

Cornerstone  
GROUP OF COMPANIES

*Putting Insights In Your Corner.*

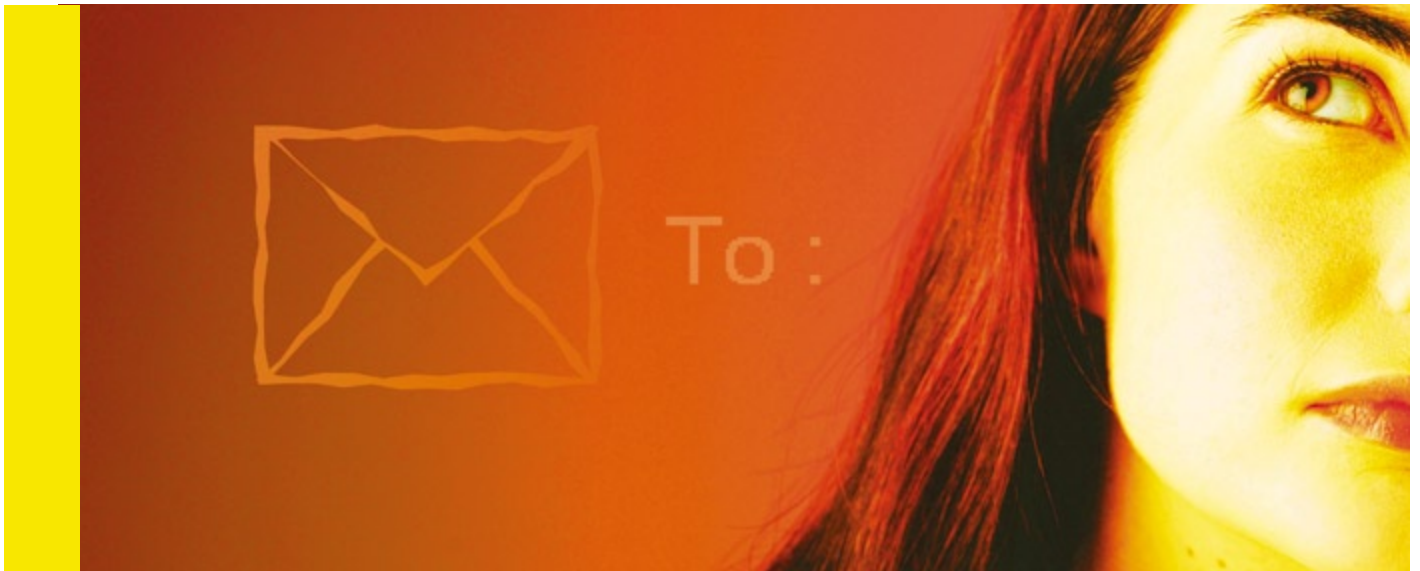
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## Mailing List Primer



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## The mailing list is the most important part of any direct mail campaign.

That seems clear enough; to send out a mailer, you're going to need a list of intended recipients. But, as simple as that sounds, there's a bit more to know about renting a list. Besides identifying your marketing strategy and zeroing in on your target audience, there are other technical, legal and logistical considerations.

This brief primer will give you a basic understanding, introduce you to some key concepts and summarize some general processes. Reviewing it will prepare you for a productive conversation with a list broker like Cornerstone.

# Mailing List Primer

## Getting Started

If you're renting a list for the first time, you'll need to do a little bit of preparation as you get started. This section outlines the information you will need to provide to a list broker in order to rent a list. As well, it will educate you about the things to consider and the process involved in planning a list rental, including research and recommendations, turnaround times and one-time use policies.

*There are over 1,600 consumer and business postal lists available in the Canadian marketplace.*

*Cornerstone manages over 600 postal lists available in the marketplace today.*

*With over twenty years of consumer and business list expertise, we can help you navigate through the complex world of list rental.*

### Required Information

Pulling together the following information before calling a company that offers list brokerage services, like Cornerstone, will help everything go smoothly.

#### Mail Date

An established list broker like Cornerstone will ask you to provide the date you plan to mail your direct marketing pieces. And, since mail dates are carefully monitored, you should tell your broker before changing your mail date by more than a day or two.

#### Lettershop or Other Destination

Generally speaking, list owners will not grant you access to their list directly. (Remember, you're just renting the list, and its owner wants to protect the information contained in it.) That means you'll need to provide contact information for where you want the list sent. Most often, the list you're renting will go to a third-party lettershop or data-processing house you designate.

#### Sample

You'll also need to provide a representative sample of the piece you

intend to mail. The list owners retain final approval regarding whether or not you may mail to their list. There are several reasons why they might refuse to release their list. For example, they may deem a mailing offensive or otherwise objectionable, or they may find that you compete too closely with their product or service.

### Research and Recommendations

Brokers like Cornerstone research available lists and compile information about them. That information, presented on datacards, becomes the basis for recommendations about which lists best fit your direct marketing strategy. Review our *Anatomy of a Datacard* illustration at [www.cstonecanada.com/datacards/anatomy.asp](http://www.cstonecanada.com/datacards/anatomy.asp) to learn more.

*Getting to Know Key Players* on page 4 will tell you more about list brokers.

To learn more about Cornerstone's list brokerage services, visit *Prospecting* at [www.cstonecanada.com/solutions/](http://www.cstonecanada.com/solutions/).

## Turnaround

Plan on at least 10 business days to complete a list order. Even with today's instant communication, the many parties involved in the process necessitate a longer timeline. Note also that this does not include the time that a list broker such as Cornerstone will need to research and prepare a list recommendation. Depending on the complexity of the recommendation, it may be provided in a few days or a week or two.

## Enforcement

As noted, list owners have an interest in protecting the information in the lists that they rent. To make sure that renters are not reusing the lists, list owners or their list managers place “decoy” names in the list. That way, when a decoy address receives an unauthorized mailing, they can detect misuse of their list.

## Understanding the Basics

After you've pulled together some of the required information, there are a few more details to consider. These include understanding where lists come from, list ownership and types of lists.

### Where Lists Come From

Most lists are by-products of doing business with an organization. Companies everywhere maintain lists of their customers. Magazine publishers have subscribers, for example. Catalogue marketers have buyers. Universities have alumni.

Many of these companies make their lists available to other companies that want to reach the same population.

Generally speaking, lists are available through list brokers, which can be smaller firms or part of a full-service direct marketing firm like Cornerstone. *Getting to Know the Key Players* on page 4 will tell you more about how list brokers operate.

Lists made available through established companies and reputable list brokers adhere to strict privacy compliance standards. *Determining Privacy Compliance* on page 5 will help you understand how to adhere to these important laws and conventions.

### Ownership

Remember that when you rent a list, you will not own the names. Although you will be able to mail to the names listed on it, your rights to the information are limited. In fact, in most cases, you will not have physical access to the list you are renting. What's more, unless your rental agreement says otherwise, you may only use the list for a one-time

mailing. Prospects who provide a positive response to your mailing may be contacted again without permission or payment to the list owner.

### Types

Despite many variations, lists fall into two major categories: response and compiled.

#### Response lists

Many renters regard response lists as more desirable. This is because the people on them have bought something, responded to an offer, subscribed to a magazine, attended a seminar, entered a contest, made an inquiry or taken some other action. These actions suggest that they are more likely to respond to offers from direct marketers, especially other companies with similar offers or reaching a similar audience.

#### Compiled lists

While compiled lists may not offer the same level of responsiveness, renters seek them out for another advantage. Their size and scope mean that they can offer higher levels of segmentation. Compiled lists are usually derived from public sources like phone books and business directories.

## Getting to Know Key Players



The process of renting lists is orchestrated by two main players: list brokers and list managers. Understanding their respective roles can help as you plan your direct response mailing.

### List Brokers

Direct marketers usually call on the services of a list broker whenever they seek a mailing list. It's important to note that brokers represent the interests of the list renter (also known as the mailer). Brokers are responsible for list research. They also prepare recommendations, basing them on a combination of list evaluation, previous experience with a list and, when available, the response history of available lists.

Brokers negotiate pricing and special deals, coordinate sample mail pieces, place orders with list managers and ensure timely delivery of the orders. They also coordinate invoicing and provide expertise and tools in the list response analysis process. If you're looking to obtain a list, brokers are the best way to find one that fits with your direct marketing strategy.

*Prospecting at [www.cstonecanada.com/solutions/](http://www.cstonecanada.com/solutions/) will tell you more about Cornerstone's list brokerage services.*

### List Managers

Companies seeking to generate revenue from their customer lists often enlist the help of a list manager. List managers represent the interests of list owners, promoting their lists to brokers and mailers. Managers provide ongoing information on costs and counts, process orders and coordinate sample mail pieces for list owner approval.

Most managers, including Cornerstone, also provide data fulfillment services. And, when owners choose turnkey services from a full-service firm like Cornerstone, they can gain the added revenue stream without having to manage all the details. This way, the list owners' involvement is limited to approving orders, reviewing financial reports and receiving monthly cheques.

*List Marketing at [www.cstonecanada.com/solutions/](http://www.cstonecanada.com/solutions/) will tell you more about Cornerstone's list promotion and management services.*

*Cornerstone has an internal research team devoted to finding and updating information on the best available media.*

*Our media database consists of information about more Canadian mailing lists, e-mail lists, alternative media and web advertising opportunities than any other company.*

## Determining Privacy Compliance

Whenever you are planning a direct marketing campaign, it is important to pay attention to privacy compliance. Canada has instituted private-sector privacy laws that regulate the use and disclosure of personal information—including the personal information found in commercially available lists. While the easiest way to be certain you are privacy compliant is to rent lists from a reputable firm like Cornerstone, understanding a little about privacy compliance can help you anticipate and avoid problems. View Cornerstone’s privacy policy at [www.cstonecanada.com/privacy/](http://www.cstonecanada.com/privacy/) to learn more about how we work to protect our Clients’ and their customers’ privacy.

### What Compliance Means

One significant question determines whether a list is privacy compliant: Did the people on the list have the chance to opt out? In other words, did they approve having their names and addresses transferred for the purpose of receiving any kind of third-party solicitation?

When the answer to that question is “yes,” a list is acknowledged as being privacy compliant.

### Following the Law

In Canada, privacy legislation may apply at both the federal and provincial levels.

At the federal level, there are two central privacy laws: the *Privacy Act* (which regulates personal information in the public sector) and the *Personal Information Protection and Electronic Documents Act* (PIPEDA) which covers personal information in the private sector.

Quebec, Alberta and British Columbia have enacted their own private-sector privacy legislation. In fact, the trend seems to be toward more provinces adopting similar laws.

PIPEDA and the substantially similar provincial privacy laws apply to consumer information. Business-to-business information is, for the most part, exempt from these laws because business contact information is accepted as being in the public domain.

You may visit the website of the Office of the Privacy Commissioner of Canada at [www.privcom.gc.ca](http://www.privcom.gc.ca) to review the federal laws. To review the provincial laws that may apply to your direct mailing, visit the websites of the individual provincial governments.

*Marketers can turn to Cornerstone for expert advice on any issue that might impact their campaigns, including privacy legislation, language laws, economic and social trends and what's hot in the world of direct response media.*



Direct response marketers in Canada make Cornerstone their vendor of choice. Cornerstone delivers high-quality sales leads based on in-depth and up-to-date knowledge of available media, coupled with the expertise that comes only with experience.

## The Cornerstone Group of Companies

Our mission is to help our Clients find and keep good customers. We will accomplish this by providing our Clients with the best prospecting leads available and helping them to be the best in the world at managing and enriching their customer databases.

### The List Group

- List Brokerage Services
- List Management Services
- List Processing Services
- Data Products
- Search Marketing Services

### The Database Group

- Marketing Database Services
- Fundraising Services
- Publishing Services

Every business unit at Cornerstone has been set up with a specialized set of products, services and experienced professionals dedicated to fulfilling the needs of marketers.

We invite you to call us at [1.416.932.9555](tel:14169329555) to explore how we can make your customer experience a long-lasting one.

