

CFAM4.3.7

Execute direct mailing processes



Overview

This is about the processes required for executing direct mail campaigns successfully. It includes the sorting, personalising, enclosing and despatch of mail, as well as the subsequent fulfilment of responses.

This unit is recommended for marketers responsible for sorting, personalising, enclosing and despatching direct mail. 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 identify the actions and timescale required to issue the materials to be mailed
 - P2 identify the mailing lists that you require for the target market
 - P3 validate the integrity of the data, ensuring that it is fit for purpose in terms of content, accuracy, layout and is free of duplicates
 - P4 identify and locate correctly the materials to be issued
 - P5 identify correctly the materials to be enclosed in the mailing, including their proper combination and order
 - P6 ensure that all mailings are collated correctly and comply with current legislation and codes of practice
 - P7 issue all mailings correctly and according to the schedule agreed
 - P8 identify promptly any variances to the agreed plan and schedule, and report these correctly
 - P9 gather and collate responses to the direct-mailing programme correctly
 - P10 review codings associated with the responses and determine response patterns correctly
 - P11 manage and measure any returned mailings correctly, ensuring that relevant records are amended accordingly
 - P12 maintain accurate and up-to-date records
 - P13 ensure that all data meets current codes of practice, and data protection legislation

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of ensuring that direct mailing is issued on time and the implications if this does not occur
- K2 the importance of maintaining confidentiality of data and how to ensure that this occurs
- K3 the information required on mailings to ensure that they reach their intended destination

You need to know and understand:

Industry/sector specific knowledge and understanding

- K4 legal, regulatory and ethical requirements affecting the issuing of direct mail
- K5 Best Practice Guidelines in Direct Mail Production relevant to executing direct mailing, processes

You need to know and understand:

Context specific knowledge and understanding

- K6 organisational guidelines affecting the execution of direct-mailing programmes
- K7 reporting procedures within the organisation, and key persons to be kept informed
- K8 the limits of your responsibility and authority, and to whom to report if these are exceeded

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Additional Information

Behaviours

1. You identify people's information needs
2. You present information clearly, concisely and accurately

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