

Direct Mail Production Management

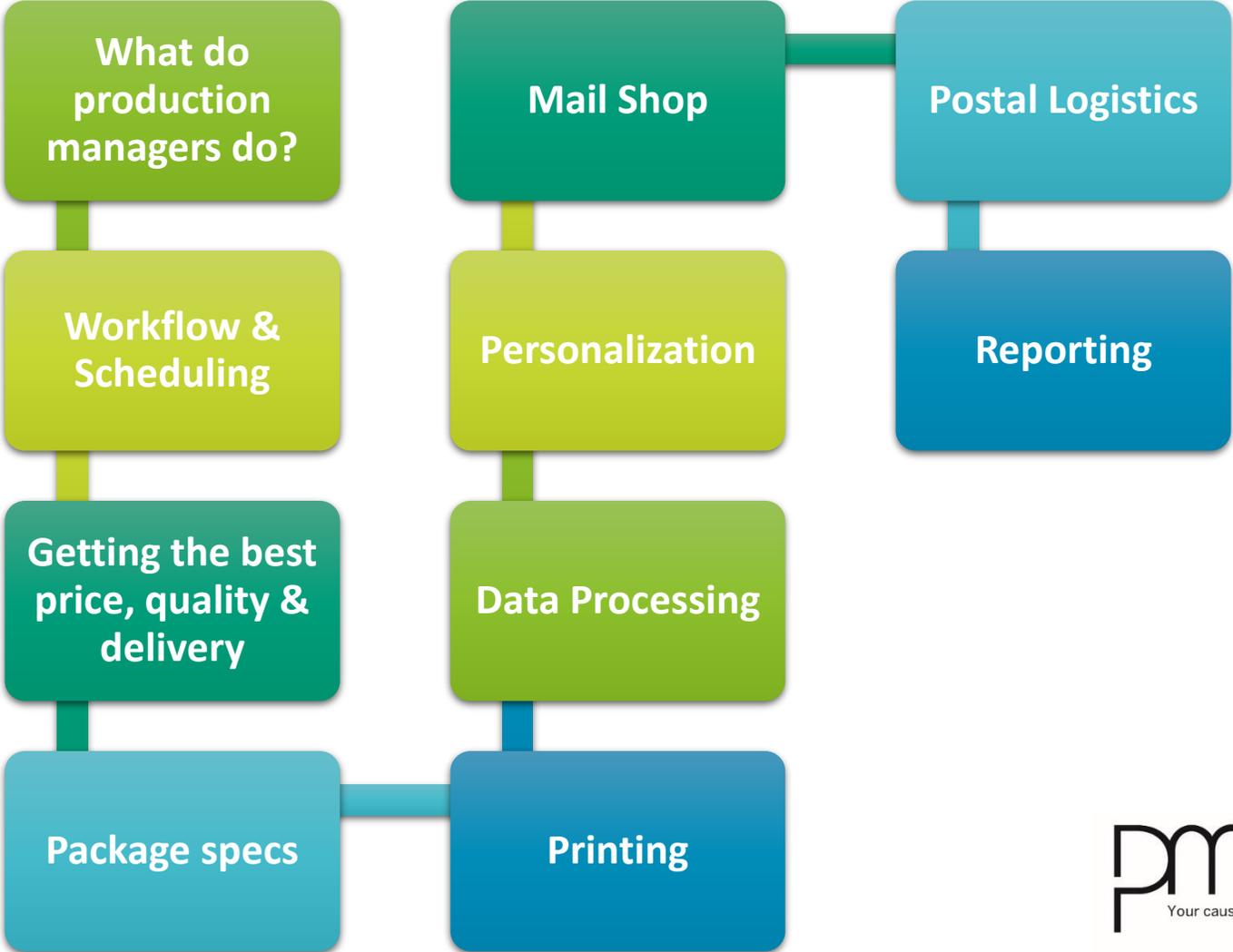
DMAW DM101

Presented by Leigh Ann Doyle, PMG

March 13, 2019



Here's what we'll cover



What do production managers do?

- Manage complex projects
- Maintain strong client and supplier relationships
- Key partner in creative development
- Resource for new package formats
- Sourcing experts
- Master multi-taskers

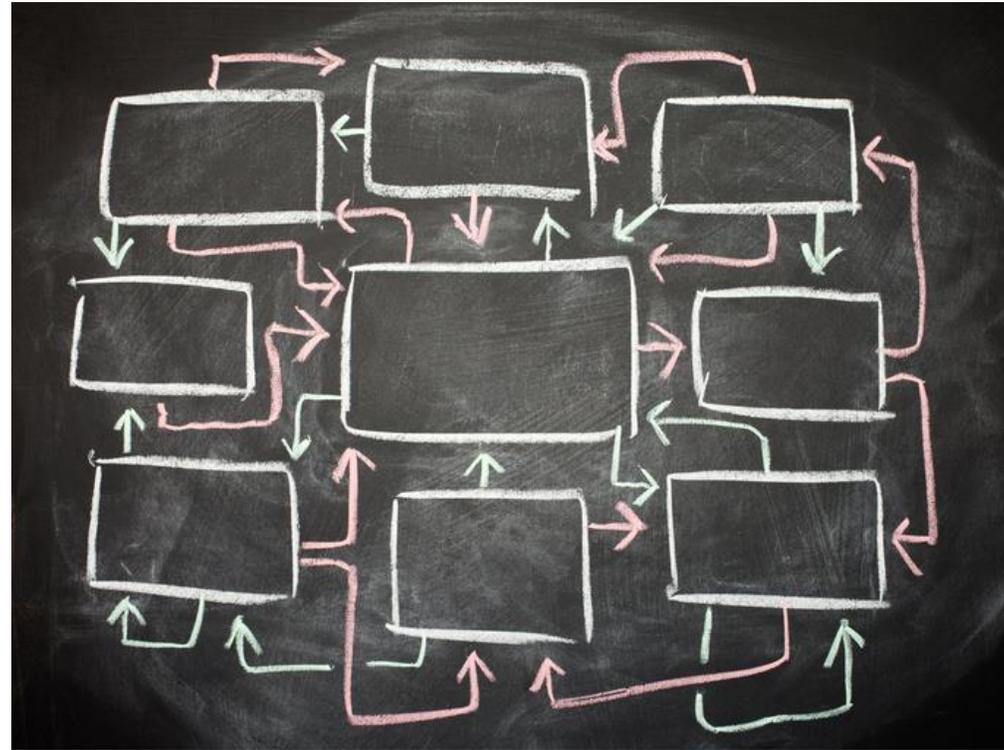


What you need to get started:

- ✓ Budget:
 - Package costs
 - Postage costs
- ✓ Strategy and audience
- ✓ Artwork
- ✓ Mission requirements:
 - Union suppliers, environmental certifications
- ✓ Donation processing requirements
- ✓ Timing



Workflow & Scheduling

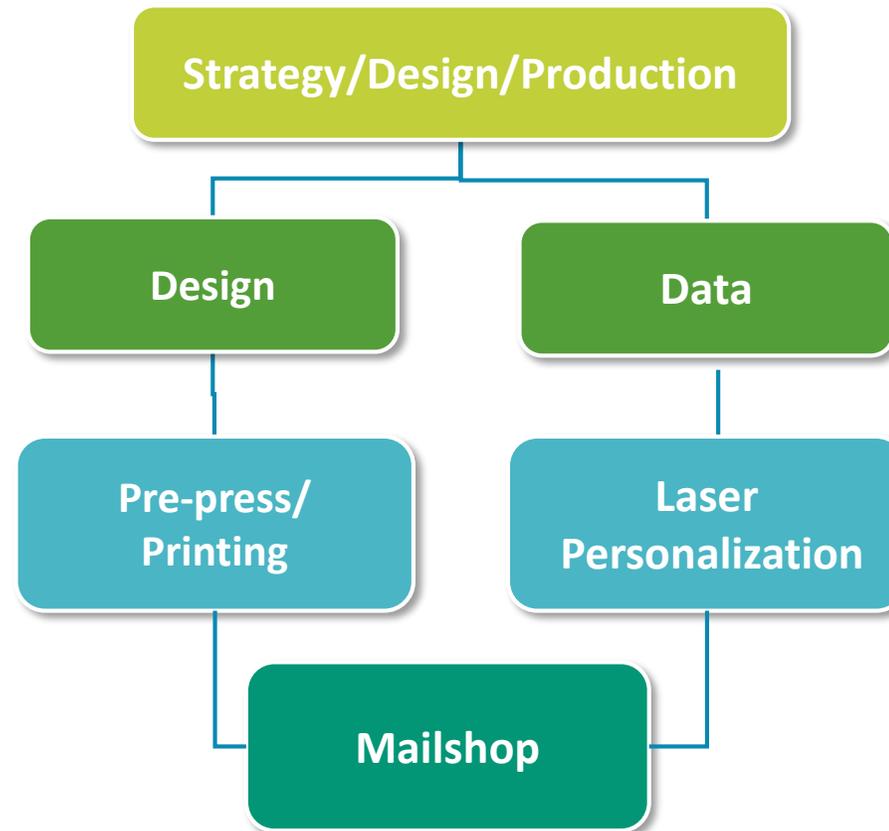


Managing Products, Services and Stakeholders

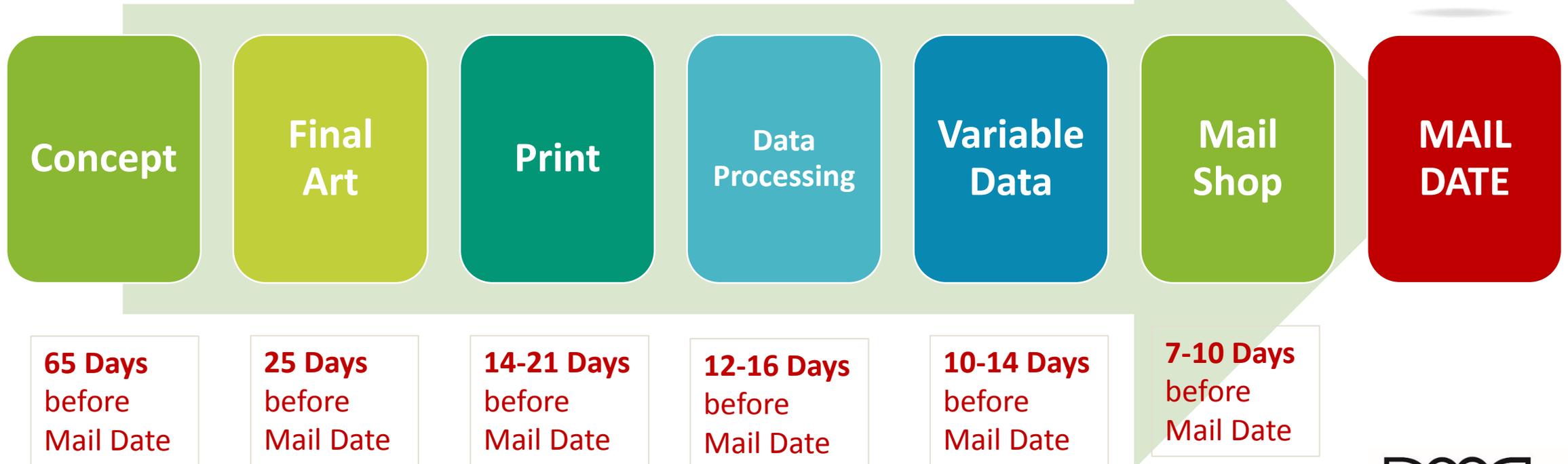
- Use a scheduling tool that works for everyone
- Discuss timelines with partners – involve them early!
- Work back from the mail date
- Review the complexity of the package – do any components need longer lead times?

Managing your project workflow

- Two simultaneous tracks
- Functions are interdependent



A Typical Project Timeline



Bid & Procurement Process



To get the best price/quality/delivery:

- Bid to your network of suppliers' strengths
- Volumes, formats, turnaround time will drive supplier selection
- Specialty suppliers include:
 - Address labels
 - "Handwritten" appeals
 - Membership cards
 - Oversized/dimensional
 - Premium items
 - Domestic/International
- Get at least 5 competitive bids per component/function

To get the best price/quality/delivery:

- Accurate specs are a must
- Be open to options
- Be aware of hidden costs: plates, dies, set-ups, deliveries

- *If the price is too good to be true...*

Package Specifications



Package Specifications

- Define every detail – leave no room for assumptions
- Understand the end product and the most efficient production method
- Will the components be generic or personalized?
- Do the specs meet postal requirements?
- Mock up the package



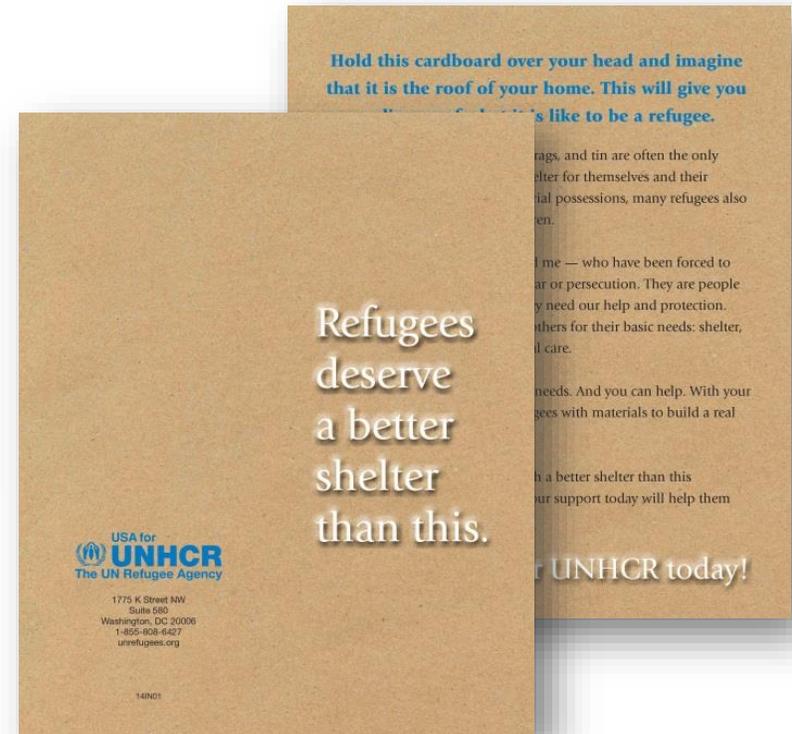
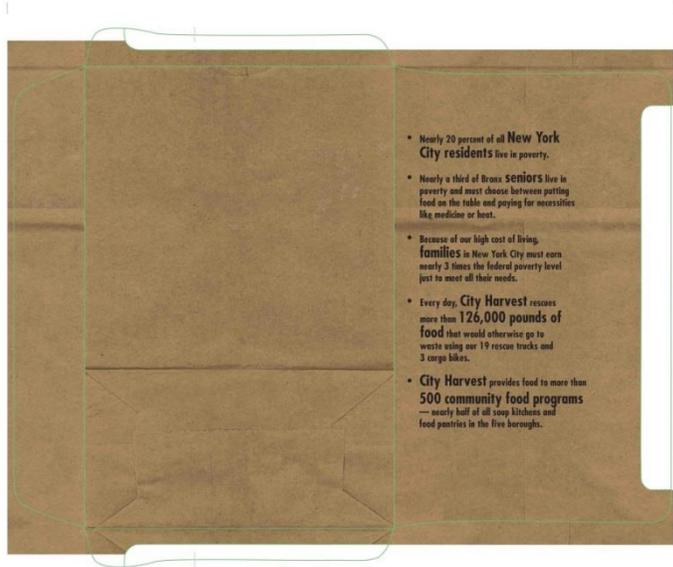
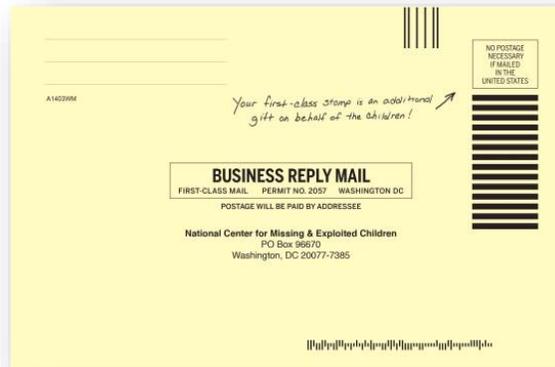
Component Sizes

- Generic or personalized/variable data
- Cut sheet vs. continuous form
- Flat and finished



Paper Stock

- Weight
- Finish/Color



Paper Stock

- Special Requirements:
 - Union
 - Forestry Stewardship Council
 - Recycled Paper
 - Corn window envelope film
 - Soy Inks



Printed on recycled paper

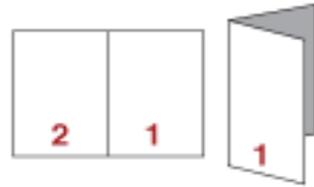


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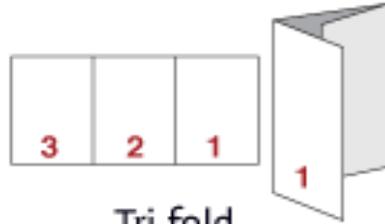


Fold Instructions

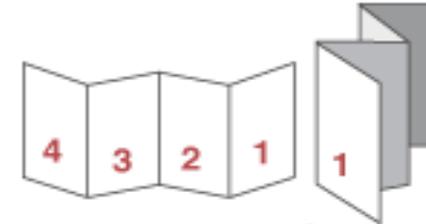
Many Variations!



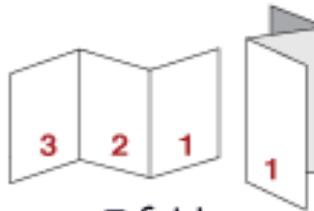
Half fold



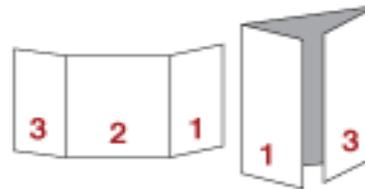
Tri fold



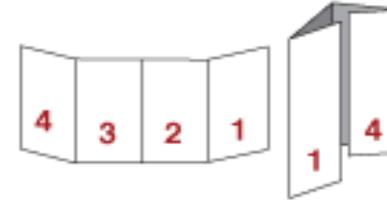
Accordion fold



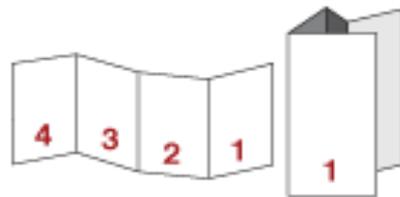
Z fold



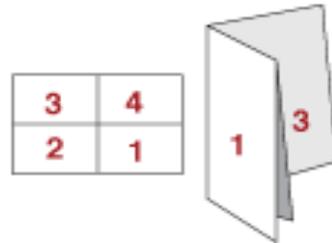
Gate fold



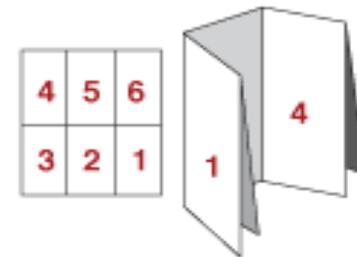
Double gate fold



Fold in half then half again
Double parallel fold



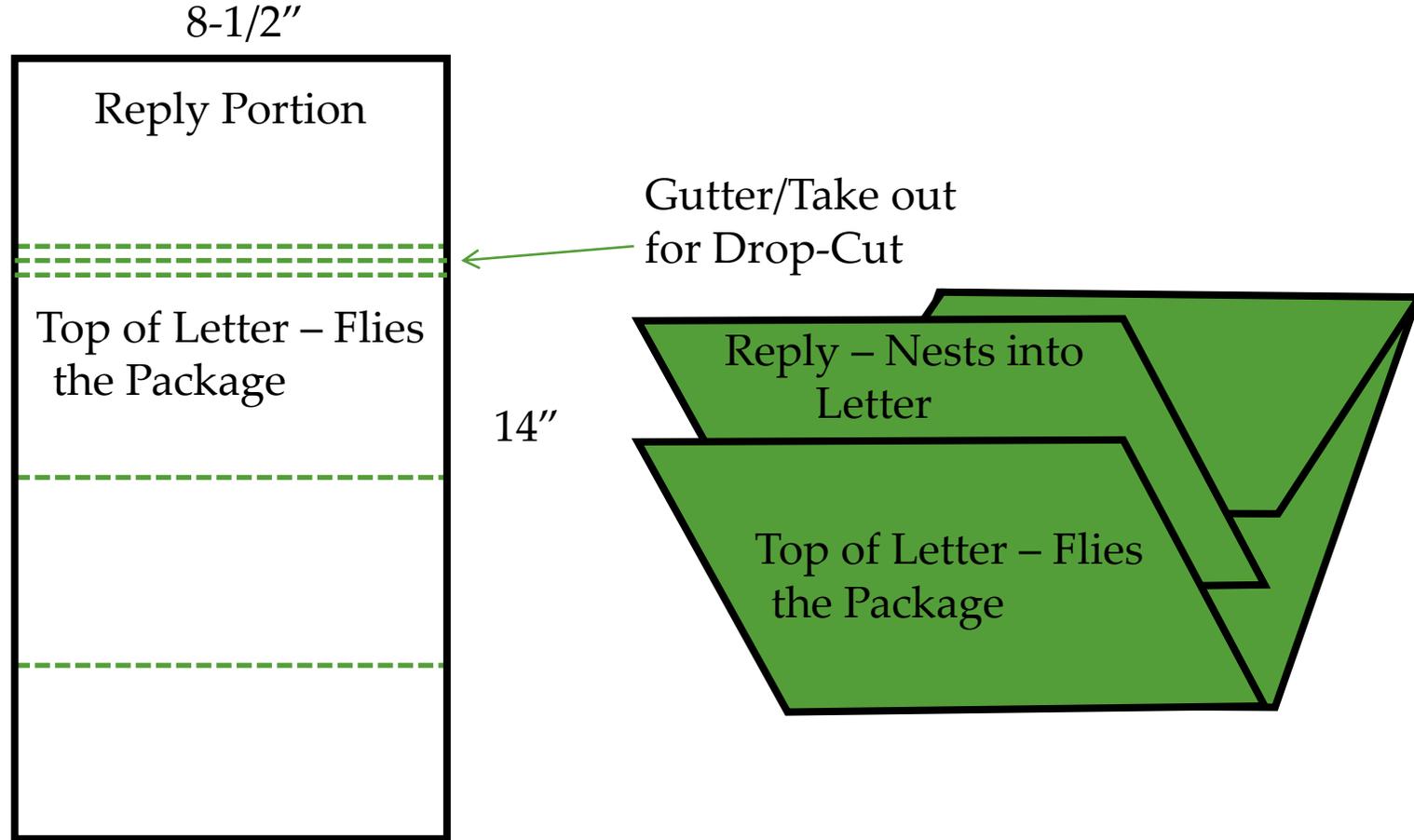
Panel 4 is upside down
before folding
French fold



Half fold & tri fold

Form Set-up

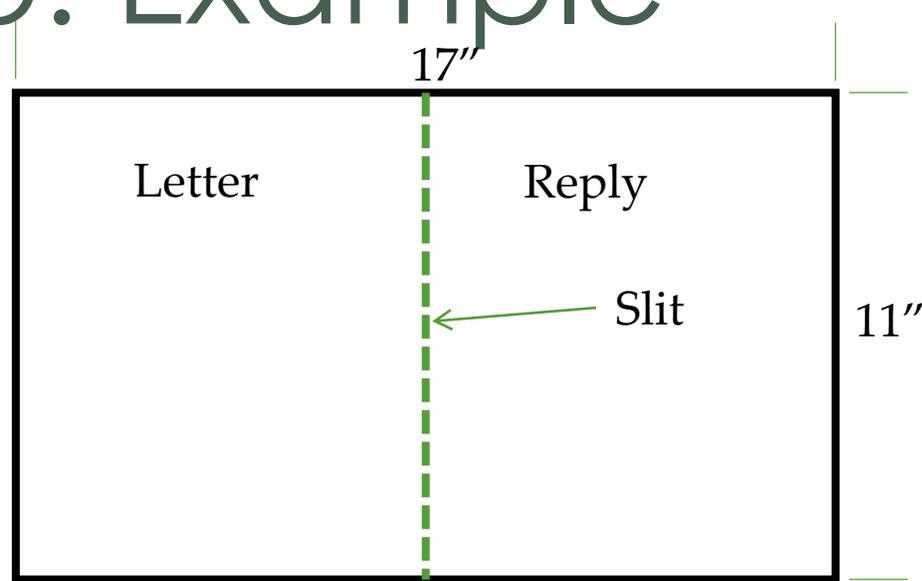
- Identify what “Flies the Package” = the mailing address visible on the Outer Envelope



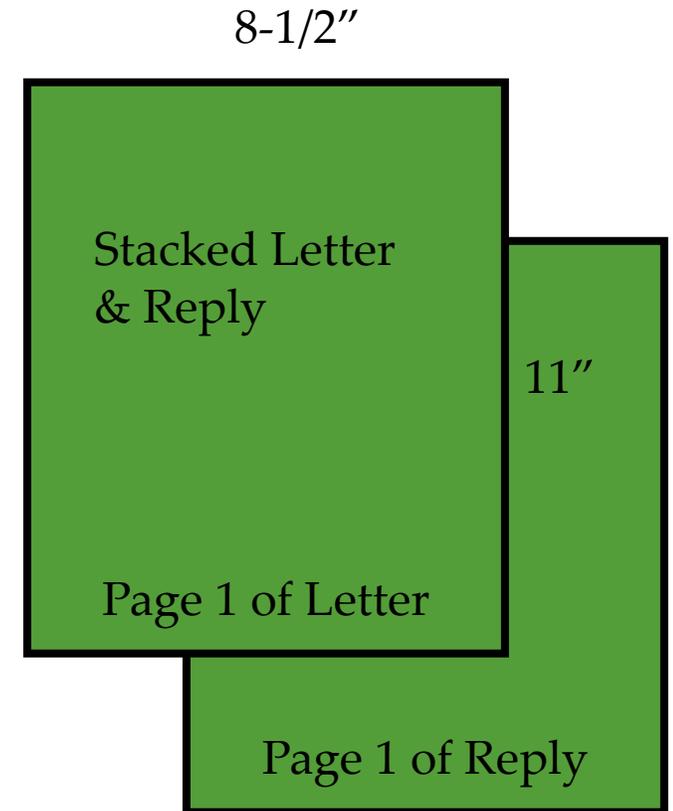
Dropcut (Gatefold) Form Set-up

Form Set-up: Example

- Letter and reply both personalized, printed on same sheet
- No need to match data



Interstack Form Set-up



Perfs

- Perforations so a part can be torn off easily
- Reply slips
- Coupons/tickets
- Member cards
- Involvement devices

 **See You at the Fall Garden Festival!**

YES! I'm joining PHS today with this Membership gift. I have enclosed the Membership Certificate that corresponds to the Member level at which I am joining, along with my donation. Please send me my Member Card!*

Household (3 plants + 1 show ticket) \$75 Household (3 plants + 3 show tickets) \$95
 Household (3 plants + 2 show tickets) \$85 Household (3 plants + 4 show tickets) \$105

Please tear off the Membership Certificate for the level at which you are joining and return it along with this form.
PLEASE SEE REVERSE SIDE FOR PAYMENT OPTIONS.
*If you do not receive your Member Card in time for the Fall Garden Festival, don't worry. We'll have a Member List at the event!

PHS • 100 North 20th Street, 5th floor, Philadelphia, PA 19103-1495 • PHSonline.org

| MEMBERSHIP CERTIFICATE | MEMBERSHIP CERTIFICATE | MEMBERSHIP CERTIFICATE | MEMBERSHIP CERTIFICATE |
|---|---|---|--|
| HOUSEHOLD 3 plants + 1 show ticket \$75  | HOUSEHOLD 3 plants + 2 show tickets \$85  | HOUSEHOLD 3 plants + 3 show tickets \$95  | HOUSEHOLD 3 plants + 4 show tickets \$105  |

NATIONAL MUSEUM of WOMEN in the ARTS
1250 New York Avenue, NW, Washington, DC 20005-3970
(800) 875-4627 • NMWA.org • nmwa@nmwa.org

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PERF

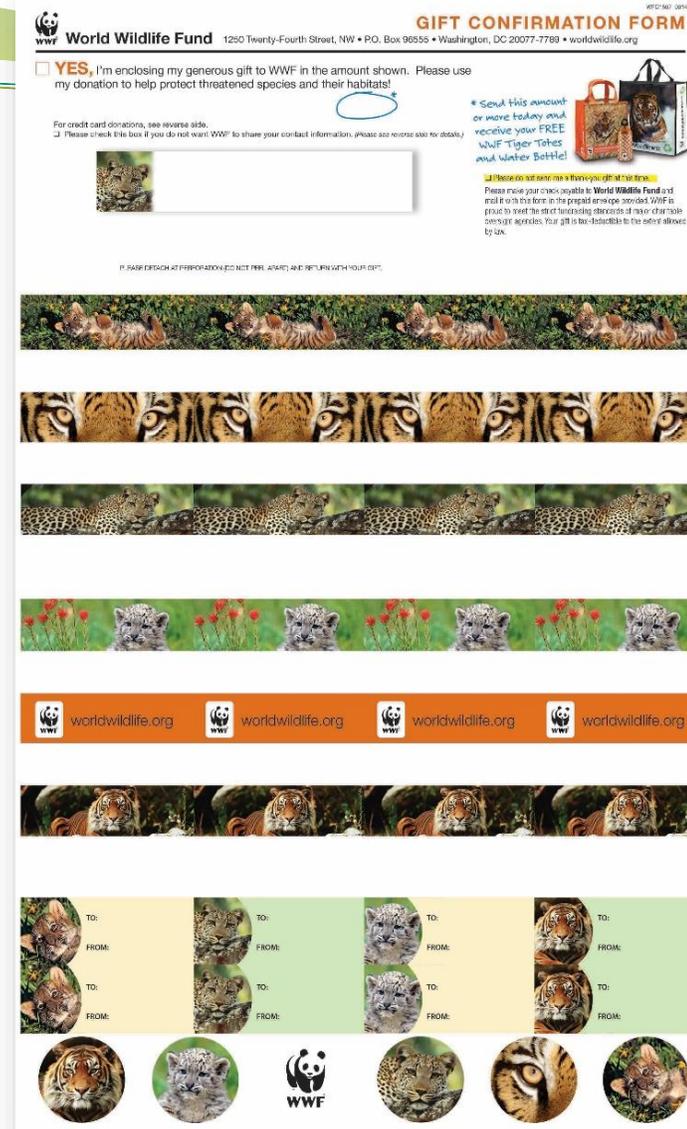
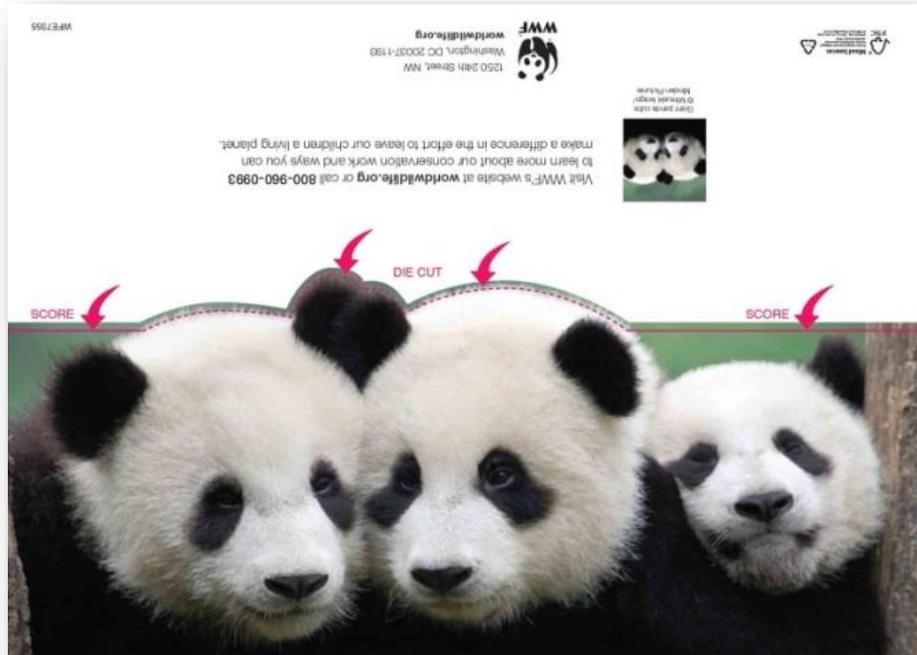
ACTIVATE YOUR MEMBERSHIP CARD TODAY!

Detach and return the portion below with your payment in the envelope provided.

Membership Renewal Confirmation

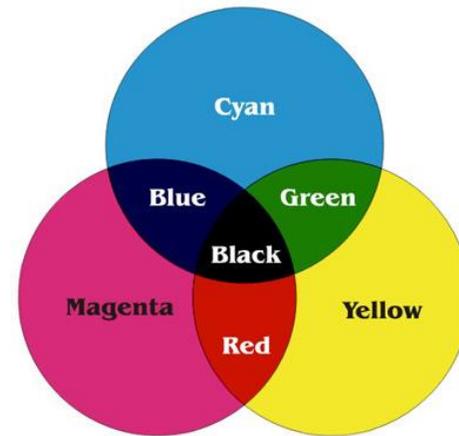
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Scores & Die Cuts



Printing Inks: CMYK & PMS Spot Colors

- CMYK for full color work
- PMS for spot colors – for logos or other precise color needs – often used with black ink for less costly 2 color print projects



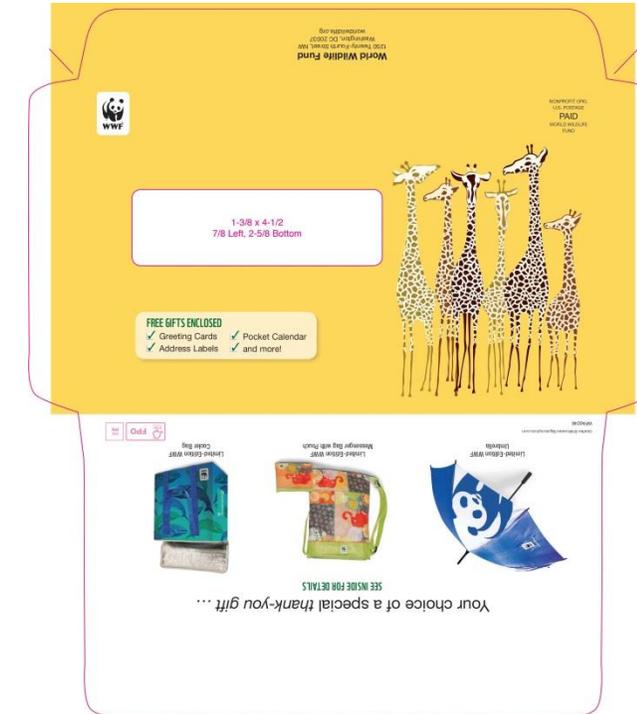
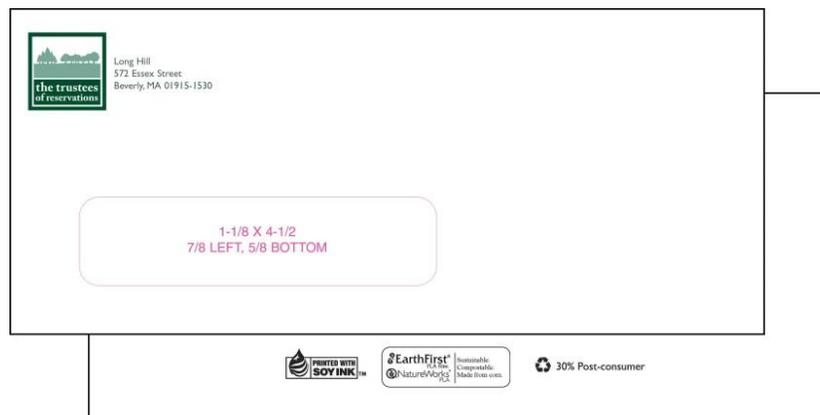
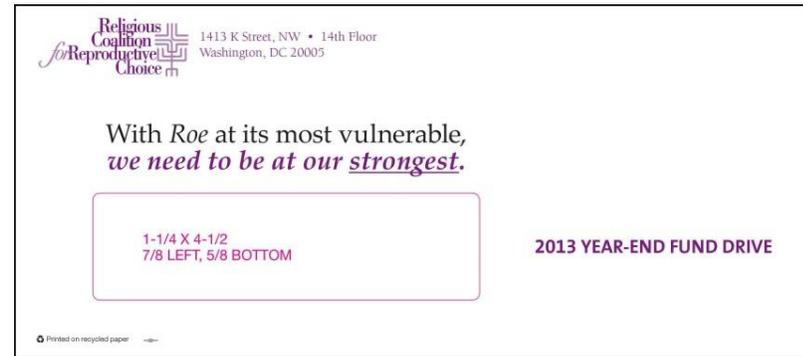
Four-Color Printing



Pantone Matching System provides precise colors

Envelope Printing

- Stock vs. custom printed and converted
- Dimensions, artwork
- Single window, double window, size, positioning, window film material (plastic, corn)



Why Should I Consider Gang Printing?

- Running multiple print projects at once to save money
- Do you have same components used throughout your annual program that you can print upfront?
 - Forms, envelopes, urgent-gram shells
- Can you join a larger multi-client print run?
 - Calendars, member cards, etc.
- Inventory management

Determining Print Quantity

- Larger print quantity vs. mail quantity due to spoilage factor
- Overall mail volume
- Number of panels/drops
- Form formats – multiple components printed on one form?
- Is project produced on machines only? Is there any handwork?

Proofing Procedures

- PDF Proofs – view on screen
- Live color proofs on actual paper stock
- Press checks for important color projects – approve photo quality
- What does your team require?
- Build proofing steps into schedule



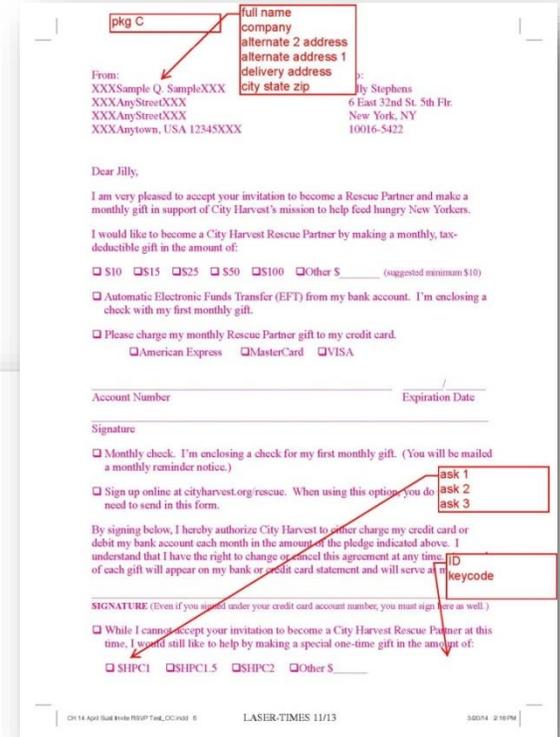
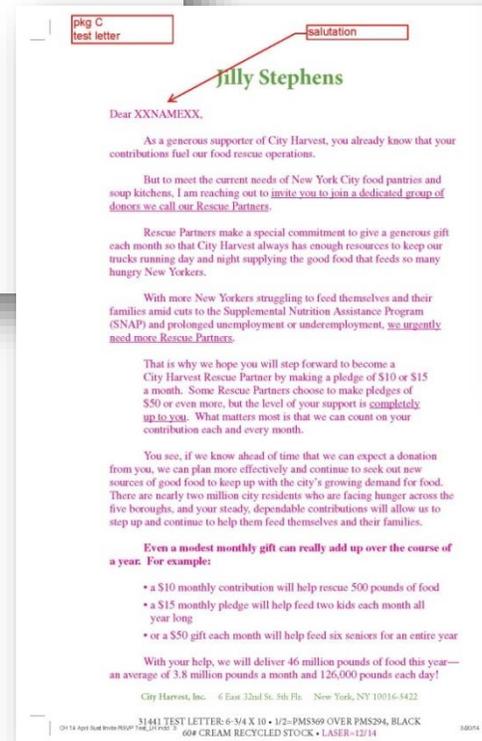
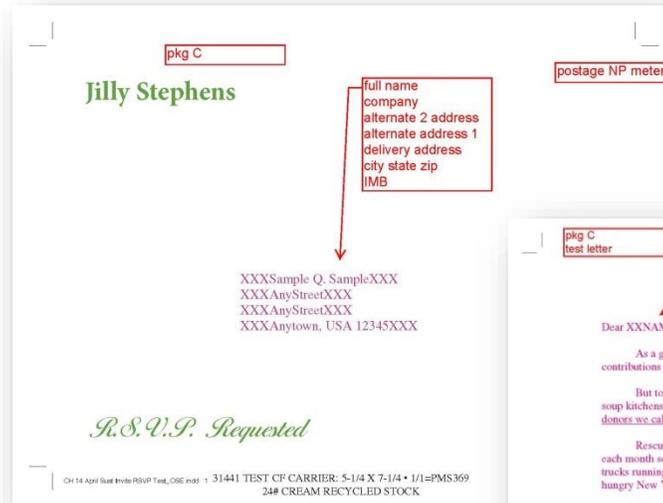
Data Processing Pointers

- File Layout – shows all your data details
 - Make sure all required data fields are populated
 - Exclude fields that are not needed
- Critical Reports to ensure accuracy
 - Data Scans – Audit of your mail data – state counts, list code counts, incomplete records
 - Gift ask data reports
 - NCOA (National Change of Address) Reports
 - Acquisition List of Lists & Suppression Files
 - Is the quantity as you expected?



Variable Data Printers

- Types: Inkjet, Laser, Real handwriting, autopen faux handwriting, digital printing
- Clearly identify variable data
- Fonts, point sizes, positioning



Mail Shop Specifications



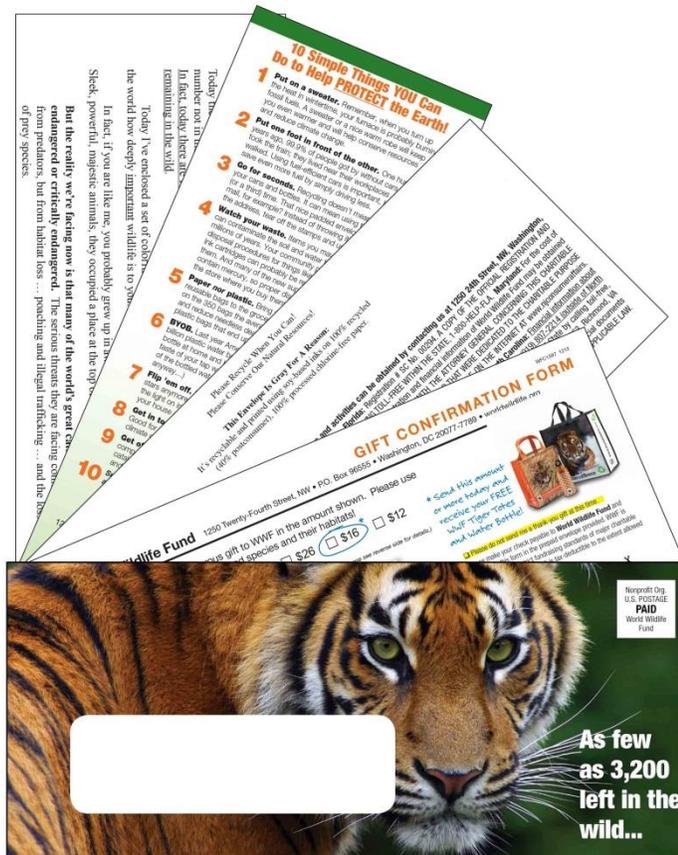
Mailshop Checklist

- ✓ Know supplier's requirements and capabilities
- ✓ Clearly identify each version and its specific requirements
- ✓ Material Delivery Notification
 - ✓ Inventory codes
 - ✓ Quantity
 - ✓ How piece will arrive: packaging, flat, folded, multiple up on form
- ✓ Trim and fold specs
- ✓ Insertion Order
- ✓ Postage due date and details
- ✓ Live stamp affixing? Inkjetting? Other special instructions
- ✓ Mail date(s)!



Insertion Order

- What component is “flying the package” (address visible on outer envelope)?
- Is window position accurate?
- What’s the first item donor sees when opening envelope?



Postal Logistics Strategy

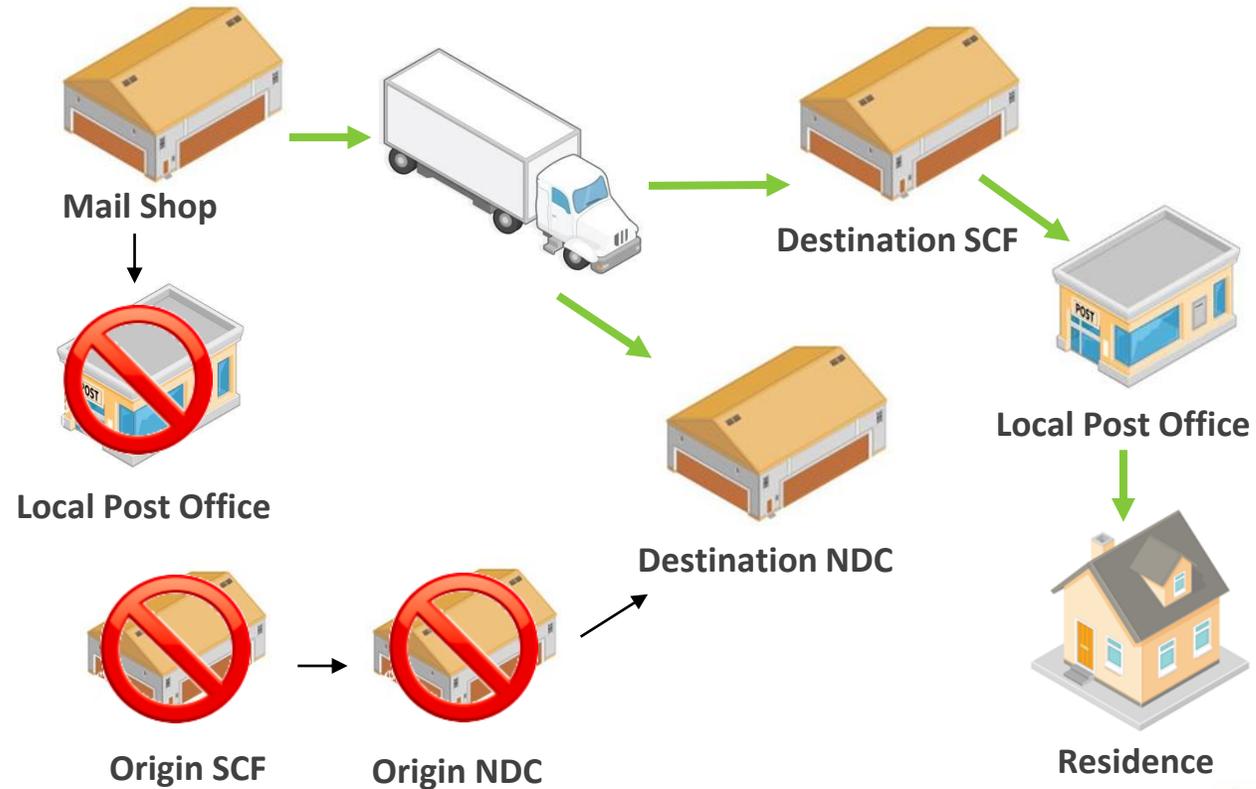


Pay attention to Postal Logistics!

- Reduce postage costs
- Speed delivery
- Skipping postal steps gives you more predictable in-home dates
- Track your mail delivery
- Now more important than ever with recent postage increases!

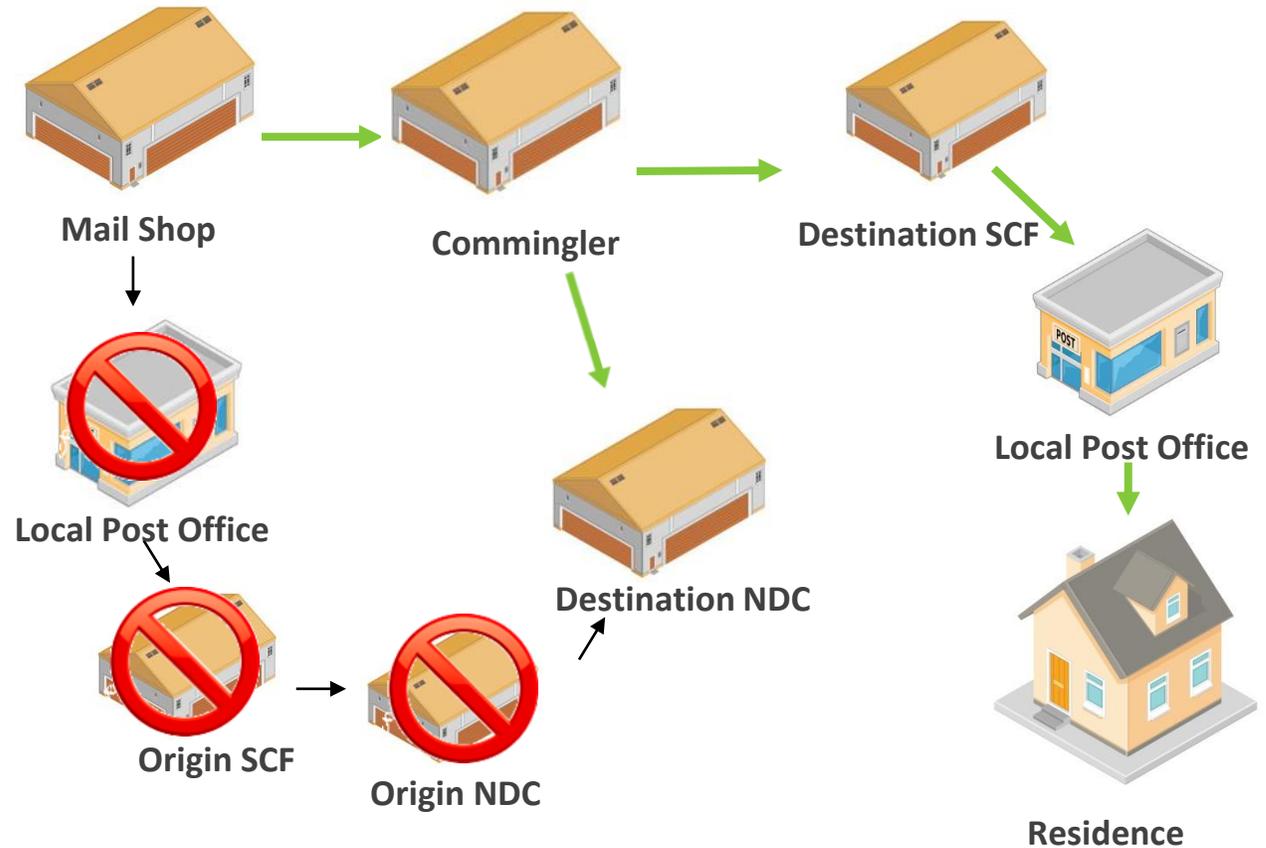
Drop Shipping

- Reduces postage cost
- Speeds delivery
- Factor in freight charges



Commingling

- Your mail is combined with other mailers for deeper volume discounts



Your project is in the mail... but there's still more to do!

- Budget Reconciliation & Invoicing
- Mail Tracking: Online tracking services and seeds
- Mailing samples
- Results Analysis
- End of Project Recap & Learnings

Key Takeaways to ensure a successful mailing

- Get suppliers involved in the planning stages of your project
 - Are they the best fit?
 - Can they meet your timeline?
- Stay on schedule – meet your critical dates
- Provide accurate and detailed instructions
- Build partnerships! Strong relationships pay dividends when challenges arise
- Develop Quality Control processes and checklists
- Each project is a learning opportunity

Thank You!



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