

## CFAM4.3.5

### Implement a direct-mailing marketing programme



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#### Overview

This is about planning and implementing a direct-mailing programme. It includes agreeing the objectives for the programme, including the selection criteria for the target market, planning and implementing the programme.

This unit is recommended for marketers responsible for planning and implementing direct-mailing programmes. Such marketers might be employed within an organisation marketing its products/services in this way, or work for an agency/consultancy.

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#### Performance criteria

- You must be able to:*
- P1 confirm and agree the objectives for the direct-mailing programme, including the levels of fulfilment sought
  - P2 determine and agree a project plan setting out the actions, resources, timescale and budget for the direct-mailing programme
  - P3 identify the target population correctly, ensuring that it is in line with the overall marketing strategy
  - P4 ensure that the materials to be mailed convey the required marketing proposition, are personalised correctly where required, and include an appropriate response device with coding to identify the source of any response where necessary
  - P5 ensure that the materials are of an agreed shape, size and weight
  - P6 approve the materials to be mailed with the relevant person(s)
  - P7 where necessary, test the materials and incorporate approved amendments correctly
  - P8 identify and create data collection and reporting systems to fulfil the monitoring and quality assurance requirements of the direct-mailing programme
  - P9 ensure that materials are mailed correctly, in line with the agreed plan, addressing any variances against the plan promptly and correctly
  - P10 ensure that resources are available to handle the forecast response
  - P11 monitor responses to the programme and evaluate fulfilment achieved against the
  - P12 review the outcomes of the direct-mailing programme and use your analysis towards informing future activities

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#### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 the role of direct-mailing and its place within an overall direct marketing strategy
- K2 the principal forms of direct mail, and their relative advantages
- K3 the importance of careful targeting in direct-mailing programmes and methods for achieving this
- K4 the principle sources of data/ mailing lists for use in targeting relevant consumers
- K5 the differences between direct-mailing programmes aimed at retention and acquisition and the implications of such differences when identifying suitable mailing lists
- K6 the principles of effective project management, and how to apply these to implementing direct-mailing programmes
- K7 typical data collection and reporting systems appropriate for direct-mailing programmes, and their relative merits
- K8 available postal schemes for use in direct-mailing programmes and their relative costs/benefits
- K9 methods for testing and gauging the likely impact of direct-mailing programmes
- K10 methods for managing direct-mailing databases, including the application of suppressions, and the circumstances when these should be applied
- K11 the importance of delivering within agreed budgets, and the ways of monitoring activities against plans and budgets
- K12 the importance of maintaining confidentiality of data and how to ensure that this occurs
- K13 the principles of data protection applying to direct-mailing programmes and how to apply these

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K14 legal, regulatory and ethical requirements affecting the implementation of direct-mailing programmes

*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K15 organisational guidelines affecting direct-mailing programmes
- K16 the organisation's products/services relevant to the direct-mailing programmes
- K17 the organisation's selling process and how the direct-marketing activity will support this
- K18 reporting procedures within the organisation, and key persons to be kept informed

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#### Additional Information

##### Behaviours

1. You demonstrate a clear understanding of different customers and their probable responses to direct-mailing campaigns
2. You identify clearly the value and benefits of a proposed course of action
3. You identify people's information needs
4. You present information clearly, concisely and accurately
5. You take personal responsibility for making things happen
6. You comply with legal requirements, professional and ethical codes

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