital printing and personalize the entire front and back cover. Depending on how your booklet is being created, you may even be able to personalize the inside spread as well.

Many catalogs also personalize the order form which are either part of a page or created separately and bound into the booklet.

Common applications

Catalogs - The most common application of the booklet is the catalog. We are familiar with catalogs as consumers but you should know they require very specialized marketing skills to produce successfully.

Educational Mailers – While many conferences, seminars and other training programs are promoted with self-mailers (using 4 or 6 pages), some require longer form messaging which would require a booklet format.

Complex Product Mailers – Some products require a great deal of explanation to make a sale. If you are trying to close a complex product sale, you may need a booklet format.

Newsletters – While not normally used for generating response, printed newsletters provide educational information for your target audience while at the same time, position you as an expert in your field. Of course, today email newsletters have replaced many printed newsletters.

Magalogs – This is a very specialized format for order generation. Magalogs are a combination of magazine and catalog – meaning the booklet will contain a mix of articles and product promotions.

9. The Dimensional Mail Package



The “wow factor” sets the dimensional package apart. It looks important, and it gets noticed.

Generally used for business-to-business applications when the target prospects are high-level executives who are difficult to reach, the dimensional mail package provides the intrigue you need to bust through the gatekeepers.

Dimension mail comes in many forms – mailing tubes, boxes, containers, bags and anything else you can imagine.

The package may include product samples, free gifts or a three-dimensional, pop-up promotion piece. It may also contain promotional items that prospects are likely to keep on the desk or office wall, such as a paper weight or calendar.

This format is most often used to target prospects who are hard to reach, such as high-level executives. In some companies, the mail room, secretaries and other gate keepers may open or even discard mail that looks less personal or less valuable.

Dimensional mail usually gets through to its target audience.

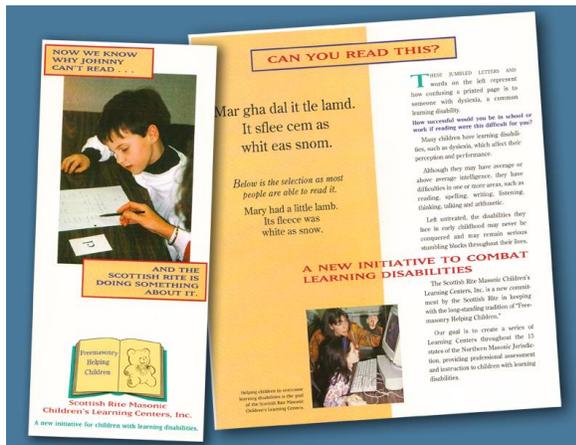
However, cost is an important consideration with dimensional mail. Some dimensional campaigns can cost \$5, \$10, \$20, even \$100 or more per piece.

Will the cost prohibit you from mailing to your entire audience? Will it be more effective to send this one expensive mail piece or a series of lower cost pieces?

While it’s true that the dimensional package can be very successful in certain situations with certain audiences, you must consider whether it fits your situation and strategy.

Don’t be so dazzled by the “wow factor” of a dimensional package that you forget to consider your return on investment.

10. The Fundraising Letter Package



The fundraising letter package is considered the standard for direct mail fundraising.

This package is commonly used for both new donors (donor acquisition) and donor renewals.

It features an outer envelope, a 2-page letter, a donation form, a reply envelope and a brochure.

For donor renewals, the brochure could be optional. Brochures are usually used to

introduce the organization and current donors are already familiar with the organization.

At the very least, the brochure could be tested with donor renewal mailings.

The fundraising letter package is usually designed for a #10 envelope, but you can also try 6×9 or 6×11 envelopes (which gives you more space without increasing postage costs).

But many fundraising mailers also go smaller. There are a whole range of smaller envelopes (like an A6 or A7) which convey a more personal or intimate look – certainly different from other mail.

Mailing components

Here's a breakdown of the fundraising letter package components:

- outer envelope (usually #10, but also 6×9, 6×11, A6 or A7)
- letter (usually 2 pages but could be longer, but normally shorter)
- brochure (ranging in size/folds)
- donation form (often fits into window of outer envelope)
- reply envelope (usually courtesy reply – ask the donor to pay for postage)

Using direct mail incentives

Fundraising mailings often include premiums, or free gifts, as incentives for making a donation.

While premiums can increase donations, there is usually a cost associated with the premium which will cut into the donation amount.

The use of premiums makes sense for new donor mailings because the primary goal is to get more donors. The actual dollar amount donated is less of a concern.

Direct Mail Formats: A Strategic Approach

For donor renewals, premiums are best used to increase the donation amount above what the donor has previously given.

There are two types of premiums – front-end premiums and back-end premiums.

Front-end premiums are free gifts that are put in the outgoing mailing package. These may include a set of personalized mailing labels, or a decal, or holiday cards. The idea is that if you give potential donors some type of gift, many will want to reciprocate.

Back-end premiums are free gifts that are given only to those who donate. A premium is promised in return for any gift or a minimum gift amount.

Both premium approaches can work, but should be tested.

Designing your mailer

Non-profits have experimented with many different creative design options.

It starts with the envelope. Many fundraising envelopes use teaser copy to let recipients know what's inside. Some non-profits prefer to avoid teaser copy and will only provide an organization name and address in the return address area.

Some have also experimented with blank envelopes leaving the contents of the envelope a mystery to the reader. And some have tried to use handwritten envelopes (both actually handwritten and simulated handwritten).

Similarly, non-profits wrestle with the issue of window envelopes. Window envelopes reduce the appearance of personalization, but they also reduce your costs.

Overall, designers need to be careful not to make the package look too slick, polished or expensive. Donors want to believe you need their money, but if the direct mail solicitations you send are expensive looking, you could experience some backlash.

Using personalization

This package can be personalized in a number of ways. You can personalize the outer envelope, the letter and the donation form.

However, to personalize all three elements may be costly. Usually, this requires multiple machine setups and physical matching of letter/reply to the envelope.

If budget is a concern, consider using a window envelope, then personalizing either the letter and/or the donation form to be positioned in the window envelope.

11. The “Every Door Direct Mail” Mailer

In 2011, the US Postal Service introduced Every Door Direct Mail (EDDM) as way of making direct mail easier and more affordable for the local business owner.

With reduced postage and a simplified mailing process, an EDDM retail flyer is an excellent choice for local restaurants, retail stores and other local businesses whose customer base is primarily local residents or businesses.

With EDDM, you can mail to just the neighborhoods closest to your location. You simply

- select the so-called Carrier Routes for your neighborhood
- print the right quantity as indicated by the Carrier Routes
- add some paperwork
- deliver to your local post office
- and your mailer is delivered

What makes EDDM different?

There are three advantages to EDDM over regular direct mail – simplicity, cost and mailer size.

1. Simplicity – EDDM can be mailed without a list and without any addressing. The post office will mail to every household and/or every business along your selected carrier routes.

2. Cost – Because there is no list or addressing needed, your costs will be lower. Postage is also at the very lowest price for any commercial mail, but it is very similar to what you would pay for so-called Saturation Mail – which like EDDM reaches every address in a carrier’s route.

3. Mailing size- The size of an EDDM mailer is also worth noting. For all other mail, the basic letter rate applies to pieces up to 6-1/8x 11-1/2 inches. Anything over that (from the either side) and your mailer becomes a “flat” which can nearly double the postage. But EDDM mailers must be the larger “flat” size.

Format sizes

In most cases, the post office has given you every financial incentive to keep your mail piece smaller than 6-1/8 x 11-1/2. Going larger may give you more exposure with your audience, but you will pay for it.

With EDDM, however, you have no choice. You must mail the larger flat. It’s required – which is ironic given it costs less than regular mail. Every Door Direct Mail mailers must be larger than 6-1/8 x 11-1/2 inches but no larger than 12 x 15 inches.

Direct Mail Formats: A Strategic Approach

Think about how more attention you will get in the mailbox with 12 x 15 inch mail piece.

Retail promotions need urgency

The most successful retail promotions are those with a “limited time” opportunity. Discounts on their own are not enough to generate meaningful traffic. What you need are discounts with a sense of urgency.

Events are good because they have a built-in deadline. End of year, post-holiday and other clearance sales work before they also have an understood deadline (that the good stuff will go first).

Personalization

If you are looking for personalization in your mail, Every Door Direct Mail is not your choice.

In fact, it’s just the opposite. There is no name or address on your mailer. Just a generic indicia placed in the postal area of the mailer.

When your mailers are given to a postal carrier, the carrier knows to distribute the flyer to every household and/or business location on the carrier route.

Direct mail personalization

What separates direct mail from other forms of advertising is the ability to individualize, or personalize, your message. Although many direct mail campaigns are not personalized, you do have the potential to personalize many elements in your direct mail package.

This of course will vary greatly from one mailer to another. At minimum, you need to personalize your mailer just to get it to the desired location. But personalization goes further than just a delivery address.

As you plan your direct mail format, think about ways you can personalize and begin to factor in the value and cost of various levels of personalization.

Levels of personalization

Let's look at a **direct mail letter package**. A letter package can be personalized in several places. You can place the recipient's name and address:

- on the outer envelope
- on the reply card
- in the letter address box
- in the salutation
- in the text of the letter

That's five places where personalization could be placed. While some of these elements can be addressed together at the same time, often multiple addressing involves separate setup and runs – which can add to your costs.

Now consider a **catalog**. Obviously, you need to personalize the back cover just to get it delivered, but why not take another step and personalize the order form on the inside of the catalog. You will be making it easier for the recipient, but you will also be making it easier and more accurate for your order takers and data processing people.

Now let's take a look at a **postcard**. Again you need addressing to get it delivered, but if we could also put the recipient's name into the message on the other side of the postcard? This is made possible by digital printing or variable data printing.

It used to be that the personalization described above was unusual and very expensive, but technology has made this accessible to pretty much everyone.

But some direct mail packages routinely have more personalization than others. For example, some letter packages may include a personalized envelope, a personalized reply form and a personalized letter, while a postcard might only have personalization in the address box.

Direct Mail Formats: A Strategic Approach

Some catalogs use a personalized address box for delivery but also use a personalized order form in the middle of the book.

Some direct mail pieces go further, inserting the person's name or address into various sections of the letter or self-mailer. Personalization has even been used as part of an illustration or teaser copy on the envelope.

A question of return on investment

In general, the more personalized the package, the more expensive it will be to produce.

But will this added level of personalization also produce more responses? In many cases, the answer is yes, people do respond better to personalized packages.

The more important and more difficult question is return on investment. Will the increase in response offset the additional costs of personalization?

When full personalization makes sense

A fully personalized package should look like one-to-one correspondence. The envelope should be a standard #10 (but with no teaser copy), personalized addressing and first-class postage (often a stamp). The letter and the reply form should also be personalized.

Personalization can be most helpful when writing to top executives in large companies where the mail room screens the envelopes and assistants screen the contents.

However, you can also achieve a first-class image with lower levels of personalization. For example, you can personalize the outer envelope but leave the other elements generic. Or you can personalize the reply card and have it show through an envelope window.

Using titles instead of names

In some cases, you may decide to target your audience with titles or job functions instead of names. This is sometimes necessary because names are not always available – especially when you are targeting lower level job titles in a company.

While less desirable, our experience has shown that title addressing can still generate response.

There actually may even be some advantage in certain economic cycles or industries where job turnover is frequent. Title addressing will ensure that you reach the current job holder.

Direct Mail Formats: A Strategic Approach

The worst of personalization

Many theorize that personalized mail works well because people like to see their names in print. If that is true, imagine how they feel if you misspell their names or assign the wrong gender prefix to their names.

Errors in personalization – especially when they are repeated time and time again – can destroy your opportunity to acquire and retain customers.

Of course, some direct mail pieces carry personalization to absurd or offensive levels, particularly when a marketer uses financial or health information that may invade a person's privacy. These excesses represent the worst of personalization.

The best in personalization

Technology today allows us to do some amazing things with personalization. But be careful to recognize when your personalization has become nothing more than a technological gimmick.

Real success in personalization is less to do with technology and more to do with content.

Start by identifying the needs and interests of the individuals on your list (or at least segments of your list). Then develop your message around those needs and interests.

The more personal and relevant you can be with your messaging, the more it will resonate with your target audience. And the more response you can expect.

Direct Mail Formats: A Strategic Approach

About McCarthy & King Marketing, Inc.

In business since 1988, McCarthy & King Marketing, Inc. has extensive experience helping clients with lead generation, order generation, fundraising, retail traffic-building, trade show support, marketing collateral and marketing surveys.

The cornerstone of our marketing advice and programs is **direct response**. We believe that every marketing program – not just direct mail and email – should have a direct response component that allows you to track and measure results.

If you don't measure it, how do you know if it's working?

Our services fall into two broad categories: copywriting/creative and full-service marketing programs.

Copywriting/Creative

Our experience covers a range of assignments that include sales letters, direct mail packages, self-mailers, postcards, survey mailers, websites, email promotions, brochures, annual reports, sales kits, newsletters, white papers and press releases.

We provide **copywriting** as a solo service (we can work with your designer if needed) or **copywriting and graphic design** as a full creative service.

Although most of our assignments come directly from our own clients, we also work on a subcontract basis with several advertising/marketing agencies.

Full Service Programs

We are known for our direct marketing experience, but we don't sell direct mail programs or email programs. We develop unique marketing programs that utilize only the most appropriate strategies. Only if direct mail or email makes sense do we recommend them.

Our programs all start with a strategic planning component followed by creative, production and response analysis.

We have experience with direct mail, email, direct response advertising, websites, landing pages, Google/Yahoo search marketing, public relations and collateral.

We also provide these services on a consulting basis.

For an estimate or to discuss a project, call Bob McCarthy at 508-473-8643, or send him an email at bob@mccarthyandking.com.

About the Author



Since 1980, Bob McCarthy has been a copywriter, consultant, creative director, project manager, list researcher, and direct marketing instructor.

After a four-year stint as a direct mail copywriter for The DR Group, Bob started freelancing in 1984 working with businesses, non-profits and agencies.

Over the years, he expanded his knowledge and experience to include direct marketing strategy, mailing list research, offer development, format selection, vendor relations, budgeting and back-end marketing.

Then with the emergence of the Internet, Bob and his firm, McCarthy & King Marketing, further expanded their services to include email, web and other online marketing activities.

He is the author of multiple ebooks on direct response marketing. He is also the publisher/writer for his blog, [The Direct Response Coach](#).

Bob is a past president of the New England Direct Marketing Association (NEDMA).

In addition to his client work, he spent 10 years teaching direct response copywriting at the Bentley College (Waltham, MA) Direct Marketing Program.

He is a 1975 graduate of Northeastern University majoring in Journalism.

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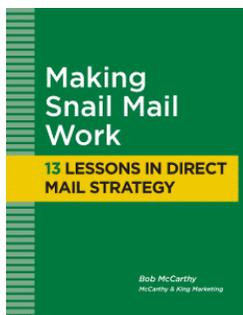
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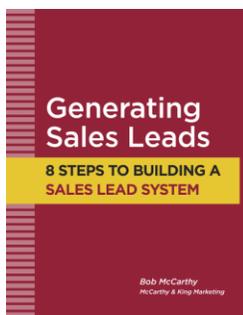
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