

# The Pre-Production Process

WHAT YOU NEED TO KNOW FOR SUCCESS

PRESENTED BY:

**Matt Ibach ♦ Production Manager**



# About the Presenter



- ▶ 15 years in the industry
- ▶ Account management & production management for nonprofits
- ▶ USPS/Postal-focused
- ▶ Heavy metal guitarist



# 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 or combination of these
- ▶ Are there scanlines?
  - What are their requirements?





# Key Due Dates



Art



Data



Postage



Suppression File



In-Home Date(s)



Mail Date(s)

# Account Schedule

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
			x	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
	x	Mail plan to client for package IDs	x	List recommendation approval due to TLC
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

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	

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

- Quantity
- 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

[illegible]

# 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; Slit, 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# Glass; 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	

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	

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	

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

# We Have a Change... Now What?

## 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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