

## **Direct Mail Briefing Document**

### **A The Objectives**

#### *1 Sales Objectives*

The precise targets (quantity percentage, quality percentage, cost per ...)

#### *2 Business Objectives*

Relevance of the sales objectives to the business as a whole.

#### *3 Timing Required*

### **B The Product or Service**

#### *1 What is it?*

What does it do, how does it work, how much does it cost, etc? Is it complete, or has it on-going or after-sales elements?

#### *2 Is it any good?*

What's wrong with it (weaknesses)?

What's right with it (strengths)?

#### *3 Who says so?*

And how do they know?

Can we quote them?

#### *4 Is it unique?*

Or merely different?

Specifically, how?

#### *5 Any guarantees?*

Or other added customer/service benefits?

#### *6 Is it mail-order, or how is it to be sold?*

### **C The Market**

#### *1 How big is it?*

Market shares?

Where do you 'sit' in the market?

#### *2 What does a buyer 'look' like?*

Research and sources

Geographies/demographics/psychographics/RFM (recency, frequency or monetary value data)

#### *3 Who makes decisions?*

How many involved?

Any third parties or other considerations?

4 *Previous and latest experiences*

Samples

Any customer correspondence

Case histories

5 *Selections/segmentations/lists*

Exploitable affinity or intermediary involvement

Relevant endorsements

Other activities: PR, advertising, sales promotion

6 *The competition*

Run through same list as above where possible

**D The Media**

1 *Why direct mail?*

2 *... and why not other media?*

3 *How is audience data held?*

Customer or file record layout

Processing requirements

Processing times

Processing constraints, restrictions

4 *Any other media factors*

Codes of practise

Restrictions

**E The Budget**

1 *Total*

Any specific allocations

2 *How calculated*

Mathematics of sale

Dynamics of financial success/failure

Break-even point

3 *Highest cost/risk factors*

Of mailing

Of project

**F Creative**

1 *Corporate*

Positioning/image requirements

Brand/product positioning and image requirements

2 *Product/service*

Feature/benefit analysis

Offer/proposition rationale

In-house or other products, services or resources available as enhancements (old stock/supplies, etc.; ancillary or consumable items)

3 *Review of previous creative work*

And results

4 *Systems/response handling/legal*

Procedures

Timing

5 *Specific test requirements*

Statistical data/viability

Variants identified

Outline matrix

6 *Information gathering*

Any data for future activity

Repeat sales

7 *Buyer attitude statement*

Before

After

**G Follow-up Procedures**

1 *Methods/systems*

2 *Despatch or follow-up times*

3 *Capacity/constraints*

Manpower

Resources

**H Results Analysis**

1 *Who and how?*

2 *Reporting and review disciplines*

Short term - when?

Long term - when?

**I Effects on future**

1 *In event of ...*

Success

Failure

2     *Development/growth potential*

3     *Any 'if it works ...' factors*

## **Direct mail production checklist**

### **A Mailing Production**

1. Preliminary discussion
2. Method of approach developed - strategy prepared
3. Strategy discussed, amended, approved
4. Brief prepared, circulated, discussed, amended, approved
5. Briefing meeting - creatives and as many others involved as possible; discussion to cover all aspects but *must* include budgets and lists/database capabilities and timing
6. Mailing concepts developed, formats agreed, outline production specification prepared
7. Product specification passed to suppliers for estimating with outline timing requirements
8. Estimates received
9. Creative concepts reviewed against prices and any discrepancies and specification or cost problems considered and resolved
10. First timing schedule issued
11. Creative given go ahead
12. Copy and visuals presented
13. Photocopies and full specification passed to suppliers for submission of first written estimates
14. Copy and visuals processed to full approval, materials gathered, studio briefed to proceed to finished artwork
15. Schedule reviewed and re-issued if appropriate
16. List or database specification finalised (go to B list routine)
17. Finished artwork received; photocopies to all appropriate parties
18. Amendments gathered, merged and consolidated
19. Final changes and amends re-circulated
20. Studio briefed for amends; schedule reviewed and re-issued if appropriate
21. As 17 to 20 until approval received from all parties
22. *Signed* proofs obtained as required
23. Meeting to pass finished artwork for printing; prices and timing checked and problems resolved
24. Revised photocopies, coding instructions and any other 'special treatments' or requirements re-instructed to suppliers.
25. Process work carried out and completed.
26. Machine and/or proofs prepared, circulated and signed off
27. If any amends - review and re-issue schedule if appropriate; postage payment checked
28. Final samples prepared for lettershop from machine proofs and/or photocopies
29. Print complete, finished samples checked and circulated; lettershop instructions re-checked; deliveries confirmed; quantities and coding details re-verified; made-up samples signed off
30. Lettershop commenced, mailing dates and response handling details re-checked
31. Lettershop complete; counts completed and checked; spot check on finished items; release sanctioned

32. Release confirmed; postal dockets received; response handling alerted
33. Invoices received, verified and passed
34. Cost discrepancies analysed and noted
35. Guard book entries, with job history and log entered (guard book is a record of all advertising activities and copies of all adverts published for a client)
36. Response processed; surplus material arrangements checked and confirmed
37. Response pattern logged and reports prepared
38. One month from mailing: interim figures reviewed and reports passed
39. First de-briefing: all suppliers attend - report on response to date and feedback; financials circulated
40. Two months after: final figures reviewed, responses and financials circulated
41. Final de-briefing with computer analysis and review and reports circulated and discussed
42. Nixies dealt with
43. Guard book entry finalised.

**B Lists/database (from A16)**

1. List and data specification agreed
2. All segmentation, availability, coding and costs drawn up
3. List owners circulated with copy and visuals for approval
4. List details, segmentation, codings, prices and dates finalised; addressing or disks ordered
5. If appropriate, electronic data checked and details passed to print bureau
6. Go ahead to bureau with instructions issued including coding details

**C Personalisation/addressing (from A5)**

1. Requirement feasibility checked and costs estimated
2. Bureau confirmed all details of selections, formats, codes, mail preference. Samples (copies of copy and visuals at the least) agreed
3. Bureau estimate, timing and provisos received and verified
4. List security requirements reviewed and instigated
5. Bureau received copies of all finished artwork for addressed/personalised items, production details checked thoroughly
6. Format proofs received, reviewed and approved
7. Live proofs on actual printed stocks prepared, reviewed and approved; timing checked if amendments required
8. OK to run
9. Run computer, counts and samples provided, checked and verified
10. Finished production delivered to lettershop
11. Deliveries checked for quality and against quantity counts