DIRECT MAIL PLATFORM EVALUATION

14 questions to ask any direct mail platform before you sign.

Most "best platform" listicles rank vendors on SEO traffic, not on which platform fits the job. From a buyer's seat, every platform claims an API, every platform claims compliance, every platform claims tracking. The questions below are what actually separate them. Ask these. The answers cut through the marketing.

HOW TO USE IT

Bring this to the demo. Score 0–2 per answer, then total out of 28. Hedge words ("we're working on that," "depends on the use case") are warning signs.

WHAT "GOOD" SOUNDS LIKE

Specifics in 30 seconds. Named integrations, named compliance docs, real percentages, real timelines. Not "yes, but…"

THE DEMO TEST

After the questions, run a live demo on your actual list and a real campaign idea. Platforms that sail through it are the ones that ship.

01 Person-level identity resolution: yes or no?

LISTEN FOR

A native pixel that resolves anonymous web visits to a postal address, named CCPA-compliant identity graph, and a quoted match rate (50–60% on US consumer traffic is realistic).

02 What's the variable imaging depth?

LISTEN FOR

Per-recipient images composed at production speed from URLs — Street View, vehicle photos, abandoned-cart product images. "Export the records and we'll batch-process" is not production variable imaging.

03 How does the postal stack actually work?

LISTEN FOR

NCOA, CASS, Pre-sort Local Entry, Pre-sort Dropship (DSCF entry), and Co-mingle named explicitly. A platform without Drop-ship and Co-mingle as configurable options leaves 15–25% of postage savings on the table.

04 Per-piece USPS scan tracking: streaming or batch?

LISTEN FOR

Real-time IV-MTR powers the USPS Scan Trigger play (per-recipient email release on the actual DDU scan). Batch IV-MTR is fine for reporting but doesn't power coordinated multichannel.

05 Omni-channel coordination: native or stitched?

LISTEN FOR

The same audience driving mail + email + SMS + Meta + dynamic QR with a single dashboard and shared attribution — not webhooks gluing four separate tools together.

06 Editor for marketers without engineering?

LISTEN FOR

Live demo of a non-engineer building a piece from scratch — list import, template, brand-locked elements, variable data, proofing, send. If the demo dwells on the API, the platform is built for engineers.

07 White-label and reseller: real or marketed?

LISTEN FOR

Native sub-accounts, branded client portals, custom domains, and reseller pricing — configured at onboarding, not a six-figure custom services build.

08 SOC 2 Type 2 audit status — can we see the report?

LISTEN FOR

Type 2 (not Type 1), latest report shareable under NDA. A vendor that can't share it either doesn't have one or has findings they're hiding. Both are problems.

CONTINUED

Questions 09 — 14, plus a scoring rubric.

The remaining six questions cover compliance, pricing, migration, integrations, the print network, and the roadmap. Score each 0–2 and add them to your page 1 totals.

09 HIPAA support: BAA execution and PHI workflow?

LISTEN FOR

BAA as part of standard onboarding, not a custom enterprise add. Specific PHI-handling environments named. Healthcare brands skipping this end up with regulatory exposure.

10 Pricing model: per-piece, platform fee, or bundled?

LISTEN FOR

How the model scales as your volume grows. Per-piece is transparent at low volume and expensive at scale. Bundled with the postal stack and channels included replaces multiple subscriptions.

11 Migration story from your current platform?

LISTEN FOR

Two-to-four weeks for a similar-shape platform. "Six months and a custom integration project" signals the platform doesn't migrate cleanly — and won't let you leave cleanly either.

12 CRM and BI integrations: native or via Zapier?

LISTEN FOR

Salesforce, HubSpot, Klaviyo, Shopify, Snowflake, Looker, Tableau, Power BI — native one-click vs Zapier or custom API. Zapier-only fails at scale.

13 What does the print network actually look like?

LISTEN FOR

Owned facilities (consistency, single point of failure) vs vetted print network (buyer picks one shop and runs there). The honest answer names the buyer-facing experience — auto-routing per drop is a future feature for most networks today.

14 What's the roadmap for the next 12 months?

LISTEN FOR

Identity resolution, AI personalization, omni-channel orchestration = modern direct-mail stack. Print operations and address verification only = legacy stack. Match the roadmap to your needs.

Scoring rubric — 14 questions, 0–2 per answer, 28 points total

0 = can't answer or doesn't have it. 1 = has it with caveats. 2 = clean answer with specifics. Total your scores, then read the band.

24–28
Strong fit. Deserves a pilot. Run a live demo on real data next.

18–23
Acceptable for a focused use case. Verify the gaps don't matter for your program.

Below 18
The platform isn't built for what you're trying to do. Keep looking.

Built by DirectMail.io — see how we answer all 14.

Bring a list and a campaign idea. We walk through every question on real screens, on a real drop. 30 minutes.

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