



FIND THE RIGHT LEADS
WITH EASY-TO-USE
SELECTION OPTIONS



USE ADVANCED
FEATURES TO SAVE
MONEY AND IMPROVE ROI



INTEGRATE LIST
ORDERING INTO
WEB-TO-PRINT SITES



Direct Marketing Fundamentals from USADATA

List Ordering Made Easy

Helping you achieve your marketing goals

USADATA has delivered over a billion targeted sales leads from multi-sourced databases that have helped more than 100,000 businesses find new customers more easily and profitably.

The Internet has revolutionized many business processes. This whitepaper focuses specifically on how to take optimal advantage of online applications to select and order targeted, multi-sourced mailings lists and sales leads to fuel direct marketing campaigns, and acquire new customers profitably.

Specifically, you will learn about:

- Using select filters to easily and accurately define your target audience
- Maximizing both ease-of-use and control by configuring a solution to meet your needs
- Taking advantage of built-in features to ensure best practices and a higher ROI
- Integrating self-service list ordering into your Web-to-Print site



1) Research Your Target Audience

With the advent of powerful, user-friendly list ordering websites over the past decade, defining and reaching your target audience has never been easier. All you need to do is specify the geographic area(s) for your campaign, then choose the targeting criteria most appropriate to your product or service, review the resulting counts, and place your order. Let's break down each step and examine the various options typically available with online list ordering platforms.

1.1) Choose a Database

The most commonly used databases for direct marketing campaigns include:

- Consumer – names and addresses of U.S. adults based on demographics and psychographics
- Business – business names, addresses, and phone numbers of U.S. companies and decision makers
- Occupant Lists – all addresses within a geographic area
- New Homeowners – contact names and addresses of new homeowners
- New Movers – contact names and addresses of both new homeowners and renters

1.2) Select Your Geographic Area

Most online systems allow you to target any U.S. geographic area by:

- Zip Code
- City Name
- County
- Metro Area
- State
- Radius around an Address

Advanced options such as “Closest X records around an address” may also be available via select platforms (more on those later).

1.3) Define Your Target Audience

You can use multiple filters to pinpoint the people or businesses most likely to purchase your product or service. The idea is to focus in on your best prospects so your direct marketing campaign generates the most leads and greatest return on investment (ROI). The more filters used, the lower the count of available records. You do have the opportunity to refine your selections so that you can balance your desire to target tightly (for best ROI) with having enough qualified leads to launch a campaign.

The filters available for targeting are unique to each database. Below are the core filters typically available to the public for Consumer, Business, and New Homeowner databases via list ordering systems. (Note: more elements are typically available for Resellers and client-specific configured platforms.)



Consumer

- o Estimated Household Income
- o Adult Age
- o Gender
- o Homeowner vs. Renter
- o Home Market Value
- o Dwelling Type
- o Length of Residence
- o Credit Card User
- o Mail Order Buyer
- o Lifestyle Interests (hundreds of choices)

Business

- o SIC Code (business type)
- o Employee Size Range (at location)
- o Sales Volume Range (corporate)
- o Job Function
- o Year Business Started
- o Home-Based Businesses

New Homeowner

- o Deed Recording Date (1 to 6 months in past)
- o Mortgage Amount
- o Purchase Price
- o Dwelling Type (condo vs. single-family home)
- o Transaction Type (new construction vs. resale)

Choose any combination of filters and their available options. For example, using an online system, for any geographic area you could select “Homeowners age 40 to 65 with a household income above \$100,000” or “Manufacturing businesses with a sales volume of \$10 to 99 million in business for at least 5 years” or “New Homeowners who’ve purchased a home within the past 6 months for at least \$300,000”.

1.4) Get Count Results

Once you have selected both your geographic area and target audience profile, an online system will query the database for the number of records that meet the criteria you specified. Most take between 5 and 15 seconds for the results to be calculated and displayed. If your count is too low, you can consider expanding the geographic area, or perhaps loosening the filters to generate more leads. For example, if you were to filter based on a household income greater than \$100,000 and did not receive your desired number of leads, you could widen the parameters to include households with an income greater than \$90,000 (assuming that segment also represented a qualified lead). You can repeat this process until you have your desired quantity of leads.



1.5) Securely Purchase Your List

You may select all available records or a subset of the available records by entering the quantity you wish to purchase. When you select your quantity, the price for the order will automatically be calculated in total, and as a price per record (lead). Note that typically the more filters you use to define your audience, the higher the price per record.

You may then securely enter your contact and credit card information in order to pay for the list. Once the credit card payment has been accepted, you will receive an order confirmation email. Typically within 10 minutes you will receive a second email with either a link to download your mailing list, or with the list as an attached file to the email.

With the list saved to your computer, you can print labels or merge the data into your letters or postcards. Or, you can provide the list to your printer or mail house fulfilling your campaign.

Soon your campaign will be in the hands of your target audience and new leads will start coming your way!

2) Configuring an Online Solution to Meet Your Needs

The workflow described above is common to just about any online list count and ordering system. Solutions however can be tailored to meet the specific needs of resellers or networks of affiliated organizations such as franchises or the sales and distribution channels of a larger corporation. For example:

- A travel agency with 500 franchisees looking for an online list solution for its agencies
- A large insurance company needing a way for its agents to order the right leads for mail campaigns promoting specific products
- A marketing service provider wanting a way to easily run online counts for its customers and order targeted leads quickly
- A printer already offering an online print ordering solution to its large customers wants to expand this solution with list ordering capabilities
- Advanced options such as “Closest X records around an address” may also be available via select platforms

The benefits of configuring a list solution or platform to meet the needs of the user base should not be underestimated. They go far beyond offering high-quality lists through a branded website. Many of these benefits are outlined in the next section which describes the types of advanced features available with online list applications.

3) Benefits of Advanced Features

Advanced features of online list ordering platforms – whether for use by affiliated organizations or by a reseller’s own staff on behalf of its customers – generate several key benefits.



3.1) Maximize Direct Mail ROI

The bottom line for any direct mail campaign is whether or not it provides a tangible result in terms of hot leads (responses), sales, and/or branding, relative to the cost of the campaign. The goal for most organizations is to earn a profit for every dollar invested in the campaign (including list, printing, postage and mailing services costs).

Most experts believe that the list is the most important factor in a successful mail campaign. What this means is that the list should be targeted so that the recipients represent the prospects with the highest likelihood of purchasing the product or service offered. For organizations with decentralized users who have limited direct marketing experience, the best way to ensure proper targeting in an online list application is to use what some call QuickPicks. QuickPicks are pre-defined segments, often based on research or prior testing, that represent the best potential prospects for a particular product or service. They appear in the workflow of a client's list ordering platform and are designed to be both simple and effective. So, for example, in the context of a solution sponsored by an insurance company for its agents to use, the profile "homeowners age 40 to 65 with income above \$100,000" might be labeled "Best Life Insurance Prospects" and be listed as an option in the Demographic Selection page. When the user clicks on this QuickPick (after selecting their geographic area), a count is automatically generated. So, QuickPicks provide a simple way to choose the right targets for a particular direct mail campaign, thereby maximizing return on investment.

3.2) Minimize Waste and Negative Branding

Another feature with significant cost and branding benefits is called "Suppression". Suppression means removing select name and address records from a new list being purchased for one of two reasons:

- 1) That record is already an existing customer
- 2) That record was purchased recently

Advanced online list applications suppress these records in real-time. In other words, when generating a list count, the number of available records (leads) displayed reflects the removal of customers and/or recent leads ordered. This means there will be no need to remove records after the list has been purchased, and that the quantity displayed is a true representation of new leads available.

3.3) Customer Suppression

Companies with their own customer list want the names of current customers excluded from prospecting/acquisition campaigns. One way to do this is to enable Customer Suppression. Most list ordering applications have the flexibility to automatically remove a client's customers in real-time when generating new list counts.

The key benefits are to reduce waste, and more importantly, to preserve branding by excluding customers from new customer acquisition messaging and campaigns.



3.4) Prior Order Supperssion

Suppression is managed automatically based on the business rules programmed into the ordering list platform. The most basic rule is to either choose individual past order to remove, or suppress records from all prior orders within a certain time period, such as 90 or 120 days.

Another suppression rule may be used for a client-configured solution in which the corporate sponsor wishes to limit the records available across users with non-exclusive territories. For example, Corporate would like to block records purchased by Agent A for 30 or 45 days so that they will not be available to other Agents. This gives Agent A a chance to get the lead and close a sale before other members of the sales force or franchise network are allowed to prospect to the same recipient.

In either case, for new customer acquisition campaigns, mailing to an existing customer or prospect who's been recently contacted can be wasteful and can negatively impact your brand. Customer and Prior Order Suppression will help ensure a higher ROI.

3.5) NCOA

USPS *Move Update* standards require that a file be processed through NCOALink within the past 95 days to qualify for discounted postage rates. While most list ordering platforms offer data that is processed through NCOALink monthly, some furthermore offer convenient ways to have a list ordered more than 95 days ago undergo NCOA processing. This can be accomplished in as little as one click.

4) Integrating List Ordering into Web-to-Print Solutions

For the past few years, online systems known as "Web-to-Print" have grown in popularity. Print and Marketing Service providers use home-grown or third-party online software that allows their customers to preview and order printed materials through a customized website. Printed materials include for example business cards, brochures and, most relevant for direct marketing purposes, postcards, letters and other mail pieces.

Web-to-Print solutions can be enhanced with list ordering capabilities transforming a print-only solution into a turnkey direct mail campaign-ordering solution.

5) Conclusion

A variety of online list ordering solutions are available to all types of businesses -- from small companies needing a targeted list to large corporate or franchise network needing a combined list ordering and print solution.

By working with a list solution provider, an application can be easily configured to meet your direct marketing needs that will result in enhanced branding, response rates, and a higher return on investment.