

Direct Mail Production Management

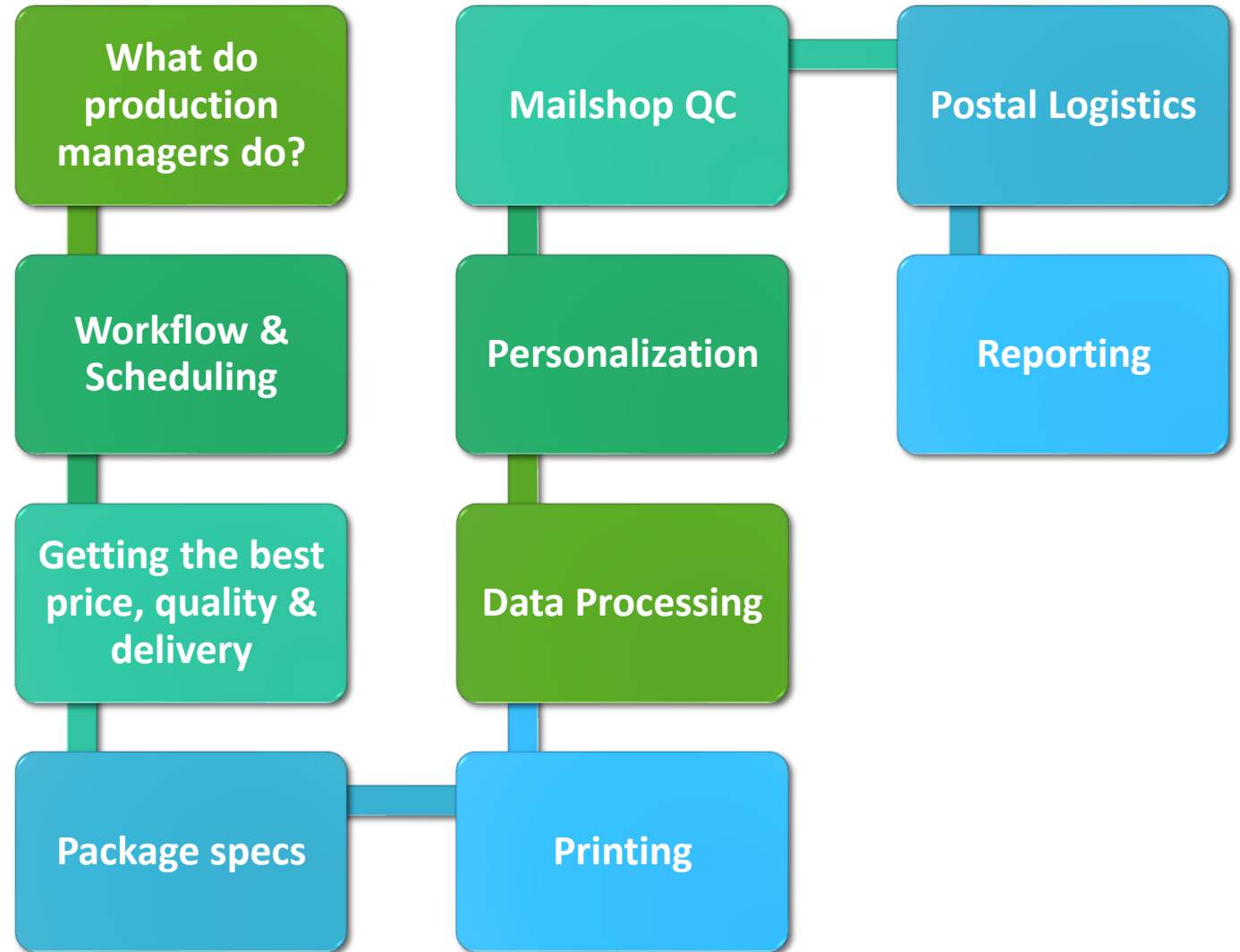
DMAW DM101

PRESENTED BY LEIGH ANN DOYLE, PMG

MARCH 23, 2023



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
- Professional multi-taskers
- Ensure quality control

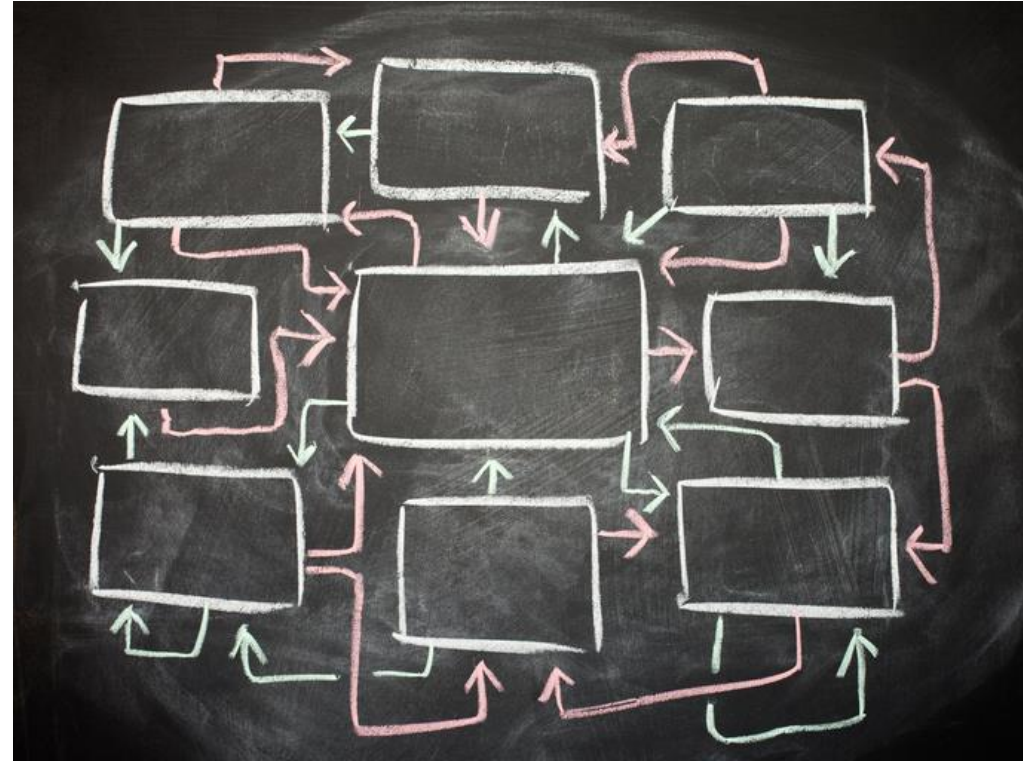


What you need to get started:

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



Workflow & Scheduling

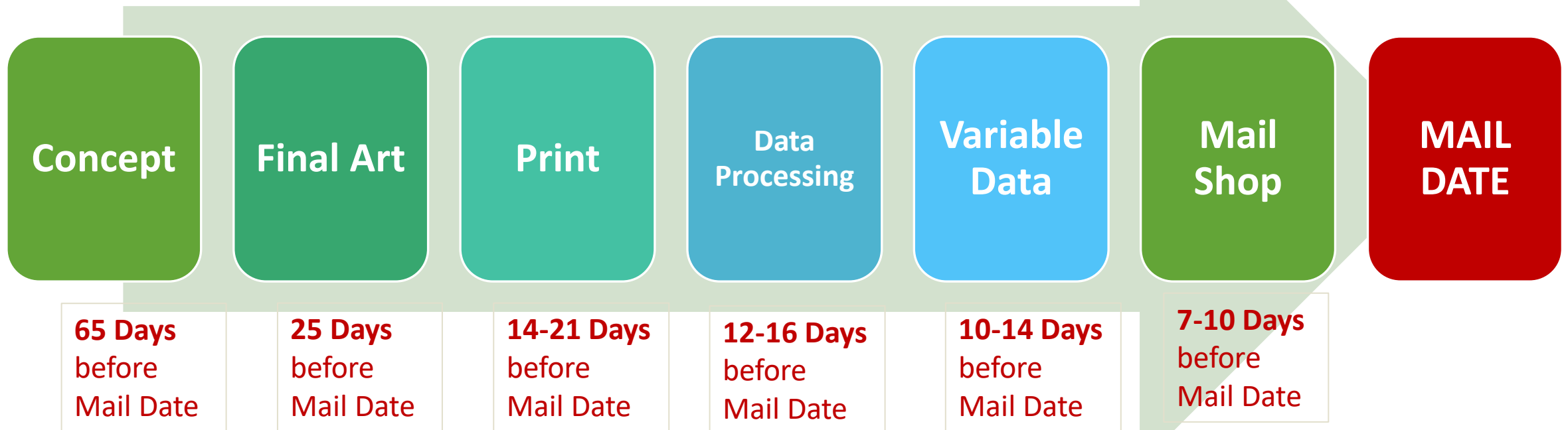


Managing Products, Services and Stakeholders

- 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

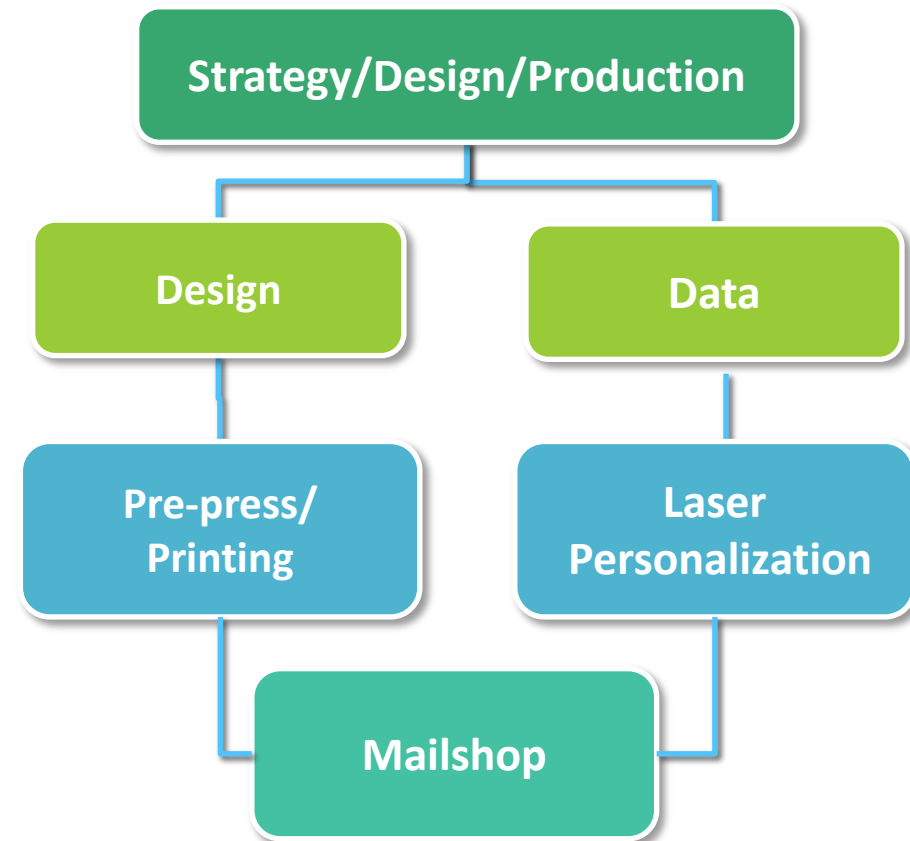
A Typical Project Timeline

~~Typical~~ Project Timeline



Managing your project workflow

- Two simultaneous tracks
- Functions are interdependent




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

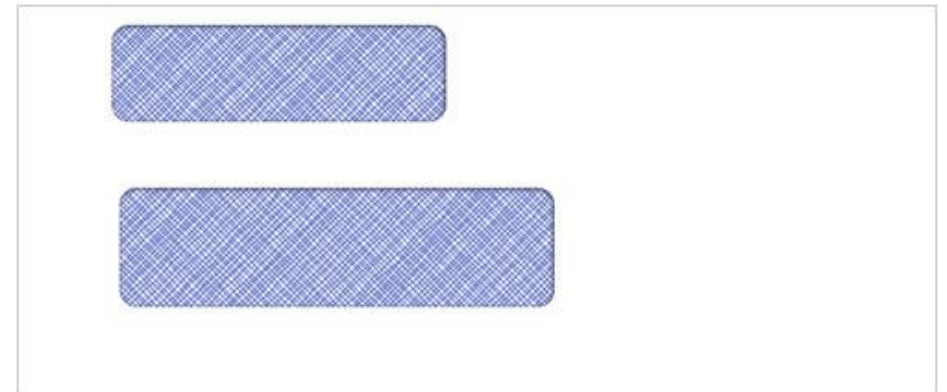


**Get at least 5
competitive bids
per component or
function**

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



Religious Coalition for Reproductive Choice

Dear Religious Coalition Supporter,

I have been working for reproductive justice for a long time. But in all those years I have never been as anxious about the dismantling of *Roe v. Wade* as I am today.

In 2013, political extremists once again enacted dozens of new restrictions on a woman's access to reproductive health care. But this year, for the first time, those laws were very clearly designed to challenge *Roe* itself — a challenge the far-right believes it can win before the conservative majority of the U.S. Supreme Court.

For example, this year we fought back an onslaught of unconstitutional 20-week abortion bans. The most recent was on the ballot in Albuquerque, New Mexico, earlier this month. It's no secret that the driving force behind this ballot initiative was Operation Rescue, an extremist group that has been linked to the killers of several abortion providers, including our dear friend Dr. George Tiller, who was gunned down in his church a few years ago.

This is further evidence of just how radicalized the opponents of reproductive justice have become. And they will stop at nothing less than complete control of every facet of a woman's life — her sexuality and fertility, her moral agency, and her future.

Unless we stop them. You and I, as people called by our faith to work for reproductive justice, have a special place in this fight.

This year, you helped the Religious Coalition for Reproductive Choice (RCRC) lead that fight in cities and towns like Albuquerque, Jackson, Milwaukee ... wherever our voice was needed. We led it in front of legislatures, courtrooms, and women's clinics under siege.

With your support, RCRC is doing what no secular organization can — meeting these religious extremists on their own ground. We are using the moral authority of our diverse faith traditions to counter their hateful rhetoric and speak out for comprehensive, compassionate reproductive health care for every woman in this country.

But we are only just beginning to gain back some of the ground that's been lost. And in 2014, we will face a new wave of attacks on women, and *Roe* will be the most vulnerable it has ever been. So we have to be our strongest.

That's why RCRC is launching our 2013 YEAR-END FUND DRIVE today. This is our most important fundraising effort of the year, and I hope you will step up with a generous gift right away.

Your year-end contribution to RCRC today will help us speak up and make our voices heard like never before, at a time when women and families have never needed us more.

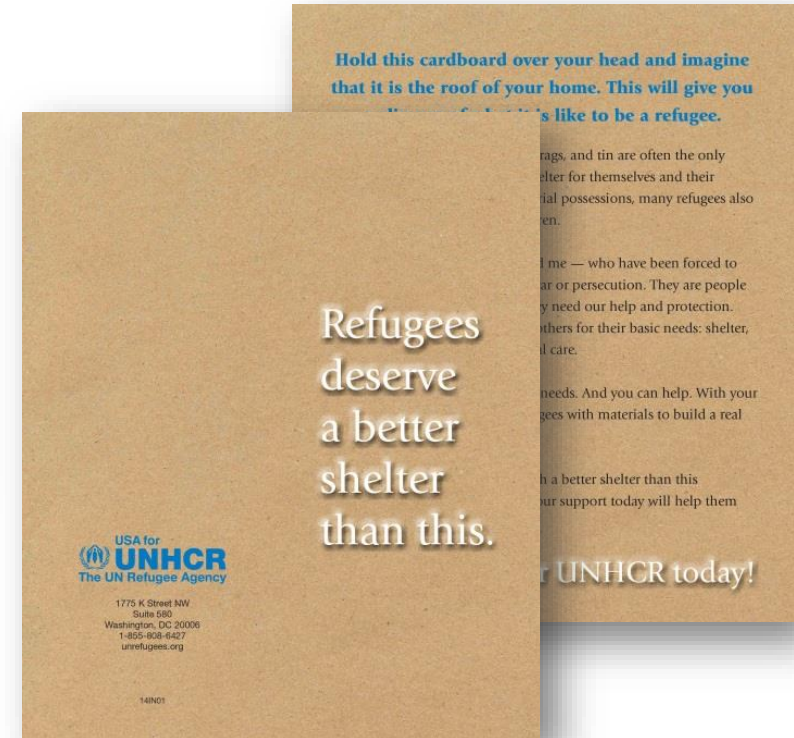
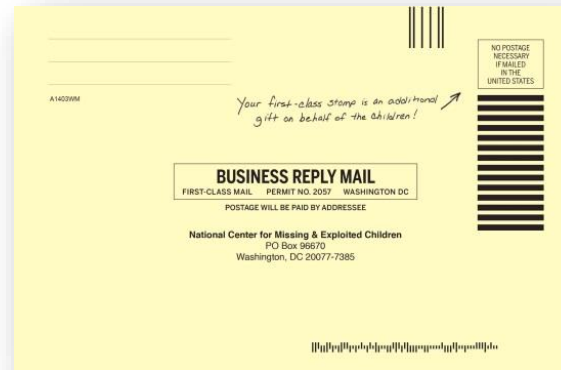
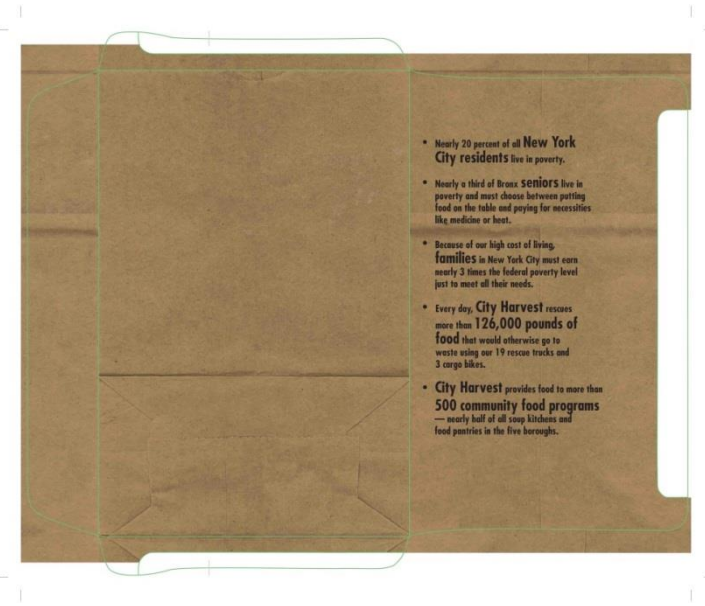
(over, please)

1413 K Street, NW • 14th Floor • Washington, DC 20005-3405
Phone: (202) 628-7700 • Fax: (202) 628-7710 • www.rcrc.org



Paper Stock

- Weight
- Finish/Color



Paper Stock

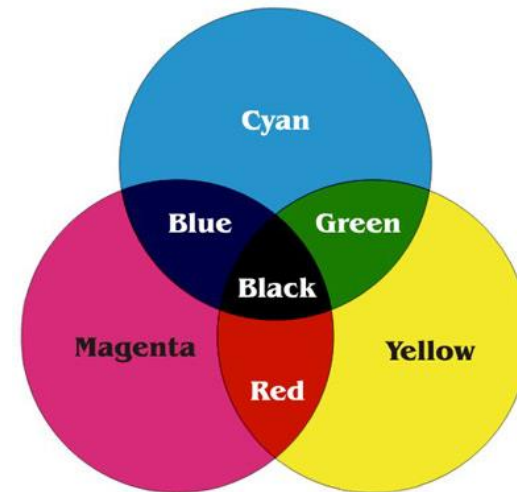
Special Requirements:

- 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



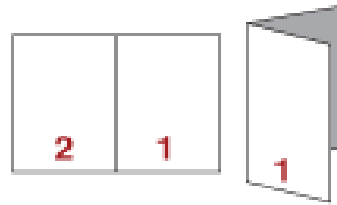
Pantone Matching System provides precise colors

Inks – Bleeds and Coverage

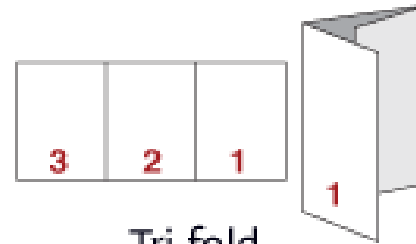


Fold Instructions

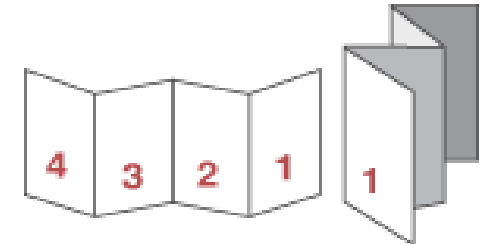
Many Variations!



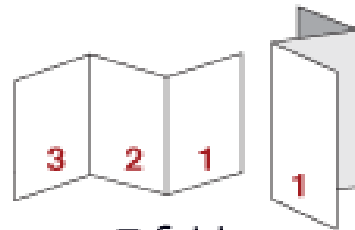
Half fold



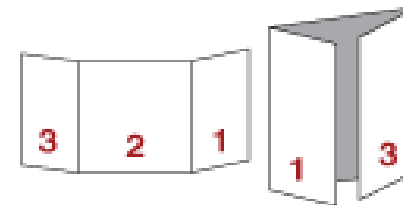
Tri fold



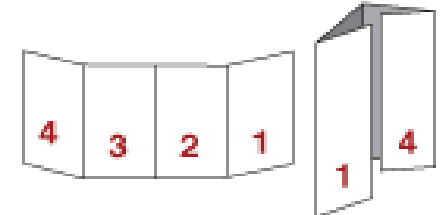
Accordion fold



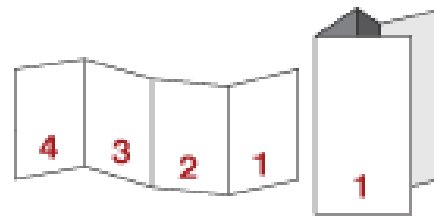
Z fold



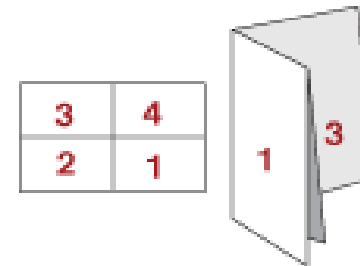
Gate fold



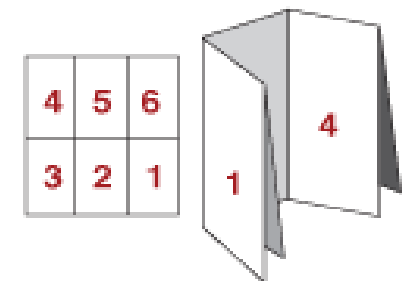
Double gate fold



Fold in half then half again
Double parallel fold



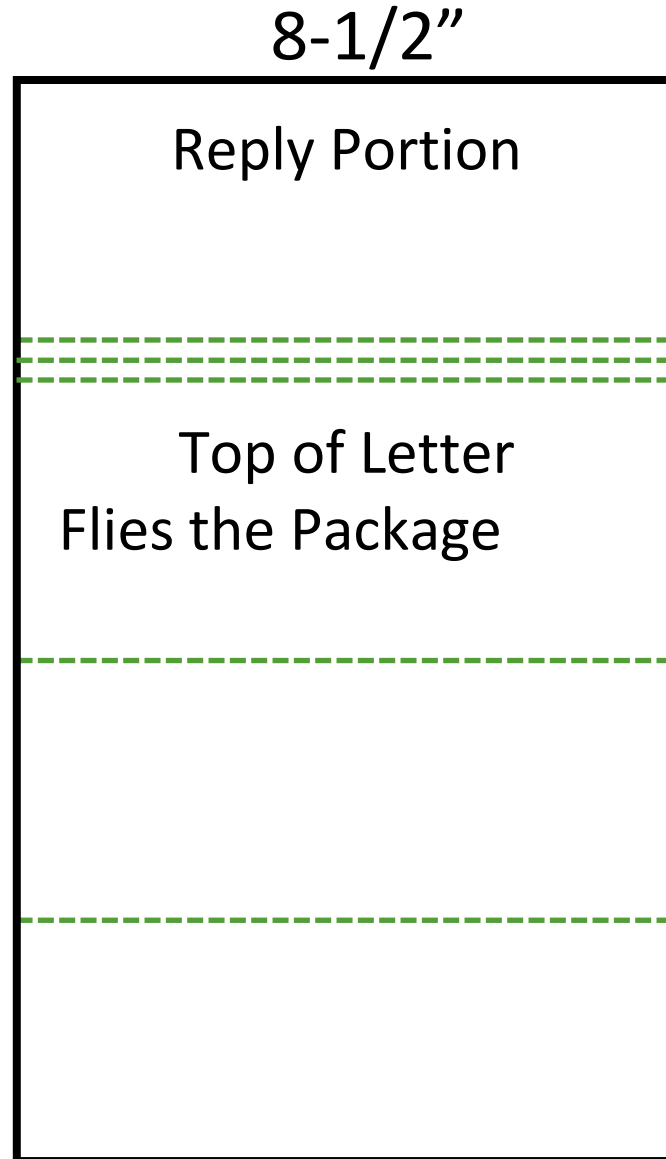
Panel 4 is upside down
before folding
French fold



Half fold & tri fold

Form Set-up: Example

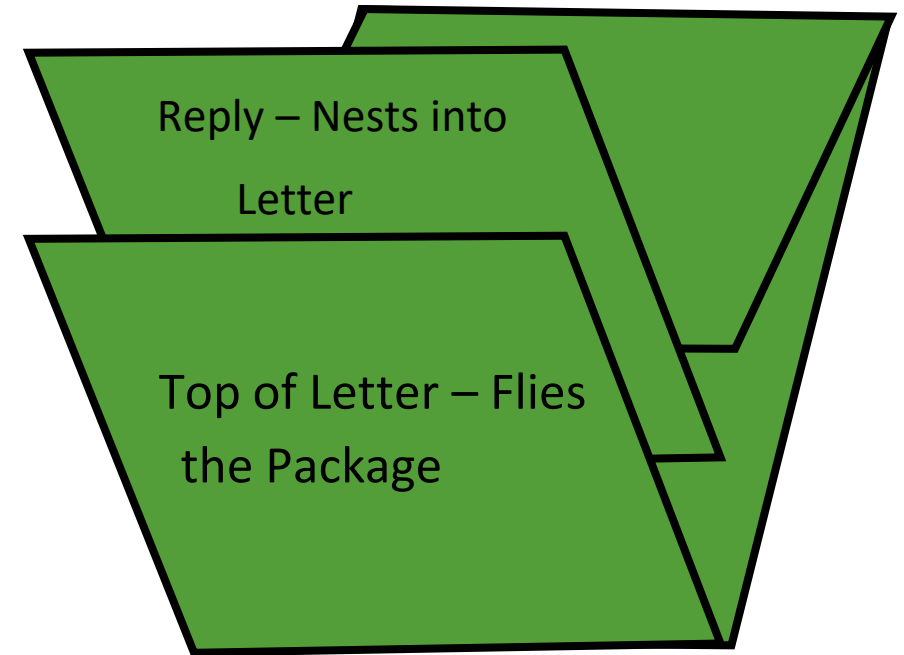
Identifies what
“Flies the Package”
= the mailing
address visible on
the outer envelope



Gutter/Take out
for Drop-Cut



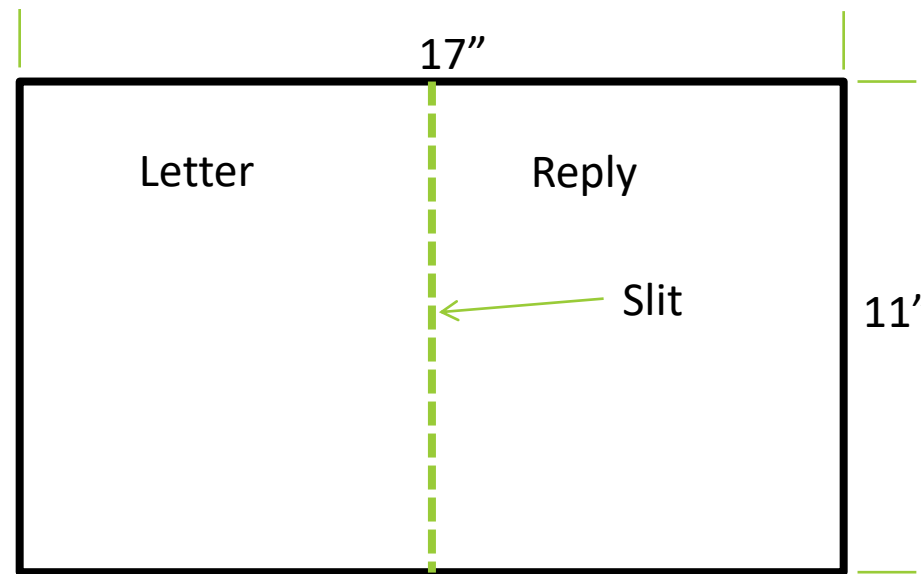
14"



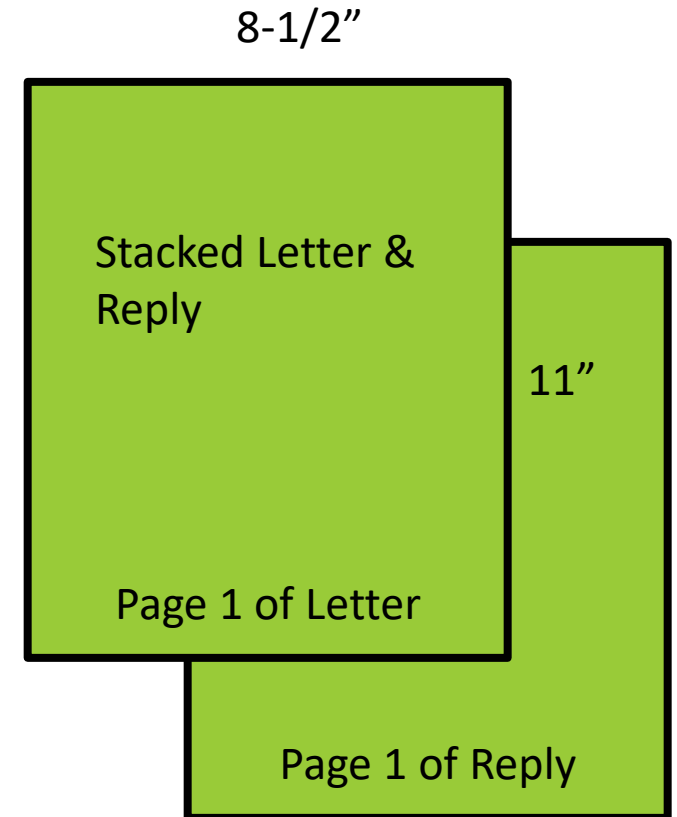
**Dropcut (Gatefold)
Form Set-up**

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) 873-4627 • NMWA.org • member@nmwa.org

 NATIONAL MUSEUM of WOMEN in the ARTS
www.nmwa.org

PERF

ACTIVATE YOUR MEMBERSHIP CARD TODAY!

PHS

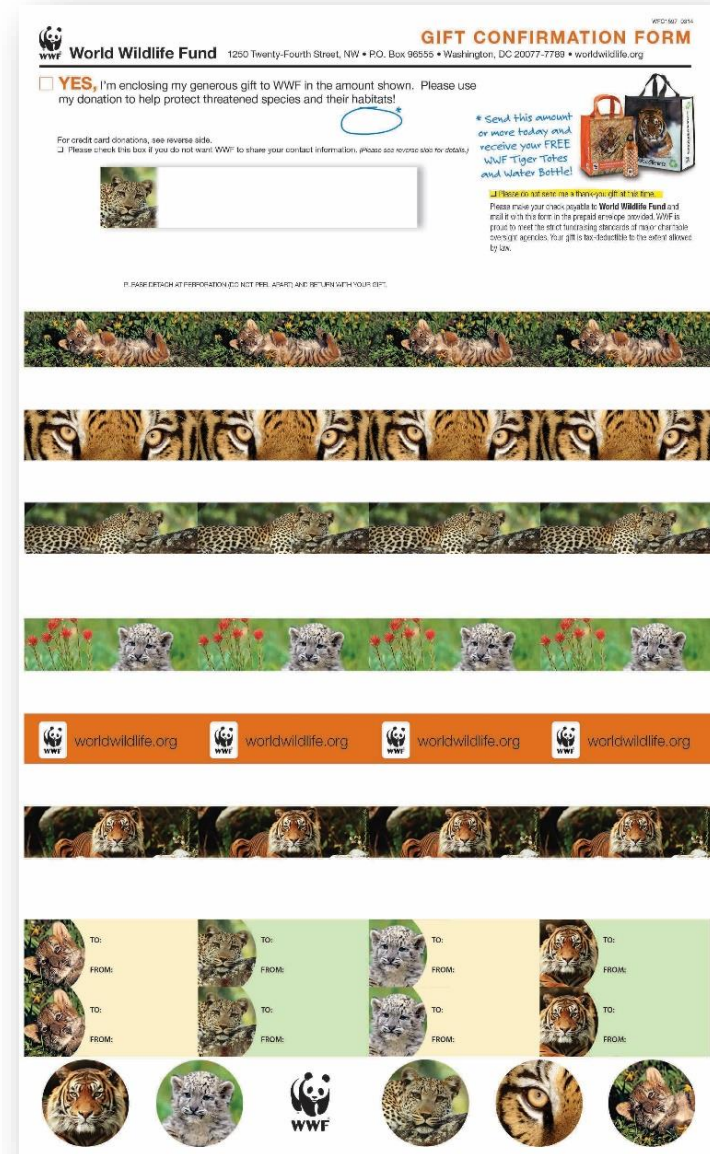
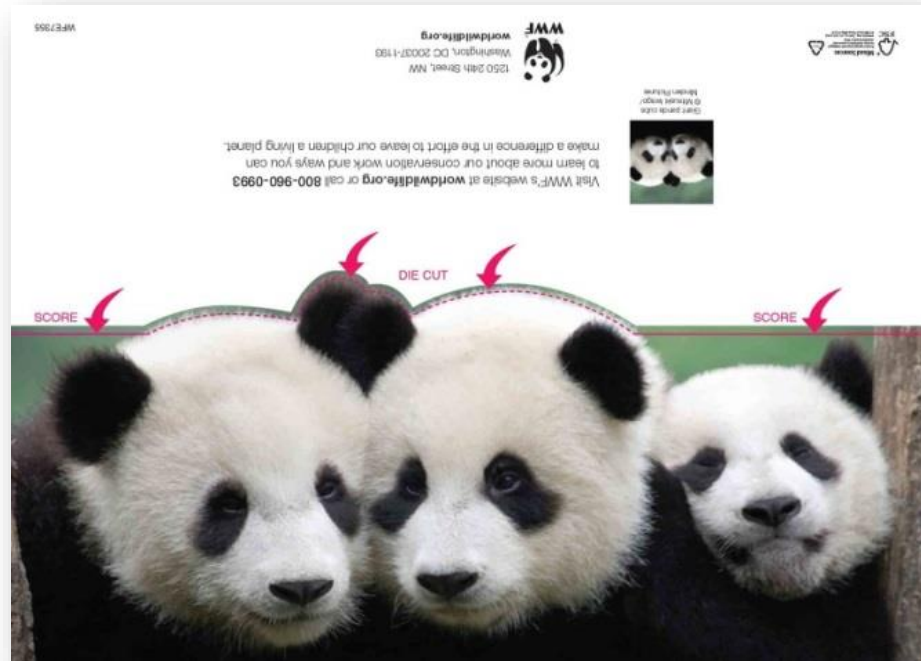
Detach and return the portion below with your payment in the envelope provided.

Membership Renewal Confirmation

NATIONAL MUSEUM of WOMEN in the ARTS
1250 New York Avenue, NW, Washington, DC 20005-3970

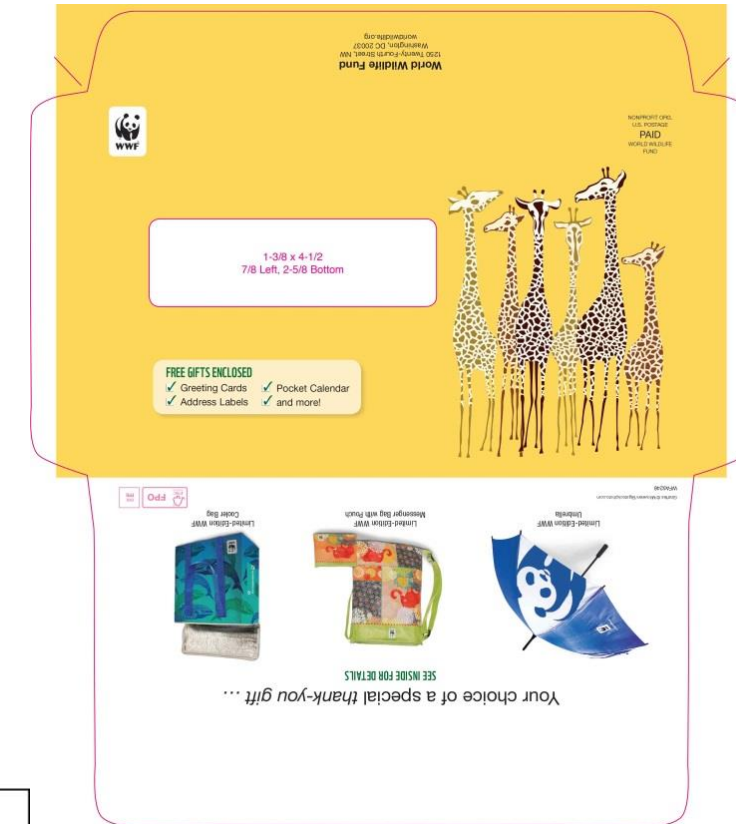
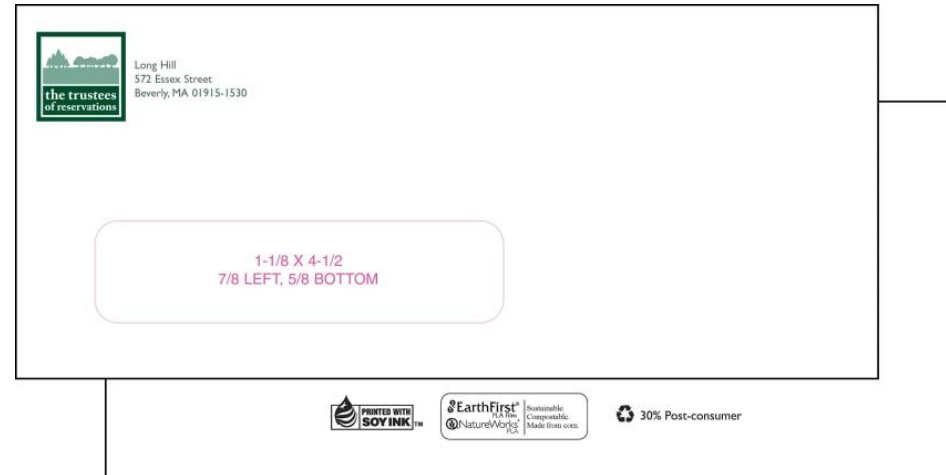
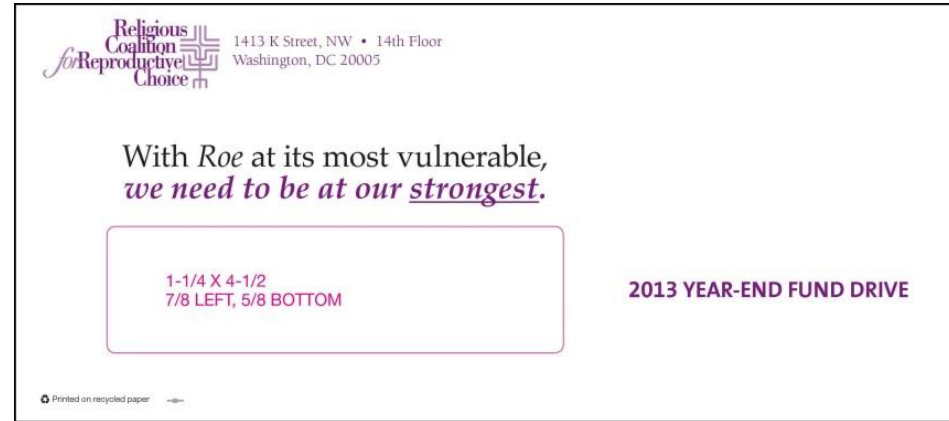
PERF

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?

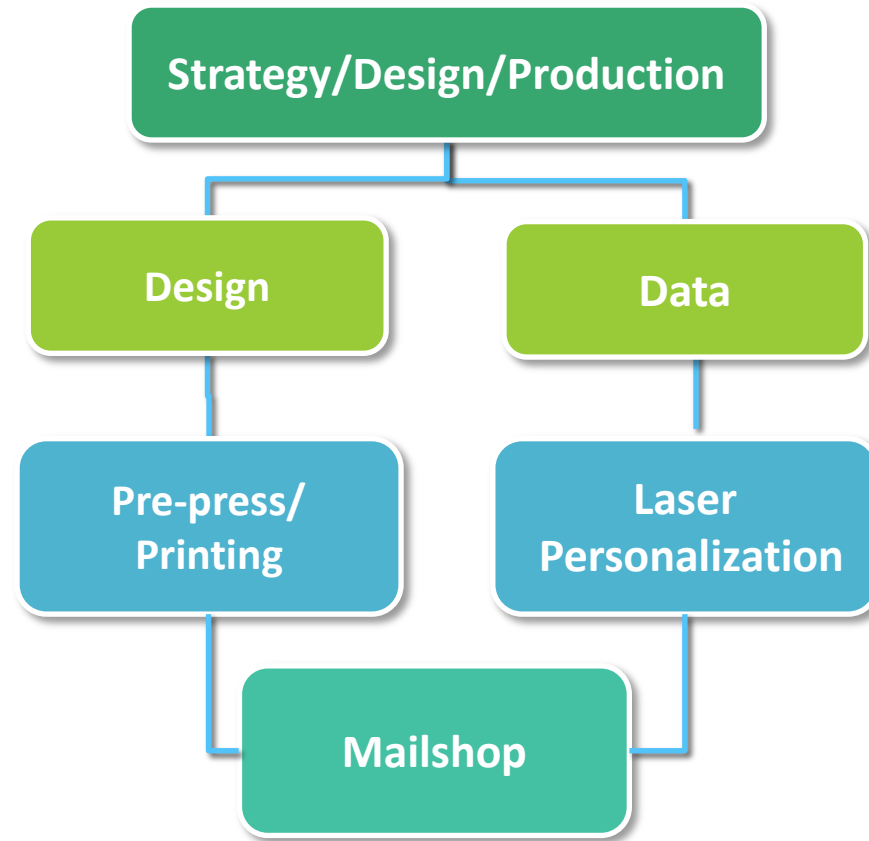


Proofing Procedures

- 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



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?



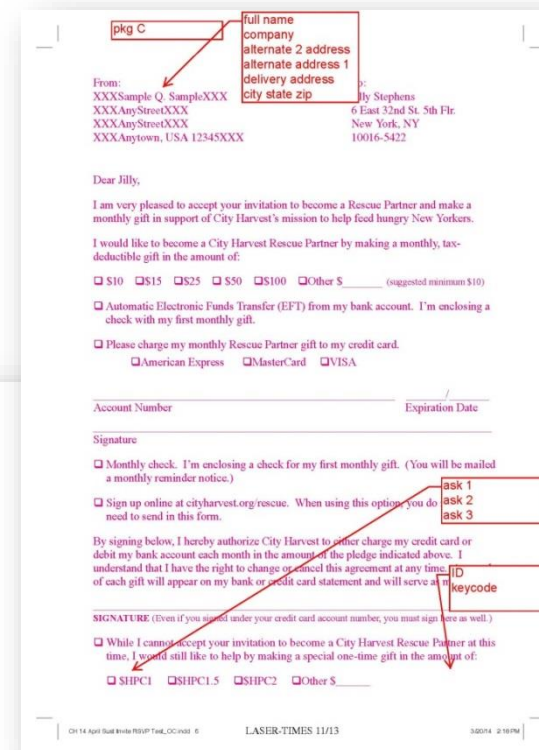
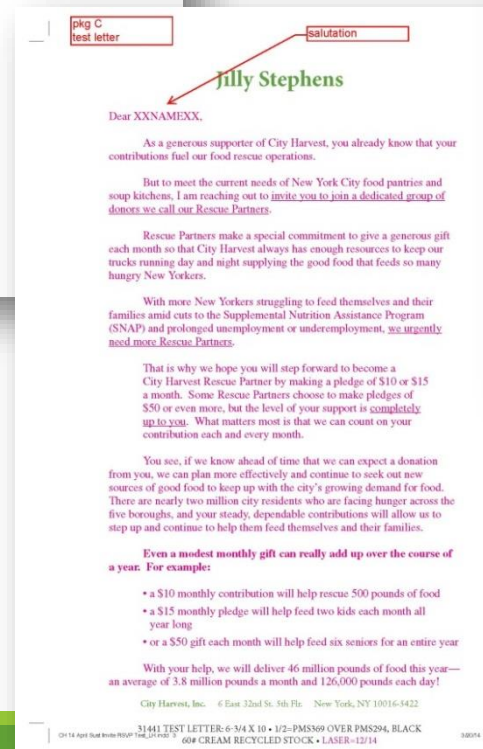
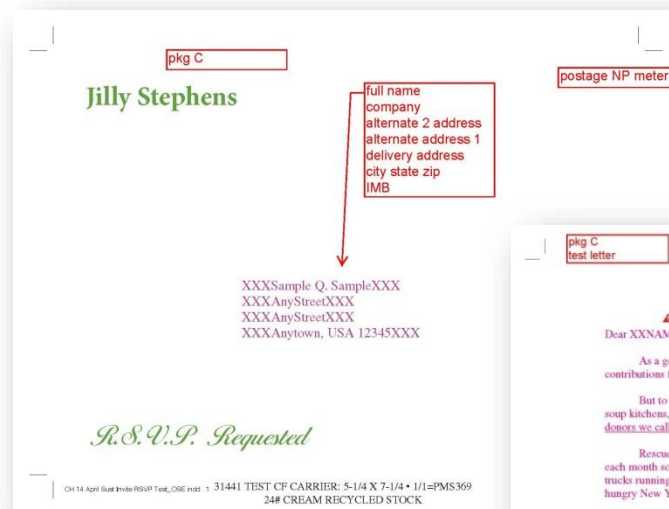
Variable Data Pointers

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
- ✓ 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

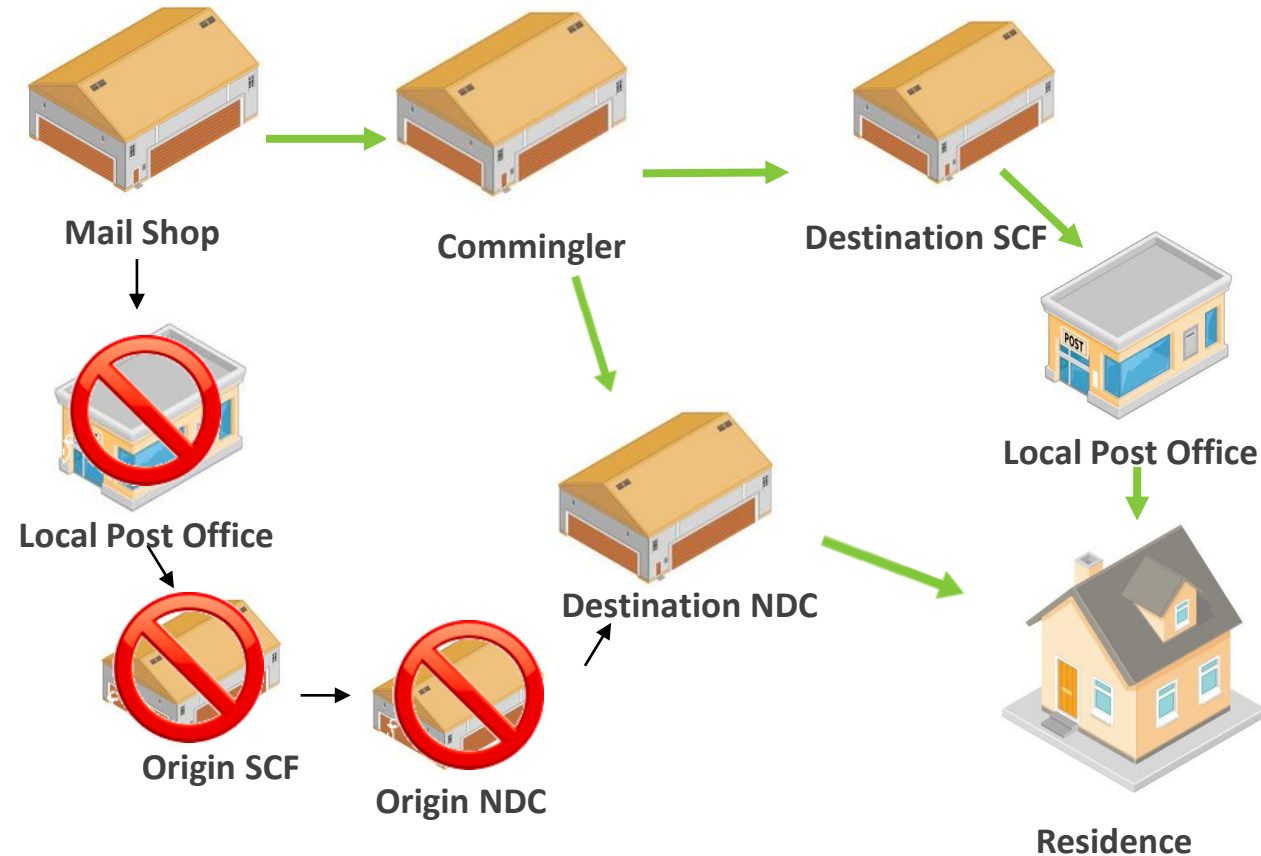


Pay attention to Postal Logistics!

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

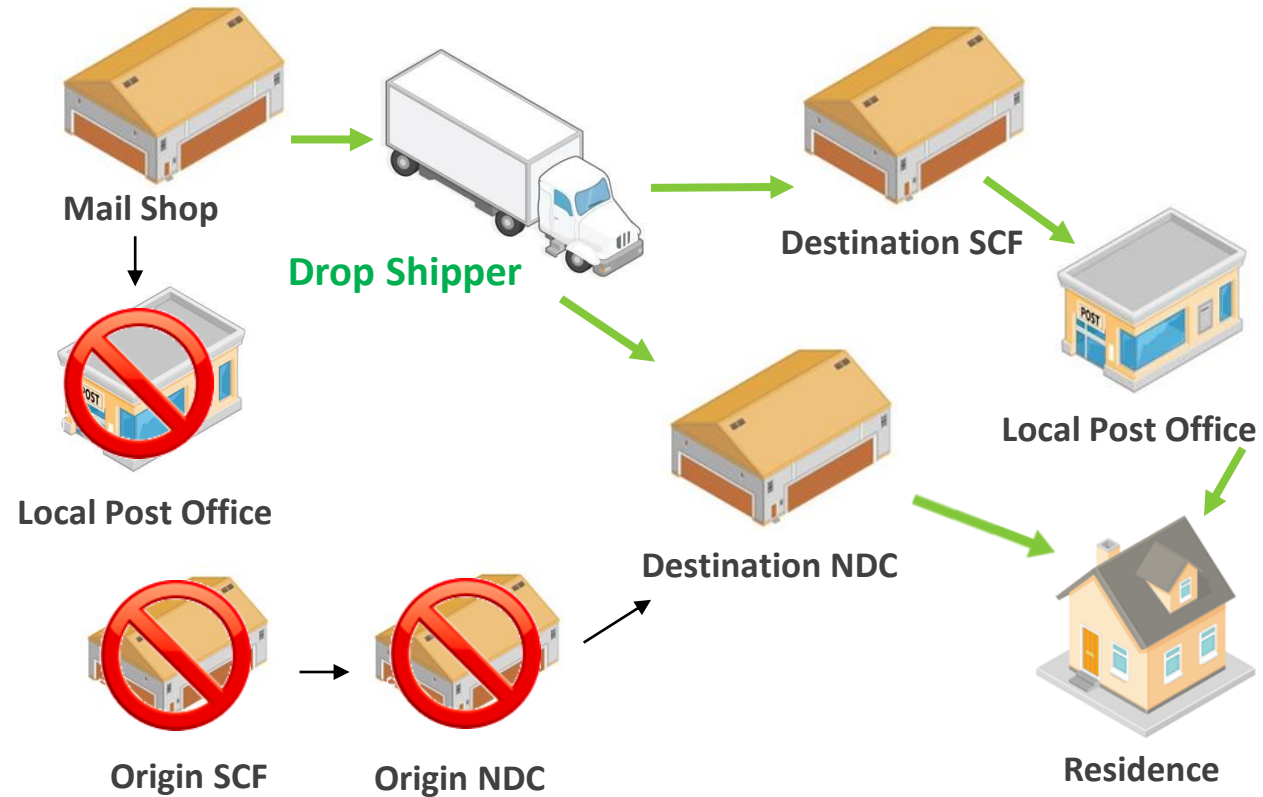
Commingling

Your mail is combined with other mailers for deeper volume discounts



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
Production Management Group
Production Manager
Senior Specialist Mail Design & Postal Procedures

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