

Direct Mail Schedule and Checklist

2 Week Leadtime

<input type="checkbox"/>	Write Sales Copy for Your Offer	Must Be Done Prior To Scheduling Out Direct Mail Campaign	Date: _____
<input type="checkbox"/>	Sales Copy Design - Lay Out the Sales Piece in the Format You Want to Mail		Date: _____
<input type="checkbox"/>	Give List Broker the Mail Schedule & Ask For List Recommendations	16 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Request Printing Quote for Sales Piece	16 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Place List Orders with List Broker	14 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Give Mailing Schedule to Data Processing Company	13 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Artwork Due at Printer	13 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Approve Bluelines and Color Proof From Printer	11 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Send Data Processor Suppression Files and Seed List	8 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	List Due Date	8 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Issue Merge Purge Instructions	8 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Approve Merge Purge	8 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Issue Key Codes and Splits	8 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Issue Lettershop Instructions	7 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Approve Key Codes and Splits	7 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Mail File Due at Lettershop	5 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Printing Due at Lettershop	5 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Postage Request from Lettershop	3 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Approve Address Panel(s)	3 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Special Reports Due From Data Processor (Broker Report, Net Name Report, Interaction Report)	2 Days Prior To Mail Date	Date: _____
<input type="checkbox"/>	Postage Due	1 Day Prior To Mail Date	Date: _____

Mail Date:

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Write Sales Copy for Your Offer: Using proven advertising principles (like the AIDA formula), prepare enticing copy with an irresistible offer.

Sales Copy Design: Have the piece professionally laid out in your chosen format.

Give List Broker Mail Schedule & Ask for List Recommendations: Get your List Broker started on compiling lists for your mailing.

Request Printing Quote for Sales Piece: Provide several print shops with all the specifications of your mailing piece, envelope, etc. and get bids on the printing costs.

Place List Orders with List Broker: Contact your list broker and place your list orders for the mailing lists you want to mail, the number of names from each list, and the segments for each list.

Give Mailing Schedule to Data Processing Company: Inform the company that will be performing the “merge purge” and “data hygiene” on your mailing list when they will receive the mailing lists from the list broker and when they need to get the final, cleaned mail file to the lettershop.

Artwork Due at Printer: Art files delivered to the print shop for processing.

Approve Bluelines and Color Proof from Printer: Approve the mock-ups prepared by the printer before the pieces are actually printed.

Send Data Processor Suppression Files and Seed List: Send the Data Processor names you want removed from your mailing list (e.g., your House List, names of prisoners, etc.), and the names you want inserted in the list so you can track mail delivery.

List Due Date: The date the mail list is due from the List Broker.

Issue Merge Purge Instructions: Give instructions to the data processor on criteria to use for merging different lists.

Approve Merge Purge: The Data Processor confirms your instructions.

Issue Key Codes and Splits: Tell the Data Processor how to segment each list and assign key codes for tracking.

Issue Lettershop Instructions: Send instructions to the company that will be assembling your pieces and preparing them for mailing.

Approve Key Codes and Splits: Examine the confirmation/sample sent by the data processor so you know all your instructions for segmenting the list have been properly carried out.

Mail File Due at Lettershop: Final mail list delivered from the Data Processor.

Printing Due at Lettershop: Printed pieces delivered from the Print Shop.

Postage Request from Lettershop: The Lettershop requests the correct amount of postage from you so you can prepay the USPS.

Approve Address Panel(s): Approve the sample address panel sent by the Lettershop.

Special Reports Due from Data Processor (Broker Report, Net Name Report, Interaction Report): Reports that indicate how many names you owe the broker for, the final mailing quantity for each list, and how the lists interacted with one another.

Postage Due: Issue a check to U.S. Postmaster to pay the postage on the mailing.

Mail Date: The date your pieces are to be mailed!