

Direct Marketing Toolkit Menu

The Direct Marketing Toolkit includes more than 50 tools for planning, analyzing, forecasting and tracking your direct marketing programs in all media: direct mail, digital, catalog, telemarketing and DRTV. The tools are designed for business to business and business to consumer marketers. The toolkit includes HTML and Flash tools as well as Word, Excel, PowerPoint and project management templates created with Gantt Project an open source project management software package that is available for Windows, iOS and Linux platforms. The GANTT chart templates can be opened with Microsoft Project or you will need a version of Gantt Project freeware which you can download at www.ganttproject.biz.

Instructions: Click the hyperlinks next to the tool description to launch a tool. If you select the HTML version, it will open in your default browser. Selecting the Excel, Word or Gantt Projects versions will open it in that application or give you a choice to open the file with one of those applications.

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Table of Tools

Name	Description	Versions	
Marketing Planning & Analysis Tools			
Customer Life Time Value Calculator	Use this Customer Life Time Value Calculator to calculate the Life Time Value of a customer, which is the monetary value of a customer over their lifespan as a customer.	HTML	Excel
Customer Net Present Value Calculator	Use this Customer NPV (Net Present Value) Marketing Calculator to calculate the "Net Present Value" of a customer based on cost of capital, their profitability, purchase history and lifespan (how long they are a customer).	HTML	Excel
Customer Retention Rate Calculator	The customer retention rate marketing calculator will calculate the year-over-year retention rate of your customers and the projected customer life time in years based on the variables you enter for the number of customers who purchased in the first year and the number of them that were still purchasing in the second year.	HTML	Excel
Sample Size Calculators	Use the Sample Size Marketing Calculators to determine a sample size for testing the response to an upcoming B2B or B2C direct marketing campaign, or for a research survey in which you want to determine how many people to interview or send questionnaires (the minimum sample size).	HTML	Excel
Campaign Planning Tools			
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1-Step Campaign Lead Conversion Breakeven ROI Calculator	Use this calculator to compute the overall response rate required to achieve breakeven and also the number of inquiries, leads, opportunities, qualified opportunities, and closed sales needed based on the advertising circulation and costs for a program, the average revenue per transaction, and the gross margin percentage for that transaction that you enter.	HTML	Excel
2-Step Campaign Lead Conversion Breakeven ROI Calculator	This tool is used to determine the overall profitability of a 2-Step promotional campaign and also the breakeven of the campaign based on the parameters you enter. Use the scroll bar at the right to read all of the instructions before using this tool. A two-step campaign involves contacting a prospect via telephone or sending a promotional piece to them via mail or email...Step 1. Step 2 involves sending some sort of fulfillment package or piece to the person who responded to your initial	HTML	Excel

promotion/offer. This fulfillment kit could be some sort of premium, white paper, etc.

Campaign Response Rate Calculator (Based On Project Revenue)	Use this Campaign Response Rate Marketing Calculator tool to calculate overall response rate required to achieve your desired revenue for this B2C or B2B direct response campaign and also the number of inquiries, leads, opportunities, qualified opportunities, and closed sales needed to achieve this profit based on the advertising circulation and costs for a program, the average revenue per transaction, and the gross margin percentage for that transaction that you enter.	HTML	Excel
Simple Marketing ROI Calculator	This tool will compute the simple return on investment (ROI) for a marketing campaign based on gross sales for the campaign, cost of goods sold and the total advertising costs.	HTML	Excel
Campaign Lead Projections Worksheet	Use this worksheet to layout your marketing campaign sales opportunities by industry and market segment; message and offers, activities calendar, lead projections, campaign spending and overall campaign budgets for the period.		Excel
CPI / CPL (Cost Per Inquiry / Cost Per Lead) Breakeven ROI Calculator	Use this Cost Per Inquiry (CPI) / Cost Per Lead (CPL) Breakeven Marketing Calculator to determine the breakeven and CPI / CPL for your B2B or B2C direct response campaign.	HTML	Excel
Single Variable Breakeven ROI Calculator	Use this tool to analyze the profitability of a campaign based expected response rate. The breakeven sensitivity analysis computes the revenue and profitability of the campaign at different levels based on varying a single variable, the overall response rate.	HTML	Excel
Campaign Inquiry Calculator	Use this Direct Response Inquiry Marketing Calculator to determine the number of mailings needed for your B2B or B2C direct response campaign in order to generate the desired number of inquiries.	HTML	Excel
Campaign Response Analysis Tool	Use this tool for tracking responses to all types of direct response campaigns, regardless of media, as long as you know the projected weekly percent of responses.	HTML	Excel
Campaign Financial Results Analysis Tool	Use this tool to calculate campaign financial results based on the campaign quantity, advertising costs, and other factors that you enter into the fields on the right side of the tool.	HTML	Excel
Inquiry / Lead Flow Calculator Based on Average Order Value	Use this tool to calculate the size of your marketing campaign and the number of leads that you need to generate from the campaign in order to achieve the desired gross revenue for the campaign based on the average transaction value.	HTML	Excel
Campaign Response Rate Calculator (Based on Gross Margin Objective)	Use this calculator to determine the response rate and sales leads required to achieve a desired profit percent from the program.	HTML	Excel
Lead Generation Calculator by Media Type	Use this pro forma Breakeven Analysis - Lead Generation Campaign BE Marketing Calculator to determine the breakeven percentage and inquiries or leads required based on a desired cost per lead / inquiry (CPI / CPL) for your direct response B2C or B2B marketing campaign.	HTML	Excel
Marketing Campaign Plan Project Template	Use this Gantt Chart template to layout your marketing campaign plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. You will need a version of Gantt Project freeware which you can download at www.ganttproject.biz or Microsoft project to open this template. Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.		Gantt Project

Marketing Communications Planning

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Promotional Capabilities Assessment Tool	Use the Promotional Assessment Tool is to determine your organization's overall readiness for successfully using integrated marketing campaigns across multiple media for promoting your products (services) to generate revenue and drive profits.	HTML	Excel
Advertising Media Selection Tool	Use this Direct Response Advertising Media Selection Tool to select the appropriate media for your direct marketing campaign based on the advantages and disadvantages of the various media types.	HTML	Excel
Advertising Appeals Checklist Tool	To successfully communicate with the buyer (business or consumer), advertising must appeal to the individual's needs, wants, desires, hopes and ambitions. In developing advertising strategies, use this checklist to select appeals currently used by you and your competition, and then check off appeals you might consider using in the future.	HTML	Word
Advertising Concept Evaluation Tool	Use the advertising concept evaluation tool to compare advertising	HTML	Excel

concepts based on all the factors that you must consider in developing your advertisements.

Advertising Effectiveness Checklist	The Advertising Effectiveness Tool is a checklist of all the factors that you must consider in developing your advertisements. There are 74 factors on which to evaluate your advertisement.	HTML	Excel
Communications Strategy Input Brief Template	Use this template to prepare your overall communications strategy, objectives and tactical direction. It guides you through outlining and addressing the strategic issues involved in developing a marketing communications campaign.	HTML	Word
Marketing Communications (Content Marketing) Plan Template	Use this template to layout your detailed communication plan, activities, and budgets for new customer acquisition, customer retention and reactivation of lost customers.	HTML	Word
Message Planning Template	This tool will help you plan your content and marketing communications strategies, tactics, activities and messages for each of the target markets (and personas) that you are pursuing in this planning period and the opportunity (\$'s) that exist for your organization in that target segment.	HTML	Word
Creative Brief Template	Use this template to prepare the creative strategy, objectives, and activities that are required to support marketing communications activities. A creative brief defines your project in such detail that everyone involved on the project will have a clear understanding what the end product is intended to be and what it's intended to accomplish from a marketing perspective.	HTML	Word
Marketing Agency Evaluation Tool	The Agency Evaluation tool will help you select a creative or marketing agency from several candidates based on an objective scoring system.	HTML	Excel

Direct Marketing Planning Tools

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Direct Marketing Campaign Planning Guide & Template	Use this guide and template to plan your direct marketing campaign, which may include one or more tactics or be a fully integrated direct marketing campaign. Each section includes instructions to guide you through the planning process and details each aspect of the campaign.	HTML	Word
Direct Marketing Program Production Cost Estimator	Use this tool for computing the per thousand cost for any direct mail campaign, whether it is a postcard, self-mailer, brochure, catalog, a dimensional mail package with free gift/premium included, or a solo mail package in flat rate envelop.	HTML	Excel
Average Order Value Breakeven ROI Analysis Tool	Use this Direct Response Average Order Value Breakeven marketing calculator to compute the breakeven response percentage and number of orders for your B2C or B2B direct marketing campaign based on advertising costs and the average order value for orders filled during the campaign.	HTML	Excel
Direct Marketing Campaign Financial Analysis Tool	Use this tool to run the numbers on a direct-mail campaign. The tool includes a breakdown of gross margin of the product being sold, the cost of the direct mail piece, and an analysis of the profit and break-even point.	HTML	Excel
Direct Marketing Campaign Breakeven ROI Calculator by Media Type	Use this tool to run the numbers on a direct-mail campaign. The tool includes a breakdown of gross margin of the product being sold, the cost of the direct mail piece, and an analysis of the profit and break-even point.	HTML	Excel
Direct Marketing Campaign Media Level Breakeven Calculator	The Breakeven - Media Level Pro-Forma Marketing Calculator will help you learn immediately if your product can make money in a direct marketing campaign in print, catalog, or email media.	HTML	Excel
List Rental Circulation Planning Tool	Use the list analysis and circulation planning tool to plan your direct response mailing list purchases, either email lists or direct mail lists. Along with a complete analysis of the various list you've selected, it allows you to build your complete campaign for all mailing list, producing ROI and P&L for the campaign. The template supports inputs for up to 25 mailing lists.	Excel	
Telemarketing Campaign Breakeven ROI Calculator (Known Revenue Goal)	Use this tool to calculate the breakeven and ROI for an outbound telemarketing campaign based on achieving a specified revenue target for the campaign determined by the average transaction value and resulting number of sales (closes) required.	HTML	Excel
Telemarketing Campaign Breakeven ROI Calculator (Known Contact Universe Size)	Use this tool to calculate the breakeven and ROI for an outbound telemarketing campaign based knowing the exact size the potential audience that you will be contacting during this campaign. The "known universe" or "# of total contacts for the campaign" is the key variable.	HTML	Excel
Direct Mail / e-Mail Testing Financial Analysis Tool	Use the Mail Testing Financial Analysis marketing calculator to help you determine acceptable response levels for a test direct mail or email	HTML	Excel

campaign.

Direct Mail Marketing Campaign Plan Project Template

Use this Gantt Chart template to layout your direct marketing campaign plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. **Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.**

[Gantt Project](#)

DRTV Ad Allowable Media Efficiency Ratio Calculator

This tool will calculate the "ad allowable" and "media efficiency ratio" for a DRTV infomercial campaign. The ad allowable tells you how much you can afford on a cost per order basis. The ad allowable is the dollar amount determined to be the maximum media expense for each unit sold in order to generate a specified level (%) profit.

[HTML](#)

[Excel](#)

DRTV Income Cash Flow Calculator

The DRTV Income & Cash Flow Projection Calculator will help you conduct "what-if" analysis, and income and cash flow projections for a direct response television campaign (infomercial). The calculator is setup to allow you to enter the retails and costs for the initial offer and three up-sell or add-on offers that are sold to the customer with their initial purchase.

[HTML](#)

[Excel](#)

DRTV Campaign ROAI Calculator

The DRTV Campaign ROAI (return on advertising investment) Calculator will help you learn immediately if your product can make money on TV.

[HTML](#)

[Excel](#)

Omni Channel / Multi Channel / Catalog / Retail Tools

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Catalog Multi Channel Marketing Assessment

The catalog and Internet merchant marketing assessment tool is a comprehensive study and review of your current and future catalog marketing plans and activities whether they be print, online, or both. The tool helps identify areas of strength and weaknesses and opportunities for improving marketing, merchandising and operations activities for catalog marketing clients.

[HTML](#)

[Excel](#)

RFM Scoring Marketing Calculator

Use the RFM (recency, frequency, monetary) analysis tool to determine quantitatively which customers are the best ones by examining how recently a customer has purchased (recency), how often they purchase (frequency), and how much the customer spends (monetary). Use it to determine your promotional schedule and offers sent to your customers based on their RFM score.

[HTML](#)

[Excel](#)

Digital & Social Media Marketing Tools

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Email Campaign Monthly Lead Flow Calculator

Use this tool is to determine what you need to mail per month to generate a given revenue objective for an email campaign. It works for all types of business-to-business and business-to-consumer email campaigns.

[HTML](#)

[Excel](#)

Email Campaign Profitability Assessment Tool

Use this E-mail Campaign Revenue & Profitability Assessment Tool to compute the number of completed responses you need to achieve breakeven and give you the ROI for the campaign based on the values you entered.

[HTML](#)

[Excel](#)

Banner Ad ROI Breakeven Calculator

Use this Internet Banner Ad (advertisement) Breakeven & ROI Calculator to compute the breakeven and ROI for a banner advertisement, based on number of impressions, click through rate, selling price and margin, and advertising costs.

[HTML](#)

[Excel](#)

Pay Per Click ROI Breakeven Calculator

Use this Pay-per-click (PPC) Advertising Breakeven & ROI Calculator to calculate the breakeven and ROI for Pay-per-click advertisements.

[HTML](#)

[Excel](#)

Website ROI Breakeven Calculator

Use this Website Return on Investment & Breakeven Calculator to compute your ROI and breakeven for your website, based on traffic, operating and promotional costs. Enter your monthly traffic figure, the cost of maintaining and promoting the site during a month, the monthly number of inquiries at your site and the conversion rate of inquiries to buyers.

[HTML](#)

[Excel](#)

Social Media ROI Breakeven Calculator

The Social Media Marketing ROI Breakeven Calculator is flexible, and it's designed to help you put an ROI formula to work for your brand in the way that makes the most sense for you.

[HTML](#)

[Excel](#)

Social Media Campaign ROI Breakeven Analysis Tool

These calculators include the key metrics we think are imperative to gauging your social media presence. The calculator takes into account your overall investment and your output on all of your social channels. The calculator is flexible, and it's designed to help you put an ROI

[HTML](#)

[Excel](#)

formula to work for your brand in the way that makes the most sense for you.

Marketing Tutorials / Workshops **Note: All tutorials are contained in zip files. Unzip the tutorial file and then open the html file in the folder in your default browser.**

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Direct Marketing Tutorial

This tutorial is an introduction to direct marketing and covers direct marketing in all channels including digital. It covers all aspects of direct marketing from strategies to offer development and how to use it in the different channels and media. It covers operations and creative development. It also contains a section covering catalog marketing.

[Zip File](#)

Catalog Marketing Tutorial

These eight tutorials take you through every step of planning, developing, launching and then managing a catalog operation. These tutorials are meant as an introduction and/or refresher to catalog marketing. If you're in the processing of thinking about launching a catalog or actually in the planning stages of one, these tutorials are excellent guides to helping you keep your plans on track.

[Zip File](#)

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