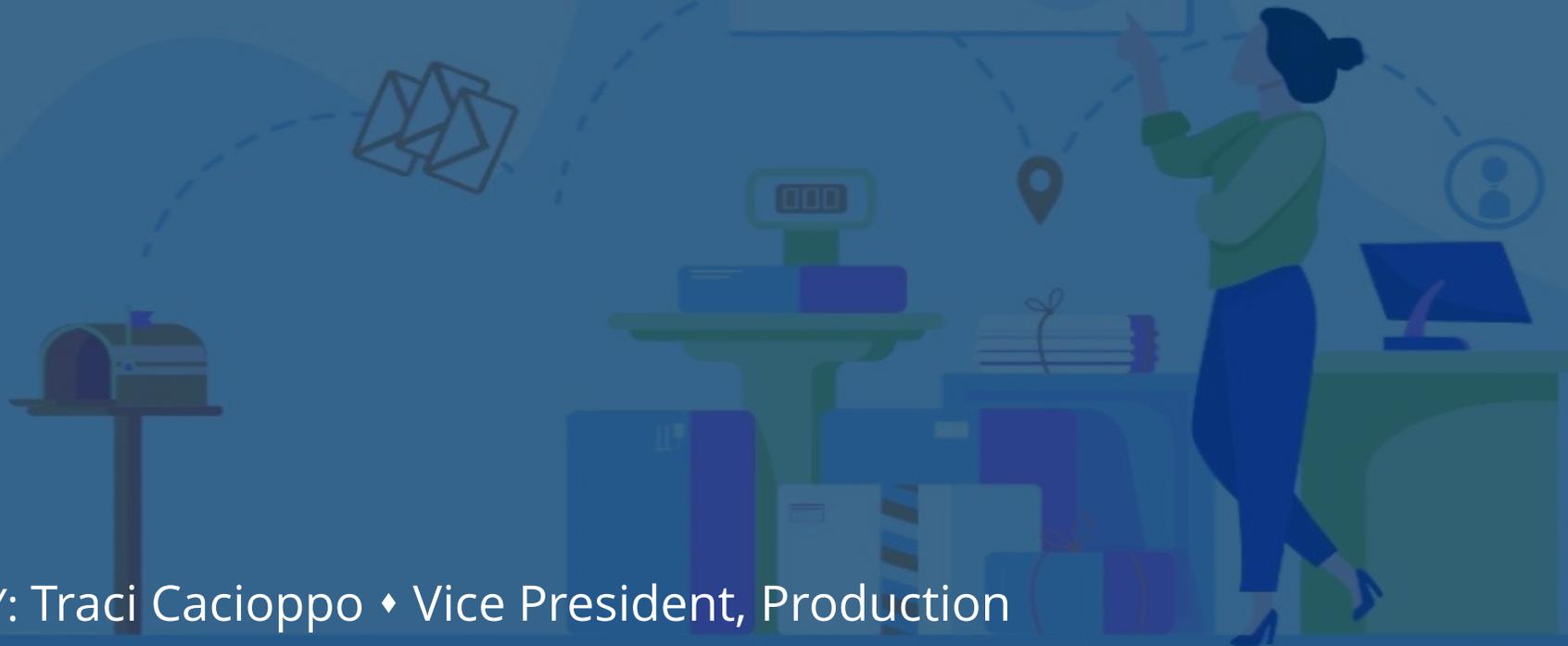


The Pre-Production Process

WHAT YOU NEED TO KNOW FOR SUCCESS



PRESENTED BY: Traci Cacioppo ♦ Vice President, Production



About the Presenter

- ▶ 30 years in the industry
- ▶ Mail shops and agencies
- ▶ Commercial and nonprofit
- ▶ Manager and mentor
- ▶ Collaborator
- ▶ Production geek

A close-up photograph of two hands writing on a document. One hand holds a silver pen, and the other holds a silver pencil. The document has a yellow and blue highlighted section. The text 'What We'll Discuss' is overlaid in white on the image.

What We'll Discuss

- ▶ Communication
- ▶ Scheduling
- ▶ Budgeting
- ▶ Art and data release



Communication

- ▶ Establish communication channels
- ▶ Create a positive environment
 - Everyone is working towards one goal
 - Delivery and response will set the tone
- ▶ Be specific with what you need
 - All details matter, no matter how small
- ▶ Never assume

Set Expectations

- ▶ Never over promise
- ▶ If you are unsure, give yourself time to get the correct answer
- ▶ Prevent misunderstandings with detailed schedules
- ▶ If the unexpected happens—and it will—stay positive and provide solutions



*“Two Things Can
Destroy any
Relationship

Unrealistic
Expectations
&
Poor
Communication”
Unknown*



Scheduling

- ▶ Be informed
- ▶ Plan ahead
- ▶ Build the schedule
- ▶ Mark your calendar with the key dates
- ▶ Create account and production schedules

Be Informed, Plan Ahead, & Be Prepared



State of the Industry

- Paper increases, allocations & shortages
- Shipping delays
- Postage increases



Expected Events

- Political mail
- Holidays
- Office closures



Unexpected Events

Track Your Mail

- USPS consolidation of facilities
- Natural disaster
- Shipping disaster

Building Your Schedule

Questions to Ask

- ▶ What is the expected in-home/mail date?
- ▶ What are the package details?
 - Letter, flat, or dimensional
 - Will the envelope need to print and convert
 - Specialty items: labels, calendar, brochure, cards, etc.
 - Premium items: ornament, medallion, rosaries, etc.
- ▶ How is the job mailing?
 - FC, FC Presort, Non-Profit, Drop Ship/Commingle or Standard
- ▶ Are there scanlines?
 - What are their requirements?



Key Due Dates



Art



Data



Postage



Suppression File



In-Home Date(s)



Mail Date(s)

Account Schedule

March 2024 Acquisition Campaign
#12546

Date		TLC Deliverables		Client Deliverables
week of: 11-Dec	x	Strategy to client		
week of: 18-Dec			x	Strategy feedback/approval due to TLC
week of: 25-Dec		TLC closed		
week of: 1-Jan		TLC closed 1/1		
	x	Pricing to client		Images due to TLC
	x	1st round art/copy due to client		
week of: 8-Jan	x	Postage invoice to client	x	1st round art/copy feedback due to TLC Price estimate approval due to TLC
week of: 15-Jan		TLC closed Monday, 1/15		
	x	2nd round art/copy due to client		
	x	List recommendation to client		
	x	Data request to client		
week of: 22-Jan			x	2nd round art/copy feedback due to TLC List recommendation approval due to TLC
	x	Mail plan to client for package IDs	x	
week of: 29-Jan	x	3rd round art/copy feedback due to client		Data & Package IDs due to TLC
	x	List cutoff		
week of: 5-Feb		Art releases to print		Final art approval due to TLC
week of: 12-Feb		Print proofs due		
week of: 19-Feb		TLC closed Monday, 2/19		
		Mail file & instructions to vendor		Print proofs approval due BRES due to vendor (2/20)
week of: 26-Feb		Setups expected		Postage due to TLC Suppression file due to TLC (2/29)
week of: 4-Mar				Setups approval due to TLC
week of: 11-Mar		Mail Date: March 11, 2024		
week of: 18-Mar				
week of: 25-Mar		Mail Date: March 25, 2024		

Production Schedule

tlc thelukenscompany			
AIC FY24		March 24 AcqLap	
Account Manager:	Elizabeth		
Production Manager:	Traci		
	TLC Job #	12546	
	NP Mailing Type	NP Local Entry - drop ship	
	Mail Date - Planned	3/11/2024 & 3/25/2024	
	Mail Date - Actual	3/11/2024 & 3/25/24	
	Mailshop	Calmark	
	Current Status	Mailed. Waiting on invoice and final mail file	
Overview:	Due	Actual	Notes
Art Release	2/9	2/16	OE 2/6, Ltrins-2/15
Data Release/DCI	2/19	2/12	
Suppression File	2/29	2/29	
Mail Date - Drop 1	3/11	3/11	
Mail Date - Drop 2	3/25	3/25	
Billing Submitted			
Planning:			
Kickoff	12/11	12/11	
Bid out with vendors	12/13	12/13	
Estimate with AM/Client	1/4	1/5	
Estimate Approved		1/24	
Schedule established		x	
PO released to vendor		2/20	
Printing:			
Art/Copy Released	2/9	2/16	OE 2/6, Ltrins-2/15
Print Proofs Received		Reply - 2/21	OE-2/19, Inserts-2/20
Print Proofs Approved		2/22	
Data/DP/Personalization:			
Copy Released (if not with Art)			
PM Prepare Production Matrix/DP Instx		N/A	
Data release/DCI	2/19	2/12	
Suppression File	2/29	2/29	
Input Counts		2/23	
Output Counts		3/4	
Setups Received		2/27	
Setup Review/Revision Rounds		x	
Setups Approved		3/4	Recv'd late 3/1
Insertion Signoffs Approved	3/6	3/7	

tlc thelukenscompany			
AIC FY24		March 24 AcqLap	
Account Manager:	Elizabeth		
Production Manager:	Traci		
	TLC Job #	12546	
	NP Mailing Type	NP Local Entry - drop ship	
	Mail Date - Planned	3/11/2024 & 3/25/2024	
	Mail Date - Actual	3/11/2024 & 3/25/24	
	Mailshop	Calmark	
	Current Status	Mailed.	
Overview:	Due	Actual	Notes
Postage:			
Postage request sent to Accounting/Client Inv #	1/8	1/10	
USPS Promotion (ID/TSI) submission	N/A	N/A	
USPS Promotion (ID/TSI) approval	N/A	N/A	
Informed Delivery Art Released	3/5	3/7	
Informed Delivery Setup	3/5	3/7	
Mailing:			
QC pulls	x	x	
Drop 1	3/11	3/11	
Drop 2	3/25	3/25	
Closeout/Reports			
Postal Receipts		3/12 & 3/26	
Counts by Code		3/28	
Final Mail File		3/28	
Snailworks Tracking			
Billing Submitted			
Seeds			
Samples			



Budgeting

- ▶ Production needs
- ▶ Strategy and mail plan
 - Control
 - Testing
- ▶ Postage and postal promotions

Strategy & Mail Plan

- ▶ Overall mail quantities
 - Control package(s)
 - Test packages(s)
- ▶ Panel information
 - Audience
 - Personalization
- ▶ Components/Package
 - Envelopes: OE, CRE or BRE
 - Forms: letter, letter/reply, reply, survey
 - Insert: buckslip, brochure, notecard
- ▶ Postage treatment
 - Rate: NP, FC, FC Presort, standard
 - Type: stamp, indicia, meter, faux cancelation, multi-stamp

Production Details: Component

- Qty
- Envelopes:
 - Window vs. Closed faced
 - Window size & position
- Size: flat and finished
- Stock: weight, type & color
- Ink: PMS, CMYK, varnish
- Prints: 1sheet/2pg, 2sheet/4pg
- Bindery: trim to size, perfs, folds, slit/nest/fold, nesting

Production Details: Component

- Overs or no overs
- AAs
- Qty of hard copy proofs
- Handling and shipping costs
- Extra quantity or client samples

Production Details: Data Processing

- Sort the file
 - NDC/SCF (presort/drop ship)
 - Zip (commingle)
- Personalization
 - Inkjet OE – single or double head
 - Laser:
 - Simplex or duplex
 - Number of versions
- Seeds or suppression files needed
- Mail tracking

Production Details: Mail Shop

- Number of inserts
- Match mailing
- Postage affixing
- Does the client require a hand signed lot

Account Mail Plan

Panel		Panel 1: Lapsed Control	Panel 2: Lapsed Test	Panel 3: MidLevel				
Description		Main Drop	Main Drop	Main Drop				
Carrier		#10 SLW	#10 SLW	#10 SLW				
Letter		8.5 x 11 Letter Control, 8.5 x 3.5 Reply, matte stock	8.5 x 11 Letter Control, 8.5 x 3.5 Reply, matte stock	8.5 x 11 Letter Control, 8.5 x 3.5 Reply, matte stock				
BRE		#9 BRE	#9 BRE	#9 BRE				
Insert		Buckslip CONTROL	Buckslip COUPON TEST	Buckslip CONTROL				
MAIL DATE		10/30/2023	10/30/2023	10/30/2023				
Offer		\$10 off	\$10 off	no offer				
MailCode	Pkg ID (for scanline)	Quantity	MailCode	Pkg ID (for scanline)	Quantity	MailCode	Pkg ID (for scanline)	Quantity
2410MMBDMQ			2410MMBDMQ			2410MPMDMQ		
Output Qty	Nth		Length					
		64,061			39,938			39,914
194,500								
Total (ACQ) =	114,647							
Total (LAP) =	79,852							
subtotal	194,499							
Total (LH) =	535							
TOTAL	195,034							
Total Control =	97,811							
Total Test =	97,223							
Total Main Drop =	195,034							

Production RFP



RFP

	Qty	Mail Date 6/17/2024	
Package 3 Acquisition	25,000	Art Due	
		Data Due	
Total			

NOTE:

Include necessary overs for all print components.

Please populate all cells in yellow.

Print Component	Specs	Qty	Cost/M	Total Cost
OSE	#11 CF (4.5" x 10.375"); 70# Matte; 4/0 bleeds	25,000		\$0.00
BRE	#9 CF (3.875" x 8.875"); 28# White Wave; 1/0	25,000		\$0.00
Letter/Reply	8.5" x 14"; 60# White Offset; 4/1; 5lit. Nest, Fold in Thirds; Final Reply Size is 8.5" x 3.5"	25,000		\$0.00
Insert#1	8.5" x 3.5"; 60# White Offset; 4/0; K bleeds	25,000		\$0.00
Insert#2	8" x 9.875"; Flat 4" x 9.875" folded; 70# Gloss; 4/4 Bleed	25,000		\$0.00
Total Print Costs				\$0.00
DP & Mailshop	Specs	Qty	Cost/M	Total Cost
DP/Personalization	Convert data file, provide input/output counts, laser & Inkjet set up for components, presort.	25,000		\$0.00
Mailshop	Simplex laser letter/reply, Inkjet OE, slit/nest/fold letter/reply insert 4 into envelope 3-pt match (letter/reply, BRE and OE), seal, apply stamp, mail	25,000		\$0.00
Samples	Send 25 John Q Samples to EWTN	25,000		\$0.00
Postage	NP Rate	25,000		\$0.00
DP & Mailshop Costs				\$0.00

	Qty	Mail Date 6/17/2024	
	180,000	Art Due	
		Data Due	
Total			

Qty	Cost/M	Total Cost
180,000		\$0.00
180,000		\$0.00
180,000		\$0.00
180,000		\$0.00
180,000		\$0.00
Total Print Costs		\$0.00
Qty	Cost/M	Total Cost
180,000		\$0.00
180,000		\$0.00
180,000		\$0.00
180,000		\$0.00
DP & Mailshop Costs		\$0.00

	Qty	Mail Date 6/17/2024	
	250,000	Art Due	
		Data Due	
Total			

Qty	Cost/M	Total Cost
250,000		\$0.00
250,000		\$0.00
250,000		\$0.00
250,000		\$0.00
250,000		\$0.00
Total Print Costs		\$0.00
Qty	Cost/M	Total Cost
250,000		\$0.00
250,000		\$0.00
250,000		\$0.00
250,000		\$0.00
DP & Mailshop Costs		\$0.00

	Qty	Mail Date 6/17/2024	
	400,000	Art Due	
		Data Due	
Total			

Qty	Cost/M	Total Cost
400,000		\$0.00
400,000		\$0.00
400,000		\$0.00
400,000		\$0.00
400,000		\$0.00
Total Print Costs		\$0.00
Qty	Cost/M	Total Cost
400,000		\$0.00
400,000		\$0.00
400,000		\$0.00
400,000		\$0.00
DP & Mailshop Costs		\$0.00

Now What... We Have a Change

How to address changes to the budget

- ▶ Communicate the change clearly – when it happens
 - No surprises
 - To all parties affected
- ▶ What are the implications
 - Time
 - Money
 - Both
- ▶ Prepare costs and provide updates
 - Email, call or both to all parties
 - Follow procedure – change order form?
 - Updated budget and schedule



Time to Release to the Supplier



- ▶ Review all components
 - Match to mail plan & budget
 - Specs & slugs correct
 - Confirm fit
 - All pieces are machinable
 - Reply fits in the CRE/BRE
- ▶ PDFs
- ▶ Laser & personalization copy included
- ▶ Preflight the data file
 - Confirm all personalization fields are populated
- ▶ Provide mail instructions/matrix
- ▶ Purchase order



Thank You



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