

PFL'S ESSENTIAL GUIDE TO:



Creating Customer Insight with Direct Mail



Contents

- 4 Introduction
- 13 Awareness Stage
- 22 Consideration Stage
- 25 Conclusion



Introduction

Make Moments Count

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.

In our recently published e-book, [*PFL's Essential Guide To: Creating Powerful Direct Mail Moments Across the Customer Lifecycle*](#), we explored how brands can generate powerful moments with customers and prospective buyers by adding personalized, direct mail touches within their digital programs. These moments can lead to significant

increases in engagement with your brand.

Chip and Dan Heath, in their best-selling book, [*The Power of Moments: Why Certain Experiences Have Extraordinary Impact*](#), 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 don’t cut it.

In the book, we learn that “defining moments” are created from one or more of the following elements: Elevation, Connection,

Celebration, and Insight—the latter of which is the subject of this e-book. These elements can help organizations plan and multiply the number of powerful experiences they can create for customers.

In general, the four elements breakdown like this:

Elevation. According to the Heaths: “Moments of elevation are experiences that rise



above the routine. They make us feel engaged, joyful, surprised, motivated.”

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.

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.

And then there is “Insight,” our topic here:

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, these “aha!” moments 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 leaves very little room for disagreement or debate.
- An experience that is quick and impactful.
- A moment of discovery by the recipient.

The Science of 'Aha!'

But how do such moments of revelation generally come about? Anecdotally, it's pretty clear that these moments are serendipitous—they can't be planned or orchestrated, they just happen. The very nature of such a moment relies on the unexpected. Just search "aha moments" on Google and see the pages upon pages of stories and examples of how both famous and not-so-famous "Eureka" ideas came to be. [For more, see our blog on PFL.com.](#)

"Chance favors only the prepared mind."

—Louis Pasteur

Nevertheless, some believe defining moments can be nudged along; at least prepared for. [A recent article on Medium from Actionable](#), a learning and development platform company, begins with this quote from Louis Pasteur: "Chance favors only the prepared mind." The article states that "the creative process can seem mysterious—almost magical at times. That moment when we 'get it'—when we have an 'aha' that leads us to an outcome we didn't see, breaks an impasse, and moves us forward—seems especially elusive." The article goes on to suggest that knowledge about creativity and insight can help us to work in ways that create the conditions for greater creativity and innovation.

Heavy Thinking and Flashes of Insight

Finally, as noted in [a New Yorker article](#) of a few years ago: "In general, creativity seems to come when insight is combined with the hard work of analytical processing. A person can't discover the theory of general relativity in a dream if he isn't a physicist who's done some heavy thinking about the subject beforehand."

So, the good news is that these flashes of insight are not as random as they seem

and can be stimulated by specific conditions. The keys to adapting insights to marketing, then, are twofold: the thinker must have something of a prepared mind, has done some heavy thinking beforehand, and is in the right inward-looking, quiet state of mind. It can also be suggested that unlike the buzz of email, direct mail—physical, dimensional mail of some sort—can play a role in this activity.



Opening personalized dimensional mail is a quiet, often solo, activity; it can be done during calm downtime. Studies show that opening a personalized package can be a positive, even fun, experience. Add to that scenario a package or mailer containing content, information, ideas, suggestions that are pertinent to the

recipient and you've created a potential aha moment of insight. Additionally, in many cases, 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.

What kinds of low-cost printed products can be used for Insights-based campaigns?

Here's a short list of some that have proved successful for PFL customers.



9 x 6 (oversized) postcards



Tri-folds with add-on treat



Brochures



Booklets



Slide & Reveal cards

Here's Some Insight into Generating Insight

Moments of insight deliver realizations and transformations. To create these moments in your marketing campaigns, you need to define the target audience and understand the problems they have. Here's a short questionnaire you can fill out to help you gain insight into how to help your customers and prospects become more insightful.

What is a problem from their point of view?

What is the problem my audience is experiencing? Do they know this is a problem? Why or why not?

How do they experience the problem?

How does this problem impact their day/week/month/year?

What are the stakes? What could happen if they don't do anything to address the problem? What could happen if they started to address the problem today?

What is needed to realize there is a problem and motivate action?

What will it take to recognize there is a problem? What will it take for them to change their behavior/attitude towards the problem? How can our organization support them to overcome the problem? (add value)

What Does Insight Look Like in The Customer Lifecycle?

In many ways, serving up “insight” to customers is just a variation of thought leadership. Good, thoughtful content is always—*always*—about the recipient and her pain points, challenges, and education. It is not about you or your products or strategy.

Examples of insight-oriented content include **quizzes, guides, worksheets, checklists, and assessments.**



Creating powerful moments of insight with direct mail allows organizations to increase engagement with online and digital touchpoints. Simply put, this can create a

holistic experience from the start—and better awareness can lead to a 20 to 30 percent increase in engagement.

While “insight” is welcome at any stage of the journey, it can be especially valuable during the first two stages: Awareness and Consideration. These are the perfect places at which to start creating moments of insight for prospective customers. During the awareness stage, positioning your organization as an expert is an essential beginning step. Best-practice programs do this by weaving in insightful, low-cost print materials at the top of the funnel, which can further increase success as the buyer moves to the consideration stage.

Awareness Stage

Your Chance to Build Authority

In the awareness stage, your prospects know little to nothing about your organization. This is your chance to build authority and prove industry expertise by incorporating insight-creating tools into your awareness content. This guides the prospect to consider your brand when they are in the market for the product or service you offer. You can:

- **Send items that stand out in the mailbox** by preparing different versions of oversized postcards targeting your audience



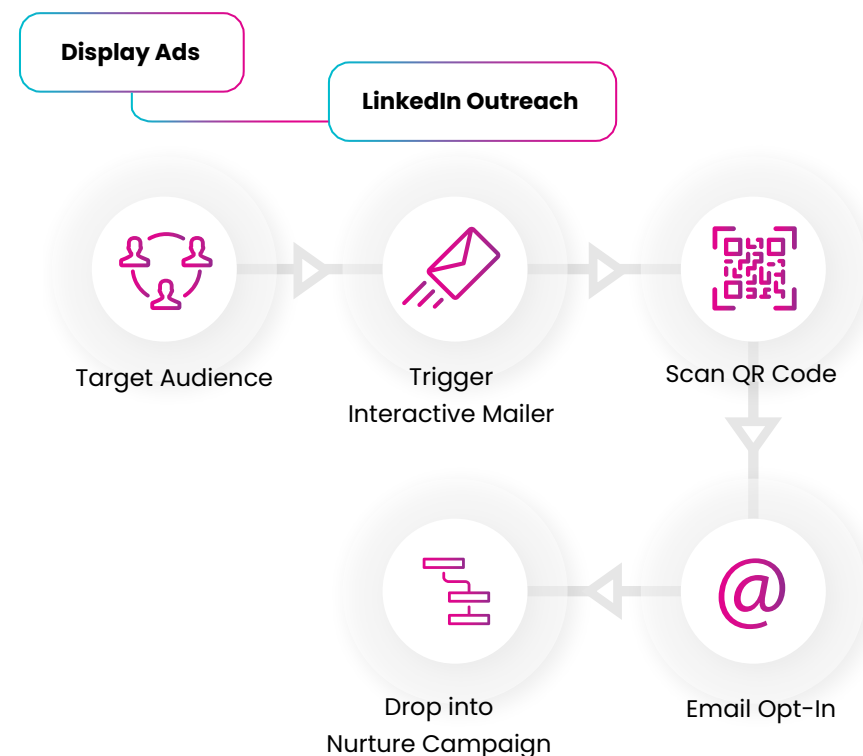
based on what you already know about them, such as demographic data, industry, title, or a problem they might be dealing with.

- **Send low-cost, but highly engaging print collateral** that incorporates a quiz or an assessment that will help the prospect gain powerful insight they might not have had before.
- **Use trackable QR codes** to direct your audience to download an e-book, guide, or worksheet. This approach also lets you know who's engaging with your brand so you can add the contact to your CRM or drop them into a nurture campaign.

AWARENESS PLAY

Introduce Yourself

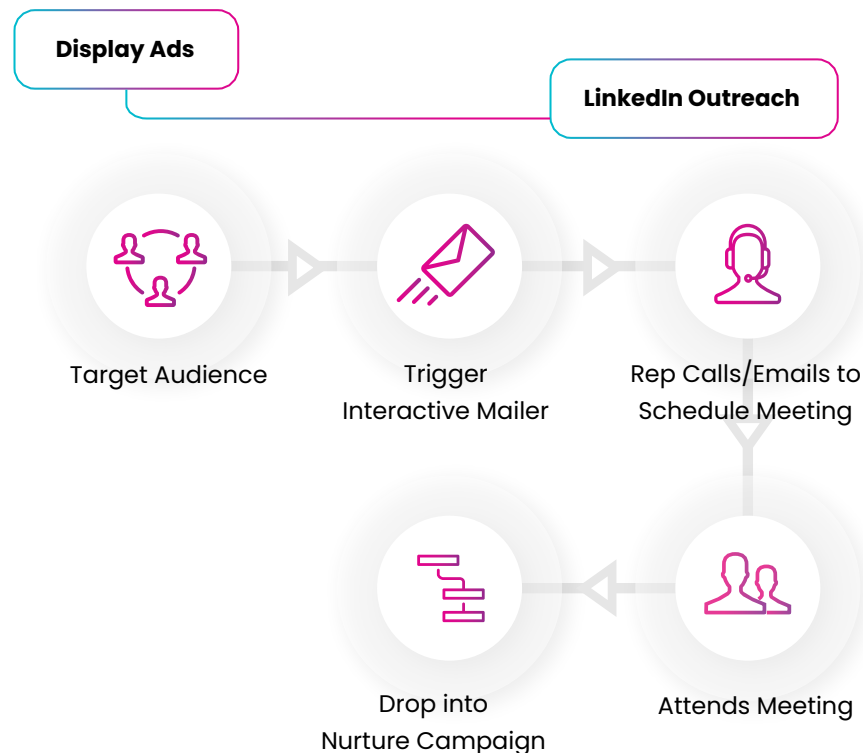
Try this: There are many plays you can run to deliver a moment of insight during the awareness stage. One example is the “Introduce Yourself” play. Once you’ve defined your target audience, trigger interactive mail with a trackable QR code that points to an insight-generating quiz or survey. Once your contact has engaged, and an email address is collected, drop the prospect into a nurture campaign.



AWARENESS PLAY

Thought Leadership

Try this: Thought leadership positions your brand as a subject matter expert—innovative, smart, and helpful. Use this play to send a book, industry report, or whitepaper with a personalized note to your target audience. If it addresses a known pain point, all the better.



Some Real-world Insight-creating 'Awareness' Examples

You might be wondering how other organizations create moments of insight. Because of the intricacies and challenges associated with these areas, the healthcare and financial industries are extremely adept at helping customers experience moments of insight through self-discovery.



NerdWallet offers customers and prospects a short quiz designed to help them understand their financial situation better. Your [Financial Health Score](#) lets customers determine the state of their financial situation so they can understand what steps to take next for success.

Intuit MintLife helps its customers and prospects deal



with the high cost of groceries today, with its [How Much Your Monthly Food Budget Should Be + Grocery Calculator](#). We all are spending more on groceries, so some legit insight into how we stack up and what we can do to be thriftier is certainly welcome in today's economy.



The Sleep Doctor is not to be caught napping when it comes to insight. Do you know your ["chronotype"](#)? Did you even know chronotype was a thing? Well, The Sleep Doctor believes insight into it will help you be wiser and healthier. To that end, it offers up ["Chronotype Quiz: Find Your Chronotype."](#)

Arxan Aims Insights at Hard-to-Reach Buyers

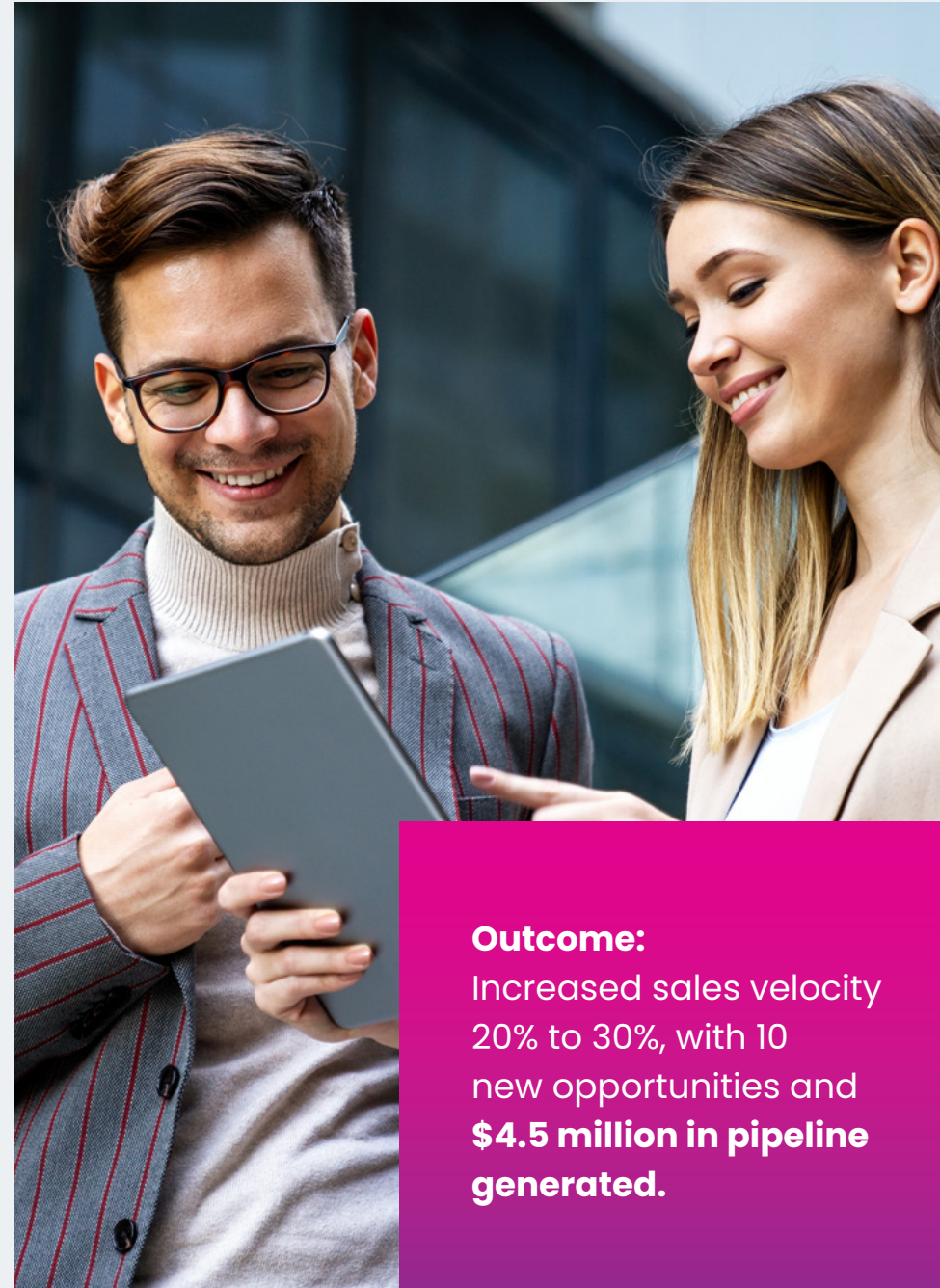
THE CHALLENGE

Arxan, acquired by Digital.ai in 2020, didn't have the budget for the spray-and-play mentality, which we know is not effective anyway. They wanted to target the most elusive prospects, those who would benefit from the product, but were so inundated with sales reach-outs that they became immune to sales—true digital fatigue.

THE ACTION

The company began its campaign by sending two mailers to warm up prospects. The first was an analyst report that explained how easy it is for hackers to

gain access to sensitive information via mobile application vulnerabilities, and the second was a risk-assessment survey. Following the first two mailers, C-level executives at target companies received an Arxan-branded box that included a personalized notecard and a small blacklight flashlight that could expose a secret message on the notecard using invisible ink - "you miss 100% of the threats you don't see."



Outcome:
Increased sales velocity
20% to 30%, with 10
new opportunities and
**\$4.5 million in pipeline
generated.**

Consideration Stage

Educate and Engage

At this stage, your prospects are aware of your brand, and you have uncovered some pain point of theirs you're able to address. This is the time to educate, increase personalization, and keep engagement high. You can:

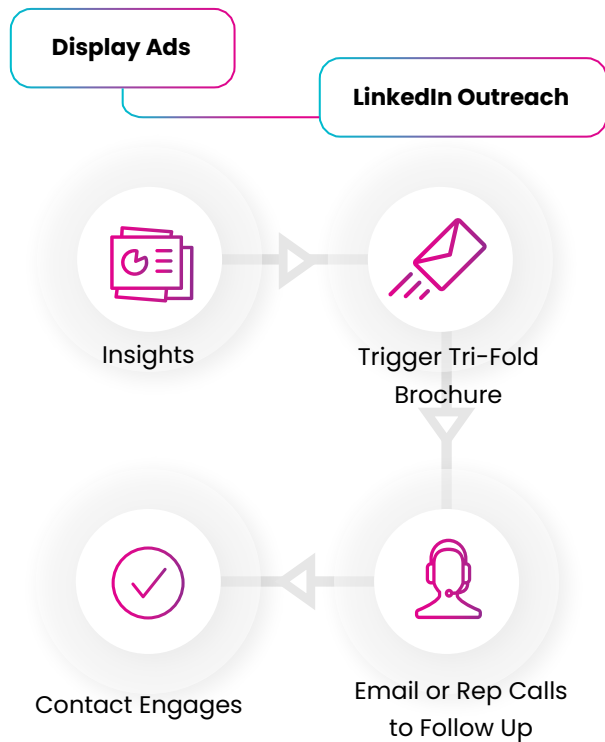
- Create an email nurture campaign that links your brand to your buyers' pain points.
- Produce multiple versions of low-cost mailers that closely align with those challenges.
- Drive engagement by triggering targeted, personalized direct mail pieces that include insightful content based on your audience's issues.
- Use trackable QR codes so you know who's engaging with your brand and what topics they are interested in.
- Use a CTA that encourages your audience to download a white paper or schedule a demo or appointment.



CONSIDERATION PLAY

Nurture

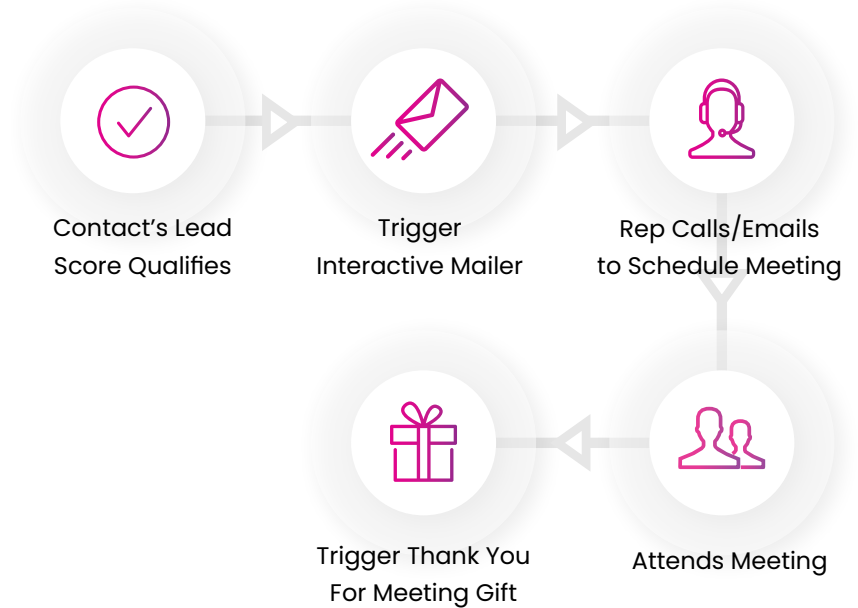
Try this: One way to put Insights into practice in the Consideration stage is with a “Nurture” play. Send relevant content at the right time by inserting links or a QR code to downloadable print collateral or web-based tools that can be used by the recipient to gain insight. When a prospect engages digitally with a specific topic, trigger additional informational print collateral—such as a booklet or a tri-fold brochure—offering ideas that relate to the topic or pain point and suggest ways customers and prospects can gain more insight.



CONSIDERATION PLAY

Meeting Maker

Try this: For the contacts that show engagement with, and interest in, the insight-generating content you’ve been sharing—say, by clicking links, downloading content, or registering for an event—it’s time to ask for a meeting. You can do this a couple of ways. One option is to send a low-cost interactive mailer, such as a Slide & Reveal, with an incentive to set a meeting to discuss how your product or service can make their lives easier. Another way is to send a mid-tier, dimensional mailer that creates a memorable moment of surprise and delight for the contact so they are eager to book a meeting.



Some Real-world Insight-creating 'Consideration' Examples

Here are more examples of how some organizations create moments of insight. These tools are geared toward buyers in the consideration stage or maybe even further along in the buying process.



Acorns, a financial technology and services company that specializes in micro-investing and “robo” advice, has a very cool [Compound Interest Calculator](#) that allows customers and prospects to see how their money could potentially grow over time through the power of compounding interest.

Paycor, an HR and payroll-technology company, has created a [“Buyer’s Guide”](#)



that offers a comprehensive checklist of what buyers should be looking for when evaluating an HR-technology solution. This guide is printed and sent in direct mail programs to mid-funnel prospects.



Lively, whose aim is to help people manage the rising costs of personal health through Health Savings Accounts (HSAs), offers prospects and customers some insight into health insurance plans. There might be nothing more confusing than trying to understand what the best and most

economical insurance plan is for you and your family. Lively’s [Health Insurance Plan Comparison Calculator](#) is designed to provide some insight into that process.



sensa.health
tips for productivity

Sensa Health, which bills itself as an online platform that connects users to tools that can support their mental health, regardless of their condition, offers insight by way of a [Stress and Anxiety Assessment](#). Questions include age, how do you normally feel, how do you describe sleep patterns, and the like.

It’s worth noting that none of the Awareness or Consideration examples directly mention the companies’ products or

services. It is, of course, indirect or implied. But good, insightful marketing aims to educate, inform, and enlighten the prospect or customer so she feels that the creator is a subject matter expert who is interested in her struggles and challenges—and, therefore, a brand that would be a good partner to do business with.

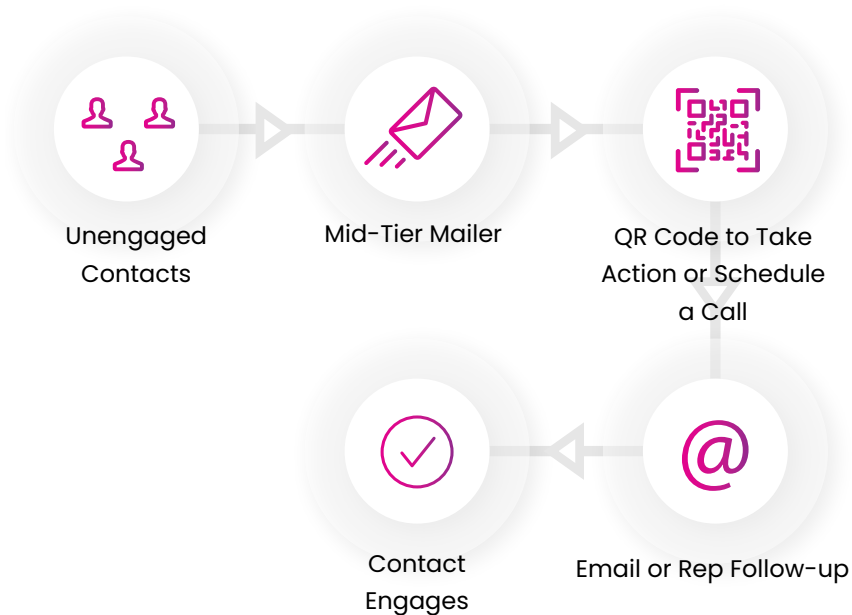
Also, especially important to understand—*an insight, if you will*—is that most of these examples can be either printed or mailed as sales collateral. It’s also possible to send a mailer including a QR code or URL directing the recipient to any of these web-based tools.

CONSIDERATION PLAY

Re-engagement

Try this: To increase engagement and quickly move prospects to the next stage, send a mid-tier mailer to those who have suddenly gone dark and are non-responsive.

As soon as the package gets delivered, automate a notification task for reps to follow-up via email and phone to schedule a meeting or an appointment.



Conclusion

Moments of Insight Inspire Action

Organizations that inspire and help create usable insights for customers and prospects—especially in the Awareness and Consideration stages of the lifecycle—through a powerful combination of digital and physical touchpoints will stand out. In an increasingly crowded and turbulent business world, these marketers understand how to use the tools that work best in almost any situation.

They deliver highly relevant messaging at the proper 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 and generate insight for recipients. Organizations that harness direct mail—

with postcards, trifolds, samples, treats, and more—are positioned to offer a complete sensory experience.

PFL simplifies 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 sustainable e-commerce print operation (PrintingforLess.com).

In short, we do it all. We are the most effective solution in the industry for handling everything required to create personalized, insightful, 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 create powerful direct mail moments of insight that benefit your customer and your brand.

PFL is uniquely positioned to help your organization generate personalized moments of insight that your prospects and customers can put into action to their benefit. By helping create these insights, people will think of your brand as an expert and a partner—one that understands your challenges and is not just selling a product or service.



Deliver Authentic Moments at Scale

No matter your use case and no matter your audience, personalized direct mail has the power to make people sit up and pay attention.

PFL brings direct mail to the martech stack so you can easily automate personalized direct mail at infinite scale. By addressing individual needs and frustrations, you can start building long-lasting relationships.



TIP

Direct mail is serious marketing... but it's also a chance to unleash your creativity. Bring your story to life, put a smile on someone's face and make an authentic human connection.



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.