



DIRECT MARKETING SOLUTIONS

where tradition and
innovation intersect

Evolution of Integration

LEND360[®]

Hawthorne Bridge
Portland, OR

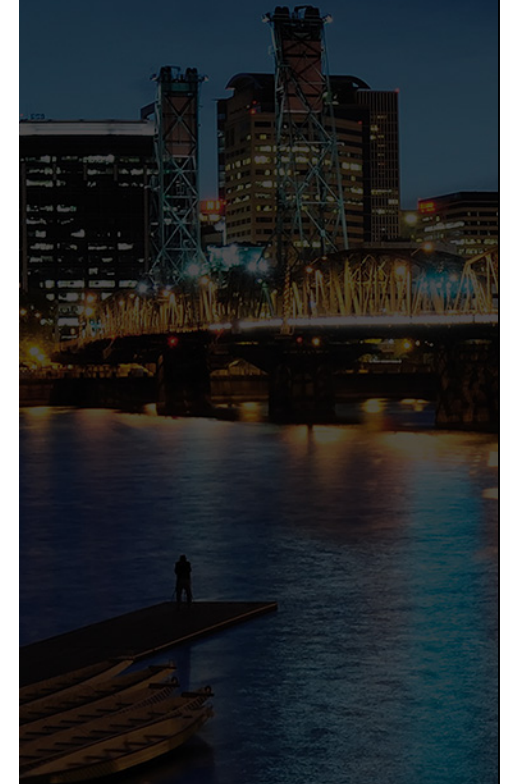
About John West

- More than 20 years of direct marketing experience at various financial service organizations, including Nationwide, Orchard Bank, Household, HSBC, Standard Insurance and Freedom Financial
- Managed over 1.5 billion pieces of direct mail
- Key leader in building the Orchard Bank direct mail business from the ground up
- At HSBC he worked on campaigns that averaged over 50M pieces mailed per month and resulted in net income growth >20% YOY.
- Launched the direct mail channel for the debt consolidation and personal loan lines of business at Freedom Financial
- PDM (Professional Direct Marketer) designation from the University of Missouri and a Certificate in Insurance Direct Marketing from the Direct Marketing Association



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Integration – Is There A Secret Sauce?

Yes and No – One has to be channel agnostic to succeed

There are two elements to consider:

1. Infrastructure
2. Tactical

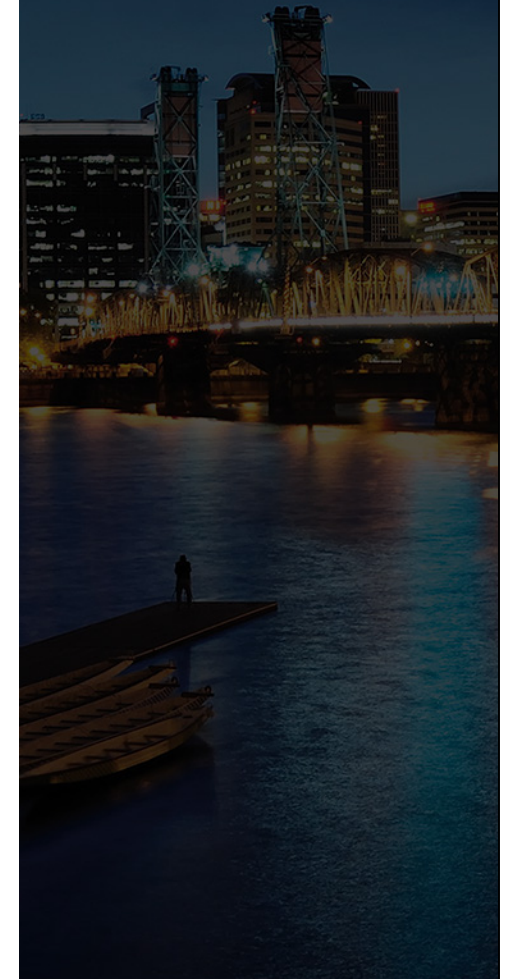
- **Infrastructure:** In order to have a *true* Attribution infrastructure, there needs to be a clear understanding of what it takes structurally and culturally to make this work. We see this as:

1. Data warehouse with real-time dashboard functionality (API's) – pipes in from all data / response sources
2. Ad-hoc reporting capabilities – to measure success and adjust on the fly
3. Complete team integration – analog and digital teams need to be on the same page with the same KPI's
4. Proper tracking tools such as individualized offer codes, pixels and match back algorithms



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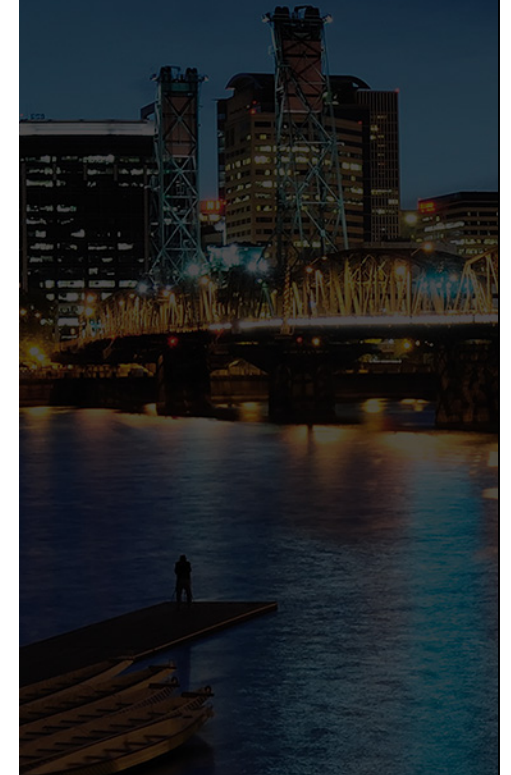
Integration

- **Tactical:** Campaign tactics are key, it must be initiated with caution and thought to truly read results.
 1. Define metrics
 2. Test before you roll
 3. Set the test up properly (have the ability to truly read results)
 - Control/holdout cells that are large enough to have statistical significance
 - Well-designed control cells that will allow the evaluation of:
 - Treatment vs. non-treatment
 - Various treatment strategies (ex. direct mail only, direct mail + mobile, etc.)
 - Timing and sequence of messaging
 - Appropriate response windows
 4. Plan several campaigns ahead of time
 - Allow testing of message sequencing
 - Enable the evaluation of remail/messaging fatigue
 - Evaluate any seasonality effects
 - More campaigns can increase statistical significance of results if one campaign is not enough



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Case Study – A True Attribution Example

Lending client running a multi-channel marketing program

- Direct mail
- Mobile
- Social
- Search
- Aggregators

Response Channels

- Online
- Brick and Mortar

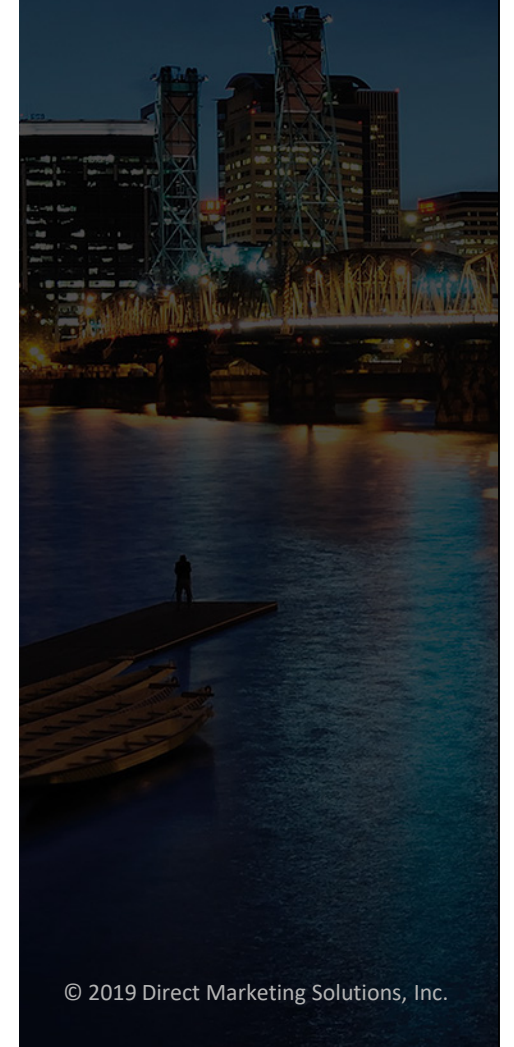
Solution

- Data Warehouse – CampaignMinder™
 - All marketing and response activity
 - APIs to connect with Google Analytics/Microsoft Advertising
 - BI Tool
- Pixels, specific offer codes and custom match back logic for tracking and attribution
- Integrated Reporting
 - Shows all the different marketing touches for each response
 - Application funnel to track hits, gross responses, abandoned applications, failed/invalid applications, approvals, and net responses
 - Reveals true ROI from all marketing channels



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