Developing an In-house Mail List

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Direct mail is a valuable tool for businesses and organizations to keep in touch with active customers or members, re-establish a relationship with inactive customers or lapsed members, and introduce the business or organization to prospects. Direct mail can be combined with social media outreach for greater effectiveness together than either used alone.

A direct mail campaign requires an attractively designed mail piece, content, and a mail list. If asked which of these three things – the design of the mail piece, its content, or who it is sent to – is the most important in generating response, what would you say? You may be surprised to learn that who it is sent to (the mailing list) is three times as important as either design or content in generating response.

Types of Mail Lists

There are two broad categories of mail lists: house and rental. A house list is the one you develop yourself from your customer and prospect contact information. A rental list is one obtained through a third party that essentially licenses its use for one or multiple mailings. (Note that even though it is common to refer to "purchasing a list", this is not accurate. Use of a list is granted for one or multiple mailings, with penalties imposed for using the list more times than agreed upon. An exception is made for responses received to a mailing. Those names can be integrated into a house list without penalty.)

Rental lists are compiled using various sources for the information. The cost of renting the list (usually stated as a cost-per-thousand-names) depends on the data source, how many times it will be used (one-time or multiple times), and sometimes how much additional information besides name and address is included (called selects).

The least expensive rental list is compiled from secondary public information sources such as professional licensing databases, real estate transactions, or census data. These are further subdivided into residential or consumer lists and business lists. A residential list may include names (called a named list) or may contain a generic descriptor such as resident or occupant in place of the name.

A response list is compiled from people who have made purchases or responded to offers, such as a magazine subscription list or survey

respondents. A specialty list contains names and addresses of a specific nature, such as people who purchased service contracts for a particular vehicle make and model. Most specialty lists are privately owned and require the list renter to meet criteria for list use (such as approving the mail piece) before agreeing to rent the list.

Developing an In-house List

For most businesses or organizations, a house list is a valuable business asset that can easily be developed. When correctly structured, aggressively maintained, and frequently used, it can be the foundation of an outbound marketing effort that builds customer loyalty and provides strong sales leads.

A house list is a collection of individuals or businesses that have at least one characteristic in common that is relevant to the product or service offered by a business. For individuals, the characteristic might be demographic – age, gender, household income, or geographic proximity. For businesses, the characteristic might be industry (represented by SEC or NAICS code), sales volume, location, or years in business.

When a mailing list is enhanced with behavioral information (date of last purchase, total purchases over a given time period, types of products or services purchased) it becomes a database that can be analyzed to predict buying patterns. This in turn can be used to tailor the sales message so it has direct and relevant appeal to each individual or business on the list.

Mail Accuracy

A house list is most effective when it is accurate. Accuracy is related to the structure of the list, data entry standards, and how often the addresses are updated. An accurate house list contains names that are spelled correctly; addresses that are up-to-date, complete and conform to United States Postal Service (USPS) standards for abbreviation and punctuation; and has no duplicates.

Mail list structure

The structure of the mail list is the foundation for accuracy. Each element – components of the

name and address plus any additional information – needs its own separate field sized appropriately for the information it will hold. For the greatest accuracy, include a field for all possible situations, even if they occur rarely.

The basic structure for a house list is first name, last name, street address, city, state, and ZIP code. But before determining the structure, think about how the list might be used.

- Will you ever send invitations to events that require a social form of address (Mr. and Mrs. Brian Taylor; The Honorable Patricia Nelson, Mayor; Pastor Jimmy Stewart)? If so, you'll need a field for title.

- Will you ever want to use an inside address with the first name of an individual and the spouse (Dear Brian and Leticia, Dear Patsy, Dear Jimmy)? You'll need additional data fields for alternate first name and spouse name.

- Will your list contain a mix of individuals and businesses? Then you'll need a company field to enter the names of businesses.

- Will you need to mail to Canada, Mexico, or another foreign country? You'll need a country field and may have to include additional fields to accommodate foreign address formats.

For accuracy, a field should contain only one type of information. That means a company name needs to be in its own field, not entered as a first or last name. For foreign addresses, it is extremely important to have a separate country field.

Data entry standards

After establishing the structure, develop written data entry conventions so everyone who updates the mailing list is doing the same thing. Of critical importance is adopting the USPS address abbreviations for street type (St., Ave., Blvd., etc.) and secondary address elements (Ste., #, Sp., etc.). These can be found in USPS Publication 28 Postal Addressing Standards available online (http://pe.usps.gov/text/pub28/welcome.htm) or as a PDF (http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf). Using USPS standards significantly

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increases the ability to deliver the mail piece to the intended person at the correct address.

Written conventions are also needed for mail list elements unique to your house list. Decide how to handle titles so they are consistent. Will you use CEO or Chief Executive Officer? VP of Sales or Vice President of Sales? Spell the word and or use an ampersand (&)? Decide how to handle data elements that are longer than the allowable field length – create an abbreviation, or let the element be truncated during addressing (that is, be cut off when the space runs out).

Move update

We are a very mobile population. The U.S. Census Bureau reports that on average, about one in six Americans move every year. However, some demographic segments move more often — about one-third of renters move each year, compared to about 10% of homeowners, and about one-third of adults in their early 20s.

For this reason, and because the USPS requires it as a condition of allowing mail to be sent at a reduced postage rate, the addresses in a house list need to be kept current. One way to do this is to mail at least every 60 days and use an ancillary service endorsement (ASE) on the outside of the mail piece. The ASE tells the USPS what to do with the mail piece if the individual or business is no longer at the address you have.

Another way is to compare your mail list to the database maintained by the USPS of individuals and businesses who have turned in change of address notices. We provide this service, called move update verification, to our customers.

Above all, you must modify your house list with the updated address information. It does no good to receive the information if it doesn't make it into your house list.

We're Direct Mail Experts

Call on us to help you keep your house list current. We have been providing direct mail services to our customers since 1980, and we are good at what we do. For more information or to set an appointment, give us a call.

"Above all, you must modify your house list with the updated address information."

Merge, Purge, and Duplicate Removal

If you are compiling a house list from more than one source (such as the customer and prospect lists from several outside sales people, or a customer list and vendor list), you need to know about merge, purge and duplicate removal. In the merge/purge process, two or more name and address files are combined (merged) into one list and duplicate records are identified and deleted (purged). De-duplication (often called de-dupe) is the same process but using only one list. The main benefit of merge/purge and de-duplication is to ensure that a single individual or business receives only one mail piece.

Identifying duplicates requires a set of rules to define what constitutes a duplicate. Addresses can be compared to addresses only; names to names only; or names and addresses to names and addresses. Matches can be exact (meaning every element is identical) or near (meaning Bob Peterson or Rob Peterson would be considered a match to Robert Peterson).

Merge/purge and de-duplication are best done with mail list management software. We offer this service. If your house list has not been checked for duplicates recently, we suggest you contact us to arrange for the service.

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Mail List Software

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If you are creating a house list, you have several options for the software to use. For the most control of the list and its data, we recommend a database manager like Access which is specifically designed for mail lists/databases. Access allows for the creation of custom data entry forms, ensuring that data entry standards are followed. Information can be retrieved based on specified selection criteria, and it allows for the creation of custom reports.

An alternative to Access is Excel, a spreadsheet application. Like Access, Excel stores data and generates reports. Both programs export files that can be imported into the mail list management software we use to prepare your mailing list for addressing. And because Excel is easier to learn than Access, many businesses prefer it for maintaining the mailing list.

Excel is a good tool for a mail list, provided the user recognizes two limitations that can affect the accuracy of addressing. The first is that you can change the sort order of a single column while leaving all the other columns in their existing order. Here's what this means: if you change the order of the "last name" column to be alphabetical, but fail to highlight all the associated columns, the last name will become separated from the first name and address. If you print labels from the file, none of the names will match the addresses.

The second is that when you "hide" rows or columns to change how the mail list displays, you are not eliminating the hidden data. It is still there, and so will be included in a file you provide to us for mailing.