Direct Mail Production Management
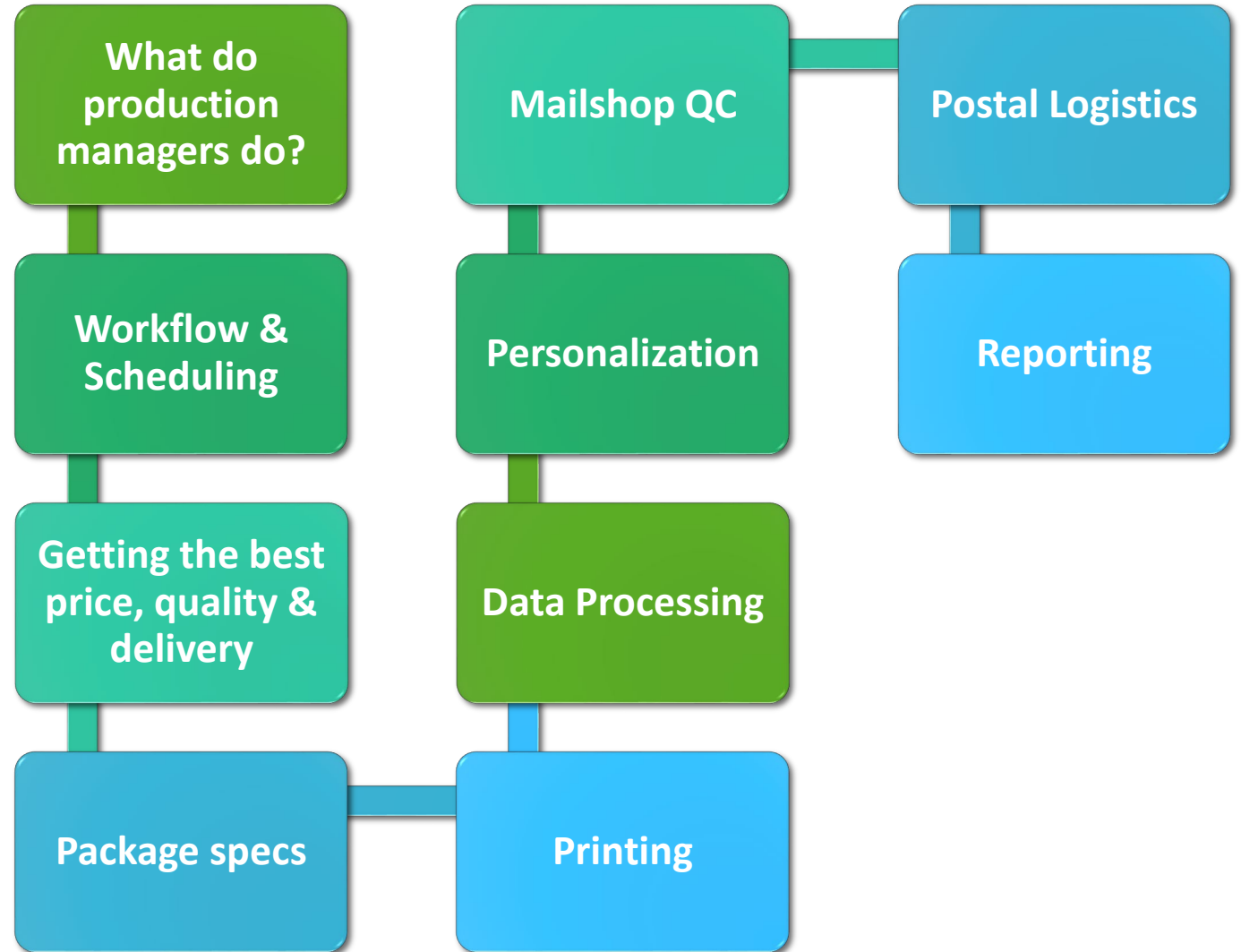
DMFA DM101

PRESENTED BY LEIGH ANN DOYLE, PMG

JUNE 27, 2024

Here's what we'll cover

```
What do production managers do?  →  Mailshop QC  →  Postal Logistics
        ↓                              ↓                    ↓
Workflow & Scheduling             Personalization       Reporting
        ↓                              ↓
Getting the best price,           Data Processing
quality & delivery                     ↓
        ↓                              ↓
Package specs          →          Printing
```

What do production managers do?

- Manage complex projects

- Maintain strong client and supplier relationships

- Key partner in creative development

- Resource for new package formats

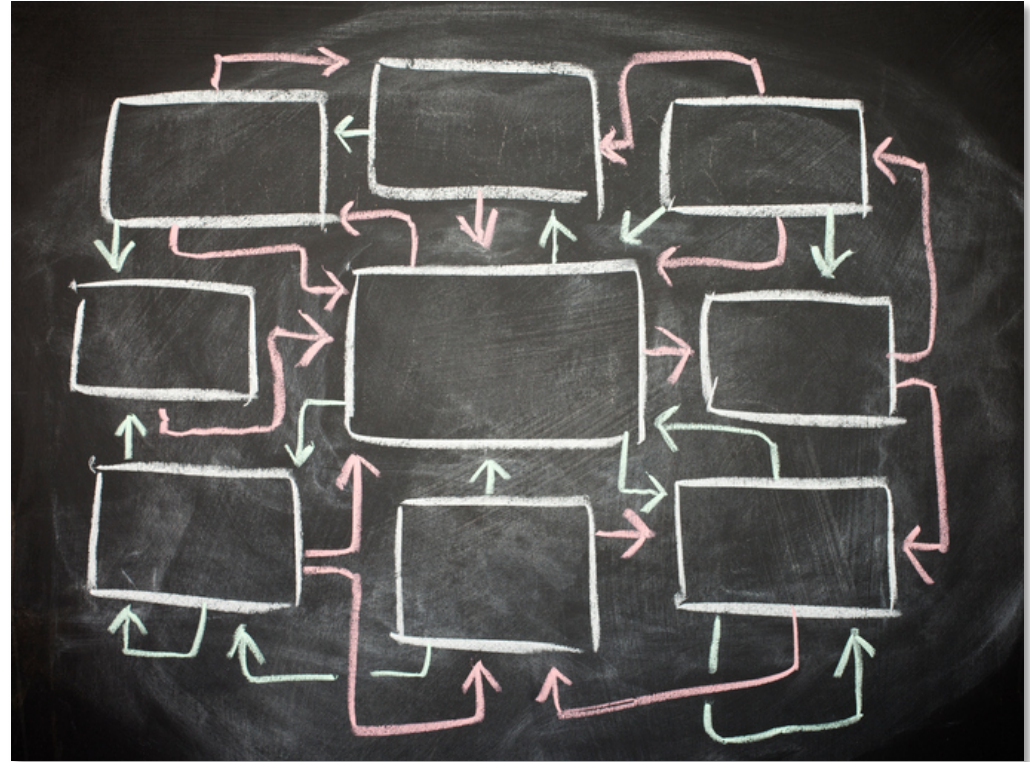- Professional multi-taskers

- Ensure quality control

What you need to get started:

✓ Budget:
  - Package costs
  - Postage costs

✓ Strategy and audience

✓ Artwork

✓ Mission requirements:
  - Union suppliers, environmental certifications

✓ Donation processing requirements
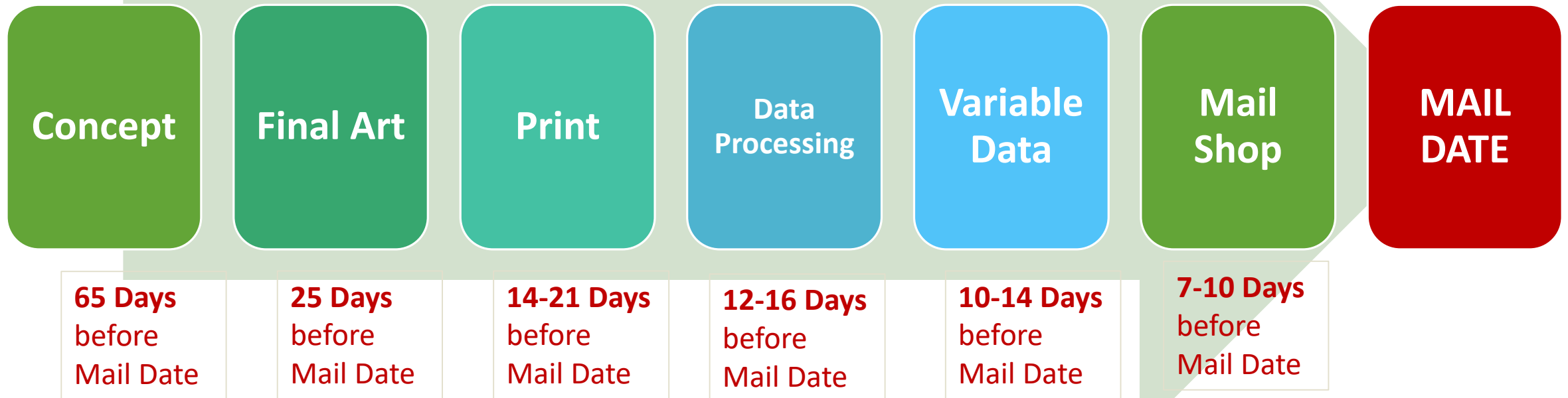
✓ Timing

Workflow & Scheduling

Managing Products, Services and Stakeholders

- Work back from the mail date

- Review the complexity of the package – do any components need longer lead times?

- Discuss timelines with partners – involve them early!
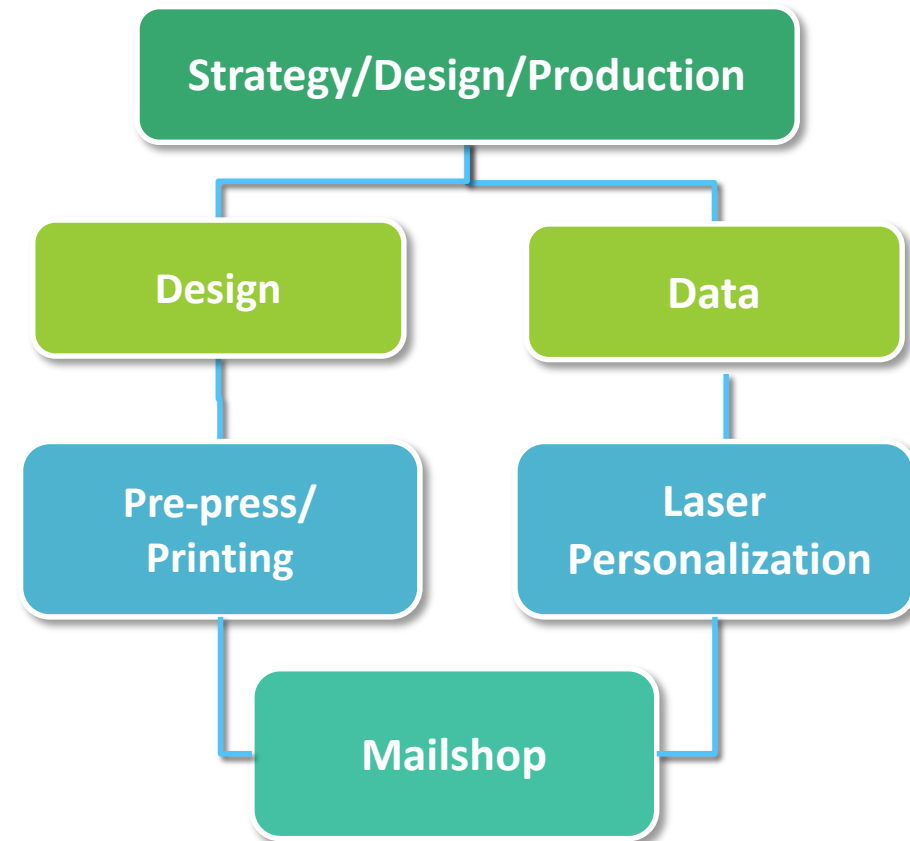
- Use a scheduling tool that works for everyone

A Typical Project Timeline

Typical Project Timeline

Concept	Final Art	Print	Data Processing	Variable Data	Mail Shop	MAIL DATE
65 Days before Mail Date	**25 Days** before Mail Date	**14-21 Days** before Mail Date	**12-16 Days** before Mail Date	**10-14 Days** before Mail Date	**7-10 Days** before Mail Date	

Managing your project workflow

- Two simultaneous tracks

- Functions are interdependent

```
        ┌─────────────────────────────┐
        │ Strategy/Design/Production  │
        └─────────────────────────────┘
            ┌───────────┴───────────┐
      ┌──────────┐            ┌──────────┐
      │  Design  │            │   Data   │
      └──────────┘            └──────────┘
      ┌──────────┐            ┌──────────────┐
      │ Pre-press/│           │    Laser     │
      │ Printing │            │Personalization│
      └──────────┘            └──────────────┘
            └────────┬──────────────┘
              ┌────────────┐
              │  Mailshop  │
              └────────────┘
```

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 or 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…
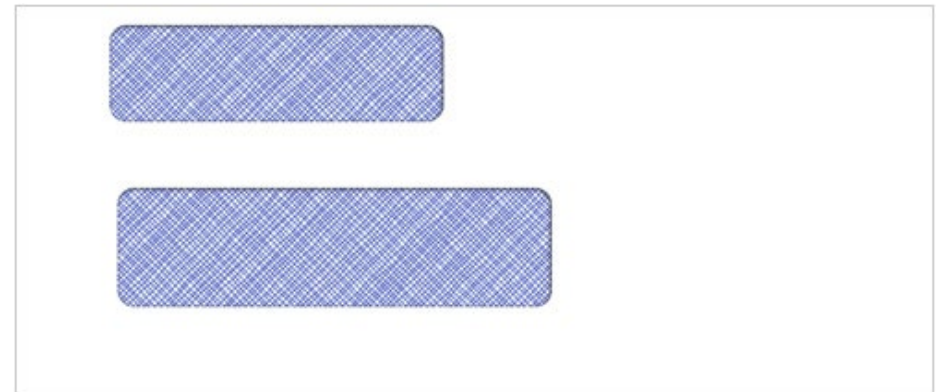
Package Specifications

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
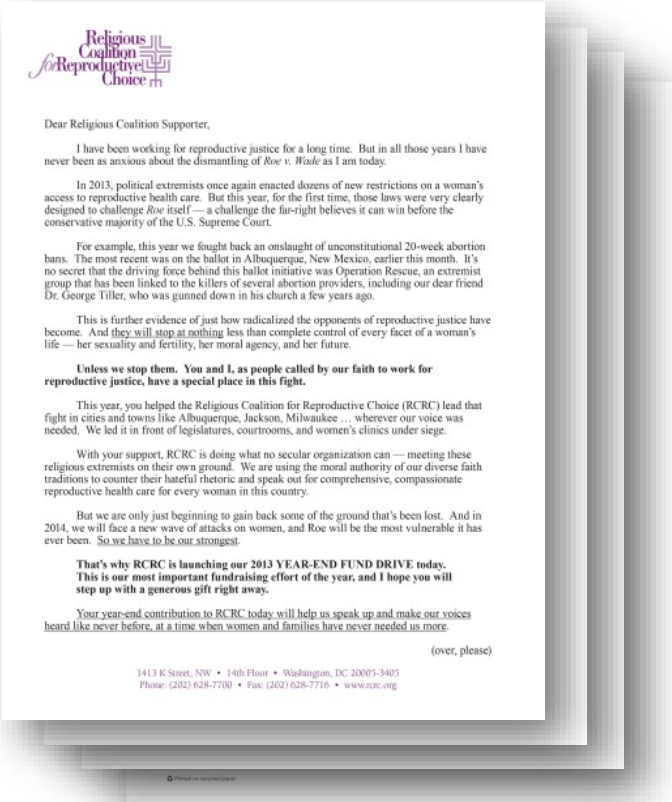
Paper Stock

- Weight
- Finish/Color
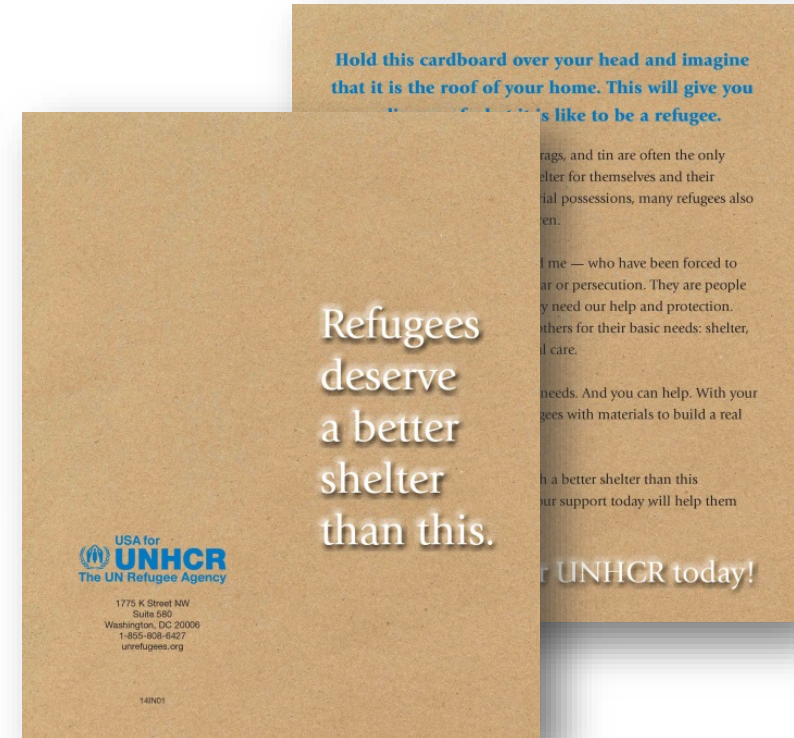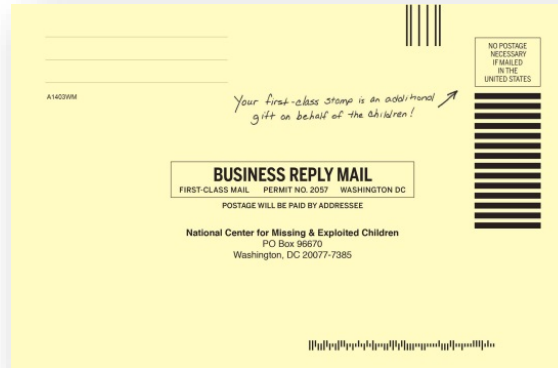
Paper Stock

Special Requirements:
- ◦ Union
- ◦ Forestry Stewardship Council
- ◦ Recycled Paper
- ◦ Corn window envelope film
- ◦ Soy Inks
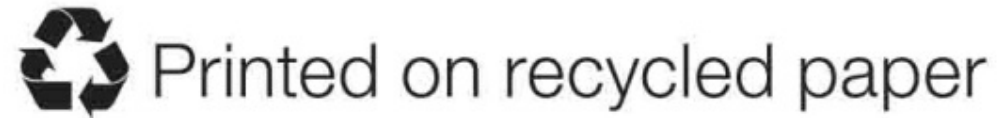
Printing Inks: CMYK & PMS Spot Colors

- 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
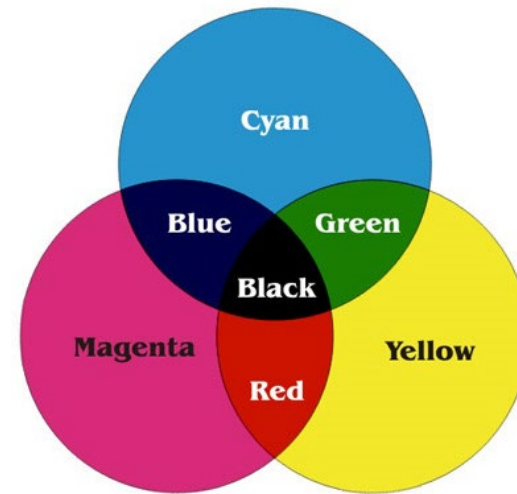
Four-Color Printing

Pantone Matching System provides precise colors
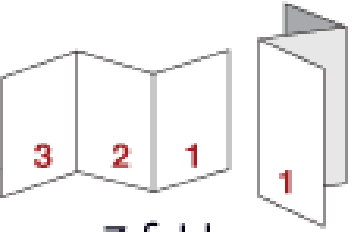
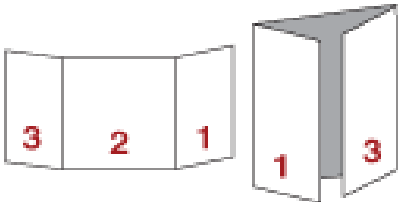# Inks – Bleeds and Coverage

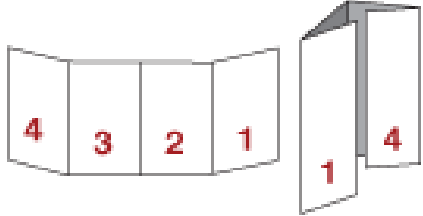# Fold Instructions

Many Variations!
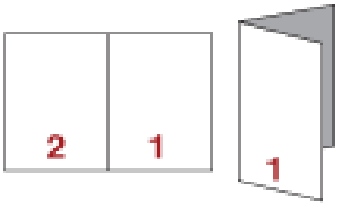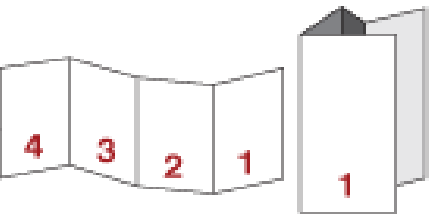

Half fold
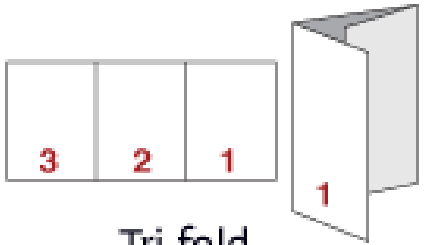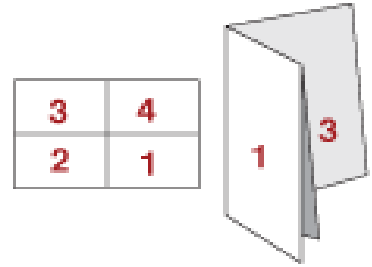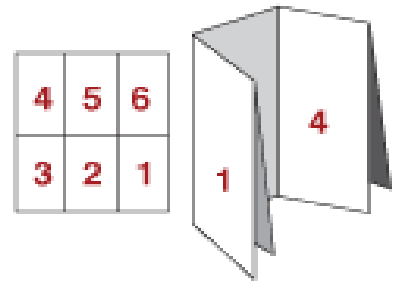
Tri fold
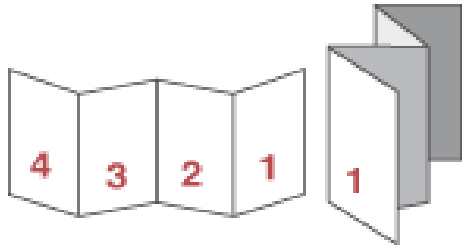
Accordion fold

Z fold

Gate fold

Double gate fold
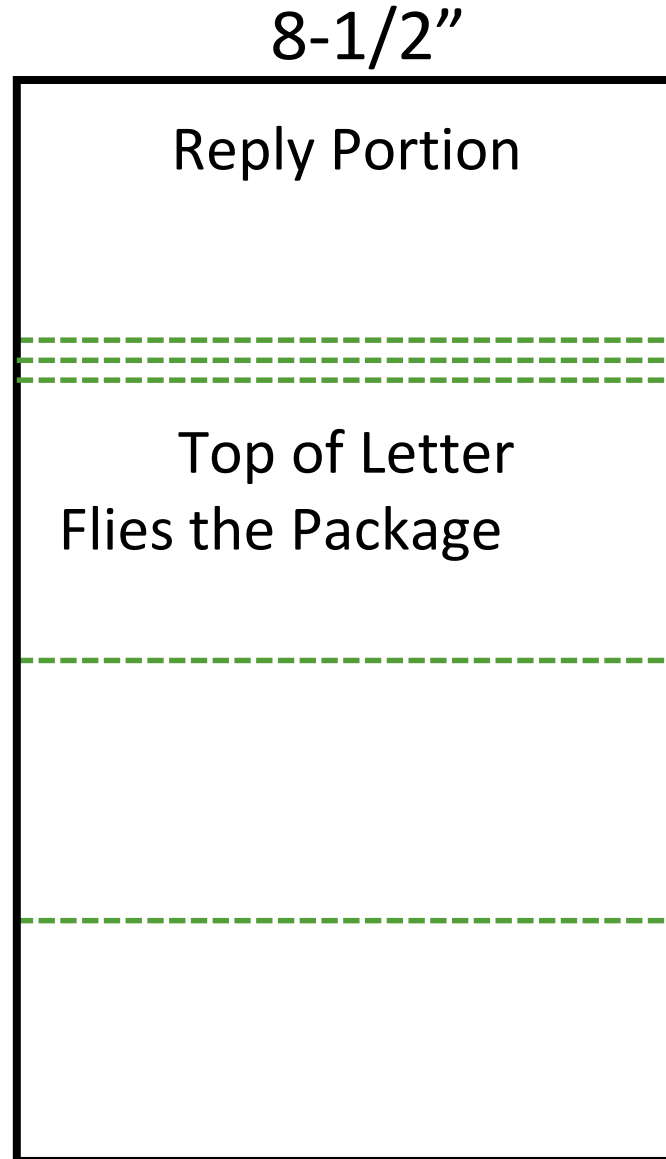
Fold in half then half again
Double parallel fold

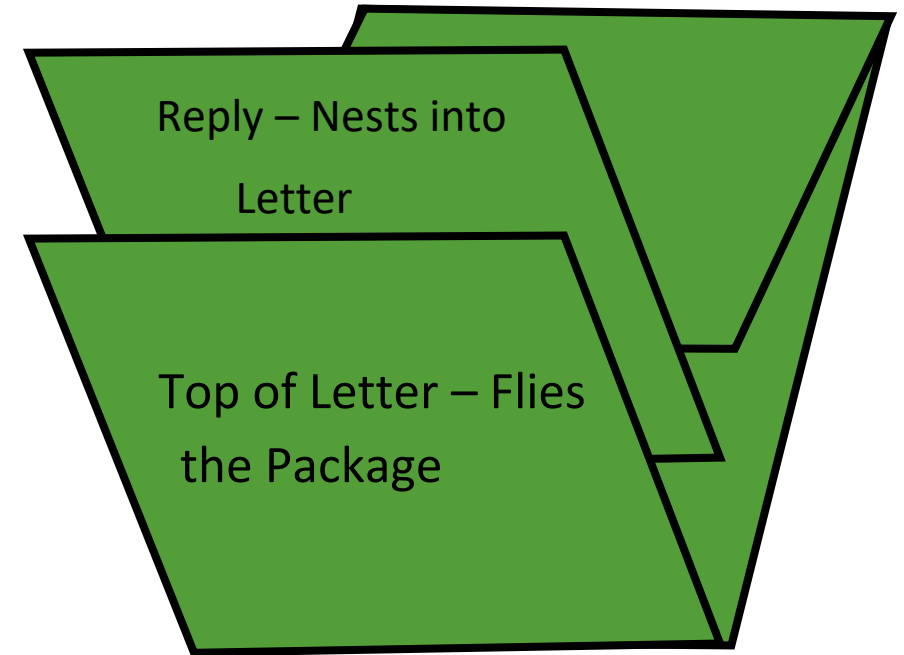Panel 4 is upside down before folding
French fold

Half fold & tri fold

Form Set-up: Example

Identifies what "Flies the Package" = the mailing address visible on the outer envelope

8-1/2"

Reply Portion

Gutter/Take out for Drop-Cut

Top of Letter
Flies the Package

14"
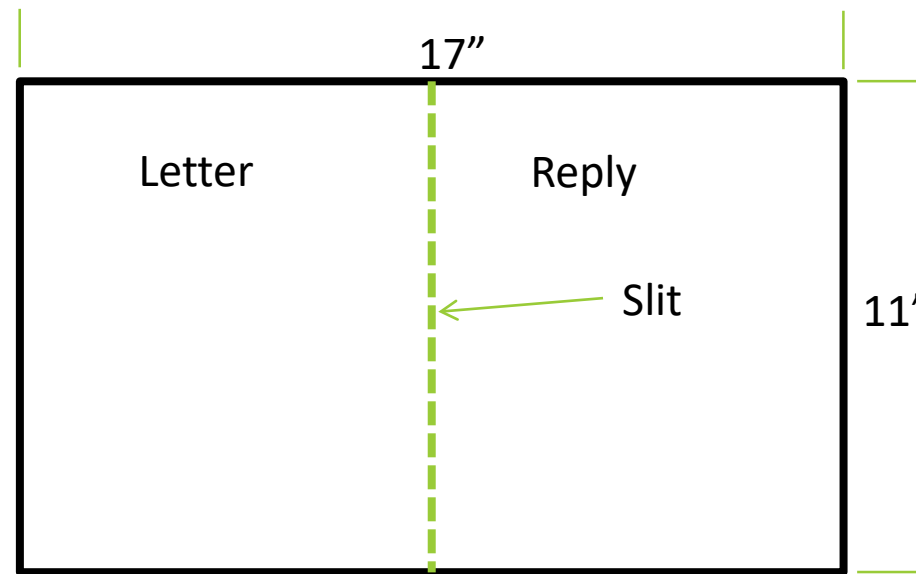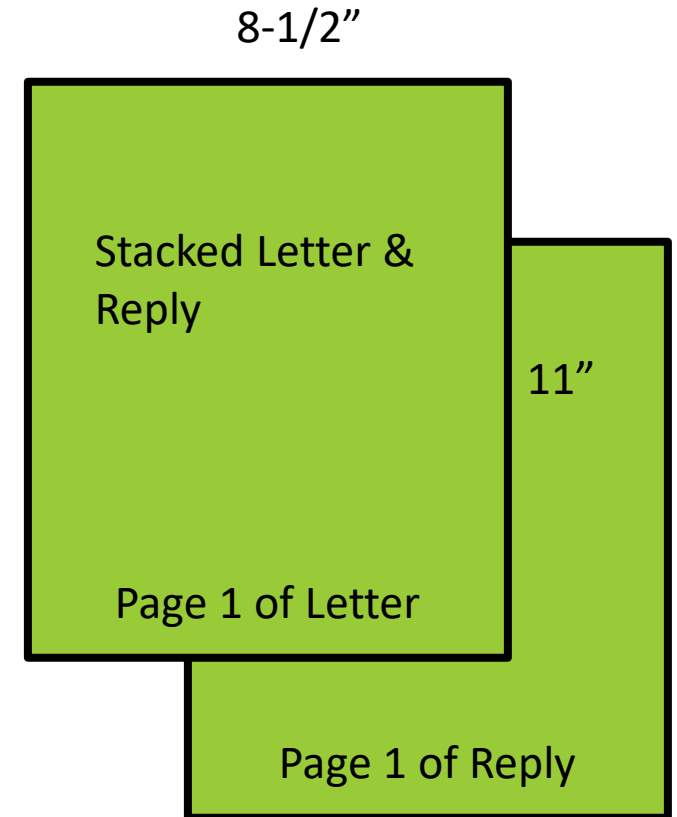
Reply – Nests into Letter

Top of Letter – Flies the Package

Dropcut (Gatefold) Form Set-up

Form Set-up: Example

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

17"

Letter   Reply

← Slit

11"

Interstack Form Set-up

8-1/2"

Stacked Letter & Reply

11"

Page 1 of Letter

Page 1 of Reply

Perfs

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

Scores & Die Cuts

Envelope Printing

- Stock vs. custom printed and converted
- Dimensions, artwork
- Single window, double window, size, positioning, window film material (plastic, corn)
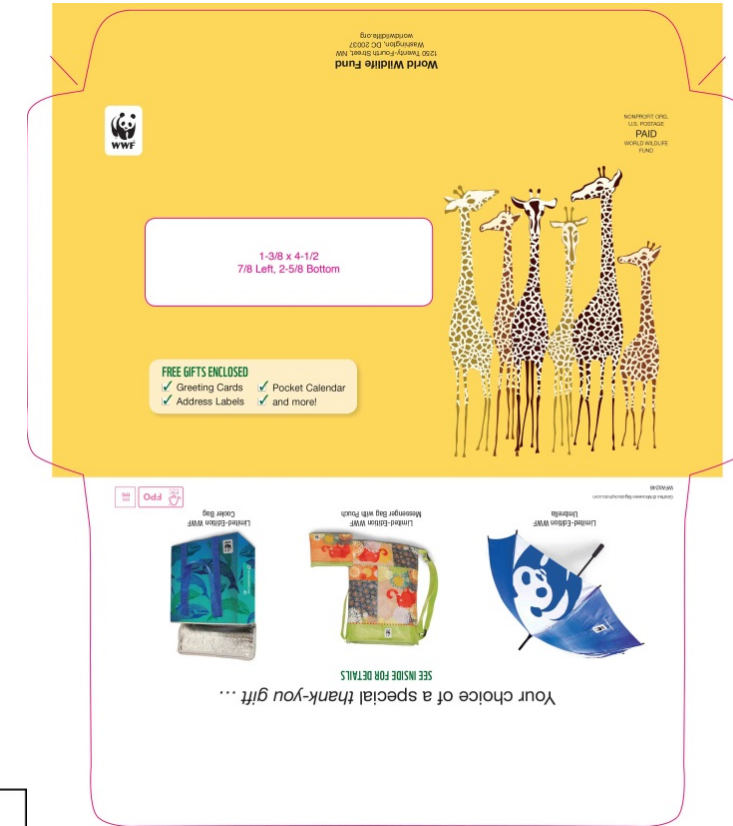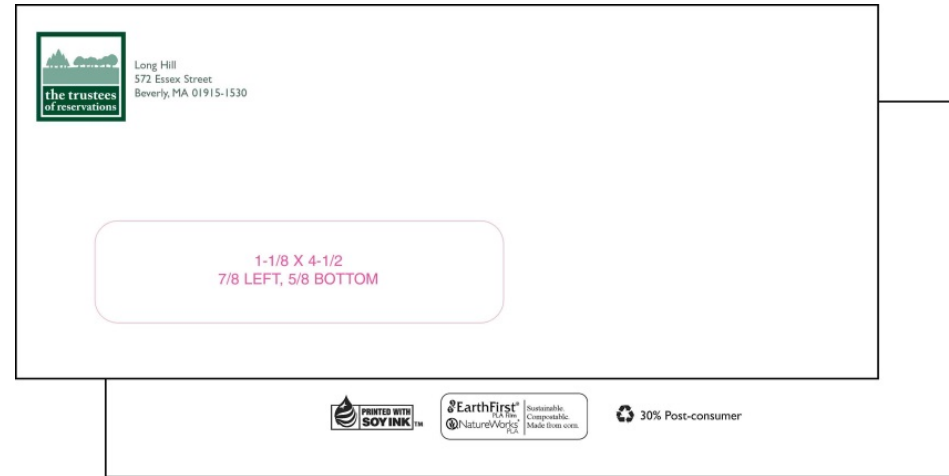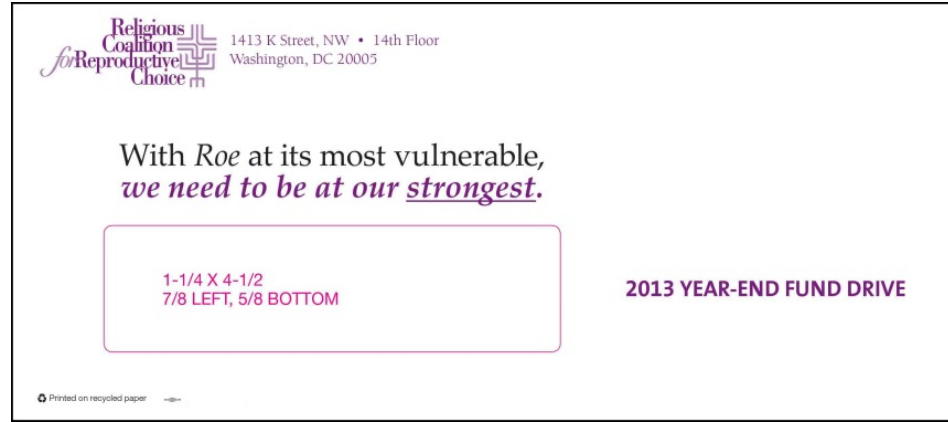
Should I Consider Gang Printing?

- 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 & schedule alignment

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

Managing your project workflow

Strategy/Design/Production
- Design
- Data
- Pre-press/Printing
- Laser Personalization
- Mailshop
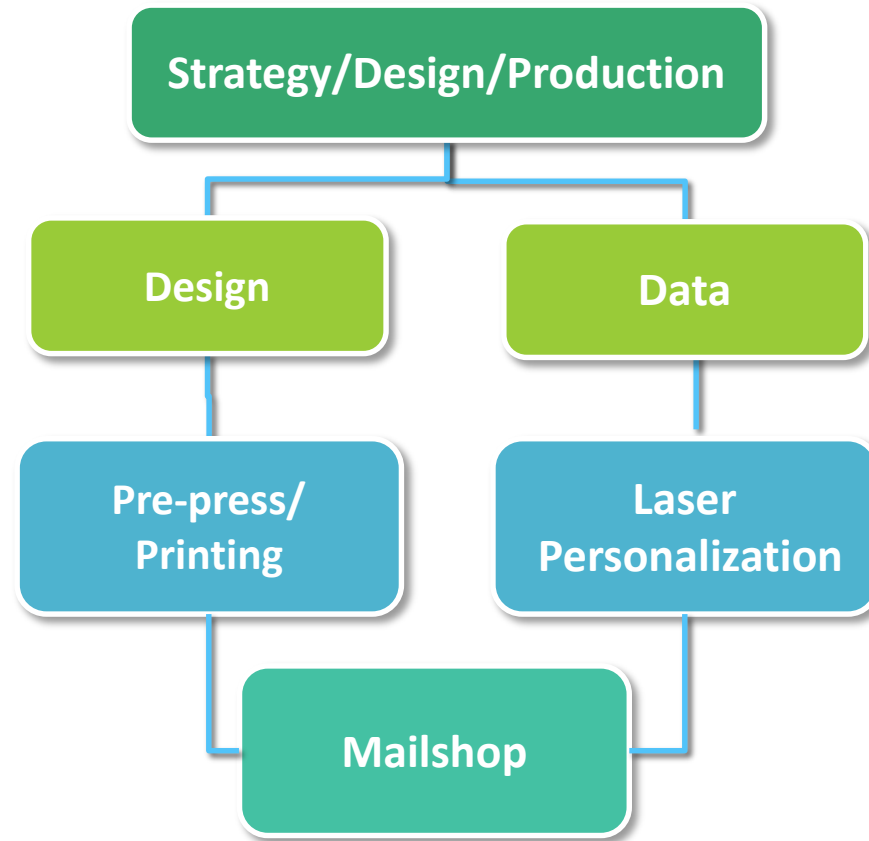
Data Processing Pointers

Quality Control Steps Prevent Errors

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 Pointers

Types:
- Inkjet
- Laser
- Real handwriting
- Autopen faux handwriting
- Digital printing

Clearly identify variable data

Fonts, point sizes, positioning
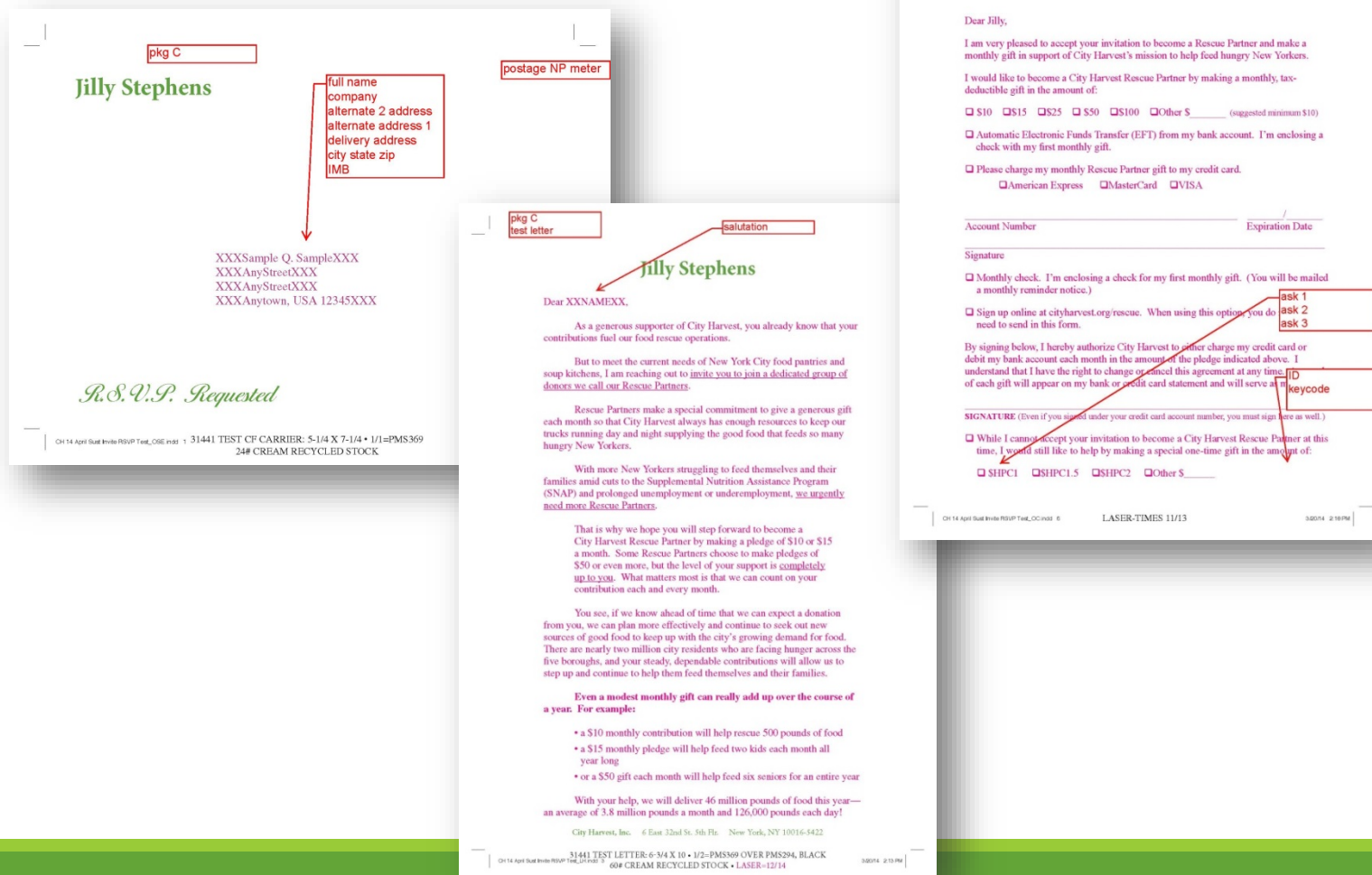
Mailshop Specifications

Mailshop Checklist

✓ Clearly identify each version and its specific requirements

✓ Material Delivery Notification
- Inventory codes
- Quantity
- How piece will arrive: flat, folded, multiple up form

✓ Trim and fold specs

✓ Insertion Order

✓ Postage due date and details

✓ 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?
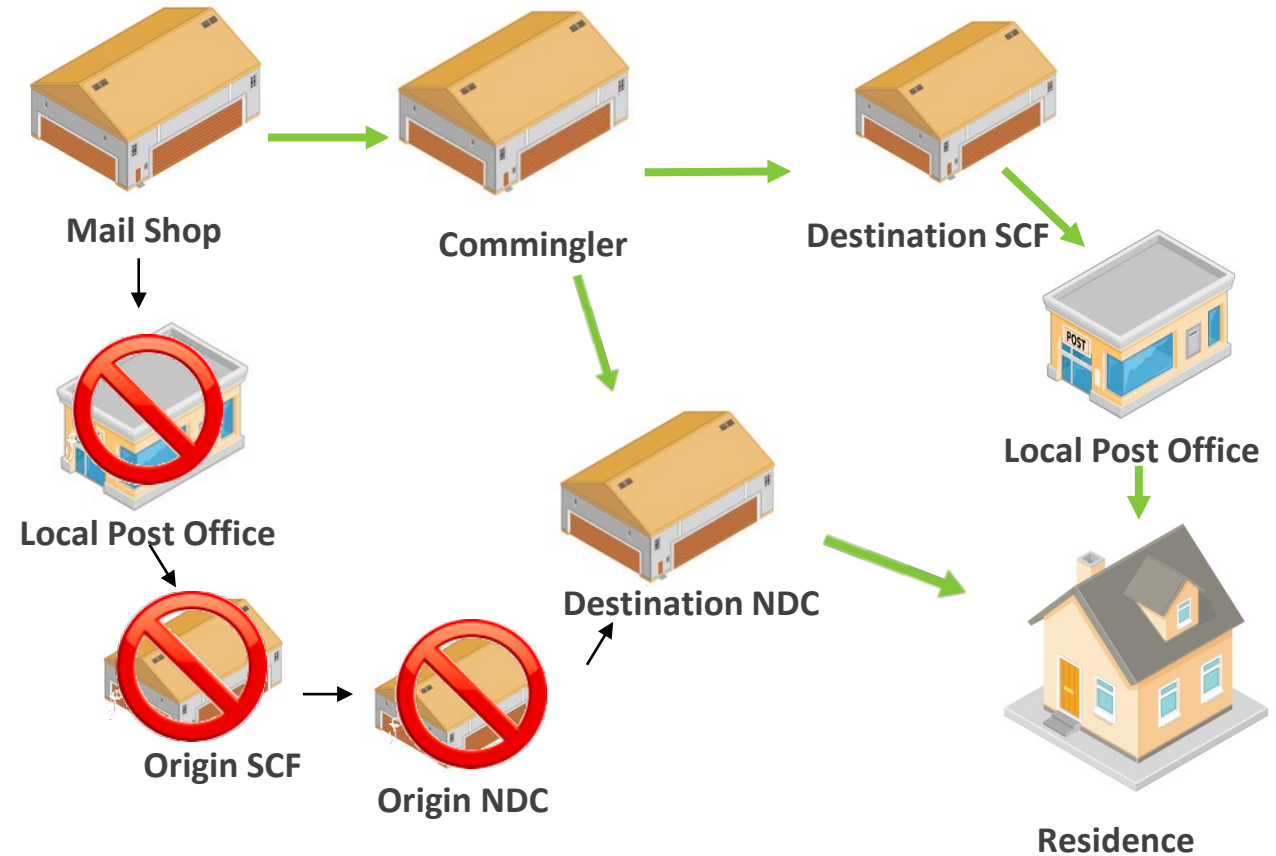
Postal Logistics Strategy

Pay attention to Postal Logistics!

- Reduce postage costs

- Faster, more predictable delivery

- Skipping postal steps gives you more predictable in-home dates

- Track your mail delivery!

Now more important than ever with postage increases!

Commingling

Your mail is combined with other mailers for deeper volume discounts

Mail Shop → Commingler → Destination SCF

Mail Shop → Local Post Office → Origin SCF → Origin NDC → Destination NDC

Commingler → Destination NDC → Residence

Destination SCF → Local Post Office → Residence

Drop Shipping

- Reduces postage cost
- Speeds delivery
- Factor in freight charges
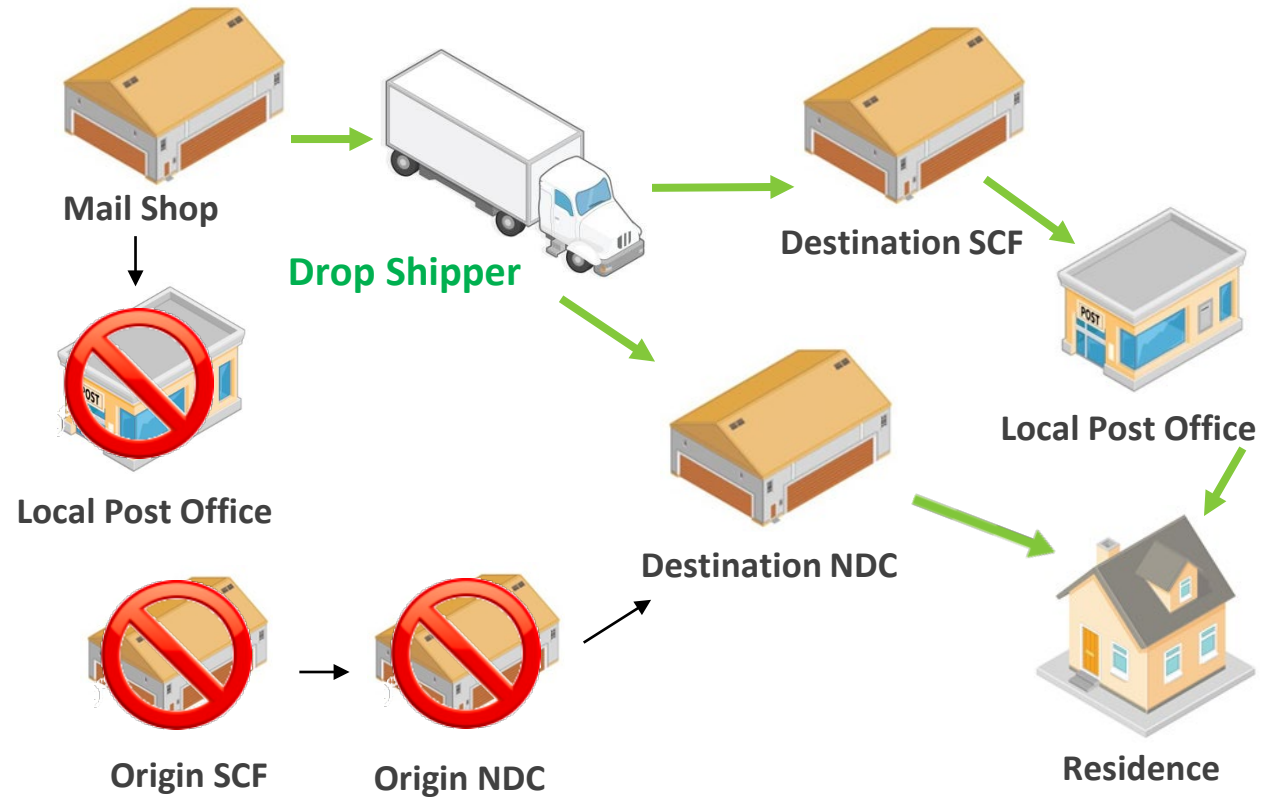
Your project is in the mail…

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 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 – communicate milestones and track progress

- 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!

Leigh Ann Doyle
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Production Manager
Senior Specialist Mail Design & Postal Procedures

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