



DEAR FIRST NAME: PERSONALIZATION AT SCALE

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YOUR PRESENTERS



Ilan Mann
Postalgia



Ryan DeGuzman
Marketing Manager, Scholastic



THE 150-MILLISECOND DECISION

- A major league batter has just 150 milliseconds to decide whether to swing at a fastball
- That's half the time it takes to blink
- Processing: 100ms | Decision: ~150ms | Swing: 150ms
- How does the brain make such fast decisions



Source: Seattle Times Mariners Science Project

TWO BRAIN SYSTEMS

Kahneman & Tversky's Nobel Prize-winning research:

SYSTEM 1: FAST THINKING

- Millions of calculations per second, automatic, intuitive
- Driving a car: speed, turns, other vehicles, pedestrians — all processed simultaneously
- Doesn't need precision, just speed and “good enough” accuracy

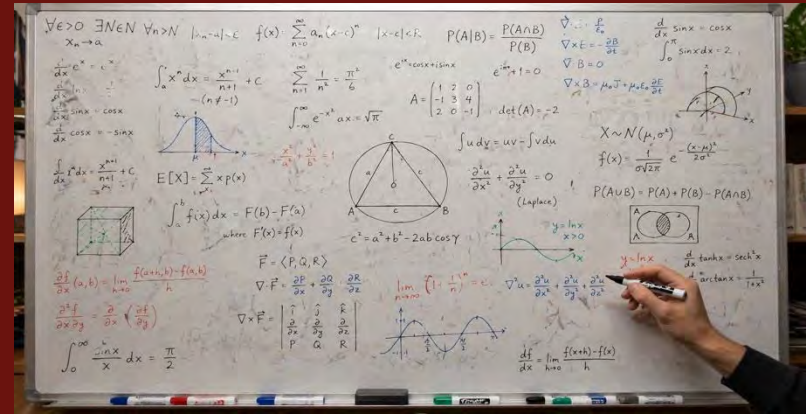


TWO BRAIN SYSTEMS

Kahneman & Tversky's Nobel Prize-winning research:

SYSTEM 2: SLOW THINKING

- Deep, accurate, complex thinking
- Answering a trivia question, solving a math problem
- When a batter faces a fastball, System 1 takes over — deciding before System 2 can catch up



SYSTEM 1'S WEAKNESS

A bat and a ball cost \$1.10 in total.

The bat costs \$1.00 more than the ball.

How much does the ball cost?

Source: Shane Frederick, cited in Thinking, Fast and Slow

The Answer

~~10¢~~

5¢ ✓

Ball = \$0.05

Bat = \$1.05

Total = \$1.10 ✓

WHAT DOES THIS HAVE TO DO WITH MAIL?

- Like hitting a fastball, the decision to open or toss mail happens in split seconds — it's a System 1 decision
- Your goal: get the person to open the envelope AND consider the offer inside

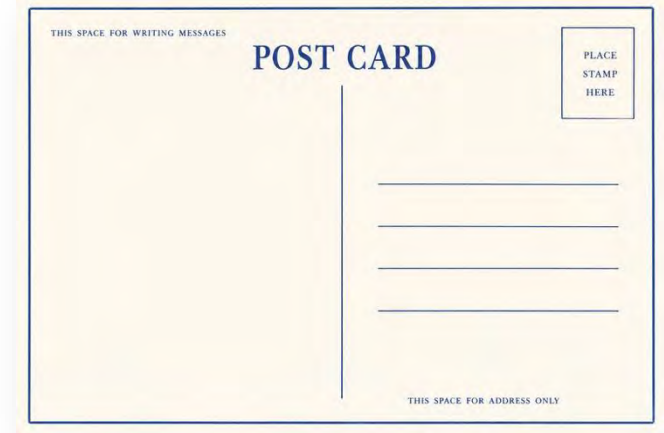
Not all opens are created equal:

- Some mail is opened with excitement and expectation
- Some mail is opened reluctantly
- If they open expecting a long-awaited check for \$1,000 and find an ad, the open was worthless — straight to trash



SO WHY NOT JUST USE A POSTCARD

- Postcards eliminate the open/toss risk — no envelope to reject
- But you also lose the opportunity for engagement
- Opening an envelope = investing time and effort
- That investment makes the recipient engaged in the task of reading what's inside
- Yes, you avoid the chance they never open it — but you also miss the chance to get them invested





What Word Catches Your Attention?

THE POWER OF A NAME

“Remember that a person’s name is to that person the sweetest and most important sound in any language.”

— Dale Carnegie

- A person’s name and personal details act as a pattern interrupt
- They break through automatic System 1 thinking and force System 2 to engage
- This matters because there are plenty of pieces of mail that System 1 would toss but System 2 wouldn’t

SAME OFFER, DIFFERENT OUTCOME

TOSS



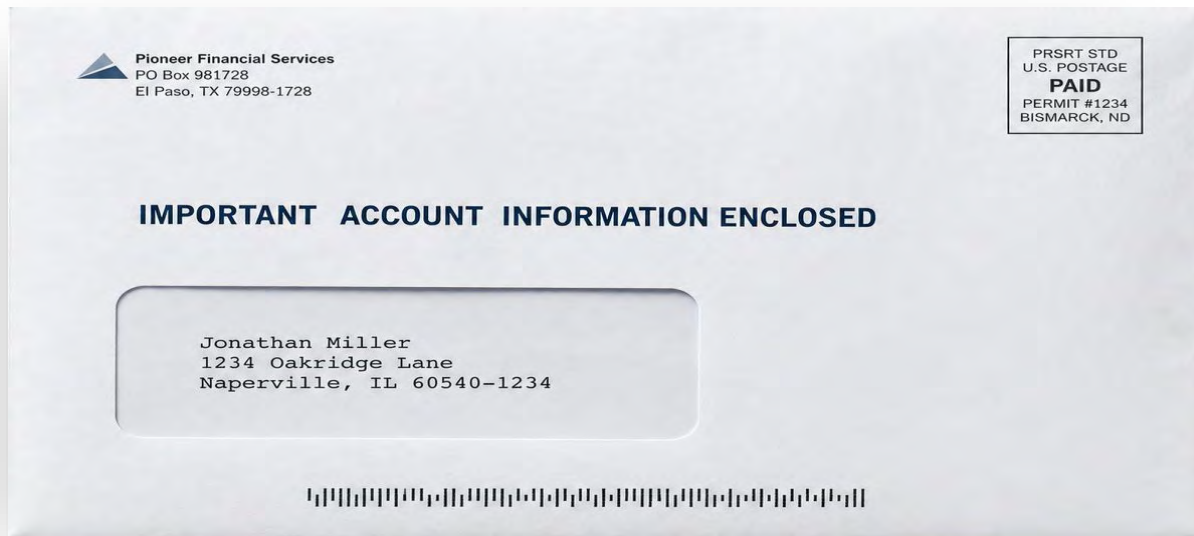
ENGAGE



THE HIERARCHY OF PERSONALIZATION



CASE STUDY: CAPITAL ONE CANADA



RESULTS: CAPITAL ONE CANADA



RECIPROCITY: GIVE SOMETHING, GET SOMETHING

CUSTOMER SATISFACTION SURVEY

Your feedback is important to us. Please take a few minutes to complete this survey and return it in the enclosed postage-paid envelope.

1. OVERALL SATISFACTION
How satisfied are you with your experience with our company?
 Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

2. PRODUCT/SERVICE QUALITY
Please rate the quality of the product/service you received.
 Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

3. CUSTOMER SERVICE
Please rate your experience with our customer service.
 Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

4. VALUE FOR THE PRICE
How would you rate the value of our product/service for the price you paid?
 Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

5. LIKELIHOOD TO RECOMMEND
How likely are you to recommend our company to a friend or colleague?
 Very Likely Likely Neutral Unlikely Very Unlikely

6. ADDITIONAL COMMENTS
Please share any additional comments or suggestions.

THANK YOU FOR YOUR TIME AND FEEDBACK!

Please take a few minutes to complete this. Thank you!

36%

Control Group
(no message, no Post-it)

48%

Message printed on cover
sheet, no Post-it

76%

Post-it note with a
handwritten request

- The Post-it did three things: drew attention, created a pattern interrupt, and triggered reciprocity by making the request feel personal

Source: The Post-it Note Study (Journal of Consumer Psychology, 2005)

THE EFFORT HEURISTIC

People judge the quality and value of something based on how much effort they believe went into creating it

The Kruger Study (2004) — three experiments:

- **A poem:** rated higher when told the poet spent 18 hours vs. 4 hours — same poem
- **Two paintings:** whichever was told to take longer was preferred — even by art experts
- **Medieval armor:** rated better at 110 hours vs. 15 hours — effect was stronger when quality was harder to judge
- When people can't easily assess quality, they lean on perceived effort as a shortcut — a System 1 heuristic



CASE STUDY: VALUABLE VS. PERSONAL

The Question

Does “expensive-looking” beat “high-effort personal”?

- A premium package signals value because people know it’s expensive — but they also know it can be mass-produced
- A handwritten piece signals effort, and people value time as expensive — they assume high-effort things can’t be done at scale

CASE STUDY: VALUABLE VS. PERSONAL

The Test

Partnered with an Ivy League university's Advancement office

- Mailed to their LYBUNT (Last Year But Unfortunately Not This) donor lists
- **Group A**: package with a premium decal
- **Group B**: handwritten envelope and handwritten card

RESULTS: VALUABLE VS. PERSONAL

Handwritten

363% ROI

33 donors, 35 gifts, \$4,900 raised, \$140 avg gift
— Cost: \$1,058

Premium Decal

-61% ROI

19 donors, 21 gifts, \$1,985 raised, \$94.52 avg
gift — Cost: \$5,134

- The handwritten piece cost nearly 5x less to produce and dramatically outperformed
- Perceived effort and personal touch was far more valuable than the actual expensive premium

CASE STUDY: SCHOLASTIC

The Questions

- Is personalized direct mail a viable and additive marketing channel for Scholastic?
- Can this tool play a role in supporting account relationships?
- Can Direct Mail be a method of engaging with customers unsubscribed from email touchpoints?

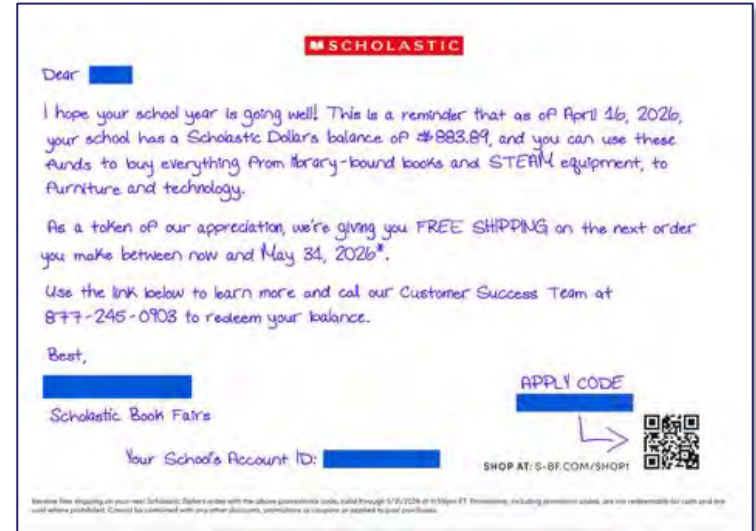
- Educators receive many emails and postal pieces from vendors and stakeholders, oftentimes with a central office administrator filtering inbound messages - does direct mail help cut through this noise?

- As discussed before, a handwritten piece signals effort, and people value time as expensive

CASE STUDY: SCHOLASTIC

Direct Mail Sample

- Notecard in envelope sent to Scholastic Dollars balance holders (administrators at elementary/middle schools)
- CTA: encourage accounts to redeem their balance towards educational materials
- Personalized to include name, account manager, balance information



SCHOLASTIC: SALES TEAM FEEDBACK

Working cross-functionally with our Sales team, these direct mail pieces also represented a holistic customer experience.

- Secondary CTA on the mail pieces was to connect with their account manager, which many accounts chose to do
- Our account team received positive feedback from accounts receiving these mail pieces
 - Appreciative of the thought of the handwritten postcard
 - Opened the door for additional conversations with our account team

Got my 1st postcard response! I just called her and she's so excited to talk that she ask I call her back as soon as her students leave the classroom in an hour 😊

Your personal hand written card is very outstanding. Not many people are taking the time to hand write anymore.
Truly appreciated!
Have a nice day!

RESULTS: SCHOLASTIC

9.7%

Blended Response Rate
Industry benchmark: 3% - 6%

*Accounts who made a purchase divided
by total mailers sent*

+22%

Increase in Average Order Value

*Compared to AOV for other marketing-
based promotions*

83x

Return on Investment

7.5% of all revenue during the offer validity window* was attributed to customers who were unsubscribed from emails

**January 5 – 26, 2026*

SCHOLASTIC: KEY TAKEAWAYS

- Direct mail is a viable channel to support other key marketing efforts
- Represented an authentic way for customers to reach out to their account managers and drive organic conversations with the sales team

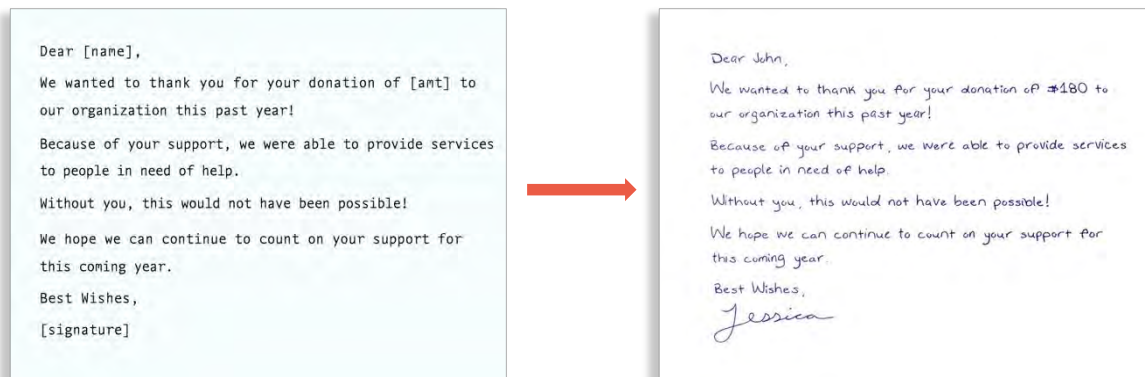
BOTTOM LINE

Personalization interrupts fast, sloppy System 1 decision-making and makes recipients consider the offer.

- Because personalized communication appears to require effort, it is perceived as more valuable.
- Because a personalized ask or offer is seen as an intimate request, it increases feelings of reciprocity.

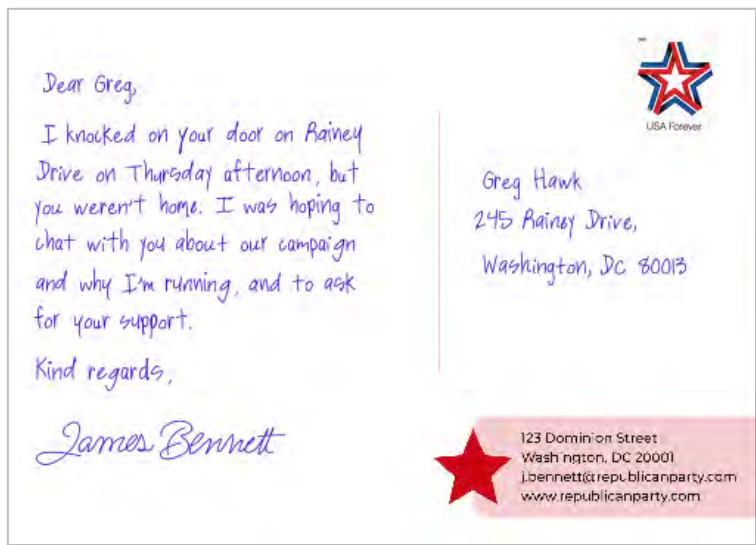
MAKE THE MESSAGE LITERALLY UNIQUE

- Use merge fields to show the recipient that this letter was written specifically to them
- Go beyond “Dear First Name” — weave personal details into the body of the message
- The more specific the details, the harder it is for the recipient to believe it was mass-produced



EXAMPLE: POST-DOOR KNOCK POSTCARD

A political candidate sends a postcard after canvassing:



- Every detail — street name, day of week — is a merge field, but it reads like a genuinely personal note
- System 1 cannot dismiss this as mass mail

PERSONALIZE THE SENDER

- Choose senders who may have interacted with the recipient, or whom they might know
- Keep senders consistent across multiple pieces and across channels
- People are more responsive to individuals than organizations
- People are more responsive to people with names like theirs



EXAMPLE: HOME SERVICES FROM A SPECIFIC CONTRACTOR

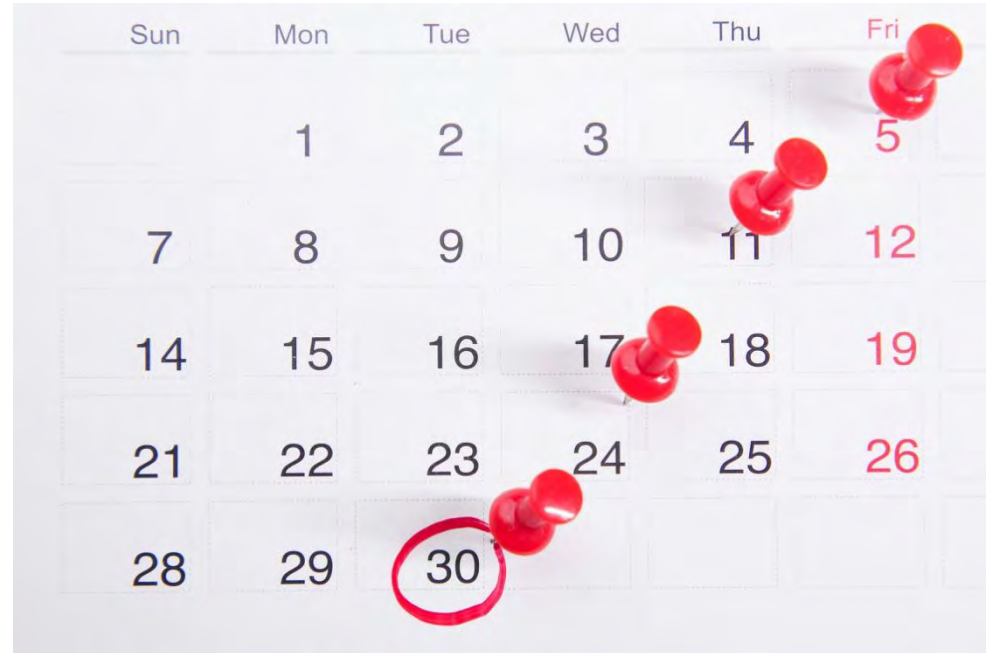
Signed by Sam (the guy who did your neighbour's roof on Pico Drive)

- Use Sam's actual handwriting and signature on the piece
- Include a phone number and email that appear to be Sam's direct line — sam@roofio.com, not info@roofio.com
- Even if they forward to the general inbox, the recipient should feel like they're reaching out to a person
- The neighbour's street name is a merge field — signals local knowledge and proximity



Personalize the Timing

- Sending pieces relevant at a specific moment makes them feel personal
- Birthdays, anniversaries, purchase dates, seasonal milestones
- Timing turns a generic offer into something that feels intentionally chosen for the recipient



Example: Donor Anniversary Card

- The date is a merge field — it's the recipient's actual donation anniversary
- Feels like the organization remembers and values them specifically
- Combines personalized timing with reciprocity — reminding them of the good they've already done



Questions?



Ilan Mann | CEO

ilan@postalgia.ink | 289-872-0522



Ryan DeGuzman | Marketing Manager

rdeguzman@scholastic.com