

# THE INS AND OUTS OF MAILSHOP

Presented by Christiana Trenum  
Director of Business Development  
Planet Direct

planet  direct  
mail





## PUTTING THE PIECES TOGETHER

- In this session, we'll walk through the key steps of the mailshop process once your mailing is ready for production. Up to this point, you've carefully planned the format and messaging. Now, it's time to bring everything together and carry out the mailshop production phase.

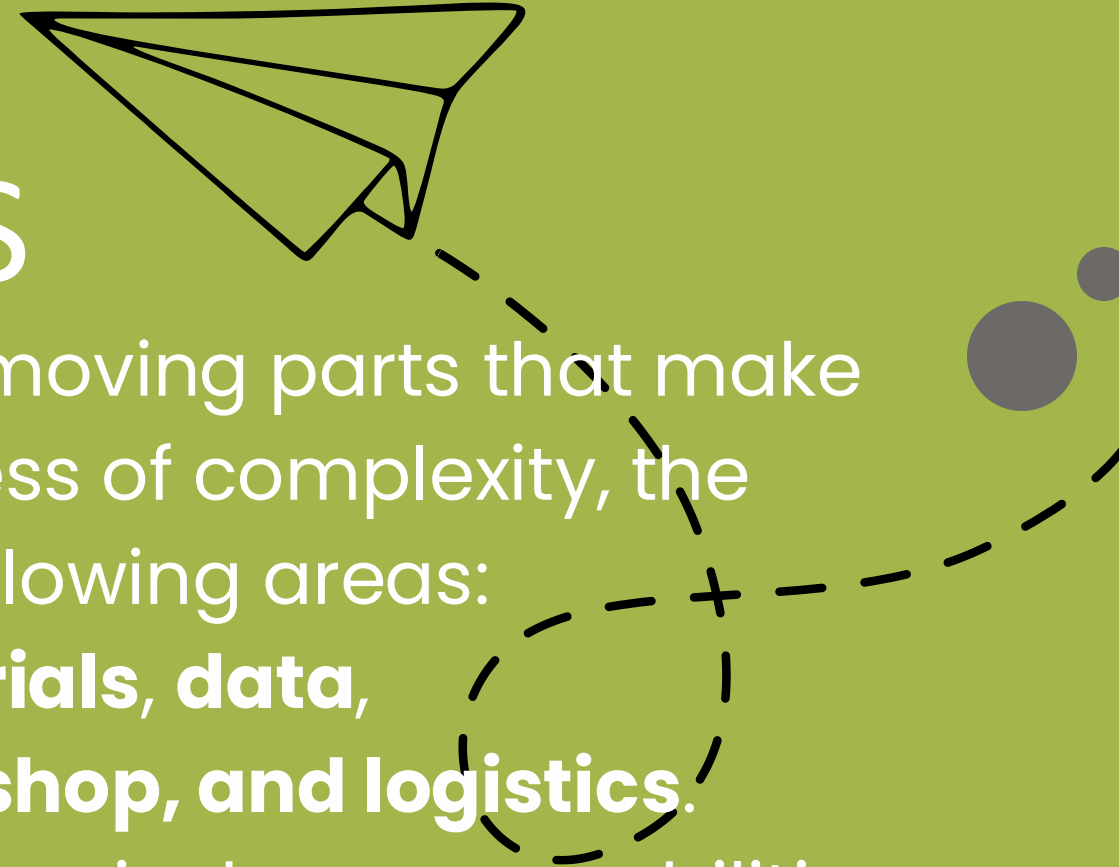


# THE PROCESS

There are quite a few moving parts that make up a mailing. Regardless of complexity, the process fits into the following areas:

**estimating, art, materials, data, personalization, mailshop, and logistics.**

Mailshops vary based on in-house capabilities and preferred formats. Communication with your partner is crucial in setting expectations and ensuring accuracy.



**What is  
mailing?**

**When is it  
mailing?**

**How do we  
make it  
happen?**





# ESTIMATING...IT'S ALL IN THE DETAILS

The estimating phase can be as simple as forwarding your one-off project specs for a specific mailing or as complex as sending a full matrix with the comprehensive details of a full mail program.

Taking the time to call out crucial project details in the printing, production, and even schedule expectations will set your team and your partnering mailshop up for success.

# KEY DETAILS TO CONSIDER

- Does this need to print using traditional offset printing or is it a candidate for digital printing?
- If branding colors include a gold or silver metallic, is true metallic ink required?
- If a window envelope is needed, is it a custom size?
- How much time do you require to review and approved proofs and live data setups?
- If the project is mailing with a stamp, do you have a preference of which stamp is used?
- Does this project require blind matching - no sequence number/match code?
- What is the mailing method - local entry, commingle, drop ship?





# MATERIALS

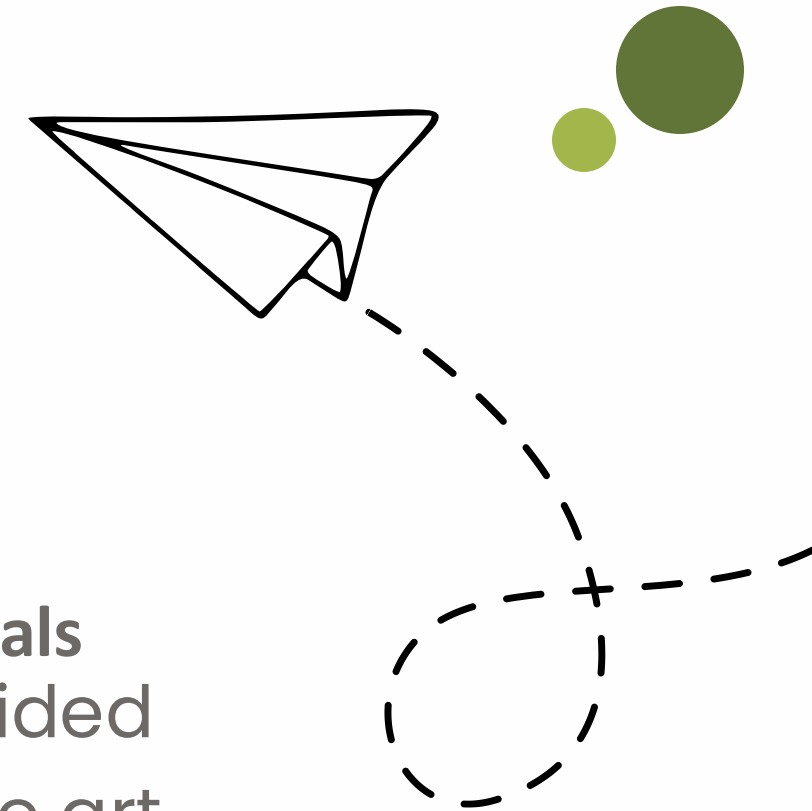
It is important to note if you are planning to source project materials or need full-service pricing.

## Client Provided Materials

- If providing forms, make sure you ask your mailshop partner how they need the specific material provided.
- Continuous versus cut sheet forms
- Discuss the schedule with your partner and be sure to communicate changes if the provided materials are off track.

## Mailshop Provided Materials

- Work with the provided schedule to provide art needed for printing.
- If a specific print method is preferred – digital (if applicable) or offset, communicate those needs.
- Items such as labels, membership cards, and other premiums can have longer lead times to produce, make sure the schedule expectations are clear.



# SCHEDULING



- Creating the schedule with your mailshop partner is an important step to include at the estimating phase and confirm again once the project is awarded to your mailshop. This ensures that everyone is on the same page and able to quickly pivot as a team if something is off track or having other issues.
- Understanding the timeline and production expectations for premiums, specialty stock items, and other non-traditionally printed components are important to review closely and communicate with your mailshop team.



# ART

- What art does your partner need? File formats, etc.
- Art files for print versus FPO PDF files.
- Are these files printing digitally or offset?
- When are proofs expected?
- When are approvals due?

**Reminder: This phase will vary somewhat based on the mailshop capabilities and workflow.**

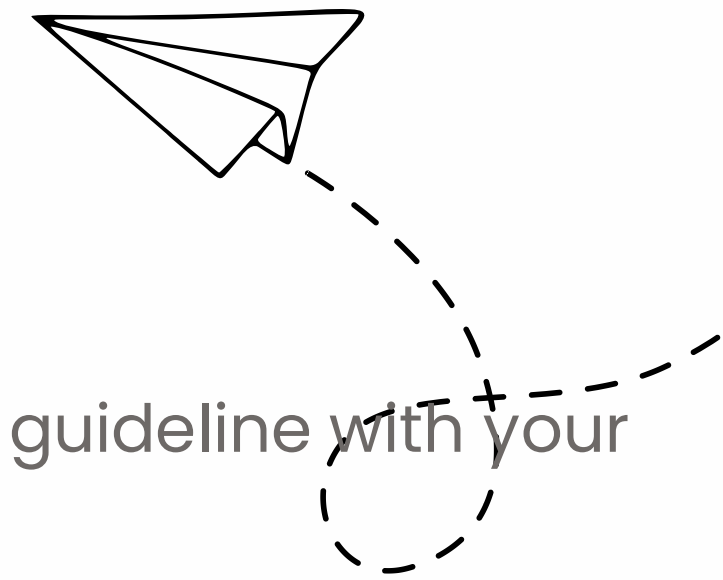




# DATA PROCESSING



- Discuss file transfer protocol and guideline with your partner.
- Data, Final FPO, & Instructions are received.
- Counts are provided for approval.
- Instructions are followed to run proper data processes – Merge/purge, presorting, CASS, NCOA, various appends, tracking, etc.
- Data dumps are created.
- Postage request is created and forwarded.
- Setups are created and sent using the final FPO posted and provided personalization instructions. This process is the same for full digital printing and traditional imaging on offset printed materials.
- If a scanline verification is required, it is done at this stage.
- Once approved, production will begin on all personalized components.



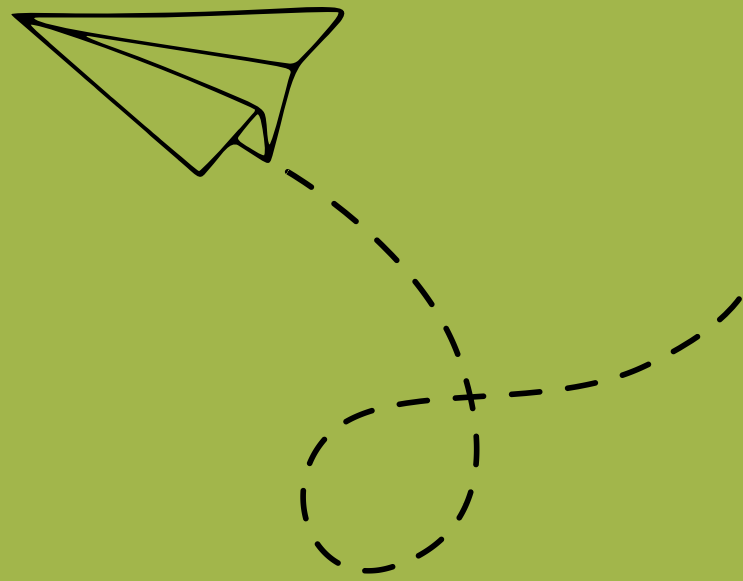




## PERSONALIZATION

- Once approved, signoffs are created on live stock for final quality control checks including but not limited to address block placement and postal compliance, overall quality, and content.
- Traditional offset QC involves reviewing the positioning closely to ensure that it aligns properly with preprint.
- Digital printing QC involves verifying the full component matches the approved proof/setup PDF.





## BINDERY & FINISHING

Once an item is off the press, or has completed imaging, it's final stop before insertion is bindery. Here the component is trimmed, folded, and assembled to its final dimension.

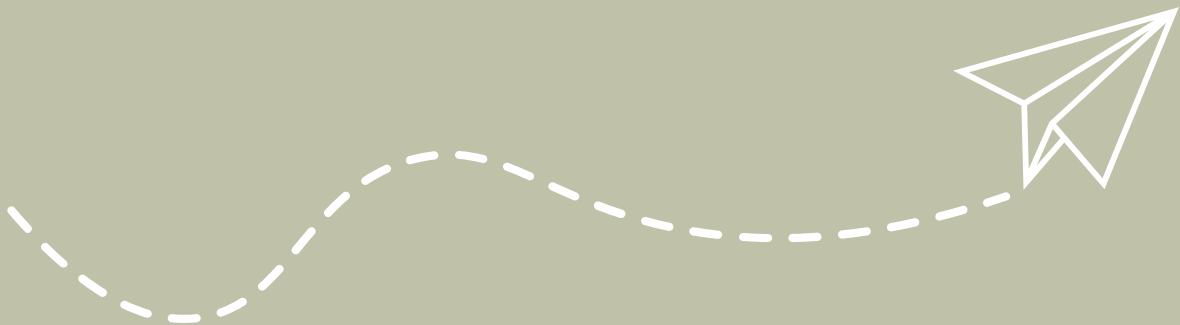


## AFFIXING

Stamps (single & multi), labels, post-its, and cards, all can be affixed by machine or by hand depending on the capabilities and equipment of the mailshop. Understanding how they will be affixing is important to know for pricing and scheduling purposes.



# POSTAGE METHODS



## Machineable Stamps



## Metered



## Permit Imprint / Indicia

NONPROFIT ORG  
US POSTAGE  
PAID  
DULLES, VA  
PERMIT NO. 242



## Precancelled Machinable Presorted Stamps

Special edition  
stamps must be  
hand affixed.





# INSERTION

## Final Steps

We've printed, presorted, personalized, and prepared each component. Now it's time to proceed to insertion. Depending on the project scope this can be either by machine or by hand. An insertion proof is created following the insertion order provided and sent for final client approval. Insertion can begin once approval is received.

## Prepare for Mailing

The mail is prepared in sort order and staged for delivery to the post office or other designated destinations. This can be either local entry drop at the post office, commingle pickup, dropship, or other freight method if package is international or requires different handling.

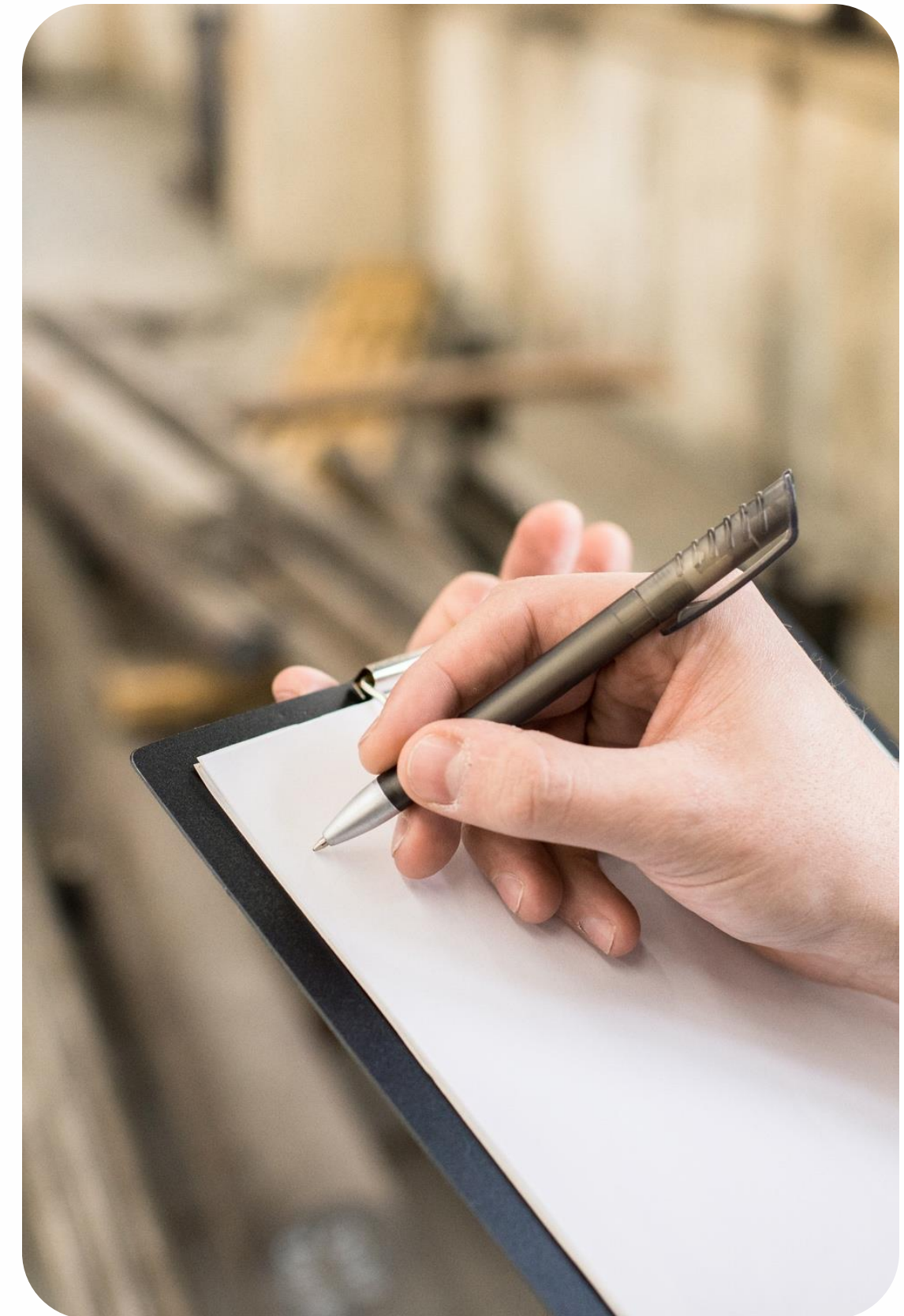




# QUALITY CONTROL

These methods are often specific to the mailshop and can be updated to include other measures if needed. It is important to discuss expectations of the QC tracking and reporting to ensure alignment.

While methods can vary from shop to shop and even department to department, some processes rely on a manual procedure to review and document. Other processes can have a digital output and tracking such as a camera system to capture certain criteria as it moves through production.



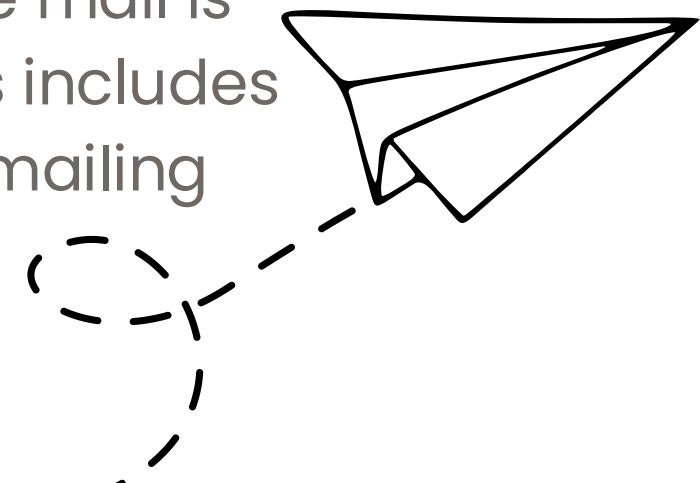




# LOGISTICS

**Logistics planning begins as early as the data processing phase of the project to ensure that the sortation follows the requirements for the chosen postal method.**

- Once the mailing is produced, logistics is coordinated either internally or with designated 3rd party mailing logistics companies.
- It is important to provide instructions in the estimating and production phases to ensure that any additional steps outside of mailing locally at the Business Mail Entry Unit (BMEU) are noted.
- Your mailshop can communicate with your logistic vendor to arrange pickups based on when the mail is complete on the designated pickup date. This includes but is not limited to commingle vendors and mailing logistics companies as well.







# THANK YOU!

**Contact Information:**  
**Christiana Trenum**  
**Director, Business Development**  
**Planet Direct**  
**[christiana@planetdirectmail.com](mailto:christiana@planetdirectmail.com)**  
**703-368-8474 ext. 105**

