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EXCHANGE 2025

Triggering Growth: Reaching New Markets with Precision

Chris Foster
VP, New Business Development
Modern Postcard

Betsy King
AVP, Senior Marketing Manager
Byline Bank

Craig Salveta
Director, Consumer Acquisition Marketing
Lumen

Audra Shue
Director, Strategic Partnerships and Market Strategy
Deluxe

About Your Host

Audra Shue

- Leads development and execution of high-impact partnerships to drive growth and enhance brand visibility
- Expert in finding tech-based solutions and making data-driven decisions
- Creates, scales and optimizes business portfolios focusing on key outcomes
- Former Equifax growth executive with a focus on strategic client solutions and data-driven partnerships
- Passionate about people, problems and data

About Your Speakers

Chris Foster

- Leads strategic efforts to drive new business ideas at Modern Postcard, a leader in the direct marketing industry
- 25+ years of experience, with expertise in growing businesses and teaching brand strategy for over a decade
- Thought leader, publishing with Forbes Business Council, hosting webcasts, moderating panels and chairing the PDMI Brand Response Council
- Advocate for business as a force for good, employee-centric culture and authentic brand connections

About Your Speakers

Betsy King

- Senior Marketing Manager at Byline Bank; leads Consumer Marketing team
- Oversees customer acquisition and retention campaigns across Retail, Business Banking and Wealth
- Formerly at BMO Bank; focused on acquiring checking product customers
- Spent a decade at agencies like Leo Burnett and DDB; supported clients including Capital One

About Your Speakers

Craig Salveta

- Leads Consumer Acquisition Marketing at Lumen Technologies for Quantum Fiber
- Oversees pricing, direct marketing and digital marketing
- Passionate about leveraging data and consumer insights to enhance marketing effectiveness
- Holds a BA from the University of Michigan and an MBA from Michigan State University

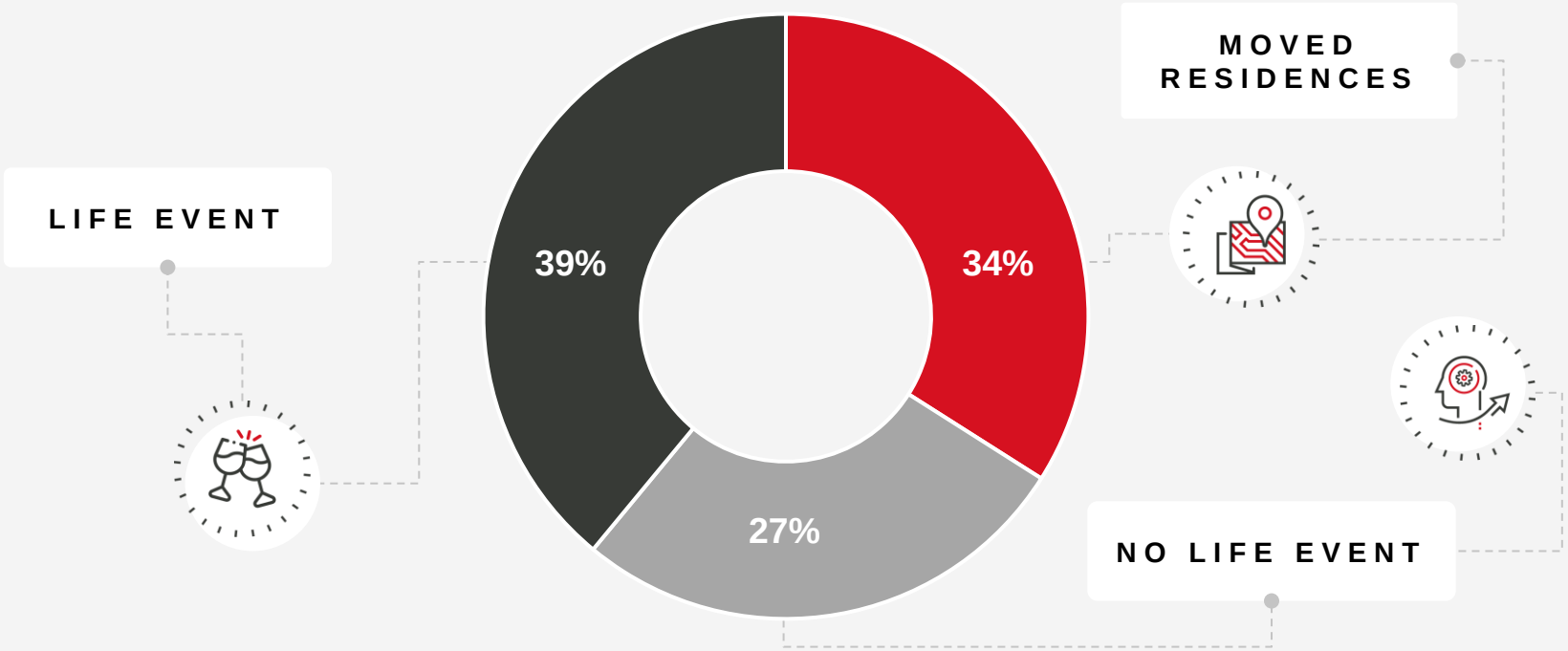
SETTING THE STAGE

Trigger Marketing

What Is Trigger Marketing?

Watch: https://www.youtube.com/watch?v=QyNLHceoQ0g

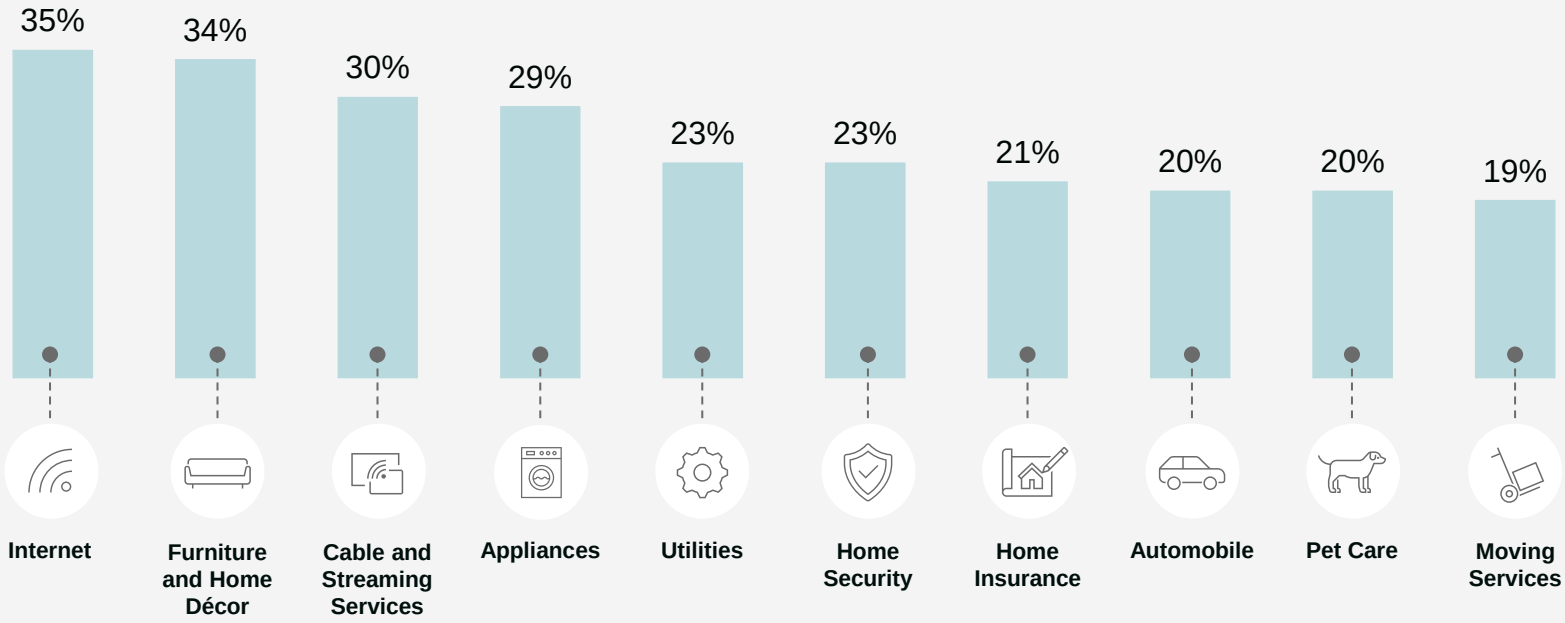
Why Consumers Switch Brands



Source: Oliver Wyman, "Path to Purchase" Study (link)

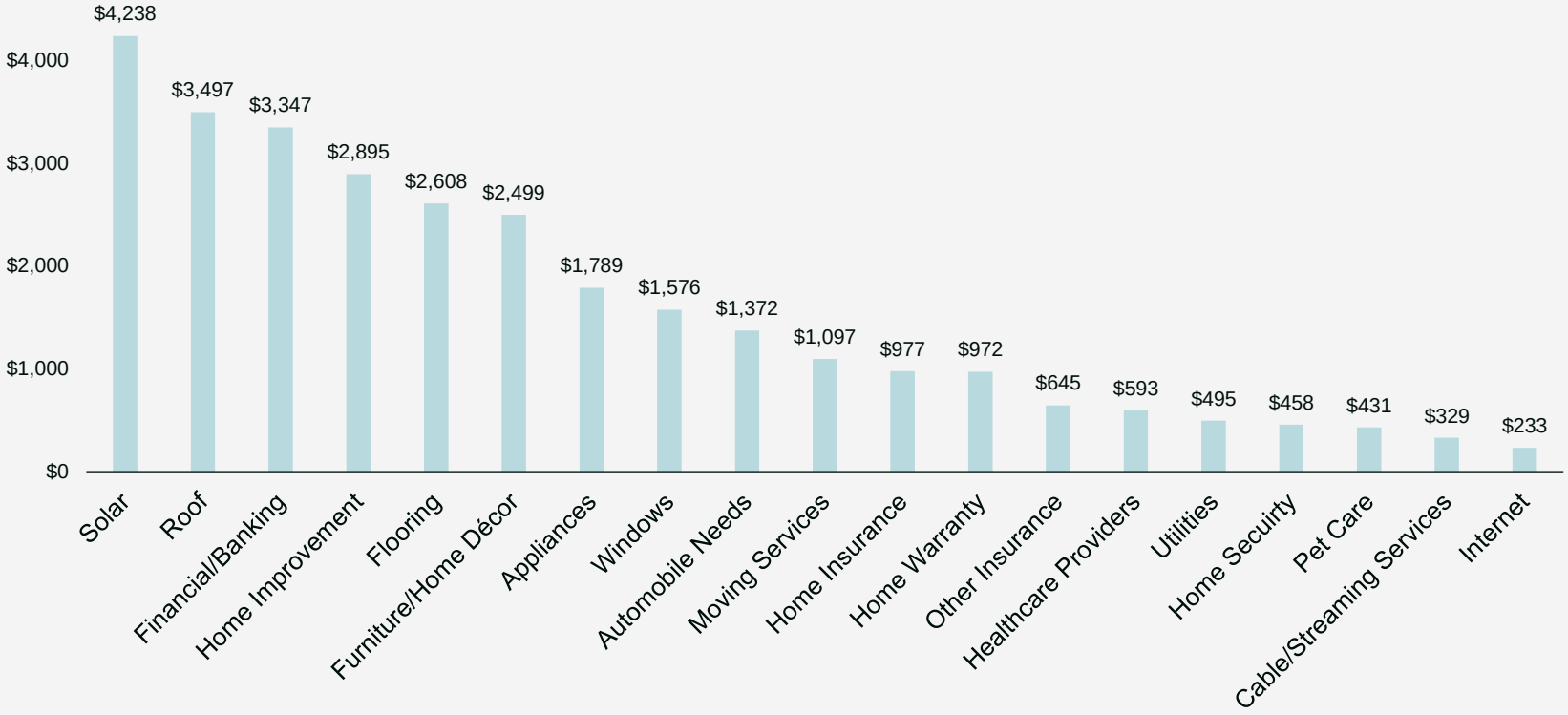
PRODUCTS AND SERVICES

Most Willing to Switch Brands



Source: Porch Group Media, New Movers Trend Report (link)

Average Estimated Spend



Source: Porch Group Media, New Movers Trend Report (link)

TRIGGER MARKETING

Panel Discussion

Why does your organization use trigger marketing?

What were your goals when your organization initially started leveraging trigger marketing?

What strategies do you use to integrate trigger marketing into your broader marketing and sales efforts?

DEEP DIVE

Trigger Journey in Home Services Category

Trigger Program	Result
Staggered Drop: 75 cards/day to look-alike audience	**7.6x ROAS** generating $61,596 within 5 months
Website Retargeting: Mail to website visitors who don't convert on lead form	**68.3x ROAS** generating $165,109 within 18 months
Thank you, referral and review request: Send cards requesting positive review and referral, triggered by CRM status	
Jobsite Radius: Mail to neighbors after a new job is completed	**16.2x ROAS** generating $292,211 within 18 months

What lifestyle or behavior-based triggers have proven most effective in reaching your target audience?

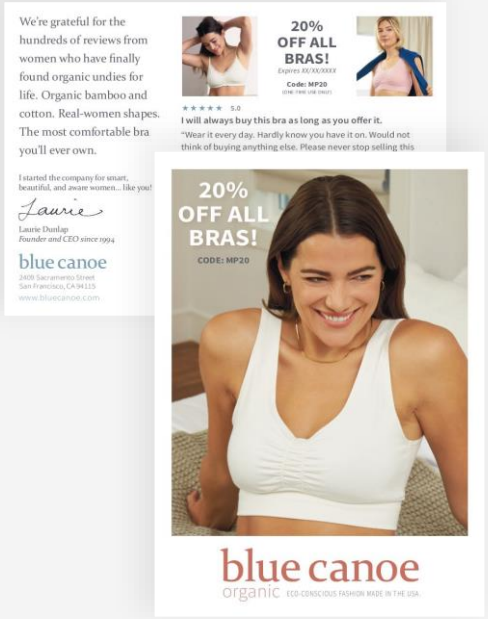
How do you align trigger marketing with your brand’s overall messaging and customer journey?

What challenges have you faced when launching a trigger marketing program?

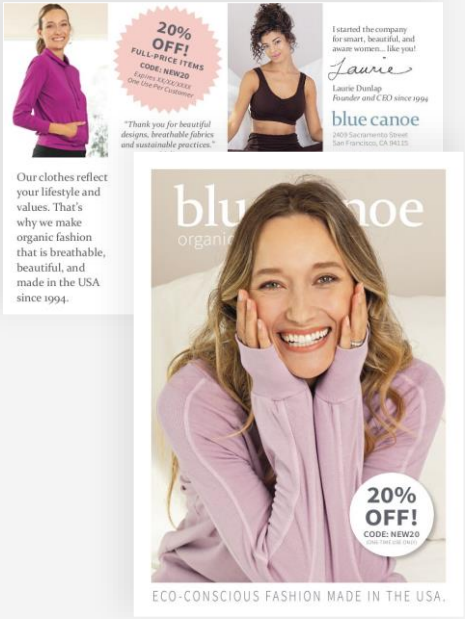
What does successful trigger marketing creative look like?

CASE STUDY

DTC eCommerce Website Retargeting



*Received if the user goes to best-selling product page (i.e., **bras**)*



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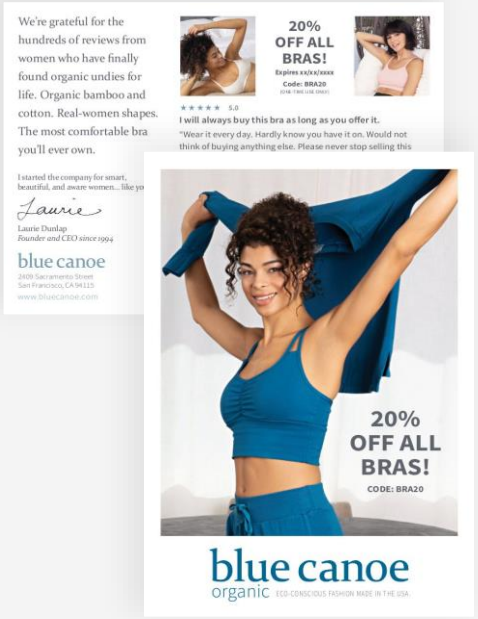
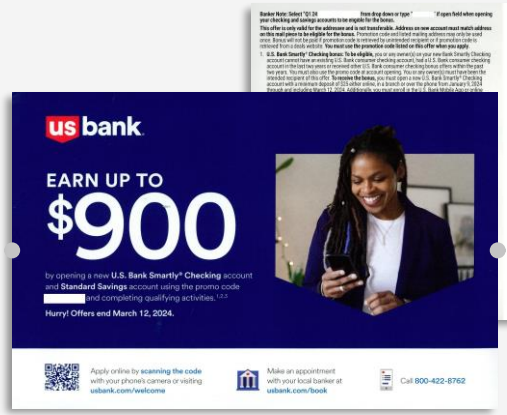
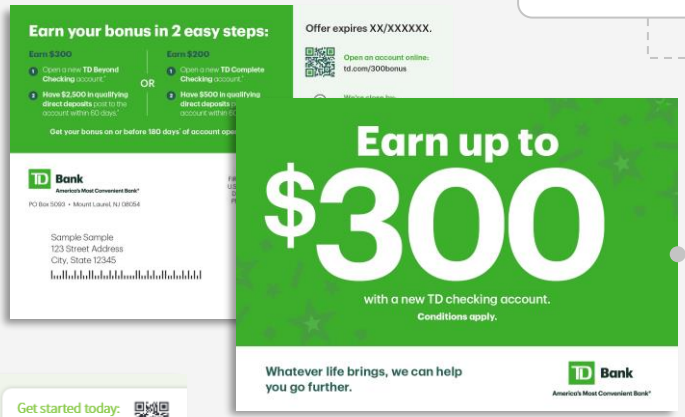


Redesigned by season

BEST PRACTICES

Life-Event Triggers Creative





Clear, prominent offer construct

Strong brand identity

Competitive offer relative to peer set

Imagery that reinforces the message

Do you have any advice for someone considering starting a trigger marketing program?

Key Takeaways

Right timing and audience are critical; integration with brand messaging matters

Executive Summary

- Success in trigger marketing depends on reaching consumers at the optimal moment
  - The timeliness of data is crucial—marketers need fast and reliable data partners to ensure they reach consumers when decisions are being made.
  - Moving, job changes, and other life transitions are stressful times for consumers. Brands that align their messaging with these pain points and position themselves as a helpful resource see stronger engagement.
  - Establishing strong attribution models ensures marketers can measure ROI and make informed optimizations.