



A collaboration with:



May 2026

The Complete Guide to a Customer Appreciation Event.

When we think of customer appreciation events, we tend to think of retailers, but the fact is that any business can use such events to enhance its brand perception, increase customer loyalty and retention, and drive business growth (primarily through increased sales and referrals). That said, there are fundamentally three types of customer appreciation events, and we will discuss all three in this article:



- 1. Events with no expectation of immediate sales,**
- 2. Events with some expectation of immediate sales, and**
- 3. Customer promotions that are thinly disguised as "appreciation events."**

On the left, you have an example of a pure relationship-building event. American Express Canada sent a logoed Yeti mug to customers with over 50 years of membership.

These cardmembers already have a strong association with (and affinity for) the AMEX brand. They use their cards and pay their bills.

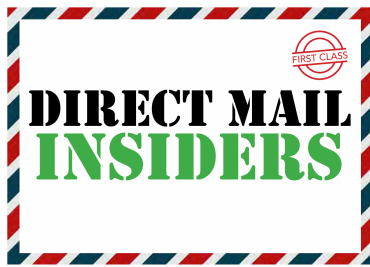
Quite possibly, these members' highest-spending years may be behind them, given that recipients are at least 70 years old. Maybe AMEX sees non-renewal as its biggest risk.

The card signed by **Brett Mooney**, SVP and Country Manager, sums up this event and reads, in part: *"Thank you for over fifty remarkable years. May this gift serve you well, and remind you how far we've come, together."*

Inside this report:

| | |
|-----------------------------------------|----|
| Mailing of the Month: JG Wentworth..... | 6 |
| Beyond The Mailbox..... | 8 |
| Call Notes..... | 11 |
| SEND-OFF..... | 12 |

Continues on page 2
"Customer Appreciation Event"



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"Customer Appreciation Event" Continued from page 1

We should point out that this custom-designed package includes AMEX branding, both strong and subtle, and was delivered by courier.

The second type of event — some expectation of immediate sales — can take many forms. To get your imagination going, here are several examples.

Costco opens at 9AM, Sunday through Friday, exclusively for its Executive members, making shopping faster and potentially more convenient for them. This is a daily customer appreciation event. (On Saturdays, it's only a 30-minute advantage.)

Fidelity Investments hosts live events for clients with free educational workshops on investment strategies. These events will occur from time to time and on a market-by-market basis.

Marriott Hotels hosts "Elite Member Appreciation Evenings" in hotel lounges, offering complimentary drinks, snacks, and entertainment for loyalty program members. These events vary by market.

Cruise ship operators offer the same type of events for cruisers at different stateroom or loyalty levels.

Card Party, a business for Pokémon fanatics, brings its customer community together at weekend conventions.

Card Party includes everything from pack battles and trade nights to tournaments and meet-and-greets. These events happen annually in Tampa (late June) and in Seattle (early October) and, in 2026, will expand to San Diego, Fort Lauderdale, and Dallas.

Kaiser Permanente, one of America's largest healthcare businesses, holds customer appreciation health fairs, offering free wellness checks, flu shots, and consultations for its members.

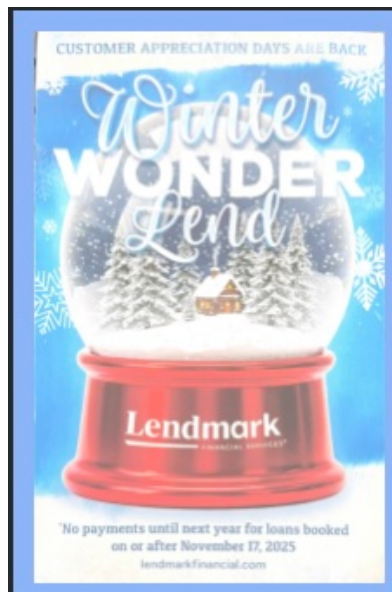
Savvy **automobile dealerships** offer their best customers extended test drives of their newest models. While almost anyone with a driver's license can get a 20-minute test drive (with the salesperson in the passenger seat), these customers

Continues on the right

get the car delivered to their home and drive it all weekend.

You will notice that most of these examples are directed at segments of their customer base, not everyone. (It can be argued that, for Card Party and Kaiser Permanente, attendees self-select.)

The third type of customer appreciation events is, as stated earlier, thinly disguised promotions.



This mailing from Lendmark is an example.

The promotion states that "no payment until January 2026 is available on all loans closed on or after November 17, 2025. To the extent that the first payment is more than one month after the

date the loan closes you will be charged interest for this extended period."

We can only say, with maximum sarcasm, **How special!**

Take note that this offer "is available," which probably means that some customers will not qualify since "all loans are subject to credit approval, income verification and normal underwriting standards... Collateral requirements may apply."

(The "legal copy," which includes the above excerpts and more, takes up one-fifth of the total area of that side of the postcard.)

Planning The Perfect Event

As you can imagine, the first step in planning any business event is describing why you want to do it; your objectives, in other words.

The next step is figuring out which customers will be invited to your event.

These may be customers who have been with you for a specific period, as in the AMEX example earlier. Or, customers in a specific loyalty tier. Or, those who recently purchased a particular product or service.

Once you know your "why," choose the type of event you want to hold, and its duration — one day, one weekend, one week, one month, or more.

Also, since you also know how many people will be invited to the event, prepare a pro-forma budget and obtain the necessary internal approvals for the event and its associated costs.

At the same time, confirm that you have sufficient lead time to plan the event. Ideally, give yourself 12 weeks to plan a new one-day event; longer for other durations.

If you are repeating an event, you can reduce planning time because some of the work has already been done.

With the necessary approvals in place and sufficient planning time, decide on the success metrics for your event. Some examples:

Attendance rate. (The percentage of invitees who attended.)

Attendee duration. (The time spent at a one-day event, or the number of sign-ins for multi-day events.)

Referral rate. This metric only applies when invitees were asked to bring another person to the event.

Continues on page 4
"Customer Appreciation Event"

"Customer Appreciation Event"
Continued from page 3

Sales lift from the event, namely, the value of incremental sales driven by the event.

Social media activity. Were attendees raving about the event online?

Improvement in Net Promoter Score, if this were an objective.

Increase in purchase frequency, average order value, or LTV, both of which will take time to determine.

Lock In Your Communications Plan

First, you must announce your event,

We are biased, of course, but prefer the impact of physical mail for this important stage, where appropriate. Ask invitees to RSVP and follow up with them (by email, text message or phone).

For invitees who do not respond, follow up with a series of automated emails and/or text messages to prompt a response.

If your events are genuinely by invitation only, you should avoid social media before the event. Keep it private for the time being.

Is there a VIP group amongst the invitees? If so, how will their communications plan differ from the

others?

Finally, in this section, order the signage that will be required, any printed material or other giveaways, and any staff apparel associated with the event.

At the event, the host welcomes the guests and may have a formal presentation or informal message to kick off the event.

Post-event, consider personalized thank-you notes sent within 24 to 48 hours, surveys, and event highlights (a brief video?) for attendees.

And, now's the time to activate social media to share the event's success after the fact.

Don't Forget The Metrics

Post-event, remember to track all the metrics that you identified before the event.

This data will give you critical insights as to how future versions of the event can (and should be) improved.

Successful events that meet or exceed their goals should be repeated from time to time.

Both you and your business deserve it!

MEMBERS-ONLY LIVE DIRECT MAIL INSIDERS' CALLS ON ZOOM

(All 90-minute calls start at NOON Eastern/11 AM Central/9 AM Pacific)

| | | | |
|---------------------|-----------------|------------------|------------------|
| ALL Members | May 12th | June 9th | July 14th |
| FULL Members | May 26th | June 23rd | July 28th |

These calls will be recorded and posted on the Private Members' Site for future reference.

Two memorable and successful customer events.

Back in my days as a performing arts administrator, we hosted many events.

Events are typical for the development department to host donors and cultivate relationships to get them to donate more, but we also held many events for the general public and audience members to deepen the relationship and create some affinity.

One series that we did a lot of this for was something called Virtuoso Introductions, which was a chance to hear a young up-and-coming artist — many of whom have become pretty famous and are soloists with major orchestras these days — but back then they might have been somebody just out of Curtis, Oberlin, or Juilliard, getting their name out there.

We would do concerts, talk back with them after the concert, and then have a reception with them and the general audience.

It was more than just a concert; it was a full experience that was far more immersive than the typical concert. Virtuoso Introductions became one of our most popular series.

Year after year, people were eager to participate in it far more than many of the other concert series we offered.

Three alumni from the Virtuoso Introductions are pianist Jonathan Biss, and violinists Jennifer Koh and Vadim Gluzman.

David Baer

My wife, **Judy McFarlane**, teamed up with another software vendor to sponsor team-building exercises at an event hosted by a computer products distributor, with its resellers as attendees.

By pairing up, the event got double the space, double the participants and, importantly, split the fee of the facilitator hired to introduce and manage the team-building events.

Attendees were divided into small teams, and over 90 minutes, they competed in several tasks, starting with some easy ones (i.e., dance the Macarena).

For the grand finale, each team received a small box containing a hard-boiled egg, a length of string, some wooden sticks, and a bunch of other stuff found at the office.

The idea was to move the egg about four feet, using the items in the box. There were two rules: (1) Once the egg's journey began, no team member could touch it, and (2) if the egg cracked (presumably by falling), the team was out of the game.

The teams quickly eliminated the obvious solutions, and the team-building kicked in.

Every team attempted several approaches. Many failed. New ideas were hatched, and a solution was eventually found.

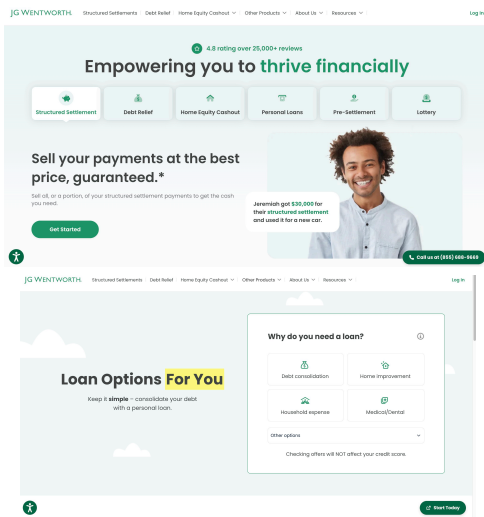
Throughout the entire event, the teams worked hard, had a great time, and worked collaboratively.

As an added benefit, a senior executive of the sponsoring distributor, checked in on the event several times. He was fascinated by it, and, later hired the facilitator for another event.

David Foley

Mailing of the Month: JG Wentworth Chesterbrook, PA

About JG Wentworth



JG Wentworth is a privately-held, 30+ year financial services company best known for "structured settlements," where it converts a recurring income stream (a monthly \$10,000 lottery win, for example) into an immediate lump sum payment. Typically, the settlement is 40% - 60% of the total amount, which sounds like a lousy deal unless the recipient is in a tough financial bind.

On its website, the company claims to have served over 150,000 Americans, which might explain its "personal loan" business. The company describes itself as a marketing firm, suggesting that it pairs with lenders for the loan origination fee and, likely, a share of the interest earned from loans made to its customer list.

About this Campaign

This campaign offers personalized loans to its recipients and is a partnership with Personify Loans, a subsidiary of First Electronic Bank (a chartered industrial bank in Utah).

Comments on this Campaign



The outer envelope "presents a loan offer just for you." The prominent JG Wentworth branding suggests that this mailing is being sent to people who are familiar with the company; it's house list or some portion thereof, in other words.

Note the words "Pre-qualified" in the window.

This copy should increase the opening rate, even though the words do not connote "pre-approval."

In this mailing (and all others), "pre-qualified" simply means that recipients have passed a certain set of criteria that allows them to be included on the mailing list.

Inside the envelope, you will find a single page letter on one side and the required loan disclosure statements. (See images on the right.)

The letter features a header, in the same green color as the envelope, which reads; **"Need some extra cash? Get approval today!"**

Beyond The Mailbox

The Impact of AI Traffic on E-Commerce and Small Business Strategy

by David Baer

It used to be that to find something online, you opened a browser, typed a request into Google, scanned a list of links, and clicked on the one that appeared to best address your need. Businesses invested in SEO, and measured success by their position on that list.

It was predictable enough that entire industries were built around it.

Then the behavior started to change.

People began asking longer, more specific questions. Search results started answering those questions directly, reducing the need to click. Featured snippets, knowledge panels, and "People Also Ask" boxes kept attention on the results page (and not the websites).

Traffic patterns started shifting before most businesses noticed.

And then, starting in early 2024, generative AI accelerated the change.

Now, instead of searching and clicking through multiple sources, a user can ask a question and receive a structured answer in seconds. Not a list of links, but an answer. Often with recommendations embedded directly into it.

That changes the flow of attention. It also introduces a new dynamic. Because your website may still influence the decision... but the user may never visit it.

This is where Generative Engine Optimization, or GEO, comes into play. The simple reality is visibility is no longer limited to search rankings. It now includes whether your

content is used, cited, or referenced inside AI-generated responses.

That shift affects just about any business that relies on being found and evaluated online. It impacts content marketing, lead generation, SaaS acquisition, professional services, and, perhaps more than anything else, e-commerce.

Against that backdrop, a recent working paper from researchers at the University of Hamburg and the Frankfurt School of Finance & Management (https://papers.ssrn.com/sol3/papers.cfm?abstract_id=5585812) examined how AI-driven traffic actually performs across 973 e-commerce websites.

The results are useful because they move the conversation out of speculation and into measurable behavior.

Key Findings From the Study

The study analyzed 12 months of data across businesses generating nearly \$20 billion in revenue. It compares AI-driven traffic against traditional channels in a way that highlights both opportunity and constraint.

1. AI Traffic Is Still Small but Growing

AI referrals made up less than 0.2% of total traffic. That number is easy to dismiss at first glance. It looks insignificant. But two details matter.

First, the growth trend is upward. Second, the majority of that traffic came from a single source, ChatGPT, which accounted for more than 90% of AI-driven sessions.

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That concentration suggests early-stage behavior. It also suggests that small shifts in user adoption could have outsized impact.

The distribution of that traffic also wasn't random. Businesses offering complex or research-heavy products saw a higher share of AI-driven visits.

2. Conversion Rates and Revenue Per Session Lag Behind Most Channels

AI-driven traffic converted at lower rates than organic search and affiliate channels (11.5% and 46.2% lower, respectively).

And yet, AI traffic outperformed paid social by a meaningful margin.

Revenue per session followed a similar pattern. It lagged behind most established channels, though the gap has been narrowing over time. So though AI traffic is not yet a primary driver of revenue, it is becoming more commercially relevant as user behavior evolves.

3. Product Complexity Is a Key Success Factor

AI referrals performed better when the purchase required explanation, comparison, or evaluation.

Categories like electronics, health products, vehicles, and B2B services benefited the most.

Simpler products (i.e., apparel, basic consumer goods) saw weaker performance. The additional step of interacting with AI introduces friction that isn't justified for straightforward purchases.

4. Engagement Metrics Indicate Quality Traffic

AI-driven visitors showed lower bounce rates than paid social traffic, which suggests a higher level of intent.

At the same time, these users viewed fewer pages and spent less time on site compared to organic and affiliate visitors.

This pattern points to a different type of behavior. Users arrive with context, find what they need quickly, and leave without browsing extensively (if at all).

5. Temporal Trends Show Improvement

Conversion rates from AI traffic are increasing over time though average order value is decreasing. One likely reason is increased price transparency. AI tools often expose comparisons and alternatives, which can push users toward lower-priced options.

What This Means for Small Businesses

The data is probably more useful for making operations decisions right now.

1. Focus on Product Complexity

AI performs best when the buying process involves uncertainty, comparison, or education. If a customer needs to understand differences, evaluate tradeoffs, or justify the (higher) price, AI becomes a natural part of that process.

For small businesses, it's wise to ask where in your offering does the customer need help?

Action Step: Audit your core products or services and identify where customers ask the most questions before buying.

Build pages that directly address those questions in plain language. Include comparisons, use cases, and clear explanations. The goal is not volume of content, but clarity that LLMs can easily interpret and reuse.

2. Prioritize AI Traffic for the Middle Funnel

AI-driven traffic rarely represents first

Continues on page 10

Continued from page 9

exposure. It typically is engaged when a prospect is already evaluating options. Which means it changes how you treat those visitors. Because they're not early-stage or cold visitors. Rather, they arrive with a frame of reference.

Action Step: Design your pages to meet that level of awareness.

Remove unnecessary introductions. Lead with specifics. Make next steps obvious.

If the visitor has already compared options before arriving, your job is to confirm alignment and reduce hesitation. This may include structured onboarding steps, clear pricing explanations, or concise summaries of what happens after purchase.

3. Don't Ignore Traditional Channels

It's easy to overcorrect when a new channel appears. Yes, AI traffic is growing, but it still represents a small share of total volume. Traditional search, paid acquisition, referrals, and partnerships still drive the majority of revenue for most businesses.

Action Step: Maintain your existing acquisition channels while observing how AI influences them.

In many cases, AI will sit upstream of those channels. That makes your existing presence more important, not less. Strong SEO, clear positioning, and consistent messaging increase the likelihood of being referenced by AI tools.

4. Optimize for AI Recommendations

AI systems don't interpret content like we do. Rather they look for structure, clarity, and consistency. This means ambiguity reduces the likelihood of being referenced by AI.

Action Step: Review your site with that lens. Add structured data where possible.

Use direct question-and-answer formats. Make

product details explicit. Avoid vague language. Include verified customer feedback. The goal is to make your content easy to extract and summarize without distortion.

5. Leverage AI for Brand Awareness

Even when AI traffic does not convert directly, it plays a role in shaping perception. If your business is consistently mentioned in AI-generated answers, it enters the consideration set earlier which has downstream effects on search behavior, referrals, and direct visits.

Action Step: Map the questions your audience is likely to ask during evaluation.

Then create content that answers those questions -- not in abstract terms, but directly tied to your offering. This increases the probability that your business is surfaced when those questions are asked in an AI interface.

The Future of AI Traffic in E-Commerce

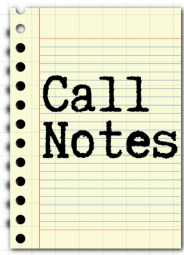
The shift toward AI-assisted discovery is already underway and it's changing how people find information, how they evaluate options, and how decisions are made.

For small businesses, the opportunity is tied to how well they support that process. Focus on clarity, decision support and the parts of your offering that require explanation.

Continue investing in the channels that drive results today, while building the conditions that make your business visible in the next layer of discovery.

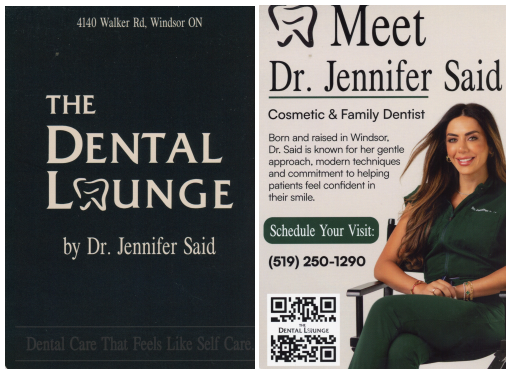
The businesses that adapt early will not see immediate dominance from AI traffic.

They'll see something more useful and be positioned to be suggested by AI at the moment a decision is being shaped.



Our April 14th call focused on predicting whether a new direct mail campaign would succeed before mailing it. (Actually, before printing it!).

We used an EDDM-like campaign from a dental practice as an example. The 5" x 7" postcard looks like this...



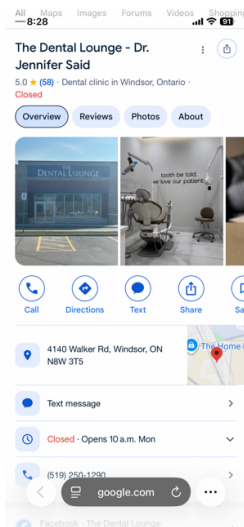
This appears to be a promotion for a recently opened dental practice, and our process for evaluating new campaign is to revisit the basics of all direct mail: List, offer, and creative.

As an EDDM campaign, there is no list, per se. But we can look at the market, which Dr. Said could have done as well.

In our experience, people are most likely to change dentists when they move, so most people who received this campaign are not in the market. (This is equally true for all other dentists who pitch their services using EDDM postcards.)

Critically, this campaign does not include any offer, unless you call "Schedule Your Visit" an offer (which we don't).

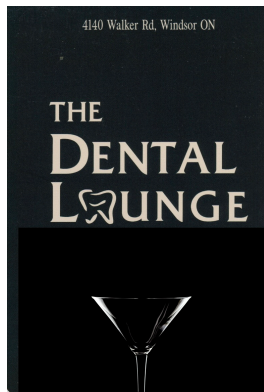
The QR code links to a generic page



about the practice, when it should go to a landing page that describes various new-patient offers, and possibly offers for current patients as well.

Every direct mail campaign must have an offer, and the dental business is no different.

More than any other factor, not having at least one new patient offer will negatively impact response.



When it comes to the design, we immediately thought of adding a martini glass, although that's probably inappropriate as The Dental Lounge is likely not licensed to serve alcohol.

That said, there's so much more that could have been done with this side of the postcard to better position the practice.

For instance, its Facebook page promotes its "spa-like experience," suggesting that Dr. Said may be targeting female clients (and their children). Accordingly, the campaign could use "spa-like" images and copy to drive home this positioning.

We're all for clean design, but clean design with a purpose!



WHY PREDICTING THE "NEXT BIG THING" MIGHT BE A FOOL'S ERRAND.

Predicting the “next big thing” is often seen as the hallmark of foresight and innovation. Yet, history shows that this pursuit can be misleading and, more often than not, unproductive.

Here’s why chasing after predictions might do more harm than good and what you can focus on instead.

The Unpredictable Nature of Markets

Markets are shaped by countless factors — economic shifts, cultural trends, technological advancements, and consumer behavior. These elements interact in ways that are nearly impossible to foresee with precision.

Many "experts" have confidently predicted trends that fizzled out while missing game-changing innovations. Betting heavily on a prediction that doesn't materialize can waste resources and leave you playing catch-up.

Bias in Forecasting

Predictions are often influenced by personal biases or popular narratives of the moment. This can lead to overconfidence in ideas that align with the current hype, ignoring subtler but potentially more impactful shifts.

It's easy to overlook emerging opportunities while chasing what seems like the obvious next step.

The Danger of Tunnel Vision

Focusing too much on finding the next big thing can cause you to miss immediate opportunities for growth and improvement.

Instead of chasing uncertain possibilities, companies can benefit from refining their current offerings, strengthening relationships with customers, and staying adaptable to change.

What to Do Instead

Focus on Agility: Build systems and teams that can respond quickly to shifts as they happen. Agility beats prediction when markets evolve unpredictably.

Understand Your Core Strengths: Invest in what your business does well and look for ways to apply those strengths to adjacent opportunities.

Stay Informed: Regularly monitor trends, but view them as signals rather than certainties. Look for patterns that align with your business's goals rather than chasing the latest buzz.

Test and Experiment: Experiment with smaller investments in emerging areas rather than going all in. This approach minimizes risk while keeping you prepared to capitalize on real opportunities.

Predicting the future may make for great headlines, but for most businesses, the smarter approach is to stay grounded, adaptable, and focused on executing well in the present.

While others may chase after what might happen, you'll be better positioned to succeed with what is happening.