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Direct-Mail

Secrets

Whether you're a direct-mail pro or novice, these proven techniques will improve your results and save you money.

By Nick Levinson

1. Select your audiences. Three publics exist: donors, prospects, and distant prospects (sometimes called suspects). Donors already give to you. Prospects give to groups similar to yours. Distant prospects have interests like yours. Each audience needs a different appeal to reach them.

Of these, your current donors can be persuaded at the lowest cost. Prospects cost more for each dollar raised. Distant prospects cost the most. That makes the choice obvious, except for one thing: If you've exhausted your donor audience, you'll need to broaden your outreach.

2. Find lists. Trade or rent lists, or build your own by collecting names wherever you can. The more you know about each source of names, the better your results

**Write for the visual,
with words for colors
and shapes and scenery.**

will be. As you add names to your database, mark each one with a source code so that you can tailor your letters and evaluate their success.

If you trade lists, consider privacy implications for the names you give out. If you're concerned about other organizations abusing your lists, offer to apply the labels yourself if they'll prepare the mailing and pay the postage. Or seed your list with a few friends' names (slightly misspelled or with new initials), and ask your friends to turn over any mail they get from being on your list.

When renting from a commercial list broker, rent a small part of a specific list first, to test its effectiveness for your pitch. A good list directory is SRDS Direct Marketing List Source, Part 2, available at business libraries. Within the consumer list descriptions, see the category for "Contributors (Philanthropic)."

3. Plan to invest. Acquisition mailings (those to prospects and distant prospects) cost more than initial returns bring in. And many of those people, perhaps a third, won't give again. But those who do give again will bring revenue over the top.

Lists often yield returns from 2% to 15%. Warm lists (lists of loyal supporters) produce near the higher end of that scale. Cold lists, people who've never given to you or even

to a competitor, give near the scale's low end, but cold lists are longer, and everyone on the list can get the same letter, which trims your costs and improves your results.

4. Divide and conquer. It makes sense to send entirely different appeals to different lists. You can segment, for example, by issue, past benefit, or giving history. People usually give about the same amount they gave previously, so you can separate \$25 donors from \$1,000 donors. Current and lapsed donors get different messages (lapsed donors may have criticisms you should address).

5. Schedule your mail for best effect. The most rewarding period is usually the end-of-year holiday season or before an annual dinner you sponsor. Or your mission may suggest even better months.

6. Use friend-to-friend letters. Invite some of your main donors to draft friend-to-friend (F2F) letters to their friends. They can write whatever they want, as long as it's not illegal (you might be liable even though you don't sign their letters or supply your letterhead).

Type their drafts into a word processor. A uniform design template can serve all your signers, so you only need to vary names and addresses. On plain envelopes with stamps, hand-write everything, using the signer's return address and local postmark.

7. Household cold lists. If a prospect list shows two people in the same household, send them one piece of mail. That's called householding the list. You save money.

Don't do that with donors. Write to them individually (or as a couple) by name, and maintain their interest.

8. Personalize by name. Word processors usually let you incorporate your reader's name, via mail merge. Create a database with given names, family names, prefixes (such as Ms. or Hon.), suffixes (like Jr.), and other identity elements. Draft your letter to include these names in greetings and inside the body. ("Did I tell you, Pat, about our clients?" is an example.)

9. Catch name customs. Names depend on culture. For example, east Asians usually put family names before given names. Some societies vary family names by gender. Some prefer initials. Addressing by given names to be friendly may offend readers if you're not of their culture.

In designing your database, a couple of true/false fields should help. One field can specify whether a given name follows the family name, another whether formal or informal is acceptable. If you're unsure about someone, don't personalize their letter.

Induce readers to agree with you many times before arriving at your clincher.

10. Beware of cultural traps. If your audiences are from other countries, religions, ages, sexualities, occupations, or lifestyles, familiarize yourself with their cultures. Buy some books and newspapers by people with the same backgrounds. Read some reliable history. Get a book on bias-free English. Ask several people with relevant backgrounds to critique your work to be sure you aren't being offensive.

11. Select a greeting or a banner. When you can't greet by name, select a greeting that fits your letter's audience. An all-purpose fallback is "Dear Friend." It's hard to be more specific when a large mailing goes to many people with different concerns, but there are possibilities. As examples, consider "Dear Environmentalist," "Dear Music Fan," or "Dear Counselor" (for attorneys). Or try opening with a one-liner instead of a greeting.

12. Be personal. Use *you*, *I*, *she*, and *their*. Write to your reader as one person, not to "all of you," "you New Yorkers," or any other plural bunch.

13. Get agreement in steps. Look for ways to induce readers to agree with you many times before arriving at your clincher. Keep momentum going right up to the check-writing moment.

14. Avoid humor. Humor and sarcasm are hazards. They depend on unspoken precepts that most readers won't share. Back away, or stay mild.

15. Balance four key elements. The best direct-mail structure is a four-some: (1) State the problem that inspires your organization to act. (2) Explain your solution to the problem. (3) Give people the opportunity to help with your solution, usually by giving money. (4) Describe the reward they'll receive for helping. This reward may be your thanks, the community's eternal gratitude, tax deductibility, and perhaps a small gift. (The IRS lets you give premiums of nominal value and still provide tax deductibility.)

16. Add a postscript. A good approach is to offer an extra bonus in the postscript. For example, "P.S. — If you'll send your donation today, I'll tell the Chancellor of your commitment. Your tickets will be sent overnight, with our compliments."

17. Write with two threads. Write your letter for people who read every word, but also orient your letter to people who read only the beginning and end. That's most people. For them, make sure your first paragraph and postscript tell a whole story.

Highlight key words to accommodate skimmers. For mail mainly to homes, underscore key words. For mail mostly to offices, use boldface. If you can print in two colors, such as black and yellow, imitate highlighter markers.

Scan your draft, reading just the highlights. Is there an emotional flow? Does it conclude on a positive beat, with a sense of resolution? Then it's right.

18. Take all the space you need. If your story demands four pages or six, so be it. It doesn't matter if most donors actually read every page. For those who skim, the fact that you had four pages to fill means you had a lot to say.

Chopping your narrative to fit one page can make it seem wordy, while taking all the pages you need

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Get a book on bias-free English.

can make it seem concise. Merely touching on points without satisfying your reader about them can make a short letter tedious or bumpy, while a long letter would be just right. If the longer letter answers readers' questions and induces giving, that's better than a too-short letter that isn't persuasive enough.

19. Be emotional. Be very emotional.

Facts, of course, are critical. But a person has a rational side and an emotional side. Play to both.

You're allowed to get under your readers' skin. After you annoy your readers a little, you soothe them. It keeps them alert and open.

When you describe the problem, make clear how horrible, terrifying, fearsome, tragic, sad, frustrating, debilitating it is. Talk about how easily misunderstood, how nearly hopeless, how desperate the situation has become. Show the pleasure, comfort, security, thrill, and sense of relief that come with the solution.

20. Stay with humanity. Talk about one child, one client, one ordinary person with a name and a life. Names, even made-up names, are better than initials or anonymity. Avoid overused pseudonyms like Doe, Smith, or Jones, but don't use too-rare names, either; there might be a person with that name, who might sue you.

21. Play to their senses. Write for the visual, with words for colors and shapes and scenery. Write for the touch, taste, smell. Speak of sounds heard. Tell of hot and cold and pain. It's worth adding more words to convey life on paper.

22. Boldly ask for dollars. Don't ask for "whatever" your reader can give. Don't tell them that "every penny counts." Suggest a minimum gift. Ask for the number of dollars you'd like.

23. Be stingy with fine print. People get nervous about too much of it. But the law may demand it. See if you can work some of it into the body of your letter. For example,

instead of saying "Donations are not tax-deductible" in pinky-sized print, consider saying, "Our political force is so overwhelming, the IRS won't let us offer tax deductions, although we would if we could," in the body of your letter. Replace "Financial statements are on file with state agencies" with "We want you to know as much as possible about our financial stability and program costs. Please contact your state agency for our latest financial statement." (Ask a legal expert to read your rewritten legal statements to be sure you're meeting the law.)



One magazine got more subscription orders when the stamps were angled slightly.

24. Decide who signs. Either the chief executive or a celebrity usually signs the letter. If you're raising funds for one of your programs, the head of that program can sign.

Who signs determines the point of view in the letter. A celebrity has a friendly outsider's overview. An executive has an intimate day-by-day knowledge.

25. Write at your readers' level. Don't write for average readers. Average means about half-way. That means you'll lose half your readers. Write further down, so almost everyone understands you — at a sixth-grade level if possible, and no higher than an eighth-grade level. Your word processor may have a feature for estimating readability. That doesn't mean, "See Spot run." You can convey intelligence and power while using simple language. The most powerful words are short ones. So are the strongest sentences.

26. Reduce buts. The word "but" is disturbing and upsets the flow of a direct-mail letter. See if you can rewrite what's nearby and use "and" instead. In addition to "but," look at all discontinuities and smooth out what you can. Continuities make an argument easier to accept.

Omitting the "but" may seem contrariant when you're going from problem to solution. It's not. For instance, you could say, "Cancer is devastating. We want to end it. That's why we're spotlighting the environmental causes of this disease."

27. Copy with permission. If you want to use copyrighted material, you normally need permission, which often costs money. As an alternative, you can rewrite interesting ideas in your own words. Ideas aren't copyrightable.

28. Declare your mail environmentally friendly. Add a tag line that your mail can be recycled.

29. Rewrite. Edit. Proofread. Then do it again. Don't just proof on a computer screen. Print the letter, and hunt for errors. Put it aside for a few days. Then read it again. Give copies to people most like those who'll be receiving the letter, and ask for their input.

30. Choose a typeface. Use a font size that's comfortable for older readers with glasses. If it works for them, it likely works for everyone else. For body text in most fonts, 13 points is a good size. The line height or leading should be at least 2 points more than the body font size. With larger fonts, use more leading. Use one font for all of the body. One, only.

For readers at home, typewriter-like fonts, such as Courier, are best. They're monospaced; every character is the same pitch (occupying the same width). For recipients at their offices, a business font, with proportional pitch, is more familiar. For them, Garamond or Bell is readable and pleasant.

Don't use sanserif fonts (fonts without serifs), like Arial or Helvetica, for the body. Serifs are the little feet at the ends of strokes. People are used to serif

fonts. Sanserif fonts are mostly good for headlines.

If you have a few fonts that meet the above guidelines, test them, because some are more compact or more spacious. They affect readability and layout.

31. Redesign your letterhead. Don't assume your regular letterhead is the best for direct mail. Tailor it to the message. Consider listing your organization's affiliations, board members, and advisory committee members as part of your direct-mail letterhead. Some readers will read that list and skip most of the letter.

32. Appeal with layout. Subtleties rule. What you think no one will notice often has a subconscious effect on readers. They won't put their finger on a problem; they'll just throw it out. Use these layout tips:

Create ample margins. Apply white space generously.

Set the left margin even, and leave the right margin ragged.

Don't use hyphens at the ends of lines except for words that come with them (like "sleepy-eyed").

Indent paragraphs, and also skip lines between them.

Number pages (except the first). Use headers for page numbers, with dashes and spaces before and after.

Break pages in mid-sentence. It pulls readers to the next page. To encourage them more, follow the broken sentence with a line like "(continue, please)" in the lower right corner, in the body font.

After you annoy your readers a little, you soothe them.

Adjust the layout so that you fill all pages. The postscript should end near the bottom of the last page. The layout should occupy an even number of pages so that no page is blank.

Check your word processor's features. Look for commands for leading, indenting, compacting, expanding, tracking, kerning, widows, and orphans. These features help you make subtle, almost

invisible changes that can have a big impact. Review the help files for advice.

Experiment on scrap paper. As you change the font, white space, and layout, adjusting one element may throw other elements out of kilter. Keep refining until everything's ideal.

33. Live it up with photos and art. Dramatic photography that illuminates the problem and your solution can tell your story almost instantly. Drawings work when you need to emphasize by exaggerating. Be sure the art is more than just cute. Make it powerful.

34. Consider printing in-house. Lasers and inkjet printers are good enough for text, as long as they print at least 300 dots per inch (dpi) in each direction. The advantages of printing it yourself are the ease of experimenting and redoing pages, the flexibility of scheduling, and the convenience of mail merge.

35. Choose a paper size and grade. Consider the 7x10" (monarch) size, instead of standard letter size. People like it. Stay away from embossed and engraved letterhead, hand-made Japanese paper, gold-leaf envelopes, and the like, even if a cousin donated them for the cause. You want to convey the message that you're spending every penny you get to solve the world's problems.

36. Entice people into opening your envelope. For direct mail to people's homes, design the envelope to pull readers inside. Headlines and big questions with graphics help. But don't do that if most of your mail is going to offices. Secretaries and mailrooms often toss mail with graphic envelopes.

For the return address, include a personal name. (Nowadays isn't a good time to send anonymous mail.) Having a personal sender gets more mail opened.

Avoid official-looking markings, such as those mimicking registered mail. The post office may refuse mail with misleading marks.

37. Maintain continuity of actions, with several small steps. Each element in your direct-mail package should entice people to the next stage,

until ultimately they carry out the final step. When your reader takes a few smaller steps, the last step of sending a check will be easier.

Don't ask for "whatever" your reader can give.

38. Leave out the all-purpose brochure. Adding a brochure may dilute your message. If you feel you must include one, design it specifically for your mailing. The brochure you give out at your office serves a different purpose from the one that belongs in your direct-mail package. It probably includes a coupon for soliciting contributions. You don't need that in a direct-mail brochure, because a separate reply form and envelope are more effective. A direct-mail brochure, if used, should complement your direct-mail package, reinforce what a solid institution you run, and fit the interests of the specific audience to whom you're writing.

39. Consider a lift letter. When the CEO signs your main letter, a celebrity can sign a lift letter that goes into the same package. The best celebrity is whomever your audience would best respond to. You can draft the letter for the celebrity's approval.

40. Use a pickup piece to confront skepticism. Most readers are skeptical. You can address their concerns with a pickup piece — a note from someone outside your organization acknowledging readers' doubts and reassuring them. The note should say, briefly, that the writer would also be skeptical but, frankly, this is an outstanding organization, committed to meeting its goals. Print the piece on colored paper, on one side only. Cut it small, so it doesn't need folding. Stuff it into the envelope so its printed side is up.

41. Create a reply device. Drafting your reply device even before you draft your letter may help focus the entire package. The reply device will encapsulate everything

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you want from your reader. You can make it into a membership certificate, a benefits catalog, a congratulation. You can offer giving options and reinforce the value of donating. You can print the donor's name and address on the reply device via mail merge to save your reader the trouble of filling it in.

Don't ask for more personal information than you need. When you load your reply device with spaces for age, e-mail address, and the like, many people get suspicious and send no money at all. If their information is legally required, say so.

42. Supply a postage-free return envelope. Arrange with the post office so you pay the postage on return envelopes as they arrive. You'll need a business reply mail (BRM) permit before you design your envelopes. One exception is the very warm high-dollar list (people on hotter lists are likelier to give, few stamps are wasted, and they'd hardly steal the stamp to evade donating). Otherwise, you'll likely make more money by paying the return postage, even though it costs you more per piece.

43. Code the return envelopes to identify gift sources. When mail comes in, you'll want to know which mailing produced a check. Since senders don't always send your forms back, you may get only a check. Since they'll probably use the prepaid envelope you supplied, that envelope should be coded for each mailing. If you have a large supply of envelopes for many mailings, you'll want an easy way to code them.

Here's how: Take a stack of envelopes, enough for one mailing, and swipe a broad-tip marker across the edges. What color you swipe and how many swipes you make is how you tell one mailing from another. Keep a sample of each envelope and label its use.

44. Synchronize fundraising channels. Mailings work best in the context of other efforts, such as print advertising, telemarketing, major events, the CEO's personal phone calls, and high-profile publicity. Coordinate all efforts as a single, smooth, thoughtful operation to control your costs and maximize your returns. Example: E-mailing one-time donors a couple of days before they get your next mailing is a good way to improve your revenue. The CEO phoning long-term donors as or after letters arrive can increase the size of each check.

45. Ask your post office about mailing at bulk rates. Even for donors who warrant first-class mail, consider quantity-discounted first-class mail instead of full rates.

Using stamps gets the most donations, and there are stamps for almost any postage rate. Your second-best choice is a postage meter. Otherwise, you'll have to print a special indicium that symbolizes junk mail.

46. Address your envelopes carefully. For small mailings to homes, ask volunteers to hand-address envelopes. Leave the bottom edge blank for postal barcodes. For



small mailings to offices and for large mailings anywhere, use mail merge to print addresses on envelopes.

47. Stuff for effect. When your recipient tears your flap open and slides your contents out, the first thing that's seen should be the top of your letterhead, which should have been specially designed to attract.

48. Seal and stamp with care. Sloppy sealing can cause envelopes to stick together and stamps to peel off. But you needn't be too precise, either. One magazine got more subscription orders when the stamps were angled slightly. It looked human.

49. Organize volunteers to stuff envelopes. Or contact residences, such as where older people live, and either pay or offer to buy lunches for people who help with your mailing. Plan for on-site supervision. And supervisors should stuff, too. That's because you'll probably have particular demands, such as what order to assemble papers. People doing the stuffing may find easier ways without realizing how their results will hurt your revenues. Supervisors can act as role models, showing the right way to do it and explaining why.

50. Use “Dear Neighbor” letters for local appeals. If the people in an apartment house are likely to be receptive, ask someone in that building to sign a stack of “Dear Neighbor” letters. Volunteers can start at the top floor and work their way down, sliding letters under doors. (Don’t put letters into recipients’ mailboxes without postage. That’s illegal.)

51. Reply to donors promptly. Get your thank-you in the mail in a day, if you can. In one week, tops. Ask volunteers to pen thanks on postcards if you can’t afford letters. Thank donors warmly for making it possible to accomplish your mission. Let them know what their gift is doing for humanity. Reassure them that you’re careful in the stewardship of their funds. Mention the amount they gave, and the date, so the letter can double as a receipt. Use IRS guidelines for tax deductions. Personalize your thank-you, and don’t make it look like a form. Or, if you must use a form, hand-write a few words of personal thanks.

Whether a thank-you should contain a new solicitation for dollars is hotly debated among professional fundraisers. Discretion may be wiser. Send the new solicitation later — maybe just a few weeks later, but later nonetheless. Meanwhile, your thank-you can mention your aspirations for the near future.

If you send a premium within a week, you can send the thank-you with that. Don’t treat the premium as an implied thank-you. Enclose your gracious letter. If the premium will take too long, send your thank-you sooner, separately, and also pack a nice card with the premium.

52. Analyze results. Compare income to costs four ways: for the whole mailing, for each large list you use, for all the fundraising appeals in the year, and for each type of direct mail sent during the year (for instance, prospects vs. donors or by demographic).

In counting costs, use consistent methods. Estimate staff, management, and consultant costs in creating, approving, and assembling your package, costs of premiums

with shipping, costs of accepting donations (such as fees deducted for credit card donations), and costs of wastage (misprints, lost premiums, and so on).

These numbers may show a failed mailing. How you judge a failure may depend on your larger experience. Perhaps the same mailing should be repeated, because readers might need to become familiar with your work before giving. Perhaps your letter should be refocused and rewritten. Perhaps a category of recipients should be dropped. Or maybe a mailing was too small, and your organization has too high an overhead to sustain many small mailings, and so you should consolidate your efforts into fewer big mailings with lower per-letter costs.

A single failed mailing shouldn’t discourage you from trying again, with changes. Many projects fail the first time.

53. Study direct mail for the future. Excellent books, articles, and consultants cover direct mail. Specialize your knowledge. There’s plenty more to learn. Refine your methods.

Collect the junk mail you receive. Keep entire packages, including outer envelopes and all the contents. Ask other people in your office if they’ll donate the direct mail that comes to their homes, too. Collect both nonprofit and for-profit solicitations, since the methods are similar.

Two kinds of mail are best to collect. Major mailers usually have direct-mail professionals draft theirs, so you’ll be looking at expert packages. And highly experienced, frequent mailers have learned the hard way what works.

The ones to sidestep are the low-budget, infrequent solicitors. Their letters may be clever, edgy, and fun, but they’re more likely to have mistakes that lower returns, and you won’t know which letters worked. Focus first on proven successes, and then experiment if you wish.

54. Scrutinize your competition. Plant a spy in their lists. For example, ask someone unknown to your competitors to contribute to them. Sending them \$35 a year should

How Deep Is Your Toolbox?

These resource tools from *Nonprofit World* (available at www.snpo.org/members) will help you put together the best possible direct-mail package for your organization:

Making the Mail Work (Better) for You, Vol. 21, No. 2

Choosing the Right Typeface Translates into Cash for Your Cause, Vol. 15, No. 6

25 Steps to Better Direct-Mail Fundraising, Vol. 7, No. 4.

How Big a Gift Should You Ask for?, Vol. 17, No. 2

The Mysteries of Postage-Paid Envelopes, Vol. 14, No. 1

Are You Giving Donors Proper Receipts?, Vol. 17, No. 6

Fundraising and Resource Development category of *Nonprofit World CD-ROM*

Resource Development Learning Institute program online at www.snpo.org/li

get you typical donor mailings. Read these mailings as soon as they come. Look for new trends. Receiving actual direct-mail packages is the quickest, most revealing way to discover new approaches that you can adapt to your needs.

55. Read gallons of books. Study every subject that interests you (not just direct mail). Read great writing. Read bad writing up to your limit, and figure out why it’s bad.

Once in a while, read books about methods of writing. Refer to dictionaries, a thesaurus, and grammar and style advice. Mostly, though, read lots of books and articles at high and low reading levels, for audiences besides yourself, on many topics, by tons of authors.

Your library card: Don’t leave home without it. ■

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