



## Seven Oaks Consulting Consulted by Another Marketing Agency – and We Saved Their Account

### Project Background

A boutique marketing agency located in a major metropolitan area faced an embarrassing problem.

Not one, but two direct mail campaigns for their most important client had failed. Research into the problem led them to discover that the dated offers in the campaigns arrived too late in customers' mailboxes.

Upon further investigation, they determined that the problem stemmed from poor project management. The young employees recently hired by the firm as junior account executives had no experience or training in traditional direct mail.

These employees, raised in the digital marketing era, were so unfamiliar with traditional direct mail that they did not manage projects efficiently. Yet their major client relied upon traditional direct mail for most of its lead generation campaigns.

### “Teach a Man to Fish” or “Teach an Agency Direct Marketing”

Jeanne first met with each team at the agency, including the junior account executives, the copywriters, graphic designers and print production team to assess their understanding of traditional direct mail.

After fully exploring their current project management method and workflow, she developed a customized system for direct mail projects. She wrote a training manual and created project planning templates for the team that enabled them to enter the desired arrival date for the mail and generate a complete project plan with target dates for each step of the process. Lastly, she delivered a brief seminar to the team to help them understand the special timing required for direct mail, direct mail requirements, and tips for achieving maximum postal discounts.

### Results: Our Expertise Saved the Agency’s Account

The marketing agency reported that after a year of using the new system, no more snafus derailed their direct mail programs. They retained their major client, and the junior account executives, now seasoned direct mail marketers, were able to pass on their knowledge to the next group of new hires.