



# PRINTtips



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TechneGraphics, Inc.  
Park 50 TechneCenter  
2002 Ford Circle  
Suite D  
Milford, OH 45150  
(513) 248-2121  
Fax (513) 248-5141

Web site:  
[www.techgra.com](http://www.techgra.com)

Email:  
[info@techgra.com](mailto:info@techgra.com)



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## Maintaining a Mail List... Do It Yourself & Do It Right

One of the most valuable assets any company has is its mail list – the compilation of information about customers and prospects that facilitates the ability to communicate with them. In its simplest form, a mail list consists of the individual's or company's name and a complete, accurate address. Including additional data elements such as contact name, telephone number, e-mail address adds value to the mail list. Add other information not related to contacting the individual or business (such as when a membership expires or when the last purchase was made), and you're creating a rich database of information that can be mined for sales and marketing purposes.

### Why is a mail list important?

Despite the growing popularity of web-based communication and mobile marketing, direct mail is now and will remain a fundamental tool for contacting customers. Not all customers accept or read unsolicited e-mail messages. Some businesses and organizations automatically block unsolicited e-mail messages addressed to their employees. Some messages are not suited to e-mail. And even if these conditions did not exist, you are more likely to reach the target of your message if you vary how it is delivered.

### The benefit of a "house" mailing list

House list is the term for a mailing list that you compile yourself using information about your customers and prospects. A house list has many benefits over a rented list. The information in it will be more current (especially if you have



compiled it from sources that mail often to the list, such as your company's billing department); you have access to information to keep it updated (such as move update information from returned mail or the call records kept by outside salesmen); and you have an established relationship with the names on the mail list. For these reasons, a house list always performs better, as measured by response rate to a mailing, than a rented list.

### Compiling a mailing list

Compiling a mail list means gathering information from various sources, then standardizing the format of the list. For example, you may gather information about your customers from a variety of sources – your company's billing department or your organization's membership records, your customer's web site, and from individuals within your company or organization who have information you desire.

## Maintaining a Mail List... (continued)

*“... it is important to establish a structure for the mailing list that is adequate to hold all the data.”*

*“When determining the structure of your mail list, think about how you might use the list in the future.”*

*“The main benefit of having a separate field for each data element is the ability to sort on a data field.”*

A common result of gathering information from different sources is that individual data elements are not consistent among the sources. For instance, the billing department may list one individual as the contact person while the customer service department may have other individuals as contacts. Even when the individual contacts are the same, the amount of information may be different. Membership records may include a title (Mr., Mrs., Dr.) and a spouse name that is not kept in the newsletter mailing list.

### Establishing standards for a mailing list

Because of the variation in information obtained by various sources, it is important to establish a structure for the mailing list that is adequate to hold all the data. Each element in the mailing list needs its own separate field, sized appropriately for the data. Thus a basic structure for a mail list is first name, last name, street address, city, state and ZIP code.

When determining the structure of your mail list, think about how you might use the list in the future.

- Will you ever send invitations to events that require a social form of address (Mr. and Mrs. Brian Taylor; The Honorable Patricia Nelson, Mayor; Pastor Jimmy Stewart)? If so, you'll need a field for *title*.
- Will you ever want to use an inside address with the first name of an individual and the spouse (Dear Brian and Leticia, Dear Patsy, Dear Jimmy)? You'll need additional data fields for *alternate first name* and *spouse name*.
- Will your list contain a mix of individuals and businesses? Then you'll need a *company* field to enter the names of businesses.
- Will you need to mail to Canada, Mexico or another foreign country? You'll need a *country* field and may have to include additional fields to accommodate foreign address formats.

The main benefit of having a separate field for each data element is the ability to sort on a data

field. While at first it may seem unnecessary to separate a name into *first* and *last* fields, having just a single name field means that a sort on the name field will alphabetize by the first character encountered – in this case, the first character of the first name. This is a much less useful sort than being able to alphabetize by last name – which requires a *last name* field.

By design, a field should contain only one type of information, and *one type* is strictly defined to mean one thing only. *First name* means the first name of an individual; *last name* means the last name of an individual. A separate field, *company name*, is required to hold the names of businesses and organizations.

If you fill a name field with a mix of the names of individuals and the names of businesses, you will create an undesirable situation for when you want to print information, such as this one where a business contact has been entered into the *first name* field and the name of a business has been entered into the *last name* field:

First name field	Last name field
Bill	Bradley
Sam and Arlene	Johnson
Carol Taylor	Taylor Manufacturing Co.

When the instructions are given to print the data on the envelope, here is what will result:

- First line of envelope 1:  
Bill Bradley
- First line of envelope 2:  
Sam and Arlene Johnson
- First line of envelope 3:  
Carol Taylor Taylor Manufacturing Co.

If the mail list is re-structured with a separate field for business name, then Carol Taylor's name

## Maintaining a Mail List... (continued)

will print on the first line and the name of her company, Taylor Manufacturing, will print on the second line – exactly as it should.

### Maintain your mail list in a database manager

Since a mail list is a form of a database, the best software to use is a relational database manager like Access. A relational database uses a table of rows and columns to store information. The rows are called *records*; the columns are called *fields*. In a mail list, the fields contain information such as first name, last name, street address, city, state, ZIP code. Taken together, the fields make up a single record, and all the records, taken together, make up the database or *file*.

Storing information in tables rather than one long data file has several advantages: you can sort based on any field, easily access information, generate reports containing only selected fields from each record, and reorganize the information

by creating new tables using data from other tables.

Having your mail list in a relational database format allows for quick searches and sorts using either a *filter* or a *query*. Both these functions apply *selection criteria* to determine what records meet the criteria, then create a new table of records that meet the criteria. A filter is a temporary tool used one time in the context of a particular table and disappears when the table is closed. In contrast, a query can be stored for reuse.

### Use our suggestions for structuring your mail list

If you'd like to see an example of a mail list structure, just let us know. We have prepared our recommendations for what fields to include as well as suggestions for the length of each field and its characteristics (alpha, numeric or alphanumeric). To get your copy, contact us at 513-248-2121 . We can send you a digital or hard copy.

*“Storing information in tables rather than one long data file has several advantages: you can sort based on any field...”*

## Reviewing Your List

If your mail list consists of a mix of customers and prospects, set a reminder to periodically review the customer segment – particularly if the mail list is kept separately from a customer list generated by the billing process. Here are the things to look for:

- *Have there been any changes in customer contact information?* Your company's billing system will have the most up-to-date mailing address information. This is because invoices must be sent as first class mail, and one service of first class mail is free address updates. If there is a problem with the address (such as a missing suite number) or if the customer has moved, the billing department will get the information from the returned invoice. Check what is in the billing file against your prospecting mail list and make changes as needed.

- *Have there been any changes in individuals within the customer's company?* Sales people and customer service representatives will know the status of the individuals associated with your customers. Has the individual been promoted or left for another company? Has the responsibility been assigned to someone else? Let your sales people and CSRs review the mail list information for accuracy.
- *Should an old customer be dropped from the mail list or a new customer added?* Check with your sales people and CSRs to see whether it still makes sense to keep existing customers on the mail list, and whether there are any new customers that should be added.



*“set a reminder to periodically review the customer segment...”*

**Maintaining  
a Mail List...  
Do It Yourself  
& Do It Right**



TECHNE  GRAPHICS INC.

2002 Ford Circle, Suite D  
Milford, OH 45150

Address Service Requested

**513-248-2121**

Fax 513-248-5141

[www.techgra.com](http://www.techgra.com)

[info@techgra.com](mailto:info@techgra.com)

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*“Two things we would like to warn you about Excel.”*

**Q.**

*I am fairly proficient at Excel. Can I use it for my mail list?*

**A.**

Yes – provided you understand that even though Excel displays the information in rows

and columns, it is not creating the tables of a relational database and so has limitations when it comes to finding and sorting data (compared to a database program like Access).

Two things we would like to warn you about Excel. The first is that you can change the sort order of a single column while leaving all the other columns in their existing order, leading to a mismatch of the address elements in each row. The second is that when you “hide” rows or columns to change how the mail list displays, you are not eliminating the hidden data. It is still there, and so will be included in a file you provide to us for mailing.