

# 12-point Direct Mail Checklist to Ensure Consistently Remarkable Campaigns



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## How to use this checklist

After talking with some of Carrot's top-performing real estate investors and agents, we put this 12-question checklist together to make *your* direct mail strategy as successful as possible.

And there's a few different ways you can use it.

The simplest way to use this checklist is to print it out, put it on your wall, and reference it when you're putting together a direct mail campaign. This will ensure that you're thinking through your direct mailers from every angle, giving it the chance of success it deserves.

If you lead a team, then you might consider giving this checklist to the appropriate people and asking them to answer each question before launching a new direct mail campaign.

Or, maybe you'll just use it to audit your current direct mail strategy.

However you use it, we hope it helps you generate more deals and build a more sustainable business.

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# Direct Mail Checklist

- ❑ **What is the goal for this piece of direct mail?** — Are you trying to build brand awareness during a slow season or are you trying to generate leads during a busy season? Each goal will require a different strategy, so make sure you answer this question before moving forward.
- ❑ **Who is your audience for this piece of direct mail?** — In line with your goal, who are you sending this piece of direct mail to? Is it a large shotgun-approach or a small unique list? Take this into account when designing your direct mailer.
- ❑ **Are you sending the best piece of direct mail at the best time?** — Maybe there's a better time of year to send this piece of direct mail. Maybe there isn't. Either way, make sure that the direct mailer you're preparing is relevant to the current real estate market.
- ❑ **How does this direct mailer fit into the rest of your mailing strategy?** — You don't want to overlap messages to lists. You also don't want to send too many (or too few) mailers to people within a certain period of time. Make sure that this direct mailer fits well into the rest of your strategy.
- ❑ **How often do you want to send this piece of direct mail?** — If this mailer is going to be recurring, then how often should you send it? Once a year? Twice a year? Once per quarter? Be wary that you don't unintentionally annoy your list with full mailboxes.

- ❑ **Does your mailer catch your target audience's attention immediately?** — Answering this question is easier said than done... I know. But do the best you can. Show the mailer to some trusted friends and maybe even some past customers and ask them, "What catches your eye? Is this something that would catch your attention if you were in this position?"
  
- ❑ **Is your direct mailer going to catch the attention of an *unintended* audience?** — The last thing you want is to spend time following up with direct mail leads that aren't even interested in your service — they're just confused. For that reason, make sure that your direct mailer is clear and specific in who you're trying to attract.
  
- ❑ **Is the layout of the direct mailer clear and uncluttered?** — Don't put too much stuff on your direct mailer. Get your message across in as few words as possible. Ask a few trusted friends if your mailer seems clear to them. Most direct mailers, for instance, should really only include three things.
  - What you do (pitch)
  - Who you are (business name)
  - What your target market can do about it (call to action)
  
- ❑ **Is your direct mailer an exception to the above rule?** — Maybe your direct mailer is more complicated and only having the above three things on it would defeat its goal (see question #1) in the first place. In that case, simply make sure that the piece of direct mail accomplishes your goal in the most clear and uncluttered way it possibly can.
  
- ❑ **Is your direct mailer honest?** — If it's not, then you'll attract the wrong people. Keep it clear and honest. No reason to try and

attract unwanted attention.

- ❑ **What's your plan for measuring the direct mailer's effectiveness?** — Do you have a way to measure how the mailer performs compared to your other marketing strategies? If you don't, then consider using a unique phone number or a unique URL on the piece so you know which leads come from the mailer.
  - ❑ **What's your plan for following up with prospects?** — Don't send a mailer unless you're prepared to respond to leads. Create a process for doing this to ensure prospects don't get lost in the shuffle.
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