



Simplify to Amplify

Better Data for Better Marketing

INTRODUCTION

- How do we meet customers where they are?
- How do we maximize the use of budget, increase response, and ultimately ROI/ROAS?
- How many people are familiar with the Rule of 7?

This creates the framework of the discussion – better data driving better marketing results. Attribution.



THE DIRECT MARKETING FRAMEWORK

- There is no shortage of data available
- The flip side is it has never been more confusing in understanding data
- Solving the problem of more data AND a more clear view of data



FRAMEWORK

- Not a lack of tools, but a lack of foundational framework
- The basics of defining the framework
 - Not just reporting (rearview mirror), but predictive and insight based (windshield view)
 - Defining the correct KPIs, not what is easy to measure
 - Using AI to explain what is going on in marketing terms
- We have data, tools, and now create a framework with a systematic approach to turn data into decisions

REPORTING ≠ INSIGHT

REPORTING

What happened?

Response rate was 2.1%

Cost per piece: \$0.47

Total Revenue Attributed: \$84K

Backward-looking. Descriptive.



INSIGHT

What should we do next?

Mid-income segments drove 3X response

SE markets underperforming – shift budget

Creative B won 3 of 4 test cells

Forward-looking. Prescriptive.

Most direct mail analytics stops at reporting.

THE KPI PROBLEM

RESPONSE RATE: 2.1%

But which 2.1%?

From which audience?

To which offer?

In which market?

At what cost per response?

Response rate is a starting point, not an answer.
Without context, it's a vanity metric.

THE 4D FRAMEWORK

A disciplined sequence for turning
data into decisions

FOUR PHASES. ONE DISCIPLINE.

1. DISCOVER

Know your audience before
you design anything

2. DESIGN

Build testable hypotheses,
not assumptions



3. DEPLOY

Execute with
measurement built in

4. DRIVE

Close the loop – learn,
optimize, repeat

THE AUDIENCE GAP

DISCOVER

What Most Mailers Know

Zip Code
Income Range
Maybe Age

~5 Variables



What's Actually Available

Behavioral Segments
Psychographic Profiles
Life Stage Indicators
Purchase Propensity
Channel Preferences

600+ Attributes

The gap between these two columns is where the opportunity lives.

THE AUDIENCE COMPOSITION INSIGHT

DISCOVER | PROOF POINT

21

Locations
analyzed

7X

Variance in
response

0.5%-

3.5%
Response
rate range

Same offer. Same creative. Same mailing strategy.

The variable? Audience Composition.

Mid-income households (\$50-85K HHI, \$150-300K home value)
responded at 3-4x the rate of affluent households.

The data told a completely different story than assumption.

If you don't know who your audience
actually is at the household level,
**you're optimizing the
wrong variables.**

Discover comes first. Always.

HYPOTHESES, NOT ASSUMPTIONS

DESIGN

ASSUMPTION

"Let's try this and see what happens."



HYPOTHESIS

"We predict X will respond at Y rate because of Z – and we'll measure it by..."

The difference is testability. Testability turns a single campaign into a learning engine.

AI-DRIVEN TEST ARCHITECTURE

DESIGN | PROOF POINT

SAME SEED LIST

PATH A: LEGACY

5-10 demographic variables
Income, age, home value
Standard look-alike model

PATH B: AI-DRIVEN

600+ consumer attributes
Persona-level segmentation
AI-driven pattern detection

**The test design is the differentiator –
not the tool.**

WHERE ANALYTICS GO TO DIE

DEPLOY

CAMPAIGN STRATEGY

Audience: defined
Hypothesis: tested
KPIs: selected
Tracking: planned

THE HANDOFF

PRODUCTION REALITY

Audience: modified
Codes: dropped
Data: degraded
Measurement: broken

Most analytics initiatives fail at deployment.

Not because the strategy was wrong – because the handoff broke the data.

CLOSE THE LOOP

DRIVE



Campaigns get smarter over time. They don't reset to zero.

PREDICTIVE ROUTE SCORING

DRIVE | PROOF POINT

10 INPUT VARIABLES

Demographic Indicators
Behavioral Signals
Competitive Density
Opportunity Score
Persona Concentration
Market Penetration



COMPOSITE SCORE

Every carrier route
ranked by predicted
response likelihood

**Tells you who to mail AND
where to stop mailing**

**Analytics isn't just about finding winners –it's
about cutting losers before you spend on them.**

**The framework is straightforward.
The hard part is the data layer
underneath it.**

Let's talk about what AI actually does –
And what's still hype

AI + ANALYTICS

What works today vs. what's still
more promise than practice

AUDIENCE SEGMENTATION AT SCALE

WHAT WORKS TODAY

130M+

U.S. households classified into
behavioral segments

Available now.
Most Mailers aren't using it.

Beyond Demographics

- Psychographic profiles
- Purchase propensity scores
- Life stage indicators
- Channel Preferences
- Behavioral clustering at household level

This isn't future-state technology. It's current-state
that's dramatically underutilized.

PREDICTIVE RESPONSE MODELING

WHAT WORKS TODAY

TRADITIONAL

Need 6-12 months of historical response data > build model > predict future

High barrier to entry. Most clients can't start here.

EMERGING

Enrich with 3rd party data > build baseline model > predict without historical performance

Unlocks predictive analytics for clients who've never had enough data to model.

This is a game-changer for accessibility. Analytics shouldn't require a year of data to start.

LOOK-ALIKES WITH DEPTH + OPTIMIZATION

WHAT WORKS TODAY

TRADITIONAL LOOK-ALIKE

5-10 demographic variables
Basic pattern matching

AI-DRIVEN AUDIENCE GENERATION

600+ attributes
Non-obvious pattern detection

The “affluent paradox” was invisible to demographics. Persona-level analysis identified it immediately.

BETWEEN-CAMPAIGN OPTIMIZATION

Shift budget allocation across segments, creative, and offers based on incoming performance – the campaign learns while it runs.



HONEST ASSESSMENT

WHAT'S STILL HYPE (OR EARLY)

REAL-TIME PERSONALIZATION

Print production timelines make true real-time impossible. Trigger-based (48-72 hr) is emerging.

FULL-FUNNEL ATTRIBUTION

QR, PURLS, and match-back are improving. Closed-loop across channels remains imperfect.

GEN AI FOR CREATIVE OPTIMIZATION

Promising for copy and layout testing. Not yet validated at direct mail scale.

We'll get there. We're not there yet. And that's okay to say.

THE PRACTITIONER'S VIEW

What we learned building data-driven
direct marketing from scratch

HOW WE BUILT THIS

18 MONTHS AGO

A corporate communications company with zero analytics capability.

No data science team.
No modeling infrastructure.
No analytics revenue.



TODAY

Enterprise clients.
Predictive modeling.
Advanced audience segmentation.
Performance analytics.

Profitable within 4 months.

Here's what we learned.

ROADBLOCKS

- Senior level buy-in
- Existing relationships can be “sticky” and difficult to move
- Compliance challenges
- Trust imperative, all stakeholders need to be involved early
- Does the new reporting move the needle or same data new visualizations
- Leveraging AI and machine learning beyond “we use AI”



START WITH THE QUESTION, NOT THE TOOL

**“Why do some markets perform
7x better than others?”**

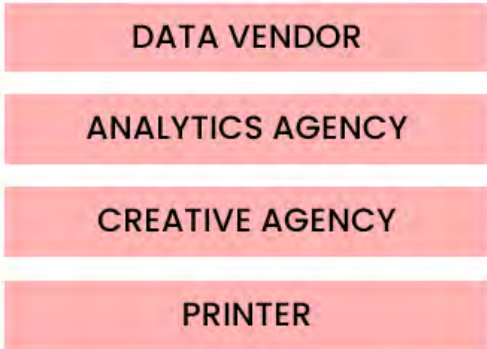
This question – asked of a spreadsheet –
produced our biggest analytical
breakthrough.

**No platform. No AI. Just the right question
asked of existing data.**

Start with the question. The tools come second.

ANALYTICS + EXECUTION UNDER ONE ROOF

MULTI-VENDOR MODEL



INTEGRATED MODEL



Fewer handoffs = fewer places for data
quality to break.

"I DON'T KNOW"

is the most underused phrase in analytics.

Attribution is imperfect.
Predictive models have confidence intervals, not certainties.
Some campaigns won't show a measurable lift.

If your analytics partner can't tell you what they're
uncertain about – that's a red flag

Intellectual honesty builds more trust than polished dashboards.

5 THINGS YOU CAN DO THIS WEEK

- 1** Audit your data – what do you have vs. what's available?
- 2** Profile one campaign audience at the household level before you design anything
- 3** Build one testable hypothesis into your next campaign
- 4** Challenge your KPIs – are you measuring what matters?
- 5** Ask your analytics partner: can you tell me WHY a campaign performed?

THANK YOU

QUESTIONS?

CONNECT ON LINKEDIN

<https://www.linkedin.com/in/jonbowman/>

<https://www.linkedin.com/in/tdgerkin/>