

PFL's Essential Guide To: Creating Powerful Direct Mail Moments Across the Customer Lifecycle



Contents

- 4 **PART I**
Powerful Moments Gain Attention
- 7 **PART II**
**Building a Better Marketing Model:
The Four Elements**
- 12 **PART III**
**Aligning the Customer Lifecycle to
Powerful Moments**
- 34 **PART IV**
**Conclusion: Stitching Moments
Together is Mission Critical**



Part I

Life is Defined By Moments

PART I

Powerful Moments

Gain Attention

It's no secret that life is defined by moments. The right experience at the right time can advance our connection to a place, event, or brand. It can transform vague feelings into concrete actions and behaviors. Creating an authentic moment is the goal of every organization and brand. It ultimately leads to increased sales and profits.

Yet creating such experiences is no simple task. Over the last couple of decades—thanks to the Internet and fundamental changes in business—there is growing competition for eyeballs, clicks, and sales. Every day, consumers are bombarded with marketing messages. In many cases, these messages completely miss the mark and consumers wind up tuning them out rather than leaning in.

Breaking through the attention economy gridlock—and breaking the conventional marketing script—is critical. When organizations get personal across a product or service lifecycle, the results can be transformative.



The best way to grab attention is to create powerful and memorable brand moments.

To bring this concept to life, we've leveraged the learnings from Chip and Dan Heath's best-selling book, *The Power of Moments: Why Certain Experiences Have Extraordinary Impact*, to their full advantage.

It's All in the Experience

Often overlooked in the quest to boost brand identity and drive sales is the fact that modern organizations don't have a "reach" problem, they have an "engagement" problem. Digital marketing can reach a nearly unlimited number of people but getting them to engage can prove daunting.

In *The Power of Moments*, the Heath brothers point out that brief but powerful experiences lead to transformative results for brands—and customers. They jolt people into a new level of consciousness, and leave an indelible imprint that carries over to everyday life.

Yet creating these "peak," or "defining," moments requires a rethinking and rewiring of marketing. Conventional methods won't cut it.

In the book, we learn that defining moments are created from one or more


of the following elements: Elevation, Insight, Connection, and Celebration. These elements can help organizations plan and multiply the number of powerful experiences they can create for customers.

The question is: How to arrive at peak moments? Digital tactics alone cannot get an organization to the finish line. To drive high engagement levels that lead to "defining moments" and "peak moments," it's critical to include interactions rooted in the physical world. These interactions can supercharge brand recall and facilitate a smoother customer journey. In fact, by taking advantage of *The Power of Moments*, brands can reboot audience engagement.

The key to unlocking superior results is data. Organizations that have the right data at their fingertips are equipped to automate and orchestrate highly personalized and impactful direct mail

campaigns. They can deliver the right message, at the right time, to the person.

Applying *The Power of Moments* concepts to direct mail allows creative marketers to strike a balance between an organizational need for greater scale and efficiency—typically achieved through digital communications—and the customer's desire for an authentic, genuine connection.



The takeaway? Brands that "think in moments" forge stronger relationships and motivate customers to engage, connect, and purchase.

Part II

Engaged, Joyful, and Motivated

PART II

Building a Better Marketing Model: The Four Elements

Defining moments possess at least one of the following four elements:

Elevation

According to the Heaths: “Moments of elevation are experiences that rise above the routine. They make us feel engaged, joyful, surprised, motivated.”

To create these peaks, the authors suggest that marketers:

- **Boost Sensory Appeal:** Turn-up the volume on reality by engaging the senses through a richer experience.
- **Raise the Stakes:** Add elements of productive pressure to push beyond any perceived limits (this includes things such as competition, games,

performance, deadlines, or public commitment).

- **Break the Script:** Violate norms and expectations about an experience by rewiring or revamping the way an experience unfolds. In other words, instead of always doing things by the rules, execute them in unexpected ways to enhance the experience.



Organizations that enhance branding through direct mail, and the sensory appeal it provides, create urgency while adding an element of surprise. An April 2022 report produced by PFL and Forrester Consulting, *Hybrid Experiences Bring Direct Mail into The Digital Age*, found that **78 percent** of business leaders say that physical assets add value.

Insight

According to the authors, “Moments of insight” deliver realizations and transformations. “To produce moments of insight for others,” they write, “we can cause [people] to ‘trip over the truth’ by revealing a clear insight [to be] discovered by the audience.”

However, the “aha!” moment should always take place in the minds of the audience. Creating a moment of insight is all about helping your audience recognize a problem so they can fully appreciate the solution you provide.

When people experience this “aha” moment, they frequently act on it because they’ve become believers without any form of coercion. The three components necessary for convincing your audience to embrace this model include:

- Clear insight that should leave very little room for disagreement or debate.
- An experience that is quick and impactful.
- A moment of discovery by the recipient.

What does this mean for marketers? This framework requires the right data from a CRM/MAP system, which makes it possible to trigger mailers that deliver the right message at just the right moment in the customer journey.

There are many ways to use direct mail to pique curiosity. Moreover, once a campaign is under way, marketers can measure ROI and adjust tactics on the fly. The right technology will deliver insights into the impact of a program while connecting prospects and customers to the organization’s entire marketing ecosystem.



Connection

People crave personal contact, and “moments of connection” bond us together. Successful organizations understand that there is a need for authentic connections with prospects and existing customers.

In the book, the Heaths speak about moments of connection using the following characteristics:

- They create shared meaning with others.
- They deepen ties.
- They make moments matter.

When members of groups grow closer, it’s because of moments that create shared meaning. In individual relationships, it’s responsive interactions that deepen ties and can bring people together quickly. Personalizing your messages is a way to create that connection. It shows that you know the person and the challenges they are dealing with.

Generating highly personalized content at scale makes customers feel known, heard, and cared for. Suddenly, an organization can communicate with customers on their terms. These personalized and relevant connections bring the company and customer closer together.

PFL can help you build these powerful connections by personalizing messaging at scale. Suddenly, both prospects and existing customers feel as though they’re respected and valued.



Celebration

Defining moments capture us at our best, and “moments of celebration” commemorate people’s achievements. When customers feel a sense of pride, they are far more likely to respond positively. One way to elicit greater pride is through recognition. This includes connecting at important moments, such as anniversaries, promotions, referrals, and other events.

Memorable Milestones

Moments of celebration are powerful, but we don’t need to think of these moments as the finish line. Marketing teams can multiply milestones by recognizing achievements along the journey toward an end goal. By reframing the journey, you can create milestones that are worth celebrating and motivate your customers to take an action. Recognition boosts brand loyalty and people-to-people connections.

In fact, these moments serve as the foundation for a far more evolved approach to marketing. As the Heaths point out: “Defining moments rise above the everyday. They provoke not just transient happiness, like laughing at a friend’s joke, but memorable delight.” Ultimately, “peak moments” or “defining moments” must truly stand out from the constant stream of unrelenting and unmemorable touchpoints.



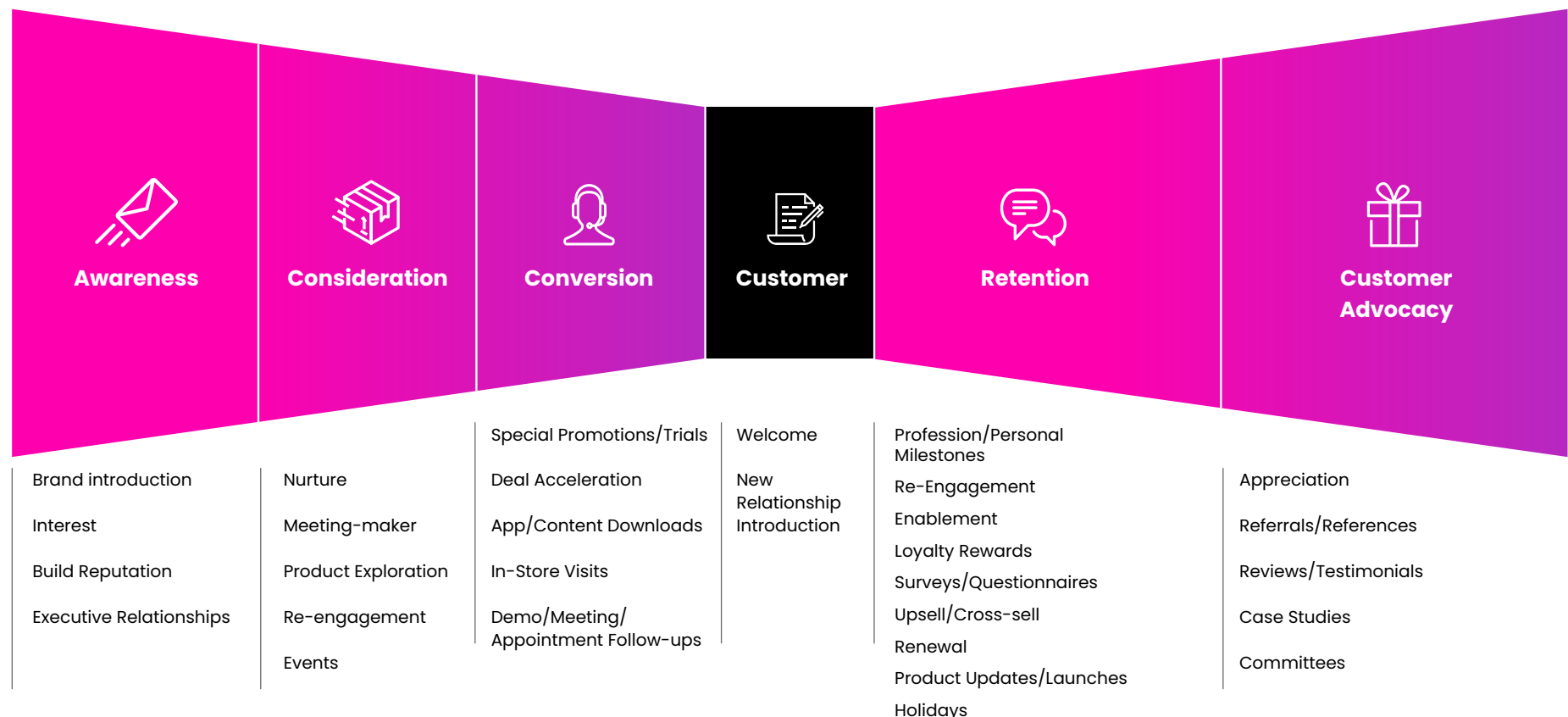
Part III

Authentic Moments For Everyone!

PART III

Aligning the Customer Lifecycle to Powerful Moments

As all marketers know, there is a series of stages that define the customer lifecycle: Awareness, Consideration, Conversion, New Customer, Retention, and Advocacy. Applying the four elements of creating powerful moments can have significant impact on all six stages of the customer lifecycle.



Awareness. A great first impression is an essential beginning step. Best-practice programs weave in high-impact, low-cost print materials at the top of the funnel.

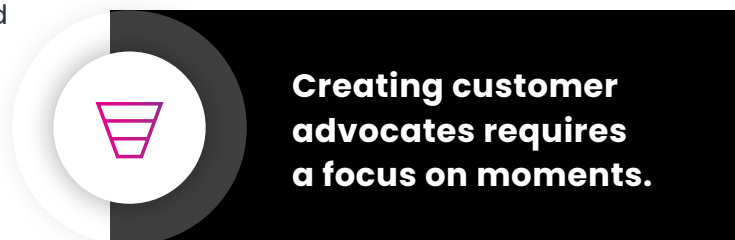
The Power of Moments allows organizations to put two key elements to work. It helps marketers create moments of **elevation** in their messaging, while introducing true moments of **insight** for prospects. This content complements online and digital touchpoints. Simply put, they create a holistic experience from the start. Better awareness can lead to a 20 to 30 percent increase in engagement.

Consideration. Industry leaders understand that success in the consideration stage takes educating, nurturing, and re-engaging prospects who show interest in a brand. Nothing aids in this task more than educational mailers or samples that show what a product is and what it can do. By tapping into moments of **insight** and **connection**, marketers can transform their efforts. Organizations that include direct mail in the consideration stage typically see a 20 to 30 percent spike in engagement.

Conversion. Organizations that succeed in converting a high percentage of prospects to customers typically focus on addressing pain points and delivering incentives to act, including offering free trials, discounts, recognition, and gifts. Creating moments of **connection** and **elevation** can help marketers achieve breakthrough results. Organizations that develop effective conversion methods see a 15 to 30 percent boost in interest.

Customer Retention. What does best-practice customer retention look like? Key experiences include moments of **connection**, **elevation**, and **celebration**. An organization must re-engage on the customer's terms, acknowledge key personal or professional milestones and achievements, offer the right loyalty rewards, and engage in other activities that enhance the relationship. For example, a customer might receive a direct mail piece that celebrates paying off a loan, attaining some kind of certification, or achieving a new status level.

Customer Advocacy. Creating customer advocates requires a focus on moments involving **connection**, **elevation**, and **celebration**. This can take many forms that span the digital and physical realms, including direct appreciation and acknowledgement, rewards related to referrals or references, soliciting reviews from loyal customers, and involving them in the organization in other important ways, including surveys and product beta testing.



New Customer. With any new customer, the initial moments matter. They set a tone that can lead to either brand affinity or deep disappointment. Key elements for new customers to start their journey with your brand include moments of **elevation** and **celebration**. It's crucial to make things easy for the customer—from setting up an account to specifying interests. It's also essential to deliver the right support for customers as they engage with the new product or service.



What Success Looks Like

Organizations that create powerful moments within each of these stages position themselves as more innovative, relevant, and intentional. They establish themselves as thought leaders and create value for customers at every stage.

Here are some specific things you can do to generate authentic moments.



A Powerful Moment in Action

How can your organization create powerful and peak moments from the four elements? There's no one-size-fits-all template. Yet successful marketers recognize that it's vital to deliver authentic moments to every customer at the appropriate stage of the customer journey. In this brave new world, the distinctions between digital and physical marketing become deeply intertwined and are completely complementary.

Take, for example, one of PFL's customers, a high-profile cyber security company that is known for creating highly strategic and creative campaigns based on *The Power of Moments* concept. As with many companies today, they are experiencing higher employee turnover rates within their customer base. This means that people they have been working with—maybe even employees who were champions—are no longer with the company.

Rather than fretting about it, this innovative company decided to flip the situation on its head. In true "Power of Moments"

spirit of "elevation" and "connection"—and not wanting to waste all the time and resources they spent nurturing these people in the first place—the marketing team built a campaign aimed to generate net-new leads by leveraging the connections they already have with those employees who have moved on.

LinkedIn Lookout

The company built a list that targeted employees who were no longer at their customers' companies. The Customer Success team can then opt-in these contacts to a new campaign as they

hear about their movement. Then, BDRs stay on the lookout on LinkedIn and other sources for when that contact joins a new company. This triggers the sending of a package designed to congratulate them on their new position and remind them about how the cyber-security company they know so well from their last position is the best suited to defend their new company's data. It's a new program, and one that will have to play out over time, but the company is already seeing positive results from applying data, creativity, and the right tools to connect in off-script ways.

Awareness Stage

At the awareness stage, your prospects know little to nothing about your organization. This is your chance to make a great first impression with a memorable, but low-cost touch.

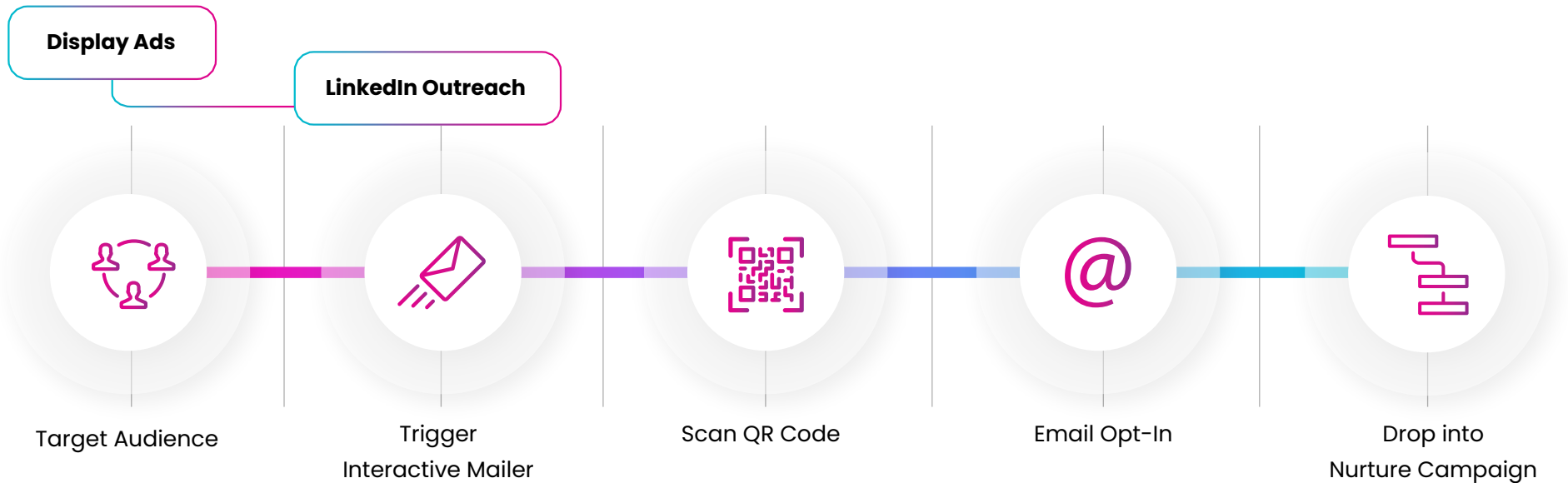
- ✓ Map data fields from your CRM/MAP application to appropriate print collateral. Personalize at scale and send mailers that stand out in the mailbox.
- ✓ Send highly engaging print collateral that stands out in the mailbox using, for instance, PFL's Interactive Mailer Collection.
- ✓ Optimize ROI by targeting audiences that are most likely to engage. PFL's Audience Modeling Service can dial up results.
- ✓ Use trackable QR codes to bridge the digital and physical worlds. This approach also lets you know who's engaging with your brand.
- ✓ Use a call to action (CTA) on all assets so you can collect email addresses and then drop them into nurture campaigns.



THE PLAY

Introduce Yourself

Try this: There are many plays you can run to create awareness. One example is the “Introduce Yourself” play. Once you’ve defined your target audience, trigger interactive mail with a trackable QR code. Once your contact has engaged, and an email address is collected, drop the prospect into a nurture campaign.



Results: 20–30% increase in engagement

AWARENESS SUCCESS STORY

Health Org Leverages Direct Mail to Level Up Patient Engagement



Eleanor Health is a mental health and addiction organization with more than 40 clinics in seven states. Its mission is to help people impacted by these struggles live amazing lives. The primary strategy for reaching this vulnerable population was cold calling, which often felt abrupt to patients who weren't quite ready to speak with a medical professional.

To properly reach potential members, the Eleanor Health team needed to explore printed marketing materials. But they didn't have the resources or the staff to manually mail thousands of letters and brochures per week. Thanks to PFL's integration with Salesforce Marketing Cloud, the marketing team can now perfectly coordinate their online and offline outreach. Every piece of mail is automatically triggered, personalized, and tracked in Marketing Cloud.

Eleanor Health will continue using mail as an outreach strategy. The team is excited to explore new ways to integrate mail in their mission to introduce themselves and engage and help patients.

Outcome:

Eleanor Health has been able to tackle widespread mail campaigns with very little manual work that have resulted in a **3X increase** in leads.

Consideration Stage

At this stage, your prospects are aware of your brand, and they have some pain you might be able to address. This is the time to educate, increase personalization, and keep engagement high.

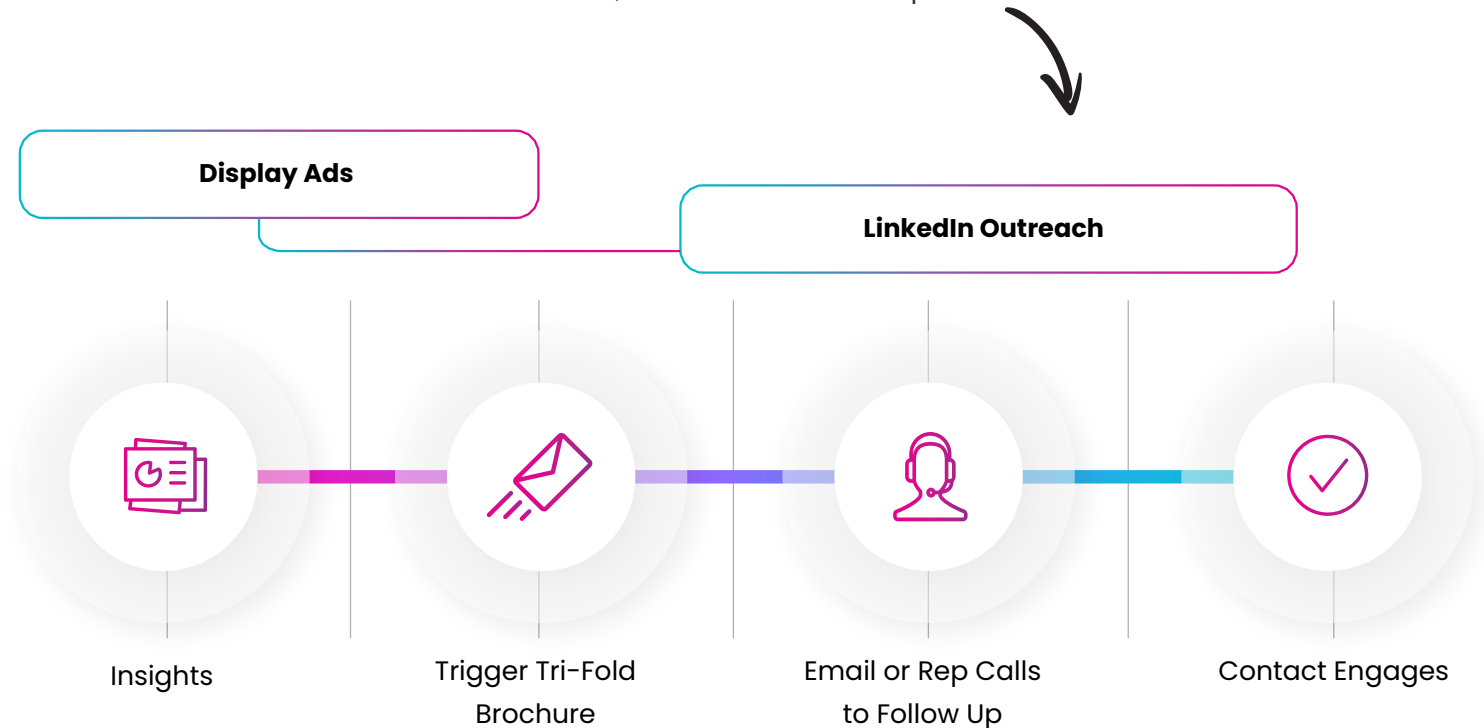
- ✓ Create an email nurture campaign that links your brand to your buyers' pain points.
- ✓ Produce multiple versions of low-cost mailers that closely align with those pain points.
- ✓ Drive engagement by triggering targeted, personalized direct mail pieces when your audience is interacting with your brand.
- ✓ Use trackable QR codes so you know who's engaging with your brand and when they're paying attention.
- ✓ Use a CTA that encourages your audience to take the next, best action.



THE PLAY

Nurture

Try this: One way to put this into practice is the “Nurture” play. Send relevant content at the right time by inserting links to your brand topics within your email nurture campaign. When a prospect engages digitally with a specific topic, trigger informational print collateral, such as a booklet or a tri-fold brochure with a treat, that relates to that topic.



Results: 20–30% increase in engagement

CONSIDERATION SUCCESS STORY

A Leading HCM Provider Makes the Power of Moments Pay Off



Paycor has established itself as a leading Human Capital Management (HCM) platform. However, the company recently faced a challenge: It needed to stand out in a crowded marketplace and add focus to its marketing efforts so that it could expand revenues and boost margins. This required better integration of digital and direct mail campaigns.

The company turned to PFL to develop a new marketing strategy. By boosting data integration with Salesforce, Marketo, and other of Paycor's marketing tools, PFL helped them

unlock more personal yet automated ways to interact with prospects. This included adding a direct mail package with a Tile and a Buyer's Guide to their mid-funnel email nurture. This led not only to increased sales opportunities, but also a higher win rate.

Outcome:

On average, Paycor's programs see a 10x ACV ROI and a **response rate increase of 21%.**

Conversion Stage

The Conversion Stage is the most pivotal moment in the journey. In order to win the business, you must demonstrate why your offering or product is better than the competition's. This is the time to increase urgency with a powerful moment.

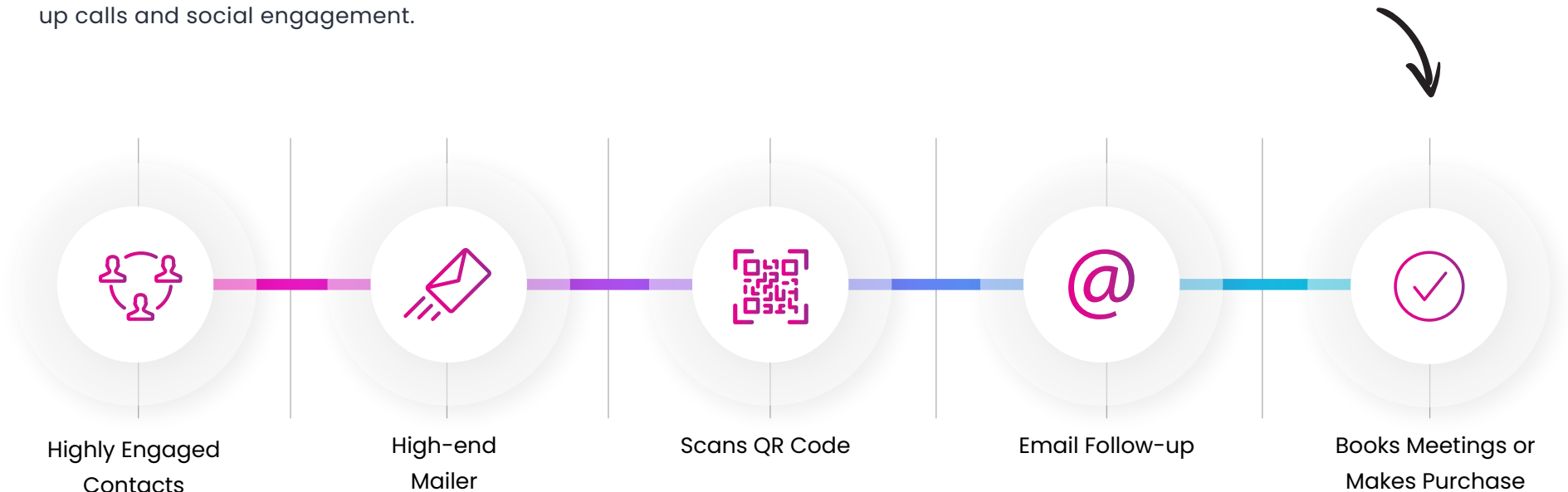
- ✓ Double-down on your prospect's biggest pain points. Shower them with case studies and testimonials that address their specific pain points. This means you might need different materials for different customer groups and personas.
- ✓ Introduce incentives with special discounts or trials.
- ✓ Deliver treats to get prospects and existing customers over the finish line. These touches will create urgency when someone is hesitating in this critical stage.



THE PLAY

Sales Acceleration

Try this: Here's a "Sales Acceleration" play that creates urgency to accelerate deals by sending sales qualified leads (SQLs) a high-impact mailer that contains a gift and a piece of content, such as a buying guide. After the prospect hits the SQL stage, trigger an email thanking them for the meeting and letting them know "something's in the mail." After the package has been delivered, notify sales reps to call and follow-up. Finally, drop contacts into an email nurture, with a continued cadence of follow-up calls and social engagement.



Results: 15–30% increase in engagement

CONVERSION SUCCESS STORY

A Cybersecurity Firm Gets More Personal

proofpoint.



Proofpoint is a leading provider of cybersecurity solutions, including tools that protect against advanced threats and compliance risks. Like many firms, it offers webinars and in-person events that help educate its audience and guide them to its solutions. Promotional items have always been a key part of its marketing strategy. Although the company has worked with PFL for years, it depended on another company to distribute these promotional materials and products. However, the system had devolved into chaos.

After turning to PFL to modernize its strategy, Proofpoint focused on better vetting lists and automating the process of distributing treats in a repeatable and highly scalable way. This included getting packages to attendees—everyone from managers to CEOs—immediately after events.

Outcome:

This approach has driven attendance rates to above **80 percent** while translating into higher sales.

New Customer Stage

Delivering value to new customers is essential for any organization. Here are three proven concepts you can use to welcome new customers and ensure loyalty and brand affinity from the start.

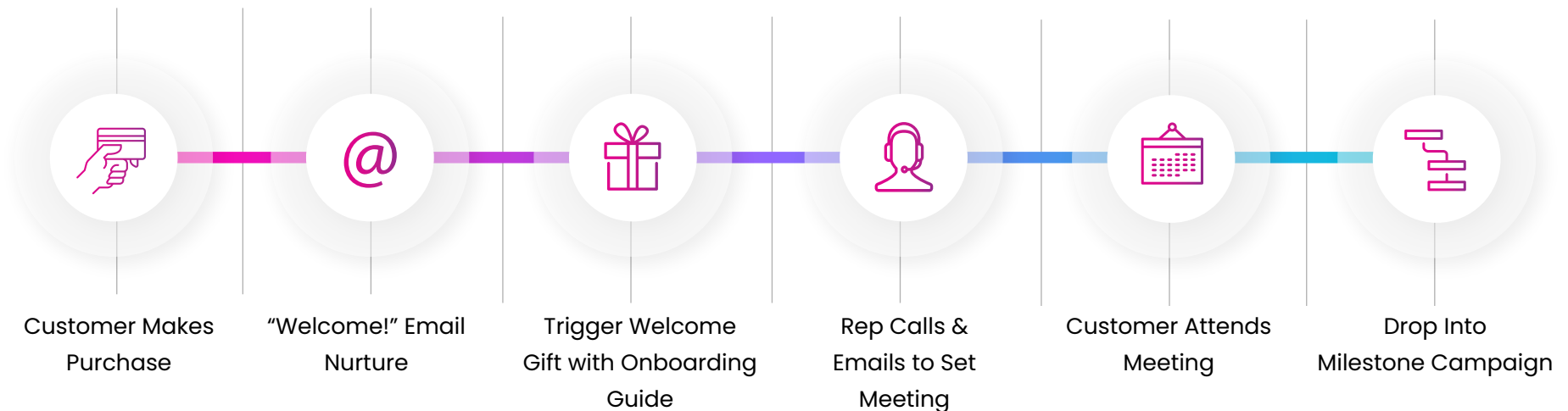
- ✓ When a deal closes, send a high-impact dimensional mailer to thank them, boost excitement, and set a positive tone for the partnership.
- ✓ Use print collateral to introduce the new team the customer will be working with and set proper expectations by including next steps in their journey.
- ✓ Drop the customer into a nurture campaign offering tips to drive adoption.



THE PLAY

Welcome Campaign

Try this: Increase adoption and build momentum from the start by elevating the customer experience with a “Welcome Campaign.” Once a customer makes a purchase, trigger a high-impact thank-you gift that introduces them to your brand or support team and share next steps.



Results: 20–40% increase in engagement

Retention Stage

Keeping existing customers in the fold is critical. Industry studies show that acquiring a new customer is five times as expensive as retaining an existing customer. Moreover, the success rate of selling to an existing customer is about 60 to 70 percent, while the success rate drops to about 5 to 20 percent for prospects.

With that in mind, here are five ways to reinforce relationships:

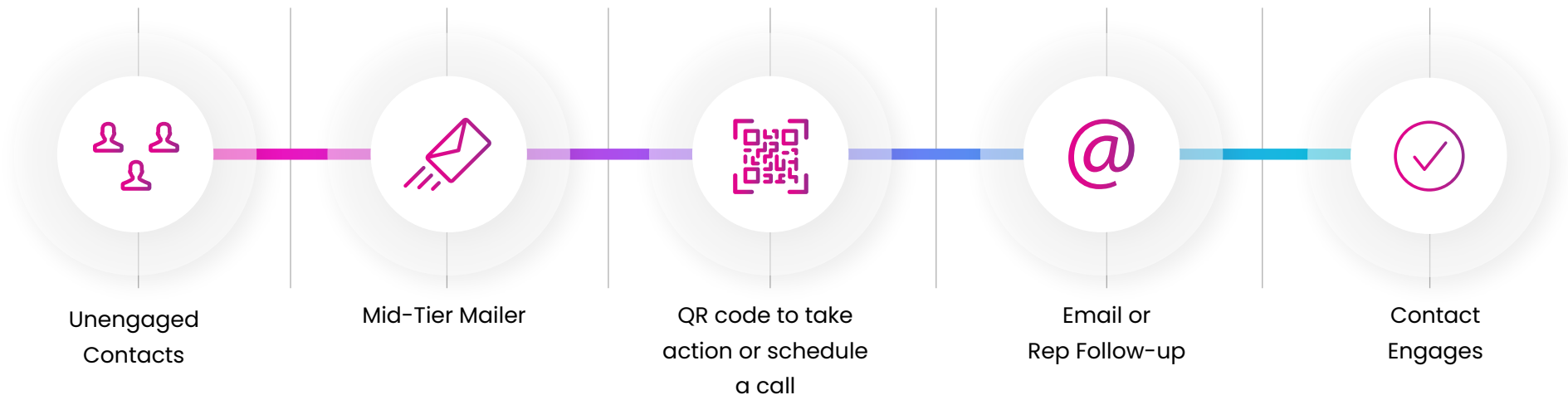
- ✓ Elevate customer experiences and increase adoption by sending physical mailers to customers when their engagement starts to dip.
- ✓ Nurture and build customer relationships by sending occasional notes or gifts to show appreciation.
- ✓ Reward customers for their continued loyalty to your brand. A well-designed loyalty program can boost engagement by 20 percent to 40 percent.
- ✓ Share customer success stories and best practices across the organization.
- ✓ Keep customers informed about new products and services for additional purchase opportunities—and even allow them a first or early opportunity to order them.



THE PLAY

Re-Engagement

Try this: The “Re-Engagement” play increases engagement and adoption for your brand by sending a physical mailer to customers who have been non-responsive. Trigger a mid-tier mailer and send a notification task to reps to follow-up via email and phone once the package has been delivered.



Results: 20–40% increase in engagement

RETENTION SUCCESS STORY

Driven Brands Maintains Excellence Through Re-engagement

**meineke**

As a leading provider of automotive maintenance services, including oil changes, Driven Brands, which includes the **Take 5 Oil** and **Meineke** brands, needed to better coordinate its digital and physical marketing efforts. Data was siloed and trying to deliver the level of personalization necessary was next to impossible. Not only did this disconnected framework result in subpar targeting and poor performance, it also drove up costs.

By turning to PFL, the company found a way to combine a wide variety of data

points collected from customers and transform the raw data into strategic information that boosted engagement. For instance, if Take 5 Oil sent out an email reminder for an oil change and the customer ignored it, the company followed up with a printed reminder delivered through the mail.

Outcome:

Take 5 Oil sends an average of 3,000 customer reminders every day and achieves an **average 5.25 percent response rate**.

Customer Advocacy Stage

Companies that harness the power of customer advocacy build strong brands. Here are five keys to success:

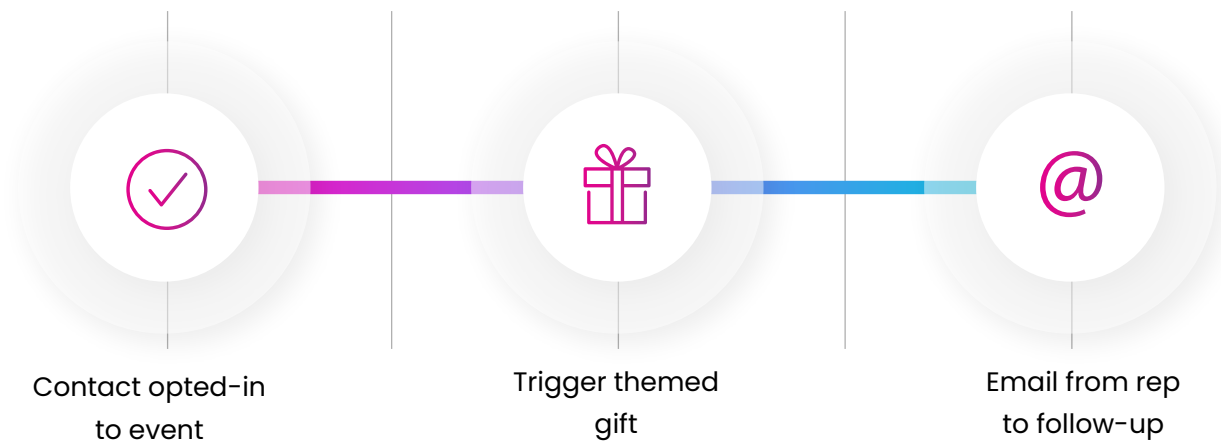
- ☑ Inspire engaged customers to recommend your brand through social media and other means. This requires educational nurture programs that tell your brand story or spotlight crucial products.
- ☑ Strengthen relationships with communities and make members feel like brand insiders and ambassadors.
- ☑ Show appreciation and nurture relationships by sending gifts for personal milestones and frequent purchases.
- ☑ Create a referral program to incentivize customers to leave reviews, testimonials, or become brand ambassadors.
- ☑ Give brand advocates an opportunity to test new products while gathering feedback. Send a thank-you gift for their time and efforts.



THE PLAY

Appreciation

Try this: The “Appreciation” play builds relationship with your customers by acknowledging moments that matter. Show your customers you care about them personally with a gift that surprises and delights when they least expect it. Store common personal events in Salesforce, such as birthday, new puppy, new baby, promotion, etc., and allow reps to add contacts to these campaigns. You can also use phone call analytics to track and listen for these words and then trigger campaigns based on the event.



CUSTOMER ADVOCACY SUCCESS STORY

Communicating the Power of Moments

zoom



Online companies such as Zoom might seem far removed from the gravity of the physical world. But nothing could be further from the truth. When the pandemic emerged, the company recognized that its marketing and sales framework had to change.

Zoom turned to PFL's Preferred Address Capture to engage prospects and customers more fully. The result? A landing page allowed individuals to choose a preferred gift—a webcam, headset, or branded tumbler—to complement their Zoom subscription.

Outcome:

Taking advantage of PFL's Preferred Address Capture to engage customers resulted in a **23x increase** in ROI.

Part IV

Conclusion

PART IV

Stitching Moments Together is Mission Critical

Organizations that elevate experiences and create powerful moments throughout the entire customer lifecycle stand out. They meet customers and prospects on their terms through a powerful combination of digital and physical touchpoints. In an increasingly crowded and noisy marketplace, these marketers understand how to use the tools that work best in almost any situation. They deliver highly relevant messaging at the most relevant moment—and maximize ROI.

Today, no one questions the value of digital marketing. It's an essential piece of the overall marketing puzzle. However, it's exponentially more powerful with the addition of direct mail methods that

engage all the senses. Organizations that harness direct mail—with postcards, trifold, samples, treats, and more—are positioned to offer a more complete sensory experience. By tapping into the power of the four elements discussed in the Heaths' book, they're able to deliver on *The Power of Moments* in profound and mutually beneficial ways.



PFL is uniquely positioned to help your organization put *The Power of Moments* concepts into action so you can elevate your marketing campaigns by creating memorable moments.

We simplify direct mail at scale by managing the entire process from strategy and production to delivery, measurement, and beyond. We have created a robust marketing-technology platform that brings direct mail into the digital ecosystem, while also providing access to our sophisticated, sustainable e-commerce printing operation (Printingforless.com).

In short, we do it all. We are the most effective solution in the industry for handling everything required to create integrated, personalized, and impactful direct mail experiences that increase engagement and generate significant ROI. [Book a demo](#) today and let our customer success team be your expert guides. We'll work with you every step of the way to help

you create powerful direct mail moments across the customer lifecycle.

So, marketers, it's time to live in the moment. It's time to tap *The Power of Moments* concepts to create powerful direct mail moments.



It's time to tap *The Power of Moments* concepts to create powerful direct mail moments across the customer lifecycle.

About PFL

PFL, a leading direct mail technology company, increases engagement for brands with their key audiences, using data to automate direct mail and create more authentic human experiences at infinite scale. PFL delivers personalized direct mail programs that are measurable and relevant so organizations can earn attention and amplify growth.



Ready to give your engagement a boost?
Call us at 877.942.8604 or send an email to inquire@pfl.com.

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