

Tactile Marketing Automation®

# Idea Book





# Your Brand Moment Starts with One Little Thing

Direct mail is the #1 most effective channel for audience engagement.<sup>1</sup> What's more, companies with strong account-based marketing ROI are planning to invest more heavily in direct mail than any other channel.<sup>2</sup>

PFL is the leader in tactile marketing automation. In short, we help leading brands orchestrate direct mail with marketing data and even other channels. We deliver memorable brand moments that are personalized, timely, and relevant.

Every memorable kit starts with one thing: **a great idea.**

We invite you to use the many examples and tips in this book as inspiration for your next campaign.

<sup>1</sup> 2020 State of Multichannel Marketing Report by Demand Metric & PFL

<sup>2</sup> 2020 ABM Market Research Study by Demandbase



## Get a Foot (Or Hand) in the Door

Be bold as you use direct mail to literally reach out and make that memorable connection!

This kit is a great way to strengthen your account-based marketing (ABM) strategy, so you can warm up contacts at key accounts. Tell the story of how much you wish you could meet them.

The pop-up handshake makes an unforgettable surprise. Plus, the coffee cup is collapsible, so you can send the whole kit in an envelope. Including a little packet of coffee is the mocha-flavored icing on the cake.

### The Strategy

Because it's so early in the funnel, you likely know only a few details about the contact. Craft a message that speaks directly to the contact's industry and persona. Highlight industry challenges and how your brand will help overcome them.



#### TRIGGERING THE SEND

- Add a list of prospects from a key account to the program
- Send it when someone opts in for a newsletter or program
- Let the sales rep trigger the send if the contact misses a meeting



#### MORE USES FOR THIS IDEA

- Introduce yourself to new stakeholders on an opportunity or customer account
- Welcome someone who opted into a program



#### ENHANCEMENTS

- Use special finishes such as metallic or scratch-off foil
- Include a QR code that leads to a personalized URL
- Send it in a clear, compostable envelope to spark curiosity



#### TIP

Be clear about the product and value you offer. When designing, seek feedback from someone who is **not** familiar with your product.



#### The Remarkable Factor

For direct mail to “be remarkable,” it should be worth remarking on to other people. Who wouldn’t want to show this card to colleagues?!



## Capture Attention by Inspiring Curiosity

You have a new lead. You've determined they're a good fit, and you need to introduce your brand value. Start with a small-but-stunning interactive mailer to nurture your relationship.

The Slide-and-Reveal uses an outer shell to hide a message on the inside. With a satisfying slide, the secret message appears. The playful nature of this piece will appeal to your contact's natural curiosity. Plus, you can use variable data from your CRM or marketing automation to personalize the content.

### The Strategy

Direct mail lifts engagement across all channels. For best results, pair your mailer with a bold call to action that directs recipients to visit a landing page. Then follow up with a phone call and email! That's what it means to ***go beyond the send***.



### TRIGGERING THE SEND

- Add a prospect or list of prospects to the program
- The prospect opts in from a web form
- The prospect registers for an event



### MORE USES FOR THIS IDEA

- Reveal a new product or service
- Enhance a nurture stream
- Re-engage deals gone cold



### ENHANCEMENTS

- Personalize the graphics and copy for each contact
- Include a physical gift card
- Use foil on the outer pieces to draw attention





#### TIP

This Slide-and-Reveal can be a self-mailed item, or you can include it in a larger kit to enhance your message.



#### Go Green!

We can send self-mailing envelopes like the Slide-and-Reveal in a compostable, clear envelope.



## Unfold Your Brand Story Around an Event

After capturing attention, the next challenge is staying top of mind. Events, whether they're in-person or virtual, help keep engagement strong.

Draw attention to an event with the dramatic Iron Cross mailer. This self-mailer has ample space for messaging and stands out from other mail thanks to its uncommon size and design. It can even contain small items and a personalized print-on-demand card. Guide the recipient through your brand story as they unfold each paper arm to uncover the complete picture!

The Iron Cross is effective either pre- or post-event.

### The Strategy

Choose the timing that makes the most sense for your audience, the buyer's journey, and for your business. Having trouble with attendance? Send it pre-event. Want to focus on booking more meetings? Send the piece afterward to lift conversions.



### TRIGGERING THE SEND

- Invite your desired attendees
- Remind those who signed up to attend (1 week pre-event)
- Follow up with attendees and no-shows



### MORE USES FOR THIS IDEA

- Send it as an introductory door opener
- Include it in a nurture stream
- Welcome new customers at low cost



### ENHANCEMENTS

- Add dimension with a small swag item
- Use die-cut shapes for visual interest and interactivity
- Give it a high-end touch with foil or varnish





## TIP

Personalize your print-on-demand notecard. Use your data to reference the pain points the individual has shown interest in addressing.



## Think Flat

For inserts, consider a mini popcorn bag, gift card, branded notepad, booklet, membership card, or custom "lottery" ticket. Whatever you add, make it part of your story!



## Re-Engage by Shining a Light on Your Value

Door openers aren't just for starting new relationships. Inevitably, some accounts go quiet, perhaps because of budget, seasonal workloads, a big project, or simply a lack of attention.

Wake up those sleepy accounts! You can recapture interest by sending an interactive folding carton. The self-mailing box can contain a notecard, collateral, and even small objects. The kit shown here includes a blacklight and a hidden message in blacklight ink, sparking curiosity and engagement.

When the hidden message hits on your contact's pain points, you become just the person they want to talk to.

### The Strategy

This kit is most effective when your timing is strategic, so use your customer data to the fullest for triggering the send. Use PFL's 15-minute delivery notifications to call your contact now that you have their attention again.



#### TRIGGERING THE SEND

- Time it for when budget will become available
- Send it before or after the busy season
- Time it for when your contact's attention will free up
- Send it after 3 to 5 weeks of unresponsiveness



#### MORE USES FOR THIS IDEA

- Use it as a door opener for target accounts
- Let sales reps choose when to send, within budget



#### ENHANCEMENTS

- Add visual interest with patterns that are only visible under blacklight
- Use the pocket to hold marketing collateral and other small swag items, like glow-in-the-dark pens so the recipient can create their own messages to share

**TIP**

Sending direct mail before the busy season can give you the chance to explain how you'll lighten the heavy workload.

**Be Remarkable**

The possibilities for your brand experience are only limited by your imagination.



## Deliver a Booth in a Box

If key prospects can't visit your event booth in person, bring the booth to them!

This box is ideal for connecting with highly targeted contacts who show interest in your events.

Your Booth in a Box kit can include anything you would have had at a physical booth: collateral, small pieces of swag, and little treats. Even better is that you can include a personalized notecard that speaks directly to your contact's interests and frustrations.

### The Strategy

Incorporate address fields into your registration form so you're ready to trigger your mail to attendees pre- or post-event. After prospects shut down their computers for the day, your physical branding will remain and reinforce the story you've worked so hard to share.



#### TRIGGERING THE SEND

- Send it upon registration to encourage attendance and enhance the live experience
- Send it after they attend the event to prompt a meeting
- Re-engage a no-show ("We missed you!")



#### MORE USES FOR THIS IDEA

- Run an account-based acceleration campaign
- Introduce your brand to new contacts on an opportunity or customer account



#### ENHANCEMENTS

- Add custom cavities to the box interior for the perfect unboxing experience (*like the kit pictured on the right does*)
- Add more sensory elements like lighting, sound chips, video cards, or scented inks



## TIP

Enhance a virtual event with interactivity. For example, send the kit before a webinar and include a workbook or a raffle ticket for a prize.



## ABM Excellence!

The collateral in a kit doesn't have to be one-size fits all. You can send different pieces based on targeted personas and your marketing data. Relevant content means better engagement!



# Book Meetings and Leave a Lasting Impression

Sometimes what your deal needs to move forward is the chance for the sales rep to talk to the right person. Capturing the attention of decision makers and executives can be tough because of tight schedules and because every other seller out there also wants their time.

Send an engraved, personalized Yeti mug along with a booklet or whitepaper. With this kit, you're signaling just how serious you are about pursuing the partnership. Not only that, but the Yeti mug becomes an unforgettable piece with your logo on it, increasing the stickiness of your brand.

Invite your recipient to relax, pour a drink, and read up on relevant content and stats.

## The Strategy

Call. To. Action! Your goal is a meeting, so make your call to action stand out in your notecard and even on the box. Personalize content to target the recipient's pain points, reinforcing why that meeting is worth their time. Follow up with a timely phone call and email to complete the "VIP" experience.



### TRIGGERING THE SEND

- Ship it when a persona hits an engagement threshold
- Let sales reps choose when to send, within budget
- Send it based on deal age



### MORE USES FOR THIS IDEA

- Thank a champion for their support
- Use it in a customer retention play
- Use as an employee spiff or to welcome new teammates



### ENHANCEMENTS

- Include a QR code that leads to a personalized URL to schedule a meeting
- Add an interactive print piece to increase engagement with your messaging





#### TIP

Laser engraving doesn't stop at Yeti mugs! Wood, plastic, metal – just about any surface is fair game for on-demand personalization.



### Hit the Pain Points

When sending a kit from your swag store, sales reps can personalize the notecard to speak directly to the contact's business challenges!

# Go Big! Signal Your Brand Quality

This play is not for every business model or just any old account. Sending an extravagant item makes the most sense for targeted, account-based marketing opportunities with potential for high ROI.

Set up a do-this-get-this program. For instance, start by sending a zip-strip mailer with an offer for a leather office chair if the contact agrees to a demo. Zip-strip mailers involve more interaction than a simple letter, and you can include small printed collateral pieces and personalized messaging.

After the contact takes the demo, the sales rep marks the offer complete in their CRM, and PFL takes that as the automatic cue to fulfill the chair.

Other items we've shipped include popcorn makers, Apple AirPods, Yeti coolers, and even televisions!

## The Strategy

This luxury item signals your brand quality. It's a bold statement that you're serious about making the relationship successful in a big way.



### TRIGGERING THE SEND

- Zip-strip: Identify key contacts at key accounts
- Item: Automated send when offer is fulfilled



### MORE USES FOR THIS IDEA

- Thank a champion at a key account
- Make it a grand prize in a contest



### ENHANCEMENTS

- Zip-strip: Use a QR code that leads to a personalized landing page
- Zip-strip: Include a die-cut image of the redemption item
- Item: Engrave the item with your brand



#### TIP

Send it where they want it!  
If they want the chair for a satellite office, ship it there. PFL makes capturing preferred addresses easy.

STORAGE IS OFTEN THE FIRST SUSPECT  
HOWEVER  
OF BOTTLENECKS  
ARE NOT DUE TO STORAGE ISSUES.

Don't wait  
Close your next App

**Empower.  
Connect.  
Win.  
Grow.**

Attend a meeting  
with us for a  
chance to win a  
Herman Miller  
Embody Chair.

Gift will be mailed upon completion  
of the meeting. Limit one per organization.



**Give  
30 Minutes**

You'll see how finding your IT bottlenecks can  
be as easy and comfortable as a new chair.



#### Provide Options

Consider using a  
Preferred Address  
Capture landing page  
(see page 26) to offer  
two or three options,  
increasing the temptation  
factor with a chance to  
pick a favorite.

# Get That "Yes!" with Video Cards

After all the demos and meetings are done, you might still be faced with a hesitant decision maker. Maybe they're still talking to your competition, comparing notes and price tags.

It's time to drop the mic...and do it on film! Send a custom video card with a video of the sales rep speaking directly to the decision maker. Mention the recipient by name and drive home the ways your product will improve their business.

You don't have to limit the video to the custom message, either. Consider including other pieces from your video library, especially if they'll resonate with the contact.

## The Strategy

Video is proven to entice and engage. It's a fantastic medium for personal storytelling, and it makes the call to action (say "Yes!") that much more compelling.

We recommend this play for ABM and for accelerating the sales cycle.



### TRIGGERING THE SEND

Automate an alert to the sales rep to send a video mailer when:

- The sales rep submits a proposal
- A proposal ages (say, it's been unaccepted for 30 days)



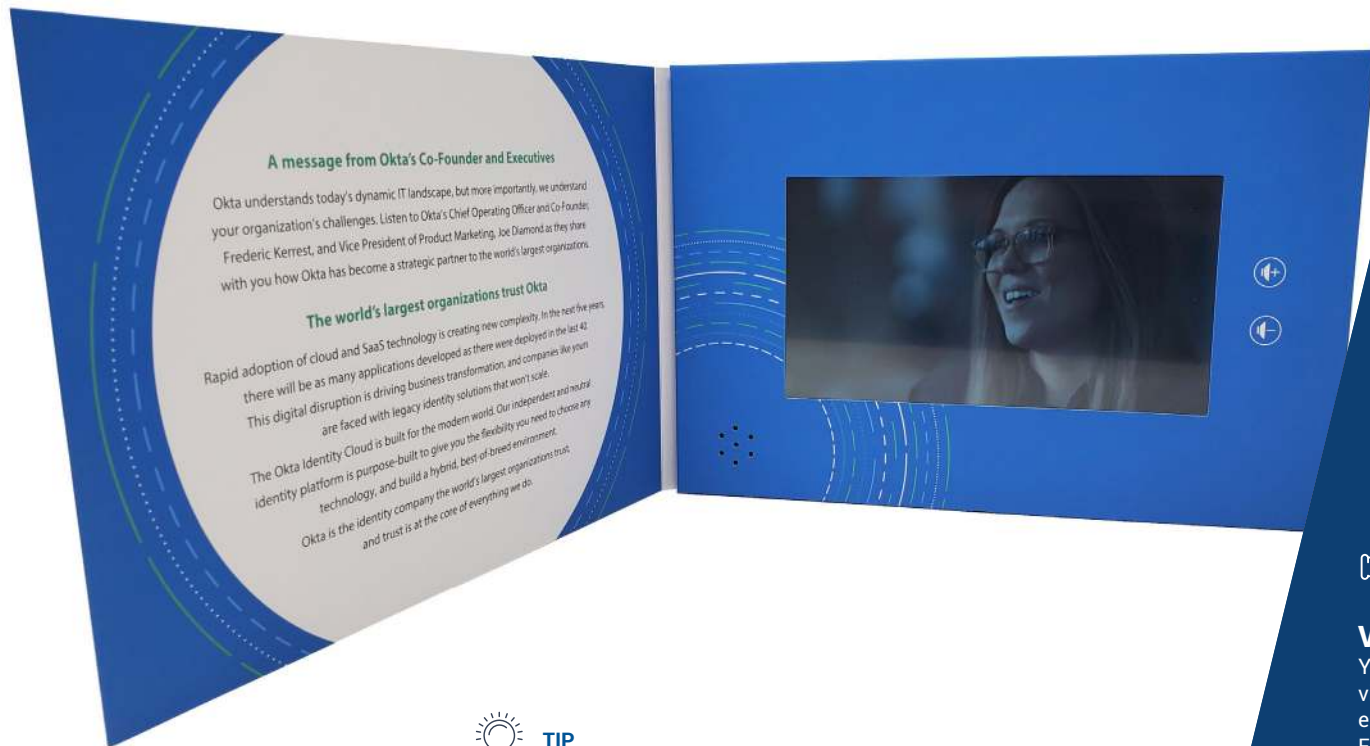
### MORE USES FOR THIS IDEA

- Create meetings at the mid-funnel stage
- Summarize a key customer's year-end ROI
- Share big product or company announcements



### ENHANCEMENTS

- Use foil to make the card pop even more
- Greet your contact by name to start the video



#### TIP

To automate video cards in a marketing campaign, use general videos instead of custom messages. Brand videos, testimonials, leadership messages, and demos make great options.



#### Video 101

You can use a homemade video, but you should ensure basic quality. Eliminate distracting noises and backgrounds, use good lighting, and frame the shot well.

## Go for the Close

Your legal team sent the redlined contract back to the prospect. It's with the decision maker, and it's sitting there. And sitting there. And sitting there. Or perhaps a sales rep is under pressure, and they want this contract locked down ASAP.

Either way, you need the decision maker to put pen to paper, so give them the pen to do it! Send a luxury pen with their name engraved.

Pair the pen with strong messaging that highlights both urgency and your partnership. Remind them of your solution's benefits and use hard statistics to make them concrete. For instance, tell them exactly what they lose out on (productivity, ROI, cost savings) for each day or week they don't sign.

### The Strategy

The pen reminds your contact what action is needed. The message reminds them what value is tied to that action.



#### TRIGGERING THE SEND

- Trigger a notice to sales reps after a time delay at contract stage
- Let sales reps choose when to send (within budget)



#### MORE USES FOR THIS IDEA

- Make it an option on a Preferred Address Capture (see page 26)
- Thank a new customer after closing
- Remind key customers of a renewal date



#### ENHANCEMENTS

- Use foil on the box to add formality
- Add a video card inside the lid so it plays as the recipient opens the box



**TIP**

Be as specific as possible. Saying "we estimated we can save you \$1,986 next month, but only if you sign today" is more compelling than "we can save you money."

**Use Empathy!**

Decision makers are typically very busy, so be understanding about that. Show empathy for their stressors.



# Celebrate Your Customer

After the deal closes, don't let the dust settle. New deals are big deals, so treat them that way by sending a package that includes numerous sharable items.

This box of sharable popcorn is playful and offers a lot of opportunity for fun messaging. It's easy to frame a story around your "new magical relationship" or "the golden ticket."

After all your hard work building momentum through the sales process, sending a thoughtful, personalized direct mail package not only continues that momentum but increases it.

## The Strategy

This kit gets entire teams interacting with each other and your brand at the same time. You're building camaraderie even if you can't be there in person, while also generating buzz and enthusiasm for your product.



### TRIGGERING THE SEND

- Send it when a new deal closes
- Celebrate a successful product launch
- Reward customer loyalty upon contract renewal



### MORE USES FOR THIS IDEA

- Thank a team for ongoing support
- Celebrate any major customer milestone
- Throw a birthday party for a leader or point of contact



### ENHANCEMENTS

- Consider branded food items, such as cookies with your company logo frosted on them
- Use variable data printing to add personalized notes that hang off the goodies



#### TIP

Place an oversized notecard on top of the goodies. When the recipient opens the kit, the notecard is visible but still hiding the surprise, creating a second reveal.



#### Safe, Sane, Sanitary

Individually wrapped packaging helps keep things hygienic.

# Thank You (Multiplied by Three)

Sometimes a simple thank you isn't enough. Sometimes you need to say thank you with style and class.

After closing a deal, you'll have people to thank immediately and over the course of the partnership. This classy, three-compartment box gives you complete flexibility — it can be one, two, or three cavities with swag boxes and collateral. For instance, you could include a candle, socks, coasters, and a small piece of collateral. Your messaging can highlight how a leader lights the way, or how together you make a great pair.

With more containers to open, you create an extended unboxing experience with lots of surprises.

## The Strategy

Many brands give prospects the red-carpet treatment through the sales funnel but fall short on customer experience. With this thank you kit, you show the style and excellence of your brand and strengthen the long-term relationship.



### TRIGGERING THE SEND

- Send it to key contacts after contract signing
- Thank a contact for supporting a case study
- Let service reps choose when to send (within budget)



### MORE USES FOR THIS IDEA

- Create an onboarding kit
- Send it as a follow-up after a big meeting
- Use it as a mid-funnel deal accelerator



### ENHANCEMENTS

- Laser engrave your logo on your swag items
- Customize the content for each recipient (copy, images, colors, and more)



#### TIP

If you fill three compartment boxes, you can still fit collateral on top!



#### CTA

Even in a thank you kit, you can include a soft CTA. Lead the contact to a web page or ask them to share their experience on social media with a hashtag.



# Onboard Customers Faster

Excellent customer onboarding strikes the right balance between simple and complete, thorough and fast. If users abandon onboarding because it's too complex or long, everyone loses out.

Make onboarding an enjoyable team effort with a large scratch-off poster! Design the poster with scratch-off sections for every milestone, revealing achievements, codes, or motivational phrases to reward progress. The poster can ship in a branded tube with a notecard and other collateral to support onboarding.

You can even make it a leaderboard with individual or team names printed right on the poster.

## The Strategy

The displayed poster keeps your brand and product top of mind, and the public goals motivate users to complete the onboarding. The faster users get onboarded, the sooner you can show ROI. Swifter, stronger ROI improves customer satisfaction and retention.



### TRIGGERING THE SEND

- Send it immediately upon contract signing
- Send it after product go-live



### MORE USES FOR THIS IDEA

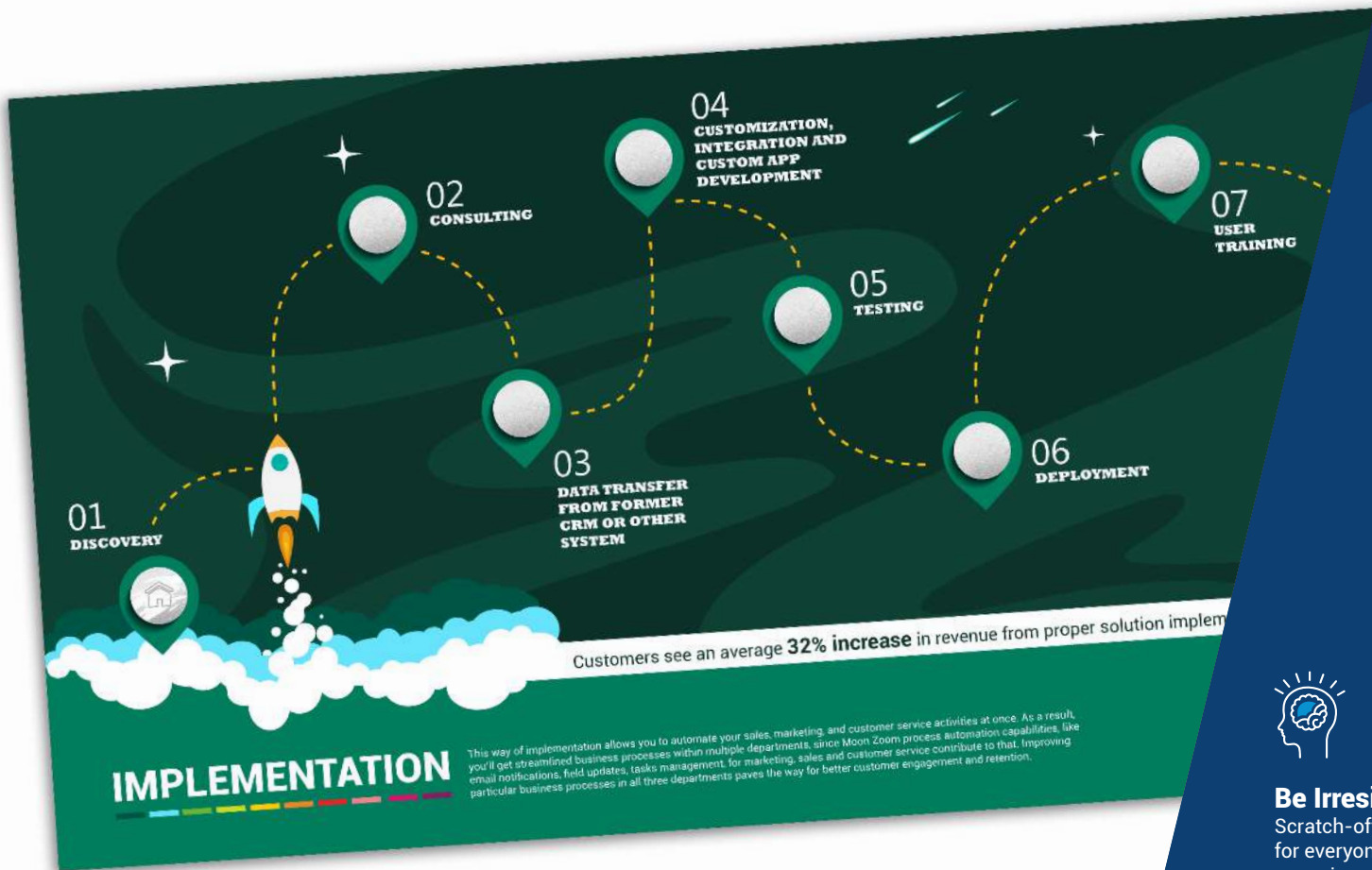
- Make it a checklist for certifications
- Reveal prize codes for attending events
- Gamify just about anything!



### ENHANCEMENTS

- Use variable data under the scratch foil
- Include a branded coin or token for scratching





#### TIP

The poster doesn't have to be large! Send a smaller scratch-off poster to individuals or as part of another kit.



#### Be Irresistible!

Scratch-off foil is fun for everyone. When engaging with your kit is irresistible, engaging with your brand becomes inevitable.

# Your Message Hits Home with Preferred Address Capture

When launching a direct mail campaign, always ask:

**How will I know the best place to send the packages?**

The answer: **Just ask.**

PFL's Preferred Address Capture solution makes asking that question part of the complete brand experience. Capturing an address becomes seamless and even enjoyable for your contacts!

## How It Works

There are three steps:

1. You **DRIVE** your audience to the landing pages.
2. Contacts **SUBMIT** info.
3. Form submission automatically **TRIGGERS** next steps (i.e. validation and fulfillment).



Learn more about how Preferred Address Capture works

## 5 Great Ways to Use Preferred Address Capture

You can apply this strategy to any direct mail campaign, but here are a few ideal ways to capture not just addresses, but attention:

- 1 Enhance virtual events.** Drive registrations and encourage attendance. Promote a virtual wine tasting by letting contacts choose a bottle of red or white at registration.
- 2 Book a meeting.** Let contacts choose a preferred stress-relief item (a neck massager, tasty snack, or coffee mug) as they schedule a meeting with a sales rep using calendar integrations. Then the sales rep will reduce stress even further with business solutions!
- 3 Run a customer loyalty program.** Set up milestones for customers or partners to earn rewards. When they can select their preferred prize, they'll feel more satisfied and be more motivated.
- 4 Offer printed collateral.** Say a contact has been reading your web content and is showing high intent. Invite them to select a printed piece so they can read offline and in comfort.
- 5 Fulfill a do-this-get-this campaign.** Send a postcard or an email offering a pick of items if the contact takes a meeting. After the meeting, send the link to your branded landing page. With the reward, send collateral and a notecard targeting pain points discovered during the meeting.



### TIP

Remote workers realize their home is also an office, and the majority will share an address to receive a package that speaks to their business needs.



### “This or That” Mindset

When you offer multiple options for direct mail, you shift the thinking process from “do I want this or not?” to “which do I want most?”



# 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 a remarkable brand moment.



# Make Remarkable Brand Moments

No matter your use case and no matter your audience, direct mail has the power to make people sit up and pay attention. Their brand experience with your kit lets them know what kind of experience they'll receive as your customer.

When you add tactile marketing automation, your direct mail idea becomes part of an engaging and successful multichannel journey. By addressing individual needs and frustrations, you can start building a long-lasting relationship.

Be personal. Be memorable. **Be remarkable.**



## About PFL

PFL is a marketing technology company providing software solutions that help brands use digital intent signals to inform the content and timing of their tactile marketing to improve the ROI of their entire marketing spend. PFL connects sophisticated marketing professionals to the automation solutions that deliver remarkable brand experiences.

The company is co-headquartered in Livingston, Montana and Indianapolis, Indiana.

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