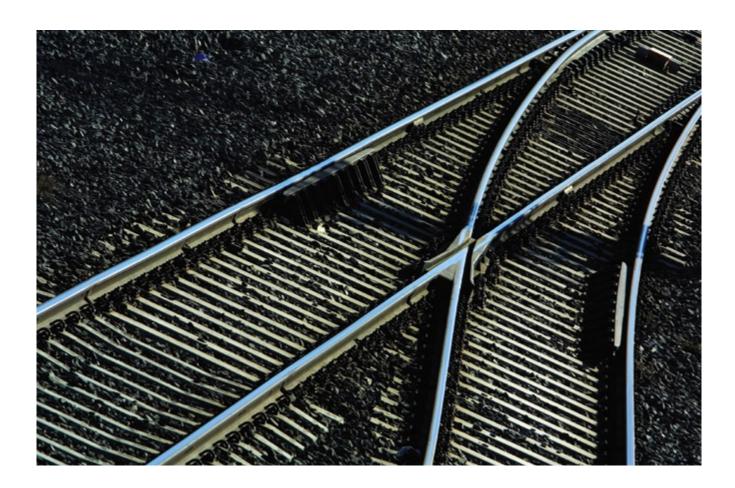# Cornerstone
GROUP OF COMPANIES

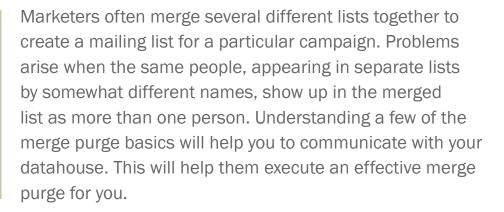*Putting Insights In Your Corner.*

Merge
Purge
Primer

Contact Us

Cornerstone Group of Companies
2200 Yonge Street, 8th Floor
Toronto, Ontario M4S 3G3
Phone: 1.416.932.9555
Fax: 1.416.932.9566
www.cstonecanada.com
info@cstonecanada.com

Merge Purge Primer

Understanding the Basics

Marketers often merge several different lists together to create a mailing list for a particular campaign. Problems arise when the same people, appearing in separate lists by somewhat different names, show up in the merged list as more than one person. Understanding a few of the merge purge basics will help you to communicate with your datahouse. This will help them execute an effective merge purge for you.

Our experience processing millions and millions of records has raised merge purge to an art form.

Draw on that experience to ensure the accuracy of your combined databases.

Cornerstone's merge purge expertise gives you a vital competitive advantage whenever you're combining databases.

Rely on our advanced processes and tools to eliminate all—but only—duplicate entries. With our help, you'll do more than just reduce postage costs. You'll also prevent the awkwardness of sending multiple mailings and, in the process, uncover a wealth of marketing information.

Input Lists

Input lists are all the lists that are being combined and which will then need to undergo merge purge. These lists may be rented or traded, or they may consist of people who have asked that they not receive solicitations (referred to as the "do not promote" or DNP list or suppression list). Input lists can also consist of house lists.

House Lists

House lists, owned in-house by the mailer, often consist of multiple lists. They usually consist of current and former customers, as well as internal DNP lists.

Change of Address

Both Canada Post and Cornerstone provide data processes that identify recent movers and update addresses. By comparing before and after addresses, these processes prevent costly returns by identifying duplicate recipients at two different addresses and removing the entry with the old address.

Finding Duplicates

Finding duplicates can be tricky. For one thing, addresses can look very different and still be deliverable. A single recipient, for example, might be listed as living at 123 Main Street, Toronto, or 123 Main Street, PO Box 22, Toronto, or even 123 Main Street, Don Mills. Catching these variations in data requires software that can standardize all the data as much as possible.

While there are established methods of performing merge purge, different datahouses employ different techniques. Cornerstone, for example, has developed sophisticated proprietary tools and programs that examine all components of an address. These methods uncover every considerable clue to determine whether or not any name is a duplicate.

Reports

Merge purge reports identify such key metrics as gross names in (the total number of names you started with) and net names out (the number of unique names you will send to a mailing house).

Reports also identify inter-file records (duplicates between lists) and intra-file records (duplicates within lists).

Considering Strategy

There is more to merge purge than simply deleting duplicate names. Working with a full-service firm like Cornerstone, sophisticated marketers can amplify the strategic benefit of this powerful tool. The merge purge process sets creative and list strategies in motion. And, it's where complex tools ensure that you are minimizing your postal costs. Getting the most out of this strategic tool involves the careful construction of your panel matrix, filling out the necessary forms correctly, and understanding the difference between business and consumer lists.

The Panel Matrix

It is with the panel matrix that sophisticated marketers begin to realize all the benefits of merge purge. This is where a mailing campaign is designed, creating a blueprint of the entire process.

After all duplicates and suppressions have been deleted, records get allotted into coded panels. These codes correspond to which lists are being mailed and/or what creative is being delivered. Done properly, it lets you carefully measure the success of variations and make intelligent, statistically based decisions about which lists perform and which creative packages are most successful.

Business versus Consumer

Because a business mailing has a different set of objectives than a consumer mailing, your merge instructions will also be different.

For a business mailing, for example, you might specify a search for specific titles, functions or industry codes. And, while a consumer merge purge normally specifies only one mailing per address, a business campaign might specify two, three or even an unlimited number per address.

Forms and Instructions

There is more potential for mistakes at the merge purge stage than at any other time in a direct marketing campaign. Plus, every mailing has different objectives.

That is why Cornerstone has created detailed forms that help you clearly communicate your merge purge instructions. Our user-friendly forms are designed to do double duty: they function as a checklist of critical items and they serve as a way to stimulate new ideas.

If you are ever in doubt about how to complete a form, our merge purge experts stand ready to help.

We ensure the effectiveness of your merge purge by designing the process based on the specific objectives of your marketing campaign.

We start by carefully interviewing you, then follow-through with user-friendly forms that walk you through the entire process.

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 to explore how we can make your customer experience a long-lasting one.