relevate ai

2026 PLAYBOOK

FOR DIRECT MAIL MARKETERS

Beyond the Drop

The direct mail marketer's playbook for selling performance, not pieces

Turn one-off mail jobs into measured, recurring client programs, with a four-stage framework, practical tools, and a 90-day plan.



Inside: the Drop-to-Program Loop, a measurement scorecard, a self-assessment, and a pilot brief for one client program.

ABOUT THIS GUIDE

Your clients are buying results. This guide shows you how to sell them.

Direct mail is having a second act. Brands are putting more budget into it, and they are treating it the way they treat search and social: as a performance channel that should be targeted, coordinated, and measured.

That shift creates a choice for every direct mail marketer. You can keep competing on price per piece. Or you can become the partner who helps clients decide **who to mail**, **what happens around the mail piece**, and **what it delivered**.

This guide is for the second path.

Who it's for

- Owners, presidents, and CEOs deciding where to invest next
- Sales and business development leaders building new offers
- Data, list, and client services teams who prepare files and report results
- Operations leaders who need new services to fit the production flow

What you'll take away

- The **Drop-to-Program Loop**: four stages and twelve practices for running mail as a measured program
- A **Fit × Timing grid** for deciding who gets mailed first
- How to set up **event-triggered mail programs** between scheduled drops
- A plain-English guide to **matchback, holdouts, and response tracking**, plus a scorecard
- A self-assessment, a modernization checklist, a **30/60/90-day plan,** and a pilot brief

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HOW TO USE IT

Read it once end to end (about 25 minutes). Then pick one recurring client and work through the tools in Section 3 with your sales and data leads.

INTRODUCTION

Your clients still believe in mail. They're buying it differently.

The budget is there. What has changed is what it's expected to prove.

83%
of U.S. marketers plan to grow 2026 direct mail budgets[1]

$36.6B
forecast U.S. direct mail spend in 2026 (+1.1%)[1]

~96%
have used AI to support direct mail performance[1]

~3 in 4
put more emphasis on performance marketing over three years[1]

Winterberry Group's 2026 research describes marketers moving budget toward channels they can target, coordinate, and measure, and it puts direct mail firmly in that group.[1] Among marketers using AI in their mail programs, the benefits cited most often were better targeting accuracy (42.5%) and better return on investment (41.6%).[1]

Now read those numbers from your side of the table. Your clients are not asking for more pieces. They are asking for better decisions about which households get a piece, what happens before and after it lands, and proof of what it did.

Those are data, orchestration, and measurement questions. Whoever answers them earns the next budget conversation, and the one after that.

The good news for direct mail marketers: much of the data needed to answer them already passes through your shop. What is usually missing is a repeatable way to turn that position into a service clients will pay for.

What clients now expect a mail partner to answer

Who should we mail?
Which households, in what order, and who to hold back.

What happens around it?
The digital touches before and after the piece lands.

What did it deliver?
Responses, conversions, and lift, tied to the campaign.

THE BIG IDEA

Stop selling the drop. Sell the program around it: the audience before it, the touches after it, and the proof that comes back. Every drop should make the next one smarter.

Figures from Winterberry Group, *Delivering Performance in the Era of AI* (June 2026), a survey of more than 250 U.S. advertising and marketing professionals. Spend figures are Winterberry estimates and forecasts. Full sources on page 24.



CHAPTER 1

The new math of a mail drop

Three forces are changing what a mail job is worth. All three favor direct mail marketers who bring data and measurement to the table.

1. Every piece costs more to send

Postage accounts for roughly half the cost of a direct mail ad.[2] USPS raised mailing services prices by about 7.4% in July 2025,[5] and USPS Marketing Mail prices rose by an average of 4.8% in July 2026.[6]

When each piece costs more, mailing a low-fit address stops being a rounding error. Precision becomes a cost argument, not just a performance one.

2. Clients want mail to behave like digital

In Lob's 2025 survey, 86% of marketing executives agreed direct mail performs best when integrated with other channels, and 46% already use mail for retargeting or trigger-based campaigns.[3] Winterberry links renewed mail spending to better data that connects postal addresses to digital identifiers.[2]

3. The data underneath isn't ready

The same marketers report that their data, integrations, and reporting lag behind their ambitions. Only a small minority say mail targeting is as effective as digital targeting (see the next page).[3]

~½

of a direct mail ad's cost is postage[2]

4.8%

average USPS Marketing Mail price increase, July 2026[6]

WHAT THIS MEANS

Higher postage makes every wasted piece more expensive, so the provider who can explain *why each household was mailed* is protecting the client's budget, not just printing it.

Sources: Winterberry Group, *Delivering Performance 2024* (postage share of cost; data linking postal addresses to digital identifiers); Lob and Comperemedia, *State of Direct Mail 2025* (survey figures); U.S. Postal Service, April 2025 (July 2025 prices); News/Media Alliance, April 2026, reporting the USPS filing (July 2026 prices). Full sources on page 24.

The gap between what clients want from mail and what their data can do

Brands are increasing mail budgets while struggling with the data, integration, and reporting that make mail perform.

12%

of marketing executives say their direct mail targeting matches the effectiveness of their digital targeting[3]

55%

find integrating direct mail with digital tracking tools particularly difficult[3]

48%

deal with outdated or incomplete address data[3]

~1 in 2

say they received inconsistent or incomplete data from direct mail campaigns[3]

Source: Lob and Comperemedia, *State of Direct Mail 2025*; 405 professionals with direct input into direct mail at North American companies with 500+ employees.

Notice where those problems live

Address quality, file consolidation, production data, and response capture all pass through a print and mail provider's hands. Most providers already touch the data their clients are struggling with. Few package what they do with it as a service.

That is the opening. You don't need to become an agency to fill it. You need to own the data and measurement work around the mail piece, and present it to clients as part of what they buy.

If you don't close the gap, someone else will

Mail automation platforms and programmatic mail vendors already sell directly to brands, and much of their content treats print and postal operations as infrastructure to be managed by software. The providers who keep the relationship will be the ones who bring audience intelligence and proof of results, not just capacity and price.

ASK YOURSELF

When a client's marketing leader asks, "Which households should we mail next quarter, and how will we know it worked?" — who do they call? If it isn't you, that's the opportunity this guide is about.

From list-driven mail to intelligence-driven programs

The production stays the same. What changes is everything that happens before the press runs and after the piece lands.

	LIST-DRIVEN DIRECT MAIL		INTELLIGENCE-DRIVEN PROGRAM
STARTING POINT	The client's latest list	→	**A persistent household profile that grows with every drop**
TARGETING	Demographics, ZIP codes, and list selects	→	**Fit, purchase history, digital intent, and propensity scores**
WHO GETS MAILED	Everyone on the list	→	**The top of the file first; low-fit and recent buyers held or suppressed**
THE MAIL PIECE	Works alone	→	**Amplified by email, social, and display, with traceable QR codes and PURLs**
REPORTING	Pieces mailed and a response count	→	**Responses, matched conversions, and incremental lift by segment**
THE RELATIONSHIP	Priced per piece, re-bid per job	→	**Priced per program, renewed on results**

THE POINT

None of the right-hand column replaces your press, your mail operation, or your fulfillment. It sits around them. That's why providers are well placed to deliver it, and why the next chapter is organized around the work you already do.

CHAPTER 2

The Drop-to-Program Loop

Modern direct mail is not one decision. It is a loop of four stages, with three practices in each, that repeats with every drop. Each pass leaves the client's audience, and the next campaign, smarter than before.



01 Foundation

Consolidate · Resolve · Connect

One persistent profile per household, matched across mail and digital channels where possible.

02 Focus

Model · Prioritize · Test

Find who fits, use intent to decide who goes first, and prove the selection with a test.

03 Follow-through

Amplify · Coordinate · Trigger

Reinforce each drop across channels, and add event-triggered mail between drops.

04 Feedback

Track · Match back · Hold out

Measure direct response, associated purchases, and incremental lift, then feed the next audience.

A Relevate AI educational framework. The Drop-to-Program Loop organizes common data-driven direct mail practices into a sequence for direct mail marketers. It is a planning tool, not externally validated research.

STAGE 1 · FOUNDATION

Stop rebuilding the list

Everything else in the loop depends on this stage. If the records are fragmented, every score, touch, and report built on them inherits the mess.

1

Consolidate the data

Most mail programs still run on whatever file the client sent last: CRM records in one place, transactions in another, last quarter's mailing list somewhere else. A persistent profile for each household changes that. Customer files, transaction history, mailing lists, and response data come together once, and every drop adds to it.

2

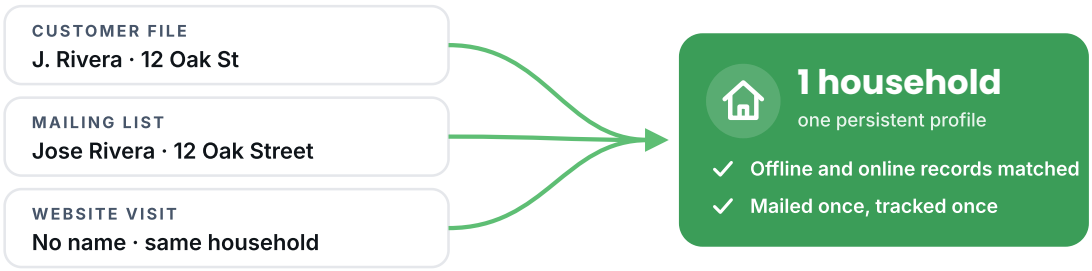
Resolve identity

The customer file says J. Rivera. The mailing list says Jose Rivera. The website visit has no name at all. To most systems, that is three people. Identity resolution matches them to one household, linking offline data such as addresses and purchases with online activity such as site visits and QR scans.

3

Connect the audience across channels

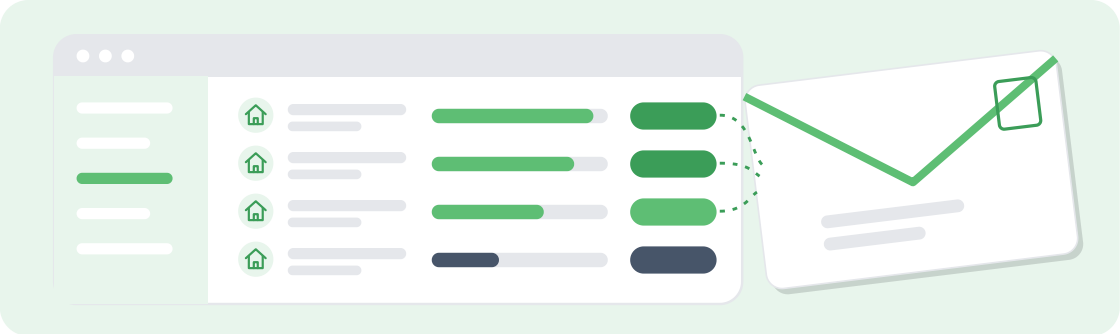
Match the postal file to eligible email addresses and digital audiences so mail, email, social, and display can reach the same people where possible. The matched share sets how far every later stage can go, so know it for each client.



ILLUSTRATIVE EXAMPLE Three records, one household. Matching them prevents duplicate pieces and lets every response tie back to the household that actually received the mail.

DO THIS FIRST · THE CLIENT FILE AUDIT

- [ ] List every data source one recurring client sends you, and how often it arrives.
- [ ] Note which fields the files share: name, address, customer ID, email.
- [ ] Count duplicate households at the same address in the last drop.
- [ ] Check how many records failed address standardization or came back undeliverable.
- [ ] Ask where response and purchase data lives after the drop, and whether you can get it.



STAGE 2 · FOCUS

Mail the people most likely to act, first

4

Model before you mail

Start with the client's customer data. Find what their best customers have in common, then use modeling and relevant demographic, household, or geographic data to find similar prospects. Scores rank every household, so you know who to mail first and who to hold.

5

Prioritize with intent

Customer data tells you who fits. Digital intent, the online research people do before they buy, shows who is showing relevant interest now. Use it to rank a qualified audience, not to replace one: intent is a signal to evaluate, not a guarantee of purchase.

The Fit × Timing grid

Sort every household by fit (from scores and history) and timing (from intent signals). Each box gets a different mail decision.

	IN MARKET NOW	NOT IN MARKET YET
HIGH FIT	**Mail first** Best piece, best offer, fastest follow-up. This is where postage earns the most.	**Keep warm** Lower-cost cadence and digital touches until a signal says they're in market.
LOWER FIT	**Test** A small test cell or digital-only touch. Promote to "mail first" if it responds.	**Hold or suppress** Don't mail this drop. Save the postage and protect the response rate.

A Relevate AI educational framework for audience planning.

STAGE 2 · FOCUS

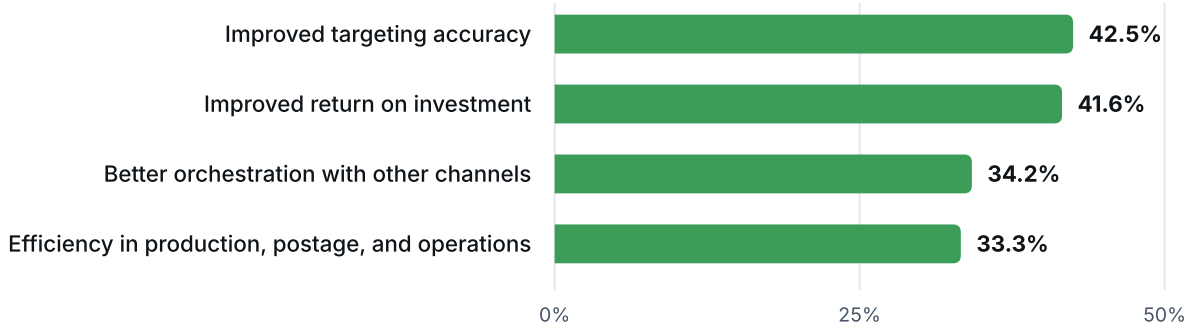
Five segments worth building for every client

You don’t need a data science team to start. These five segments cover most acquisition and retention programs, and each one maps to a clear mail decision.

SEGMENT	BUILT FROM	TYPICAL MAIL PLAY
Best-customer lookalikes	A client’s top customers by value or frequency, modeled against the wider market	Acquisition drops to the highest-scoring prospects
In-market prospects	Fit criteria plus recent digital intent signals	Timely offer, premium piece, fast email follow-up
Lapsed high-value customers	Purchase history with no recent activity	Win-back offer with a clear reason to return
Next-product customers	Current customers whose history points to a logical next purchase	Cross-sell piece that references what they already own
Suppression	Recent buyers, low-fit scores, undeliverable and duplicate records	Not mailed this drop; saves postage and protects response

AI is earning its place in targeting

Share of surveyed U.S. marketers citing each benefit from recent AI initiatives in direct mail



Source: Winterberry Group, *Delivering Performance in the Era of AI*, June 2026 (n > 250). Respondents could cite more than one benefit.

6

Test the difference

Before changing a client’s selection for good, prove it. Mail an intent-prioritized or model-selected group alongside the standard selection, with the same offer and creative, and compare. Either way, you bring the next planning meeting an audience recommendation backed by the client’s own results.

STAGE 3 · FOLLOW-THROUGH

Never let the mail piece work alone

A mail piece lands once. If nothing else happens, the household acts that day or forgets. Follow-through turns a single impression into a sequence.

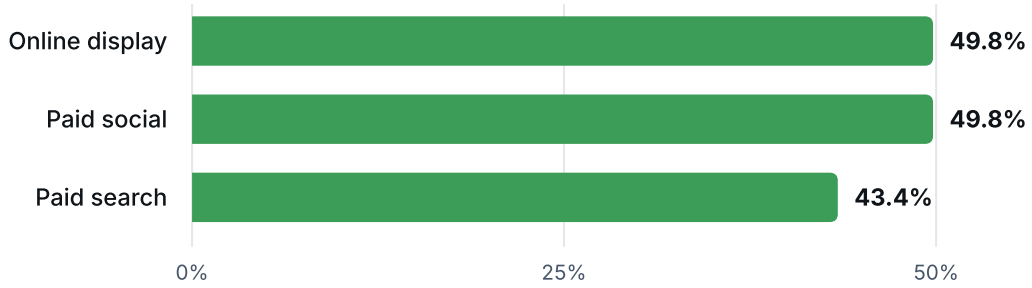
7

Amplify every drop

Amplification puts the same offer in front of the same people again by email, social, and display, before and after the piece lands, for the part of the audience that can be matched. QR codes, PURLs, and personalized landing pages connect responses back to the drop, so the client sees one campaign, not four disconnected channels.

Digital performs better alongside mail

Share of surveyed marketers reporting a performance lift in each channel when paired with direct mail



Source: Winterberry Group, *Delivering Performance in the Era of AI*, June 2026 (n > 250 U.S. advertising and marketing professionals).

Start with email

Match the postal file to eligible email addresses, keep the offer and creative recognizable, and plan around the in-home window: an introduction before the piece arrives, a reminder during the response window, and a follow-up before the offer expires. Adjust the cadence to the campaign.

WHY IT MATTERS TO YOU

When the mail piece anchors a coordinated campaign, you are selling the campaign, and you own the audience every channel runs from.

Use the mailbox's own digital layer

USPS Informed Delivery shows households a digital preview of their incoming mail. It reported 72.9 million active users and a 58.6% average open rate for its Daily Digest email between April 2024 and March 2025.[7] Interactive campaigns let mailers add a clickable link alongside that preview.

72.9M
active Informed Delivery users[7]

58.6%
average Daily Digest email open rate[7]

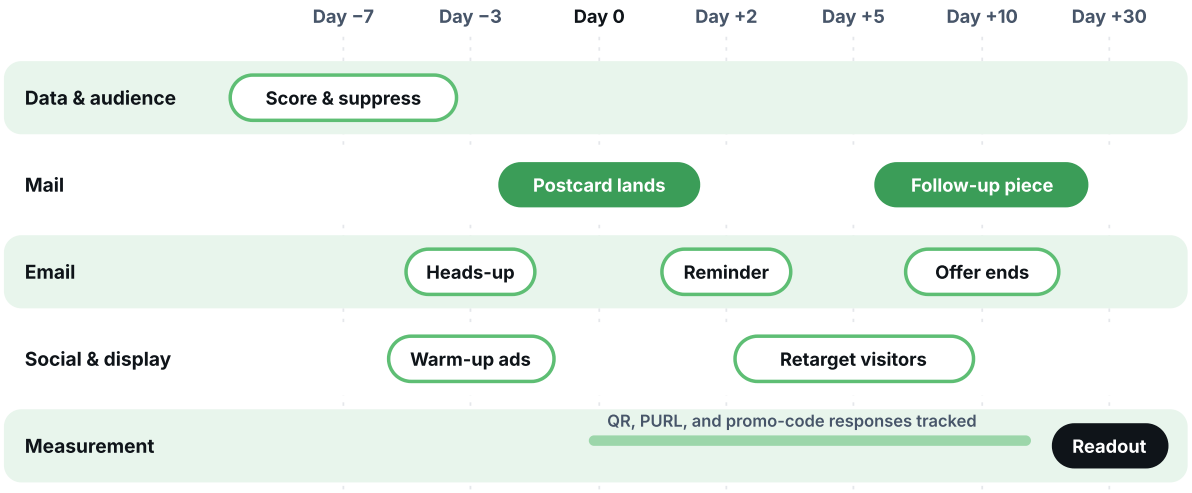
Source: U.S. Postal Service, *Informed Delivery Year in Review*, updated March 2025. Users as of March 31, 2025; open rate for April 2024–March 2025.

STAGE 3 · FOLLOW-THROUGH

One drop, coordinated across every channel

8 Coordinate the channels

Mail, email, social, and display work more coherently when they share one audience strategy, one offer, and one calendar. Here is how a regional home services brand's spring tune-up campaign could run through its print partner.



ILLUSTRATIVE EXAMPLE A hypothetical campaign showing how touches can be sequenced. It is not a client result, and timings should be adapted to each offer and buying cycle.

Day −7	**Score and suppress.** Past customers and in-market prospects are ranked; recent buyers and low-fit households are held back.
Day −3	**Warm up.** Matched households see social and display ads and a heads-up email, so the offer is familiar when the mail arrives.
Day 0	**Postcard lands.** A personalized piece with a QR code and PURL; Informed Delivery shows a digital preview where enabled.
Day +2	**Reminder email.** Matched households get the same offer and booking link during the response window.
Day +5	**Retarget visitors.** Households who scanned or visited but didn't book see a reminder ad.
Day +10	**Follow-up and last call.** Engaged non-converters get a second piece; a final email goes out before the offer expires.
Day +30	**Readout.** Direct responses, matched bookings, and lift versus a holdout group; results shape the next audience.

WHAT THE PROVIDER DELIVERS

The scored audience and suppression file, the mail piece, the coordinated digital touches, the response paths, and the readout. That's a program the client renews, not a one-off job.

Agree on owners before launch

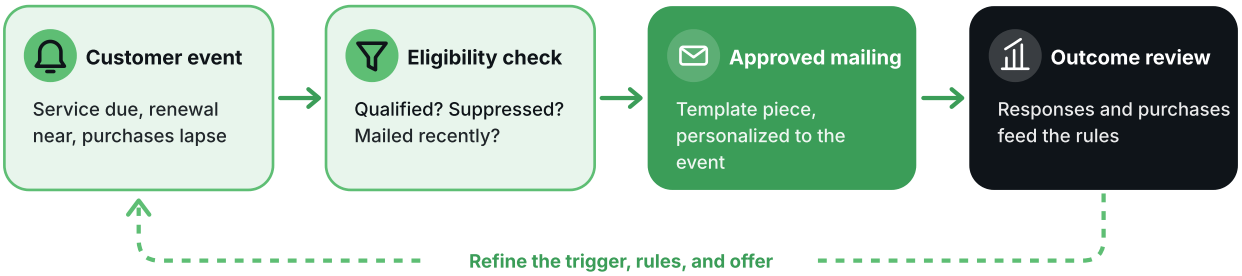
Audience updates and suppression, including when a prospect becomes a customer · Digital activation · Production files and postal timing · Response tracking and the readout

STAGE 3 · FOLLOW-THROUGH

Mail the moment, not just the calendar

9 Trigger mail from customer events

Some of the best reasons to mail happen between scheduled drops: a customer becomes due for service, a renewal approaches, or an active buyer stops purchasing. Programmatic direct mail turns defined events like these into repeatable mailing opportunities. In Lob's 2025 survey, 46% of marketing executives already use mail for retargeting or trigger-based campaigns.[3]



Four decisions before the first trigger fires

DECISION	SETTLE THESE QUESTIONS
1 **Choose a meaningful trigger**	Which event gives the client a genuine reason to get in touch? Is the data that signals it available, accurate, and timely?
2 **Set eligibility rules**	Who qualifies, who is suppressed, and how often can one household receive a piece?
3 **Prepare the offer and creative**	Approved templates with personalization suited to the event, so each batch prints without a new proof cycle.
4 **Establish the production handoff**	File delivery, batching schedule, minimum volumes, turnaround, postal timing, and response measurement.

Starter triggers

EVENT	MAIL PLAY	FITS
Service due	Reminder with a booking offer	Home services, auto care
Renewal approaching	Renewal reminder	Insurance, memberships
Purchases lapse	Win-back offer	Retail, ecommerce
First purchase	Welcome and next-step offer	Most categories

START SMALL

One event, one client. Confirm the data is available and the production economics work, including batching windows and minimum volumes, before you expand. Done well, triggered programs add recurring volume between the larger scheduled drops.

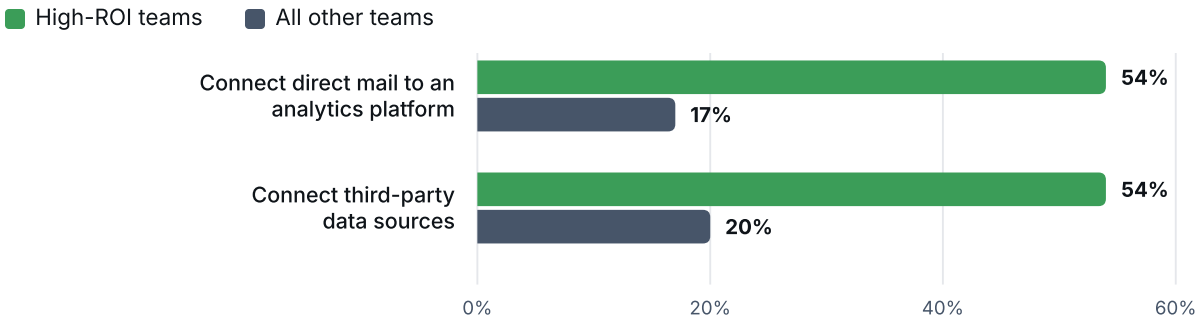
STAGE 4 · FEEDBACK

Prove what drove the response

"Which campaign actually drove the conversion?" QR scans, promo codes, and landing-page visits capture valuable responses, but miss recipients who later buy online or in store without using them. A fuller plan combines three practices, each answering a different question.

PRACTICE	HOW IT WORKS	THE QUESTION IT ANSWERS	USE IT FOR
10 · Track direct response	Campaign links, QR codes, PURLs, promo codes, and campaign phone numbers	Who responded through the piece? Clear, but misses people who buy another way	Every drop
11 · Match back to outcomes	Compare the mailed audience with later transactions, in a window suited to the client's buying cycle	Which mailed households bought, even without a tracked response? Association alone doesn't prove incremental lift.	Every drop, with rules set up front
12 · Hold out to measure lift	A properly designed, unmailed holdout group, where feasible	How many additional purchases did the campaign generate? Needs enough volume and discipline	Recurring programs and major tests
Multi-touch attribution	Crediting mail and digital touches by household across the journey	What did each channel contribute? Depends on good identity data	Coordinated mail-plus-digital programs

What high-ROI mail teams do differently



Source: Lob, *State of Direct Mail: Business Insights 2026* (250 senior marketing and operations leaders), key findings published by Lob, February 2026.

Basic tracking is still uneven. In the same research, only 22% of teams said they track QR codes and 31% capture in-store redemptions.[4] Each gap is a service a provider can close.

AGREE BEFORE THE DROP

Set the matchback window, define what counts as a conversion, and decide whether a holdout group will be set aside. Changing the rules after results arrive undermines trust in the numbers.

TOOL · CAMPAIGN MEASUREMENT SCORECARD

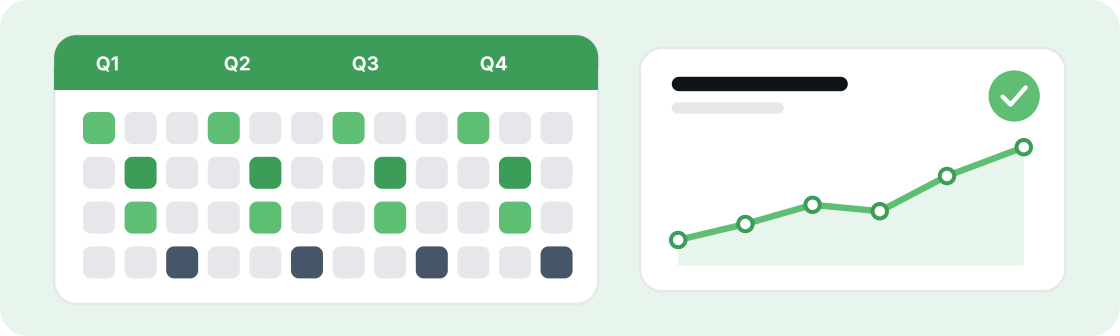
One page to bring to every client review

Fill it in after each drop. Over three or four drops, the trend lines become the reason the client keeps mailing with you.

Client: _____ Program: _____ Drop date: _____

METRIC	DEFINITION	THIS DROP	LAST DROP	NOTE
Pieces mailed	Total pieces entered after suppression			
Undeliverable rate	Pieces returned or flagged undeliverable ÷ pieces mailed			
Unique households reached	Households after identity resolution and dedupe			
Direct responses	QR scans, PURL visits, promo-code uses, calls			
Response rate	Direct responses ÷ pieces mailed			
Matched conversions	Purchases or bookings matched to mailed households (window: ___ days)			
Holdout conversion rate	Conversions ÷ households in the holdout group			
Incremental lift	Mailed conversion rate minus holdout conversion rate			
Cost per response	Total program cost ÷ direct responses			
Cost per acquisition	Total program cost ÷ matched (or incremental) conversions			
Digital touches delivered	Emails delivered, ad impressions, Informed Delivery impressions			
Best segment / offer / channel	Where response or lift was strongest			
Change for next drop	One decision the results support			

Response rate and cost per response are directional; incremental lift from a holdout is the most reliable measure of what mail added. Compare like with like: same segment, offer, and season.



CHAPTER 3

Sell the program, not the piece

The loop is an operating model. It's also a business model: each stage you deliver well is a service a price-per-piece competitor can't easily match.

The Provider Value Ladder

Each rung changes the question your client asks you, and the conversation you're invited into.

"What's your price per piece?"

1
Production provider
Prints and mails to spec

"Can you clean up our list?"

2
Data-ready mailer
Cleans, dedupes, and consolidates files

"Who should we mail?"

3
Audience partner
Decides who gets mailed, and when

"How do we follow up?"

4
Campaign partner
Coordinates mail with digital touches

"What should we do next quarter?"

5
Performance partner
Proves results and runs recurring programs

Most providers sit on rung one or two. Climbing doesn't require becoming an agency. It requires owning the data and measurement work that already passes through your shop, and naming it as a service.

Use the self-assessment on page 18 to see where you are today. The rest of this section shows how to package the next rung and bring it to clients.

A Relevate AI educational framework.

Package it so clients can buy it

Clients buy what they can name and compare. Three clear tiers turn your new capabilities into an easy yes, and give each client a path up.

Essentials

Print and mail plus data hygiene

- File consolidation and dedupe
- Address standardization
- Suppression of duplicates and undeliverables
- Response codes on every piece

Per piece, plus a data fee

Performance

Everything in Essentials, plus

- Scored audience and Fit × Timing selection
- Email follow-up to the same households
- QR and PURL tracking
- Post-drop readout

Per campaign

Program

Everything in Performance, plus

- Recurring and triggered drops
- Social and display to the same audience
- Matchback and holdout testing
- Quarterly business review

Monthly program fee

ILLUSTRATIVE PACKAGING Adapt names, contents, and pricing models to your market and cost structure.

Five questions to answer at every client review

1. Who did we mail, and why those households?
2. What happened around the piece: email, digital, QR codes, and PURLs?
3. What did it deliver: responses, matched conversions, and, where measured, incremental lift?
4. Which segment, offer, or channel did best, and what should we cut?
5. What will we change in the next drop?

THE PRICING SHIFT

When you can answer those five questions, the conversation moves from cost per piece to cost per response and cost per acquisition — measures where precision makes you more valuable, not more expensive.

Start every renewal conversation with the scorecard, not the rate card.

TOOL · SELF-ASSESSMENT

Where are you on the ladder?

Score each statement for how your company works today: 0 = not yet, 1 = for some clients, 2 = for most recurring clients. Be honest; the point is to find the next rung.

	STATEMENT	0	1	2
01	We keep a persistent, updated customer file for each recurring client instead of starting from the latest list.	○	○	○
02	We dedupe at household level and match the postal file to email and digital audiences where possible.	○	○	○
03	We model or score audiences and use intent signals to prioritize who gets mailed first.	○	○	○
04	We test new audience selections against the client's standard selection with the same offer and creative.	○	○	○
05	We coordinate at least one digital touch (email, social, or display) with each drop.	○	○	○
06	We run at least one event-triggered mail program for a client (service due, renewal, lapse).	○	○	○
07	Every piece we mail carries a trackable response path: QR code, PURL, or code.	○	○	○
08	We run matchback in a window suited to the buying cycle, and holdouts where feasible.	○	○	○
09	We bring a results readout and a recommendation to every client review.	○	○	○
10	Some of our client revenue comes from programs or retainers, not only per-job pricing.	○	○	○

Your total _____ **/ 20**

0–5	6–9	10–13	14–17	18–20
Production provider	Data-ready mailer	Audience partner	Campaign partner	Performance partner

READING YOUR SCORE

Look at the statements you scored 0 or 1. Statements 1–2 point to Foundation work; 3–4 to Focus; 5–6 to Follow-through; 7–8 to Feedback; 9–10 to packaging. Those gaps are your 90-day priorities.

TOOL · MODERNIZATION CHECKLIST

The direct mail marketer's modernization checklist

Sixteen capabilities that separate a mail job from a mail program. Tick what you have, circle what you'll add this year.

Data foundation

- ☐ One persistent file per recurring client, updated after every drop
- ☐ Household-level dedupe and identity matching across client files
- ☐ Address standardization and undeliverable handling built into intake
- ☐ A documented way to receive response and purchase data after each drop

Audience intelligence

- ☐ Modeling or scoring applied before mailing
- ☐ Digital intent used to prioritize a qualified audience
- ☐ Lookalike audiences built from clients' best customers
- ☐ New selections tested against the standard selection

Coordinated activation

- ☐ Postal files matched to eligible email addresses
- ☐ Social and display reach to the matched audience
- ☐ QR codes, PURLs, or promo codes on every piece
- ☐ An event-triggered program with eligibility, suppression, and frequency rules

Measurement and commercial

- ☐ Matchback windows suited to each client's buying cycle
- ☐ Holdout testing for recurring programs, where feasible
- ☐ A scorecard and readout for every client review
- ☐ Named service tiers with program-based pricing

BUILD OR PARTNER?

Few providers build all sixteen in-house. A practical rule: own the client relationship, the production quality, and the readout; partner for the data infrastructure, identity resolution, and modeling that would take years to build.

TOOL · 30/60/90-DAY PLAN

Run your first program in 90 days

Don’t reorganize the business. Prove the loop on one client, then package what worked.

DAYS 1–30

Prepare

- [ ] Pick one pilot client: a recurring mailer with outcome data and an internal champion
- [ ] Run the client file audit from page 8
- [ ] Agree on the business outcome, success metric, and measurement plan, including a holdout
- [ ] Map handoffs: data → prepress → production → postal → response

GATE
Client signs off on the audience, response paths, and measurement plan

DAYS 31–60

Pilot

- [ ] Build the scored audience and suppression file
- [ ] Sort households with the Fit × Timing grid
- [ ] Launch the drop with email follow-up and trackable response paths
- [ ] Add social or display to the same audience if the client agrees

GATE
Drop is live with every touch drawing from one audience and every response path tracking

DAYS 61–90

Prove and package

- [ ] Read results: direct response, matchback, holdout lift
- [ ] Run the client review with the scorecard and the five questions
- [ ] Propose the next quarter as a program, not a job
- [ ] Choose the next two clients and name your service tiers

GATE
Client agrees to a next-quarter program, not a one-off job

CHOOSING THE PILOT CLIENT

Look for a client who mails on a regular cycle, can share response or sales data, and has someone who wants to show results internally. Avoid a one-time job or a client in the middle of an RFP.

DEFINING SUCCESS

Agree on one primary measure before launch, such as cost per acquisition or incremental lift versus a holdout, and one learning goal, such as which segment responds best.

What you have on day 90

A scorecard with real results from one client program

A renewal case built on outcomes, not price per piece

A named package you can offer to the next two clients

TOOL · PILOT BRIEF

Pilot brief: one client program

Fill this in for the client you chose. It's the working document for your team, and the best thing to bring to a conversation about tools and partners.

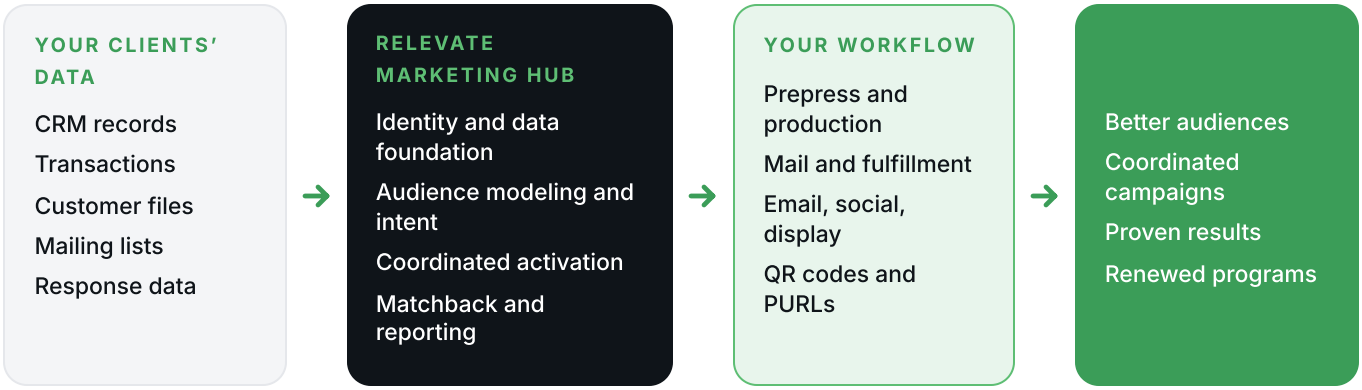
Client and program Client name, program type (acquisition, retention, win-back, cross-sell)	
Business outcome What the client's leadership cares about, in their words	
Data available Customer file, transactions, mailing lists, web or response data	
Audience hypothesis Who should respond best, and why	
Segments Mail first · Keep warm · Test · Hold or suppress	
Coordinated touches Email, social, display, Informed Delivery, triggered follow-up	
Response paths QR code, PURL, promo code, call tracking	
Measurement plan Matchback window, conversion definition, holdout group	
Success threshold The number that would make this a program	
Timeline and owners Drop date, readout date, who owns data, production, and the review	

WHERE RELEVATE MARKETING HUB FITS

An intelligence layer for the loop, alongside the workflow you already run

Everything in this guide can be started with the tools you have. Running it across many clients, every drop, is where a platform helps.

Relevate Marketing Hub, part of the Relevate AI platform, helps direct mail marketers add audience intelligence, digital intent, coordinated activation, and measurement **alongside the print, marketing, and fulfillment workflows they already use**, so they can bring clients a broader program, not just a broader quote.



How Relevate Marketing Hub sits between your clients' data and your existing production and channel workflow.

01 Foundation
Brings CRM records, transaction history, customer files, and mailing lists together into persistent customer and household profiles, with identity resolution.

02 Focus
Connects customer data, audience modeling, and digital intent to support audience development and prioritization, and the tests that prove it.

03 Follow-through
Helps connect the mailing audience with coordinated email and supported digital activation. It can also support event-triggered programs, with triggers and production handoffs scoped to the use case.

04 Feedback
Supports matchback and campaign reporting using available audience and outcome data, so results inform the next campaign.

AI-POWERED. HUMAN-APPROVED.

Relevate AI surfaces audiences and recommended actions; your team and your client approve what goes into market.

YOUR NEXT STEP

Bring one client program. We'll show you the loop on it.

THE SHORT VERSION

Your clients are growing mail budgets and expecting mail to perform like a measured channel.

The Drop-to-Program Loop — Foundation, Focus, Follow-through, Feedback — turns each drop, and the events between drops, into a program that gets smarter every cycle.

Direct mail marketers who package that work move from price per piece to renewed programs.

Tell us how your team manages audience data, direct mail, digital activation, and campaign measurement today. A Relevate AI Partner Specialist will review one of your client campaigns with you and show where audience intelligence, digital intent, coordinated activation, and closed-loop measurement could fit alongside the systems and print workflows you already use.

Talk to a Partner Specialist →

relevate.ai/contact-us

PREPARE IN 10 MINUTES

Fill in the pilot brief on page 21 for the client you have in mind.

BRING YOUR SCORE

Your self-assessment total shows where to start.

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Notes on the numbers

Survey percentages describe the respondents of each study, mostly large U.S. or North American brands and marketers, not every company that mails. Studies differ in sample, timing, and question wording, so figures from different sources should not be compared directly. Spend figures are research-firm estimates and forecasts.

This guide does not quote average direct mail response rates. Published benchmarks vary widely with list type (house file versus prospect), format, offer, industry, and how a "response" is defined, and a single average is a poor planning target. Measure your own programs with the scorecard on page 15, and use holdout tests for incremental lift.

About the frameworks and examples

The Drop-to-Program Loop (with its twelve practices), the Fit × Timing grid, and the Provider Value Ladder are Relevate AI educational frameworks, not externally validated research. Examples and packaging marked "illustrative" are hypothetical and do not describe a specific client or result. Descriptions of Relevate AI and Relevate Marketing Hub capabilities are drawn from relevate.ai and Relevate AI's current outreach materials as of November 2026.

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Unify your data. Find the opportunity. Take the next best action.

AI-powered. Human-approved.

Relevate AI gives direct mail marketers the audience intelligence, digital intent, coordinated activation, and attribution they need to deliver more relevant campaigns.

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