

DIRECT MAIL CAMPAIGN PLANNING WORKSHEET

Campaign Name: _____

Primary Goal: ☐ Acquisition ☐ Renewal ☐ Informational ☐ Additional Gift

Projected Revenue: _____

Projected Response Rate: _____

Estimated Cost, including postage: _____

List Source(s): ☐ In-House ☐ External

☐ List broker: _____

☐ Exchange from: _____

Estimated Quantity: _____

List Name(s): _____

Target Drop Date: _____

Mail Method: ☐ Nonprofit Standard ☐ First Class

☐ Indicia ☐ Presort

☐ Bulk Stamp ☐ Metered

☐ Live stamp

Mailing Service: ☐ Mail house ☐ Volunteers

Deadline for print goods to mailing service/volunteers scheduled on: _____

Package Contents:

☐ Reply device:

☐ Return envelope: ☐ #9 closed face ☐ wallet

☐ Outer envelope: ☐ window ☐ closed face ☐ non-standard

☐ Letter—specify approximate length:

☐ Other inserts:

Copywriter: _____

Copy due date: _____

Designer: _____

Initial proof due: _____

Final proof due: _____

Printer: _____

Printing due date: _____

DIRECT MAIL CAMPAIGN ANALYSIS

Campaign Name: _____

Primary Goal: ☐ Acquisition ☐ Renewal ☐ Informational ☐ Additional Gift

Initially Projected Revenue: _____

Initially Projected Response Rate: _____

Actual Drop Date: _____

Actual Quantity Mailed: (A) _____

Actual Cost, including postage: _____

Date of First Response:		
Date of ten business days after first response:		
Dollars received at ten days:	(B)	
Number of gifts received at ten days:	(C)	
Highest two gifts received at ten days:		
Lowest two gifts received at ten days:		
Total of two highest and two lowest:	(D)	

Projected Totals for Life of Campaign

Dollars: (Line B-Line D) X 2	(E)	
Gifts: Line C X 2	(F)	
Response Rate: Line F/Line A		
Average Gift: Line E/Line F		