

Campaign Performance + Matchback Attribution Intake

Client Data Intake Form

Purpose

Direct Advantage Mail now provides ongoing campaign performance summaries with matchback attribution at no extra fee. To participate, please provide your lead and sales data using the simplest option below. We will match the data to your mail records and calculate the reporting on our end.

Data handling

Direct Advantage Mail does not share or retain your data.

The information is used only to prepare your campaign attribution and performance summaries. You do not have to provide revenue data; Revenue and Gross Profit may be left blank if you choose.

1. Client Information

Company / Client Name

Primary Contact

Contact Email

Contact Phone

2. How Will You Provide the Data?

Choose one or more options:

- Complete this PDF form Send a CRM export, spreadsheet, or CSV Provide CRM access

CRM Access Details

Only complete this section if CRM access is being provided. Temporary or read-only access is preferred when available.

Site / URL

User / Login

Password / Access Code or Sent Separately

Access Notes / Instructions

Sales / Transaction Data Needed

These are the only client data fields required

What to send

Please provide one row for each lead, appointment, sale, or transaction. Direct Advantage Mail will use this list to match activity back to mailed households and prepare the attribution reporting. Campaign/job data will be pulled and calculated on our end.

Revenue and Gross Profit are optional

You do not have to provide revenue data. You may leave Revenue and Gross Profit blank if you choose. If left blank, revenue/profit-based metrics will be omitted or limited.

Required Data Fields

Field	What to Provide	Requirement / Notes
Address	Street address associated with the appointment, lead, sale, or job.	Required. Use the service or customer address whenever possible.
City	City for the address record.	Required.
State	State for the address record.	Required. Two-letter abbreviation is fine.
Zip	ZIP code for the address record.	Required. 5-digit or ZIP+4 is fine.
Appointment Date	Date the appointment or lead was created, scheduled, or completed.	Provide when applicable; leave blank only if no appointment/lead date exists.
Job Sale Date	Date the job sold or sale was completed.	Provide when applicable; needed for sale attribution.
Revenue	Total revenue for the sale or transaction.	Optional. You may leave this blank if you choose.
Gross Profit	Gross profit before mailing or marketing cost.	Optional. Needed only for profit-based ROI metrics.

Preferred list format

Address | City | State | Zip | Appointment Date | Job Sale Date | Revenue (Optional) | Gross Profit (Optional)

For larger lists, a CRM export, spreadsheet, or CSV is preferred over manual PDF entry.

Metric Readiness Guide

This is what the report will provide

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Using the client data fields above plus Direct Advantage Mail campaign records, the ongoing campaign performance summaries can provide the reporting outputs below.

Report Output	What It Shows
Campaign performance by job, mail date, or issue	Summary of attributed activity for each mailing campaign using Direct Advantage Mail campaign records.
Product type summary	Performance grouped by mailer category, service type, or campaign type.
Matched appointments / leads	Count of appointment records matched back to mailed addresses.
Attributed sales / jobs	Count of job sales or completed transactions attributed to the mail campaign.
Total revenue, if provided	Revenue from sales attributed to the campaign when revenue is included in the supplied data.
Gross profit, if provided	Gross profit from attributed sales before mailing cost when Gross Profit is included in the supplied data.
Cost of mailing	Mailing cost pulled from Direct Advantage Mail records.
ROI % and revenue-to-cost ratio	Return compared with mailing cost. Revenue/profit-based metrics depend on Revenue and/or Gross Profit being provided.
Net revenue, campaign profit, and margin	Revenue and gross profit results after accounting for mailing cost when the needed financial fields are provided.
Response and conversion rates	How mailed households moved from matched appointment/lead activity to sale.
Average sale value	Average revenue per attributed sale when Revenue is provided.
Revenue/profit per mailed piece	Revenue and/or Gross Profit compared against pieces mailed when those financial fields are provided.
Cost per match and cost per sale	Mailing cost efficiency based on matches, appointments, and sales.

Metric notes

Revenue and Gross Profit are optional. If those fields are left blank, the report can still provide match, appointment, sale count, cost, response, and conversion reporting; revenue/profit-based metrics may be omitted or limited.

Optional Manual Entry Sheet - Records 1 to 15

Use only if not sending a spreadsheet, CSV, CRM export, or CRM access

Use this sheet only if you are not sending a spreadsheet, CSV, CRM export, or CRM access. For additional records, attach a separate file or copy this page. Revenue and Gross Profit are optional and may be left blank.

Address	City	State	Zip	Appointment Date	Job Sale Date	Revenue (Optional)	Gross Profit (Optional)

Reminder

If you have more records than fit here, please attach a spreadsheet or CRM export with the same columns. Columns: Address, City, State, Zip, Appointment Date, Job Sale Date, Revenue (Optional), Gross Profit (Optional).

