

Recommendations for Maximizing Direct Mail Results using Market Insight



Decide with Confidence

What are the factors of Deliverability?

It is important to understand that "deliverability" is really a function of three equally important factors:

- A. Accuracy of the address
- B. Recency of the address -- is the business still there?
- C. Recency of the name -- is the business still using the same name?

Some Key Points:

- D&B focuses on all three aspects of data quality, ***but*** the volatility of the business universe will be the driving factors that may make an accurately addressed record undeliverable.
- It has been generally accepted in the industry for at least 20 years that even an accurate and up-to-date prospect list may turn out to be up to 10% undeliverable because of factors
 - B and C.
- Higher rates may be experienced when mailing our very smallest companies (1-4 employees) or newest companies








What is D&B's Process?

Our monthly process for all active records includes:

- CASS-Certified Address Standardization
- SUITELink,
- LACSLink,
- DSF2 and
- NCOALink
- All new addresses are reprocessed via DSF2.



Recommendations for Maximizing Direct Mail Results from D&B Data

1. Initiate mailing campaigns as soon as possible after your Market Insight has been updated by D&B. Since the rate of decay for marketing data is between 1.5 and 3% per month, it is most beneficial to use the data as soon as it is received.
2. When creating your report, ( Data Grid), include the following:
 - Always use the preferred **Mailing Address** ( Mail Street Address Line 1 and  Mail Street Address Line 2) if present on the record -- otherwise use Physical Address ( Physical Street Address Line 1 and  Physical Street Address Line 2).
 - Always use the **Tradestyle Name** ( Tradestyle) (“Doing Business As”), if available: the letter carrier will know a business by its Common name (“Smith’s Bar & Grill”) rather than by its Legal or Primary Name (“ABC Holdings, Inc.”) ( Business Name).



3. For mailing campaigns, select record addresses by using D&B's Physical Address DSF Code (Physical Address Accuracy) and or D&B's Mailing Address DSF Code (Mail Address Accuracy). Each month D&B's active address records are processed against a file of every delivery point in the U.S. These records are updated every month in Market Insight. At the top of your Market Insight you will see a date, which indicates when your application has been updated (**[MI - built on 7/11/2008 12:25:22 PM]**). We add a code to every address that is an indicator of relative accuracy and deliverability five times more granular than merely having a ZIP+4, codes 1 – 3 have Zip+4:
- 1 - All aspects of Address are correct
 - 2 - The required Suite/Apt. # may be unnecessary
 - 3 - The required Suite/Apt. # is missing
 - 4 - Address matches only to range of Building/PO Box/Rural Route numbers - no ZIP+4
 - 5 - Address matches only to range of Buildings where Suite/Apt. # is required - no ZIP+4
 - 6 - Address matched multiple ranges of valid numbers - no ZIP+4
 - 7 - Building or PO Box # out of range or Non-Numeric - no ZIP+4
 - 8 - May be missing Building or PO Box# - no ZIP+4
 - 9 - Address missing primary address or street name/# is wrong - no ZIP+4
 - X - Address is accurate but not a mail delivery point. It is equivalent in accuracy of address as per code 1 or 2 or 3
 - Blank - Address not available or Edit Reject Record



A few items to note:

- While low codes are no guarantee of delivery, they are the best information that exists as to whether USPS thinks the address is accurate.
- Choose code 1 records for the highest accuracy.
- Codes higher than 1 have address defects that MAY make delivery less likely.
- Standard Class mailings, in order to get highest postal discounts, select Physical Address Accuracy and/or Mail Address Accuracy

1	All aspects of Address are correct
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Note: a DSF (Physical Address Accuracy and/or Mail Address Accuracy) of a code 1 equivalent to a DPV (Data Point Validation) of a Y (Delivery Point Validated.

- DSF (Physical Address Accuracy and/or Mail Address Accuracy)= 1-3 is equivalent to DPV (Data Point Validation) of a Y (Delivery Point Validated S Data Point Validated-Suite is bad, and a D (Missing Suite)

1	All aspects of Address are correct
2	The Required STE/Apt # may be incorrect
3	The Required STE/Apt # may be missing

- DSF (Physical Address Accuracy and/or Mail Address Accuracy) of 4-9, X is equivalent to DPV (Data Point Validation) of an N (No Data Point Validation).

4	Address matches to range of Building/PO Box/RR numbers
5	Address matches to range of Buildings where Suite/Apt# is required
6	Address matched multiple ranges of valid numbers - no zip+4
7	Building or P O Box # out of range or Non-Numeric - no zip+4
8	May be missing Building or P O Box # - no zip+4
9	Address missing primary address or street name/# is wrong - no zip+4
X	Not a mail delivery point



This is how it looks in your Market Insight for Physical Address Accuracy :

Selection *

- New Selection 1
 - THE Sample Customer Data having THE Site with Physical Address Accuracy
 - Physical Address Accuracy

Physical Address Accuracy

Search: Description Co [] [] [] [] [] []

Include	Code	Description	Sites
<input type="checkbox"/>	!	Unclassified	6,730,279
<input type="checkbox"/>	1	All aspects of Address are correct	18,167,297
<input type="checkbox"/>	2	The Required STE/Apt # may be incorrect	267,408
<input type="checkbox"/>	3	The Required STE/Apt # may be missing	2,870,292
<input type="checkbox"/>	4	Address matches to range of Building/PO Box/RR numbers	717,565
<input type="checkbox"/>	5	Address matches to range of Buildings where Suite/Apt# is re...	226
<input type="checkbox"/>	6	Address matched multiple ranges of valid numbers - no zip+4	96,537
<input type="checkbox"/>	7	Building or P O Box # out of range or Non-Numeric - no zip+4	232,349
<input type="checkbox"/>	8	May be missing Building or P O Box # - no zip+4	124,286
<input type="checkbox"/>	9	Address missing primary address or street name/# is wrong -...	386,903
<input type="checkbox"/>	X	Not a mail delivery point	20,111

***Unclassifieds are DUNS Numbers within a universe, but these records were not part of the USPS file. With the monthly updates of the USPS file, those records should change.



This is how it looks in your Market Insight for Mail Address Accuracy :

Selection *

- New Selection 1
 - THE Sample Customer Data having THE Site with Mail Address Accuracy
 - Mail Address Accuracy

Mail Address Accuracy

Search: Description Co [] [] [] [] []

Include	Code	Description	Sites
<input type="checkbox"/>	!	Unclassified	27,024,853
<input type="checkbox"/>	1	All aspects of Address are correct	2,454,275
<input type="checkbox"/>	2	The Required STE/Apt # may be incorrect	179
<input type="checkbox"/>	3	The Required STE/Apt # may be missing	509
<input type="checkbox"/>	4	Address matches to range of Building/PO Box/RR numbers	47,537
<input type="checkbox"/>	5	Address matches to range of Buildings where Suite/Apt# is re...	177
<input type="checkbox"/>	6	Address matched multiple ranges of valid numbers - no zip+4	6,384
<input type="checkbox"/>	7	Building or P O Box # out of range or Non-Numeric - no zip+4	59,237
<input type="checkbox"/>	8	May be missing Building or P O Box # - no zip+4	12,970
<input type="checkbox"/>	9	Address missing primary address or street name/# is wrong -...	7,124
<input type="checkbox"/>	X	Not a mail delivery point	8

***Unclassifieds are DUNS Numbers within a universe, but these records were not part of the USPS file. With the monthly updates of the USPS file, those records should change.

4. Conduct tests using executive titles rather than specific contact names in marketing campaigns, such as Owner or Partner or President. With executive turnover higher than ever, it may be beneficial to use only a title, rather than a specific contact name.
5. Expect to find a higher rate of address decay among the small business population. Small firms go in and out of business more often than average and they also move more frequently than larger firms do.



6. Allow for a higher undeliverable rate for branch records. Branch locations move more frequently than the average business and they also have a tendency to close when operations are consolidated into the headquarters location. You will find Branch and Headquarter selections in Market Insight in Location Type .



7. Market Insight is updated as follows:

- Full Domestic Systems have a universe of 24 million records. Full Global Systems have a universe of 54 million records. These system universes are updated monthly. For example you can see new records come into our marketable file and records drop from the prospect universe.
- For Custom Market Insights (special universes are created), the data elements for records are refreshed monthly. New records are added when you customer data is refreshed.



Segmentation opportunities worth testing for impact on response rate:

Selections in Market Insight recommended to use for testing:

- DSF (Data Sequence File) (Physical Address Accuracy and Mail Address Accuracy) selection of code 1 and 2 are generally considered deliverable via First Class Mail. Code 1 & 2 is equivalent to a DPV (Data Point Validation) code Y (Delivery Point Validated) and S (Data Point Validated – Suite Number bad).

1	All aspects of Address are correct
2	The Required STE/Apt # may be incorrect

- DSF (Data Sequence File) (Physical Address Accuracy and Mail Address Accuracy) selection of code =3, DPV (Data Point Validation) code of a D (missing Suite Number)

3	The Required STE/Apt # may be missing
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- 1 Segment and code outgoing mail by USPS-derived address accuracy indicators – bearing in mind that deliverability is as much determined by whether the company is still there, and doing business under the same name as before, as by address accuracy. Let results tell you what minimum address quality should be your threshold.
2. Segment outgoing mail by:
 - specific business contact names
 - business titles
 - a. if the specific contact is no longer there, or
 - b. has a different function/title;
 - i. the mailroom is likely to toss the piece of mail.
 - If you address your piece by title and function, the mailroom is more likely to deliver your piece to the person who currently has that title/function.
3. Segment by number of employees at a site – by size of business. Expect to find a higher rate of name and address decay, and so undeliverability, among smaller businesses. Small firms go in and out of business more often than average, change their names more often, and move more frequently than larger firms do.
4. Segment by location type - branch vs. HQ, vs. single site. Allow for a higher undeliverable rate for branch records, which we find move more frequently than the average business, and which have a tendency to close when operations are consolidated into a headquarters location.



5. Segment by age of company – by Year Started. Companies with Year Started of two years or less have change rates more than double that of older firms – when mailing them expect higher undeliverable rates.



How to use Market Insight for Mail Campaigns

In this example we will be using our main Market Insight System, which is a Full Global Universe containing 54 million records, our first data element that we will be using is State - Province and selecting the state of New York.

The screenshot shows a software window titled "New Selection 3". It contains a tree view under "Selection*" with the following structure:

- New Selection 3
 - THE Sample Customer Data having THE Site with State - Province
 - State - Province of NEW YORK

Below the tree view is a search filter section titled "State - Province". It includes a search box with "new york" entered, a dropdown menu set to "State - Prov", and a table of results.

	Include	Code	Description	Sites
+	<input checked="" type="checkbox"/>	US ...	NEW YORK	1,615,818



Next we will add Physical Address Accuracy to our selection. We selected codes 1 – 3 as they all have zip+4 (see page 1 of recommendations):

The screenshot shows two windows from the Market Insight software. The top window, titled 'New Selection 3', displays a hierarchical selection tree. The bottom window, titled 'Physical Address Accuracy', shows a search interface and a table of accuracy codes.

Selection Tree:

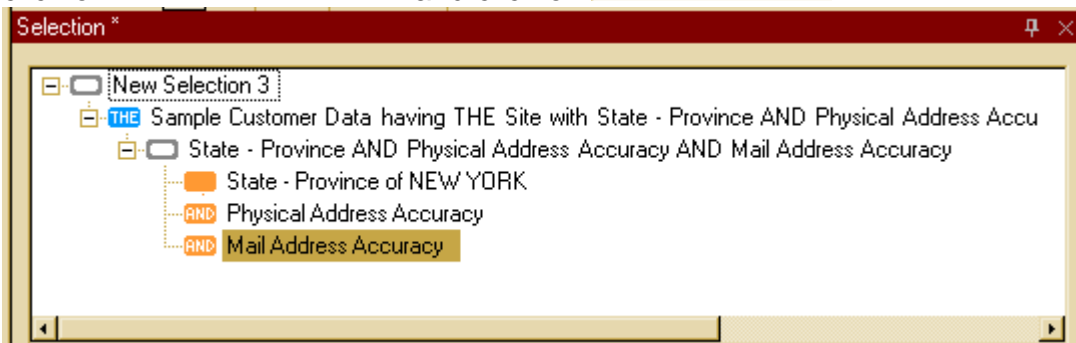
- [-] New Selection 3
 - [+] THE Sample Customer Data having THE Site with State - Province AND Physical Address Accu
 - State - Province AND Physical Address Accuracy
 - State - Province of NEW YORK
 - AND Physical Address Accuracy of All aspects of Address are correct or The Required S

Physical Address Accuracy Table:

Include	Code	Description	Sites
<input type="checkbox"/>	!	Unclassified	6,730,279
<input checked="" type="checkbox"/>	1	All aspects of Address are correct	18,167,297
<input checked="" type="checkbox"/>	2	The Required STE/Apt # may be incorrect	267,408
<input checked="" type="checkbox"/>	3	The Required STE/Apt # may be missing	2,870,292
<input type="checkbox"/>	4	Address matches to range of Building/PO Box/RR numbers	717,565
<input type="checkbox"/>	5	Address matches to range of Buildings where Suite/Apt# is...	226
<input type="checkbox"/>	6	Address matched multiple ranges of valid numbers - no zip...	96,537
<input type="checkbox"/>	7	Building or P O Box # out of range or Non-Numeric - no zip...	232,349
<input type="checkbox"/>	8	May be missing Building or P O Box # - no zip+4	124,286
<input type="checkbox"/>	9	Address missing primary address or street name/# is wron...	386,903
<input type="checkbox"/>	X	Not a mail delivery point	20,111

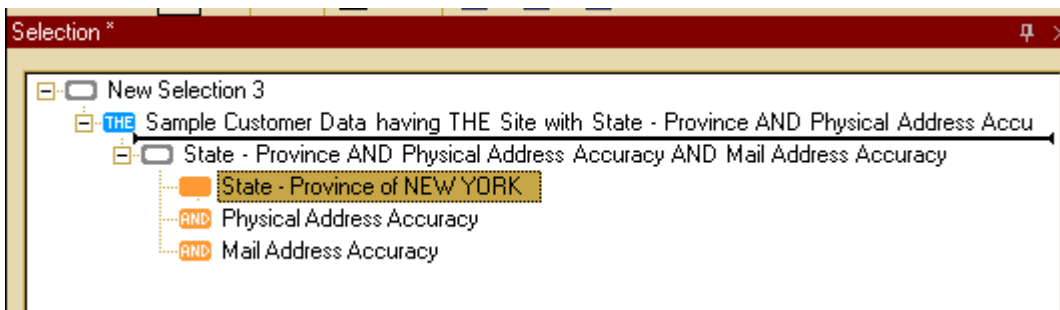


Next you will want to drag and drop Mail Address Accuracy on to the selection. Then you will right click on Mail Address Accuracy and click on Change Logic to OR .



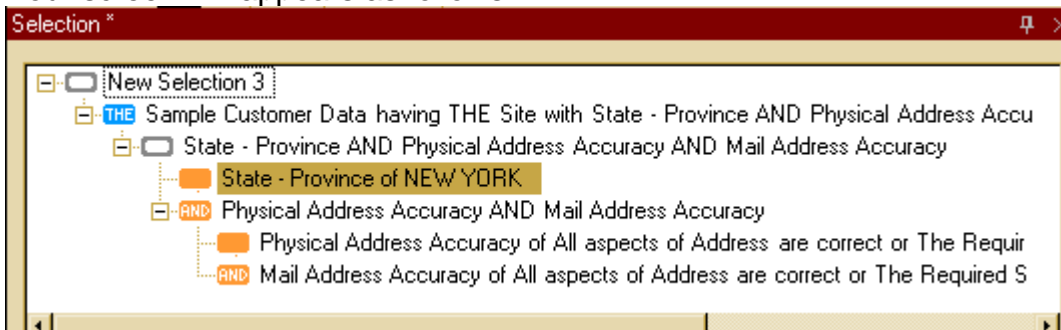
You want to pull records in the state of New York that have a Physical Address Accuracy or a Mail Address Accuracy of 1- 3.

You want to click on State - Province of NEW YORK and drag it to just below, THE Sample Customer Data having THE Site with State - Province AND Physical Address Accu and you will see a bold line appear:

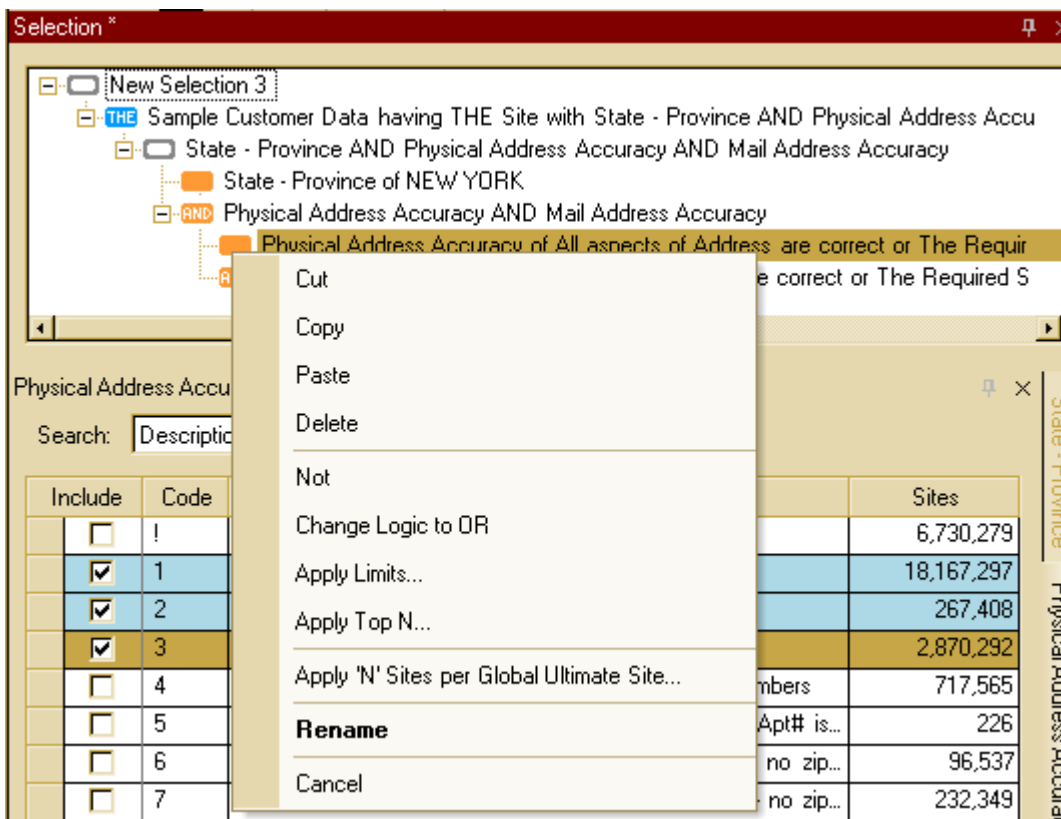




Your screen will appear as follows:



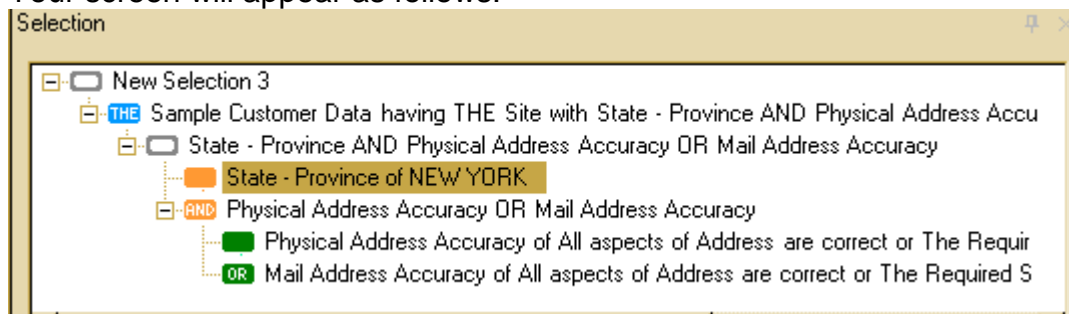
Now you will want to right click on Physical Address Accuracy of All aspects of Address are correct or The Required S





Then click on Change Logic to OR

Your screen will appear as follows:



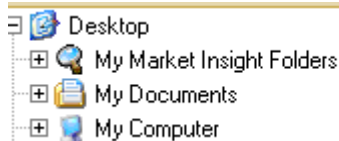
By doing the above you are pulling in records with physical address accuracy **or** a mailing address accuracy of:

1	All aspects of Address are correct
2	The Required STE/Apt # may be incorrect
3	The Required STE/Apt # may be missing

Recommendation: Save this selection in your public folder. First you will want to add a folder either in your private or public folder. To do this, click on your File Explorer tab

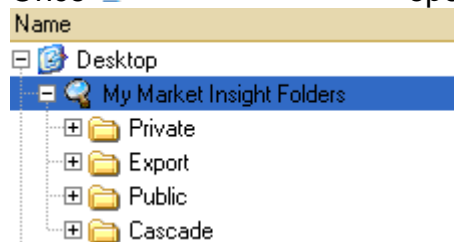
(System Explorer | File Explorer | Favorites). In this example I am saving it to my private folder.

You will want to click on the + on My Market Insight Folders

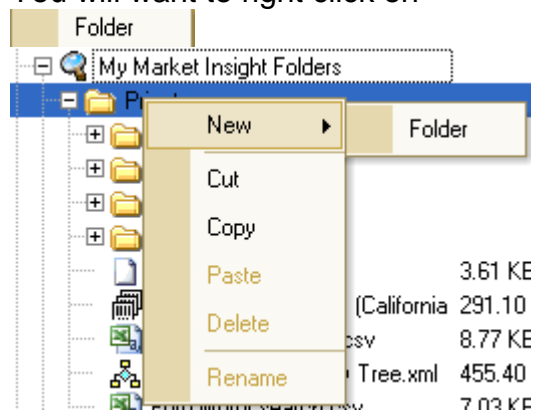




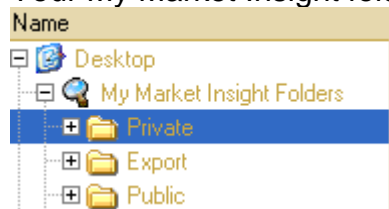
Once My Market Insight Folders opens, you will see a Private, Export and a Public folder:



You will want to right click on Private , then click on New , then click on



Your My Market Insight folders will change colors.



A new folder will be created called New Folder

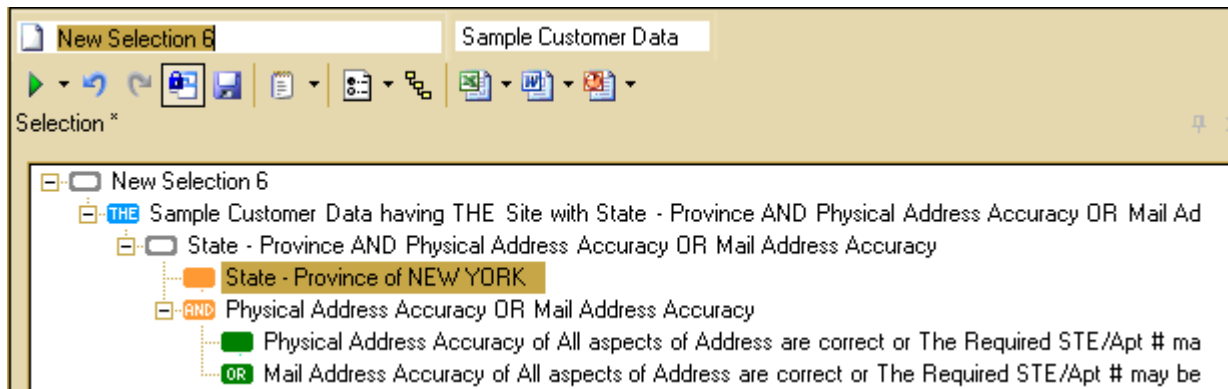




Change the name of **+ New Folder** , which is highlighted by hitting the backspace and then type what you would like to call the folder, in this example, I called it **+ Mail Campaign** .

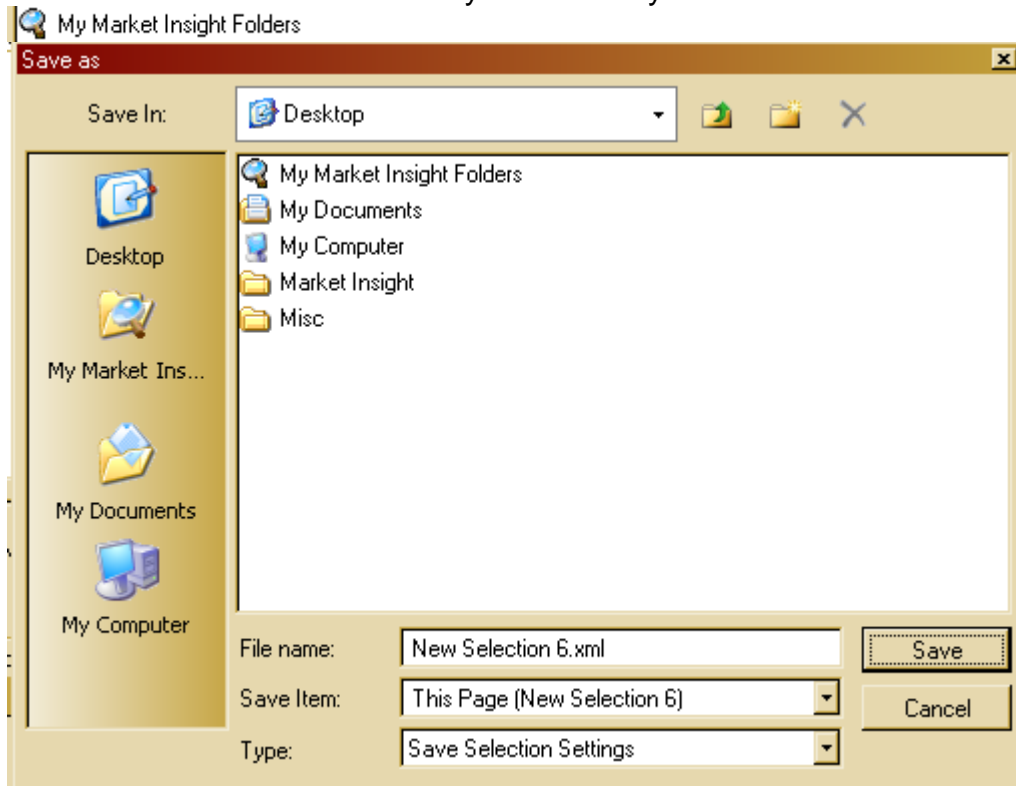


Now that I have my folder that I want to save my selection to, click on

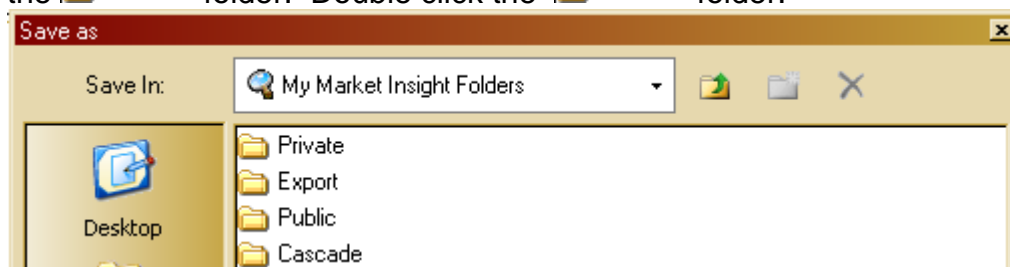




This will be the next screen that you see and you will now want to click on

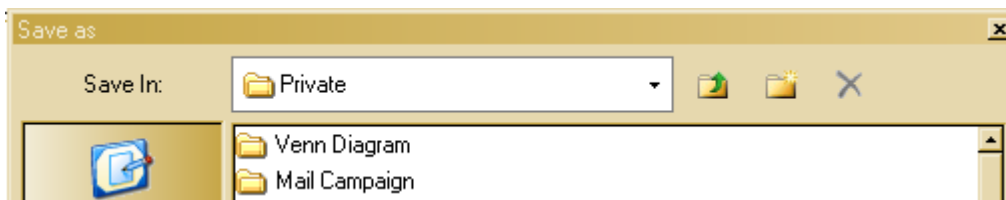


At this screen, click on where you want to store your selection, in this example we will save it to the Private folder. Double click the Private folder.

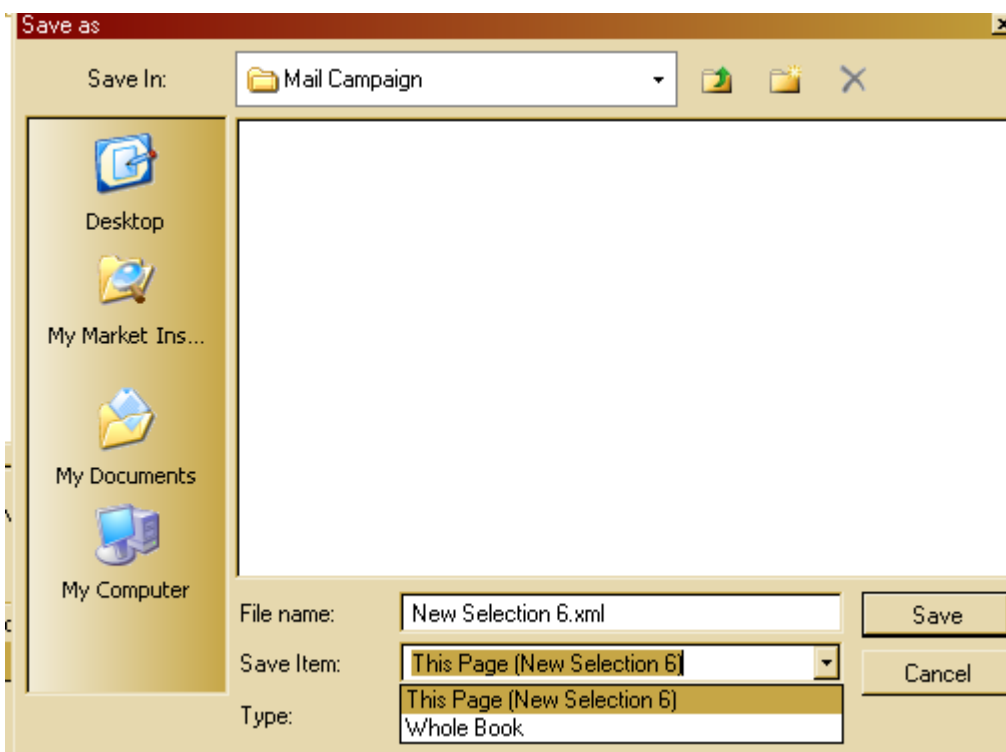




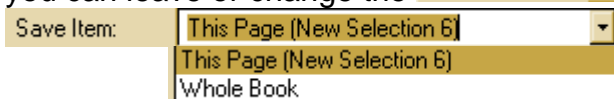
Next you will click on the Mail Campaign folder.



Once the Mail Campaign folder opens,



you can leave or change the  File name: New Selection 6.xml, then in  Save Item:






you can elect to save just this selection, by clicking on **This Page (New Selection 6)** or you can save everything attached to your selection, by clicking on **Whole Book** . Then click on **Save**

Now when you go back to your private folder, you will see your Mail Campaign and your selection that you just saved New Selection 6.xml .



If I ever wanted to go back and use the selection we just saved New Selection 6.xml for my next mail campaign, I can drag and drop New Selection 6.xml to my workspace and begin working on my next campaign. Just remember when you go to save the new selection, change the name. If not, a window will appear asking you if you want to overlay the selection.



Go ahead and add any other data elements you would like to add, then execute the selection by clicking on .

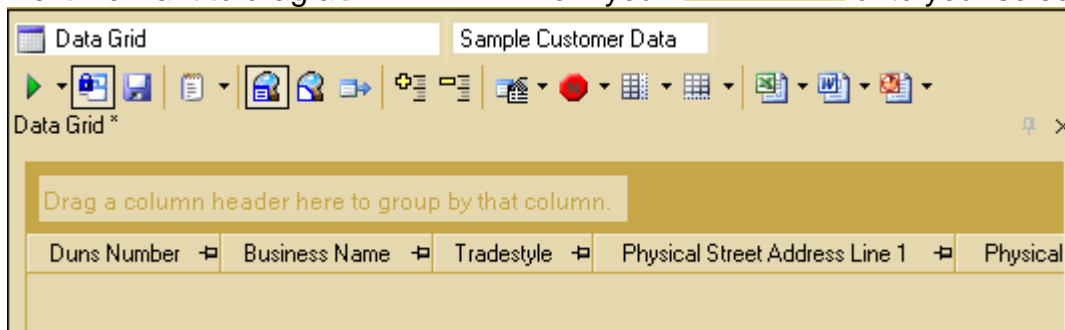
The screenshot shows a software window titled "New Selection 3" with a toolbar and a "Selection" panel. The search criteria are set to "Description Co" with the value "new york". A table below shows the results of the selection.

Include	Co...	Description	Sites
<input checked="" type="checkbox"/>	US...	NEW YORK	1,615,8...

At the bottom of the window, a status bar shows "1,432,034 Sample Customer Data".



Next we want to drag a  Data Grid from your  Toolbox onto your selection.



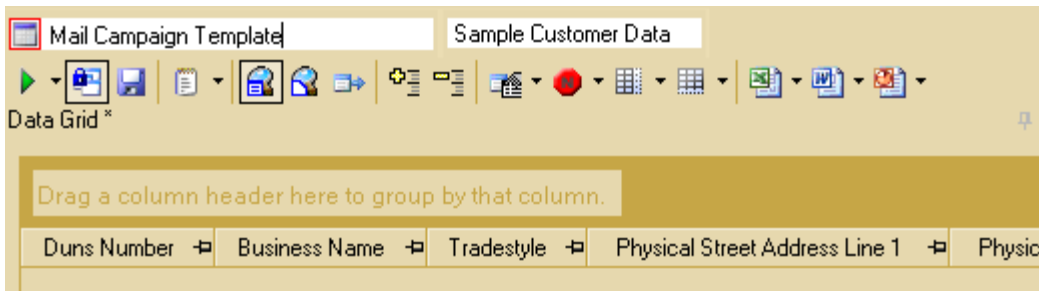


Using the recommended data elements in the recommended and segmentation sections, we added the following to our data grid:

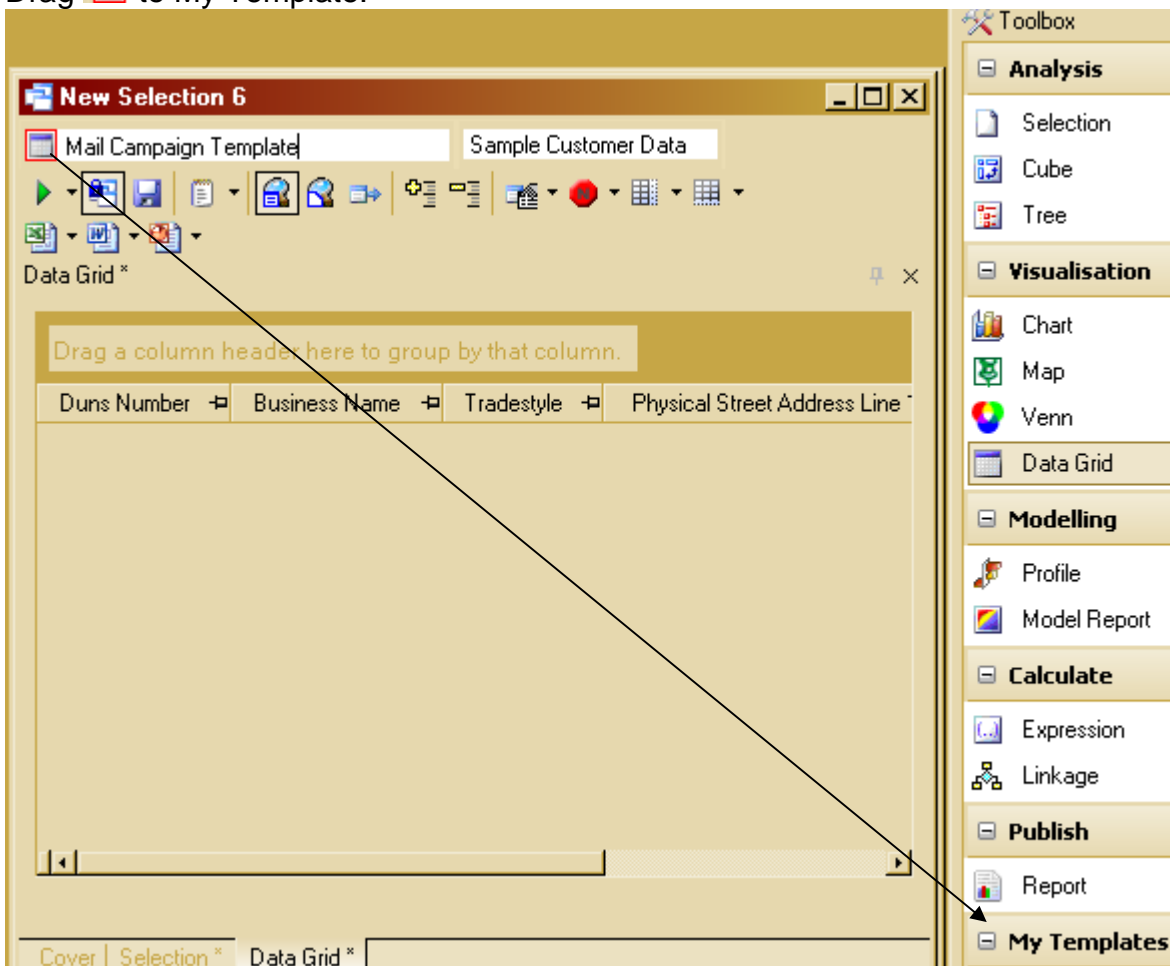
- ID Duns Number
- A_BC Business Name
- A_BC Tradestyle
- A_BC Physical Street Address Line 1
- A_BC Physical Street Address Line 2
- A_BC Physical City
- A_BC Physical State Abbreviation
- A_BC Physical Zip (All)
- A_BC Telephone
- A_BC Mail Street Address Line 1
- A_BC Mail Street Address Line 2
- A_BC Mail City
- A_BC Mail State
- A_BC Mail Zip
- Physical Address Accuracy
- Mail Address Accuracy
- 1₂3 Emp Here
- 1₂3 Emp Total
- 1₂3 Sales Volume US
- Location Type
- 1₂3 Year Started
- A_BC CEO First Name
- A_BC CEO Middle Initial
- A_BC CEO Last Name
- A_BC CEO Suffix
- A_BC CEO Full Name
- A_BC CEO Title

Note: Once you have built your data grid, you can drag your data grid to my templates by moving your mouse to the icon that looks like a spreadsheet, and it will turn red.




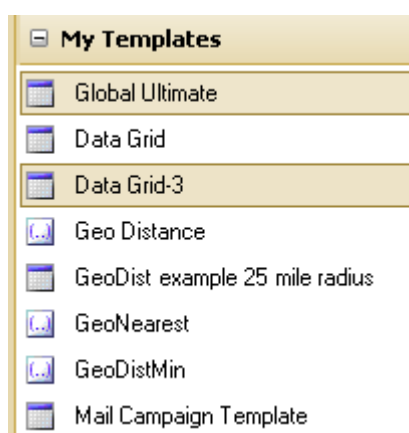


Drag  to My Template.





If you want to use that same data grid for another campaign, go to your My Templates and drag  Mail Campaign Template to your selection.



Execute the data grid for your records by clicking on .



Depending on the type of mail campaign you are doing, there are two additional data elements that you may want add to your selection:

- Physical Address Business - Residential Code
- Mailing Address Business - Residential Code

For each of these you can select the following:

Code	Description
!	Unclassified
9	Unknown
B	Business Address
R	Residential Address

If you are doing a mail campaign and you want to exclude residential records, you would select Business Address for Physical Address Business - Residential Code and Mailing Address Business - Residential Code . By doing this you ensuring that you are pulling in records that have a Business Address.

The screenshot shows a software interface with a tree view and a table. The tree view shows a selection named 'New Selection 4' containing a sub-selection 'Sample Customer Data having THE Site with Physical Address Busi' which includes 'Physical Address Business - Residential Code'. Below the tree view is a search bar with 'Description Co' and a dropdown arrow. Below the search bar is a table with columns 'Include', 'Code', 'Description', and 'Sites'.

Include	Code	Description	Sites
<input type="checkbox"/>	!	Unclassified	5,826,989
<input type="checkbox"/>	9	Unknown	5,981,831
<input type="checkbox"/>	B	Business Address	7,495,138
<input type="checkbox"/>	R	Residential Address	10,309,295



Selection *

New Selection 4

- THE Sample Customer Data having THE Site with Mailing Address Busin
 - Mailing Address Business - Residential Code

Mailing Address Business - Residential Code

Search: Description Co [] [] [] [] []

Include	Code	Description	Sites
<input type="checkbox"/>	!	Unclassified	5,826,989
<input type="checkbox"/>	9	Unknown	23,714,455
<input type="checkbox"/>	B	Business Address	14,508
<input type="checkbox"/>	R	Residential Address	57,301