USPS
PROJECT MANAGEMENT
DIRECT MAIL PROCESS
REMOTE WORK GUIDE

MRM

Introduction

The purpose of developing this training manual is to:

- Establish a standardized USPS Direct Mail Remote Project Management Process
- Provide the tools necessary for the Project Management team to facilitate DM print projects remotely
- Please refer to Eileen Brady's *USPS-DM Process Training Guide* (June 2018) for the complete DM training guide

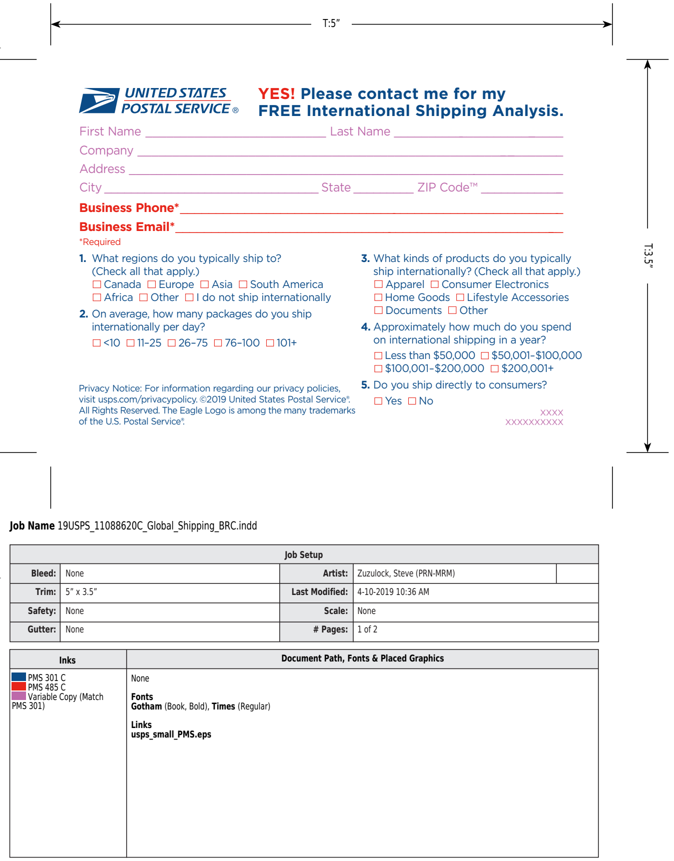
Link: https://interpublic.sharepoint.com/:p:/r/sites/MRMUSPS/Shared%20Documents/General/PM%20Operations/DM%20Print%20Process%20Document/USPS-DM%20Process%20Training%20Guide%20Final%206.26.18.pptx?d=wa74b54a5ccc44e50bf0f5d27b29bea89&csf=1&e=NDX17P

USPS Direct Mail Print Deliverables include:

- **DM** (with or without an OE/outer envelope)
- **BRC** (Business Reply Card if required)
- **Promo Reg Page** (If BRC is included)
- **Ride-Along Content** (Email notification/Informed Delivery – Desktop and Mobile versions)
- **Standard Banners** (if part of a campaign including digital deliverables)
- **Email/Thank You Page** (if part of a campaign including digital deliverables)
- **Digital Comp** (The DM or campaign including all deliverables in a deck format)

DM Deliverables

OE (Outer Envelope)	DM	BRC (Business Reply Card)
Various sizes and formats	Self mailers, gatefold, roll fold, etc.	Can be placed with DM in various locations



MRM

DM Deliverables: Ride-Along Content

Ride-Along Content is a digital channel that ties hardcopy mail to digital content and is meant to enhance the CTA and reinforce the business objectives of the mail piece. It also allows for additional digital impressions/click-through rates that can be measured and collected through data analytics.

The assets include a static representative image and a clickable Ride-Along accompanied by the CTA "Learn More." Once a destination URL has been chosen, the Campaign Management team will set up the parameters as they do for banners within 3-5 business days.

Ride-Along Content Specs: (JPGs)

- Portrait/vertical Representative Image: 350px by 500px
- Landscape/horizontal Representative Image: 780px by 500px
- Ride-Along: 300px x 200px
- Max File Size: 200kb
- Color Mode: RGB (not CMYK)

DM Deliverables: Promo Reg Page Assets

Anytime a BRC (Business Reply Card) is included with a DM, a Promo Reg Page (online registration page) must also be set up that mirrors the BRC information. The Account team sends a request form to USPS which is then created and sent to Marketing Operations for approval. The process that takes about 7 days. Once approved, Marketing Operations sets up the parameters and allows USPS and our agency to track results via a unique code that is assigned to identify a specific campaign.

Promo Reg Page Specs: (JPGs)

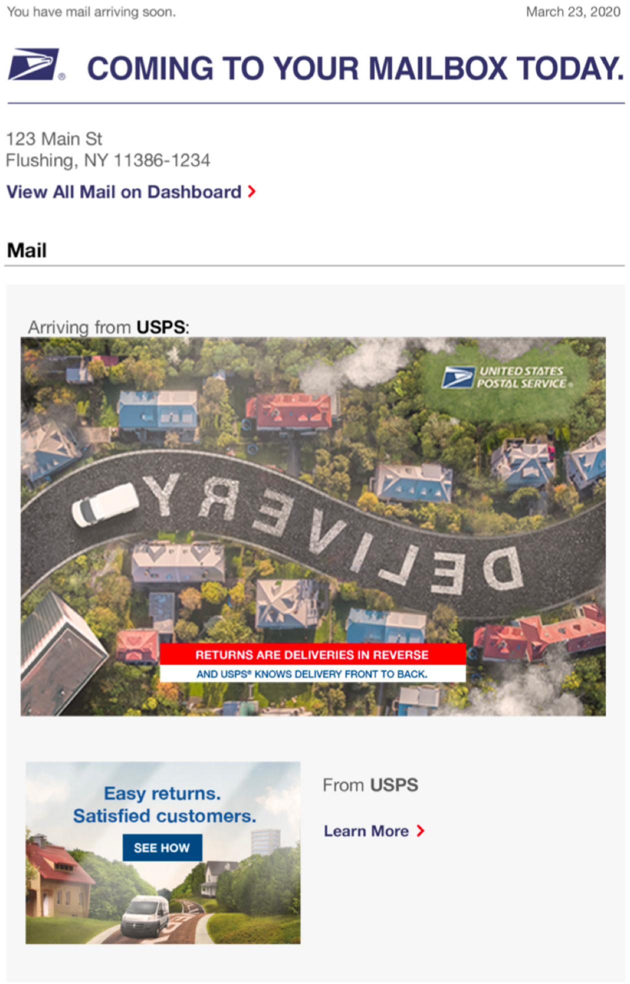
- Desktop Image: 960 x 350px (The desktop size can vary – confirm with the Account team)
- Mobile Image: 960 x 540px
- Max File Size: 200kb
- Color Mode: RGB (not CMYK)

Both the Ride-Along content and Promo Reg Page assets need to be submitted with the creative concepts for Legal reviews.

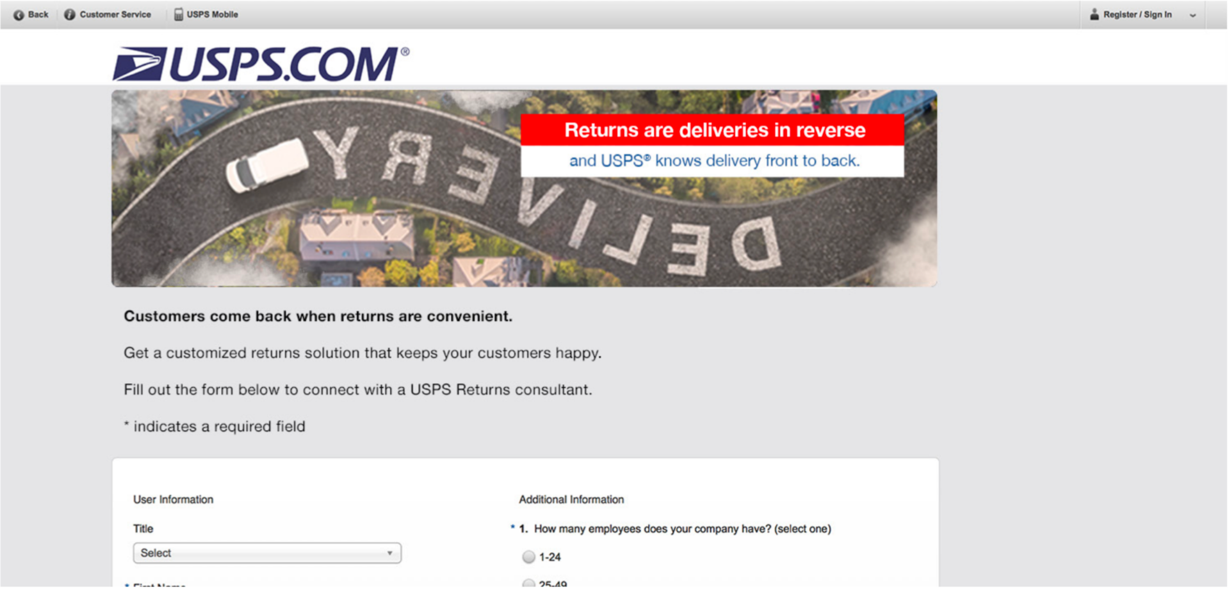
All Specs: https://teams.microsoft.com/_#/files/General?threadId=19%3Abe432ae8e2c0433cab1409e1f3af51b7%40thread.skype&ctx=channel&context=PM%2520Operations

DM Deliverables: Ride Along Content & Promo Reg Page Samples

Ride-Along Representative Image and CTA



Promo Reg Page Image



DM Deliverables: Digital Comp Sample

Digital Comp – Includes all DM deliverables in a deck format

SMALL BUSINESS DIRECT MAIL 5

Small Biz DM

Client Brief & Strategy Springboard Brief Development

During this phase the USPS Business Driver, Account Management and Strategy teams develop an overview of the USPS Marketing project requirements and basic information needed to create the Springboard Brief (Internal Brief).

- The PM will be notified by Account of incoming/new project and a preliminary timeline will be requested based on either the DM Mail Date or by the In-market Date.
- The PM will include Strategy's Springboard Brief development timing (2-3 weeks duration) in the timeline in order to determine the Internal Brief/Kick-off date.
- The PM needs to be involved with Strategy's progress and next steps.
- The Account team will follow Strategy's progress and will notify the PM if there are any Client delays or changes in timing.

DM Print Timelines

New Project Timeline Request

- The Account team will request a new timeline based on either an in-market or a mail date for the DM.
- The Print Production team will share the DM Release Date and production timing based on the requested in-market or mail date.
- Once these dates have been determined, the PM will build out the timeline and determine the earliest Internal Brief/Kick-off date.
- The Account team will then share the preliminary timeline with the Campaign Management team to determine if the dates are feasible.
- Data Posting is the most relevant date for Campaign Management. Once dates are confirmed with the Account team, the key dates will be shared with Production and the PM.
- The PM will then incorporate Campaign Management's key dates into the full project timeline.
- The PM shares the final approved timeline with the larger team.
- Final Production timing will be determined once the DM format and quantity have been determined and a vendor has been selected.

Client Brief Development

- If the Client Brief has already been received and shared with the Strategy team, request timing of when the brief is expected to be completed.
- The Brief Development Phase is generally 2-3 weeks once the Client Brief has been received. Timing will vary based on the complexity of the brief.
  (Request timing from Account/Strategy)
- The Internal Brief/Kick-off can be set the day after Client approval of the Brief.

Creative Development

- The Creative Development phase, including Client reviews, is typically around 30 days for a condensed schedule. If timing allows, give more time for creative development. If Client Feedback is extensive, more time will be needed for the team to make the requested revisions.
- If timing is too condensed and more time is needed, ask the Account team if shortening Client feedback timing is possible.
- Another option to cut time is by expediting the IPG Legal Review timing, which can be set for 3-4 days instead of 5-6 days. *(Inform Account if this needs to be done)*
- USPS Legal Review cannot be expedited. *(5-8 days and up to 10 days occasionally)*

Campaigns

- Campaigns can include additional digital deliverables such as standard banners and emails.
- If deliverables include banners, the timeline will automatically be at risk due to the banner in-market date, which is a month before the DM's are due in-market.
- Share the preliminary timeline with Account. Once approved, share internally with the rest of the team for approval.
- The Account team will share the timeline with Campaign Management (DMs and Emails – but not banners).

Job Number

Job numbers are required to be opened so that work can begin at the Agency.

In order for a job number to be opened:

- Projects needs to be in scope - ask the Account team which fiscal year the project number should be opened under.
- Campaign name/descriptions are standardized, unique and clearly identify a specific campaign.
- Naming Convention: Fiscal Year/QTR/USPS/Creative Name/Drop or Version number *(if applicable):*

i.e. *FY20 Q3 USPS "Project Name" DM*

- Confirm with the Account team under which fiscal year this project is scoped.
- Email Finance with the above information and request a job number to be opened. *(Copy Petra Boden)*

Note: *Campaign Management has their own Job Number they use for the entire fiscal year*

OOP Job Number

OOP Job numbers (Out Of Pocket) are required for:

- Art Buying Department: to purchase images
- Studio (Graphic Services): for billing of Proofs and Comps (physical deliverables)

- *The Studio (Graphic Services) will use their own internal job number for billing time. They are responsible for acquiring their internal job numbers from Finance.*
- *The Graphic Services Job Number starts with the letters "GS." Make sure you don't select these job numbers in Fiori when doing your timesheets, as they do show up in a pop-up window even if you have entered the correct Job Number. Finance is renaming the Graphic Services job numbers in the system so that they are not similar to our project job naming conventions.*

OOP Job Number Creation:

- The Account team will send Client-Approval of TPPs (Art Buying Estimate & Studio Estimates) to the MRM Contracting team.
- The Contracting team will then provide the Account and Finance teams with the OOP Job Number.
- The Account team will then share the OOP Job Number with the PM.
- The PM is responsible for sharing the OOP job number with the Graphic Services team and Art Buying team.

Note: *Campaign Management has their own Job Number they use for the entire fiscal year*

Project Set-Up in Microsoft Teams

- Create a channel on TEAMS under the correct Fiscal Year using the USPS Naming Convention & Job Number.
- Do not create hidden or private channels for projects.
- Create the project folders under the "Files" tab using the **USPS TEAMS Folder Template** as reference:
  https://interpublic.sharepoint.com/sites/MRMUSPS/Shared%20Documents/Forms/AllItems.aspx?csf=1&e=tRjxAg&cid=a6922fc2%2Dbdb8%2D4025%2D9f08%2D29f4d975f730&RootFolder=%2Fsites%2FMRMUSPS%2FShared%20Documents%2FSample%20Folder%20Set%20Up%202020&FolderCTID=0x012000F4CB6AAC794D5F40B0B9554E7FD2F32D
- Add members by clicking on the three dots next to MRM USPS NYC and enter the email of the persons you wish to add.
- Define roles by selecting either "Member" or "Owner" (PMs are designated as Owner, others as Members)
- To add files, go to your channel (project) and click on the top tab called "Open in Sharepoint" or simply upload the files to TEAMS directly.

MRM USPS Teams URL:

https://teams.microsoft.com/l/team/19%3abe432ae8e2c0433cab1409e1f3af51b7%40thread.skype/conversations?groupId=b88885c3-7b92-44a6-9eef-927d70796f6d&tenantId=d026e4c1-5892-497a-b9da-ee493c9f0364

The Internal Agency Brief

- The briefs will include information such as objectives, deliverables and date requirements in order for the Creative team to begin concepting.
- Project Management creates the Internal Brief meeting invite to includes Account Management, Strategy, Creative, Production and Kobi deGraft-Johnson. *(if digital deliverables such as Emails or Banners are included as part of a campaign)*
- Invite Anthony Jones, Daniel Carlsson, Tina Braun, Eileen Brady and Petra Boden to all Internal Briefs.
- Ask the Account team if the Campaign Management team should be included in the DM and Email Internal Briefings.

The Account team will determine if CM is required to attend in order to understand the objectives, challenges and data requirements for the campaigns.

  - **Eileen Kennedy** (list management/process)
  - **Rosa De Leon** (tracking)
  - **Danielle DeRobertis** (data processing)
  - **John Tang** (operations/logistics)

- The Meeting invite can be created via TEAMS. *(Other options include: Webex, Skype and Zoom)*
- Strategy will share the brief with the full team prior to the kick-off.
- The PM saves the brief on Sharepoint.
- The PM will create the preliminary timeline (with key dates from Production) and share it with the Account team.
- Once the timeline has been approved by Account, Production and CM, the PM will share the timeline with the rest of the team.
- The PM is responsible for taking meeting notes and sharing it with the full team following the Internal Brief.

**Include Purpose, Time, Location, Dial-In Info, Job Number, Full Schedule URL and Teams URL on the Internal Brief Invites.*

Creative Development

The Creative Development Phase starts the day after the Internal Review.

- The Production team will share vendor templates or mechanicals with the Creative team if available, and can supply a few DM samples for reference.
- The Production team will determine and approve manufacturing and mailability of the creative concepts.
- Strategy may also supply additional information if the Creative team is unclear with the messaging and/or strategy.
- The ACD will reach out and alert the PM if more time is needed for concept development. The timeline may need to be revised and pushed out. Keep the Account team informed if there are any delays during the creative development phase that impacts timing.
- Remind the Creative team that only IPG-approved stock houses can be used for finding images and that they must be Rights-Managed.
    - **Getty**
    - **Shutterstock**
    - **Offset**
    - **AdobeStock**
    - **GalleryStock**
- If digital assets are required as part of a campaign, Kobi needs to be involved for feasibility of concept as early as possible, and to ensure 508 Compliance. Include Karuna (QA Manager) on the emails as well.
- Daniel Carlsson, Anthony Jones and ACDs will be heavily involved in the creative development/review/approval of the creative concepts. Include them in all creative and internal reviews.
- The Creative team needs to alert the PM if stock images are not being used and/or an illustrator or comp artist will be required. The PM will need to alert the Account team.
- Client Presentation R3 Deck (winning concept) needs to include all deliverable representations: DM concepts, BRC, Ride-Along Content, Promo Reg Page *(if BRC is required)* & Banners. *(if part of a campaign)*
- No proofreading is required at this early stage.

Creative Review

The Creative Review happens 1-2 days prior to the Internal Review. It serves as a check for overall concepts that will be presented to the larger team during the Internal Review.

- The Creative Review needs to be created as a TEAMS meeting.
- Sometimes, the Creative Leads will request the meeting to include the Creative team only. (PM to send the deck to Strategy, Production and Tech Lead *(if digital assets are included)* once the revised deck is ready to share.
- Creative Reviews should include the full Creative team, Strategy, Production & PM. *(Account team does not attend Creative Reviews)*
- The Creative team & PM are responsible for taking notes when feedback is given.
- The Production team will confirm feasibility and mailability of the DM format and supply templates if available.
- Strategy will review and confirm if messaging strategy is accurate.
- The PM is responsible for communicating usage of IPG-approved stock houses for art and requesting if an illustrator or comp artist is required for the tactics. *(This will increase Client costs and Account must be alerted as soon as possible.)*
- Once the revisions have been made, the Creative team will share the PDF for final review/feedback/approval prior to the Internal Review with the full team including Account.
- Proofreading is still not required at this stage.

Internal Review

The Internal Review happens 1-3 days prior to the Client Presentation. It serves as a check of the concepts that will be presented to the Clients during the R1 Client Presentation.

- The PM is responsible for creating the TEAMS meeting for the Internal Review. Invitees include Account, Strategy, Creative & Production teams.
- Account will determine if the Campaign Management team needs to attend the briefing.
- Kobi deGraft-Johnson should be invited if digital deliverables include Email or Banners as part of a campaign.
- Include Daniel Carlsson, Anthony Jones, Tina Braun, Eileen Brady and Petra Boden.
- The deck will be shared prior to the meeting or after the concepts have been presented internally.
- The PM is also responsible for taking meeting notes to be distributed to the full team following the meeting.
- The Creative team is responsible for taking their own meeting notes *as per Tony & Daniel.*
- The Creative team presents the concepts via TEAMS and by sharing their screen with the participants.
- The PM is prepared to discuss timing and next steps once the internal presentation has ended.
- The Account team will share Next Steps slide information to be included in the deck for the Client Presentation.
- Production team will give an estimate of the cost per piece that will be included in the deck for each concept. *(if possible)*
- Once the Creative team makes edits based on internal feedback (same-day or next day), the deck will need to be proofread and comments will need to be incorporated.
- The final deck will then be shared via email with the full team. If changes are extensive, the Account team will request a second internal meeting to review the deck prior to the Client Presentation. *(if time permits)*
- If more time is needed beyond the Client Presentation date, the timeline will need to be pushed out. Alert the Account team as soon as possible.

Proofreading

Proofreading requests need to be entered on the Proofreading Smartsheet:

https://app.smartsheet.com/sheets/Fcw2cMgh8qQCQF9QvmH3JGgF3P5Qjqg7gCP8J951

- Provide project info: Date, Project Number, Project Name, Client, Project Manager Name, Medium, # of Pages, Stage, Project Date/Time Submitted, Ziflow Request & Due Date.
- If a previous proofreading round was involved, include it with your request. Proofreading will use it as a reference for their work and will refrain from making the same comments.
- Do not submit proofreading requests weeks in advance. Proofreaders can lose track of the job on Smartsheet. Both PRN and NY proofreaders access the same sheet. Put in requests at least 3 days in advance.
- If a job is coming in late in the day, alert the proofreaders in advance.
- When a DM is released, PDF Proofs and Color Proofs will be provided within 2 days. Enter the job request on the Proofreading Smartsheet in advance.

Client Presentations

- The Account team will request timing from the Clients for the concept presentation and send a meeting invite to them.
- The PM will be notified of the timing and set up the meeting invite that includes the entire team to ensure their calendars are booked.
- Account team is responsible for creating the meeting invite, meeting introduction, driving the presentation & taking the meeting notes that will be shared with the full team following the Client Presentation.
- Creative team is responsible for presenting the concepts. *(usually 2-3 concepts are presented)*
- During this phase, if the timeline allows, give more time to the Creative team to develop the creative development.
- If Client feedback is extensive or late, more time may be needed for the revisions and proofreading. (The timeline can also be pushed out if there are too many delays)
- There are 3 rounds of Client Presentations and concept selection happens by the second round.
- The Account team will notify the entire team of the winning concept and share the Client Feedback. *(Copy/image changes, copyright info, etc.)*
- For the R3 Client Presentation, the Creative team will adjust the deck to include only the chosen concept, Ride-Along Content, Promo Reg & Banner concept *(if needed)* and share it with the team.
- Once approved by the Client, the Creative team must supply the image and stock house info for TPP submission.
- The PM will fill out and sends the Art Buying Form to Art Buying department for an Art Estimate as soon as possible. *(See next slide for AB process)*
- The Account team will submit the deck to IPG Legal for review. *(Duration is 5-10 days, expedited timing is 3-5 days)*
- Once IPG Legal gives their feedback, the Account team will request creative/copy or strategy revisions if needed and resubmit to IPG Legal for approval.
- Once IPG approval has been received, the Account team will submit the deck to USPS Legal for review. *(Duration is 5 - 8 days and cannot be expedited – sometimes it may take longer and up to 10 days)*

Art Buying Form and Art Estimate

Once the Client has chosen a winning concept, an Art Buying Form needs to be submitted to the Art Buying Department in order to obtain an Art Estimate for Client approval.

- Creative team will provide a PDF with image numbers and stock house for all images used in the creative concept
- The 5 IPG-approved stock houses are:
  - **Getty**
  - **Shutterstock**
  - **Offset**
  - **AdobeStock**
  - **GalleryStock**
- If the Creative team does not have all the information for images, they must request help from the ACD and resubmit the list to the PM.
- The PM will fill out the Art Buying Form and provide the information requested.
- Art Buying Process Document and Forms can be found here:

https://teams.microsoft.com/_#/files/General?threadId=19%3Abe432ae8e2c0433cab1409e1f3af51b7%40thread.skype&ctx=channel&context=PM%2520Operations

- Once the the Art Buying Form has been submitted to the Art Buying department, it may take 1-2 days to receive the Art Estimate for Client approval.
- The Art Estimate will then be shared with the Account team and submitted with the other TPPs *(example: Studio Estimate)* for Client approval.
- Once the Art Estimate is approved, Account will give the PM an OOP Job Number that is used to purchase high-resolution art files from AB department. If this takes longer to obtain, it will not effect Studio work and retouching, as they most likely already have access to the high-resolution images and have started their work by the time the Client approves the TPPs.
- If an illustrator or comp artist is required through the AB Department, they are responsible for creating an Estimate and timeline to be shared with Account & PM.

Data Alignment and Requirement Call (DARC)

3 weeks after the Internal Review, Account team sets up a DARC with the Client, Campaign Management and Production team to discuss data requirements for the DM campaign. Types of data include Rental, House, Business, Consumer and other criteria such as product mix, record quantities, personalization, data appends, etc.

- The PM may be invited to attend this meeting, but it is not mandatory. It would be beneficial to attend a DARC at least once to get insight into the Campaign Management process and data requirements outlined by the Client.

Spec Meeting

A Spec meeting is required in order to obtain all the detailed specifications of the Client-chosen concept:

- Initial matrix and version knowledge
- Creative layouts
- Color breaks/Varnish Plates

- The Spec meeting can be scheduled once the Client has chosen a concept and after receiving IPG and USPS Legal Feedback. If the timeline is condensed, the Spec Meeting can happen after IPG Legal Feedback or at the same time. *(Studio production would start at risk)*
- PM sets up the TEAMS meeting and invites Creative, Production & Account Management. Sometimes Production creates the specs in advance or revises previous specs if job is a pick-up. Check with Production and ask if a Spec meeting is required. *(Sometimes, it is not needed)*
- A Pre-Pro Meeting can be set up the next day if specs are completed. For new DM concepts, sometimes 2 days are needed for Production to create the new specs. *(Pre-Pro outlined on the next slide)*
- Production creates specs in order to provide them at the Pre-Pro and to obtain formal pricing from the USPS Contracting team.
- The Specs will also be shared with the Studio team at Pre-Pro in order to obtain a Studio TPP. *(Studio Technical Price Proposal or Estimate)*
- The Studio TPP and Art Estimate will be sent to the Client for approval.

Pre-Pro Meeting

The "Pre-Pro" is a meeting for the final review of the Client-approved copy and layout in order to place the job into the Studio.

Materials needed for the Pre-Pro meeting are:

- Spec sheet *(Production creates Spec sheet prior to this meeting)*
- Creative layouts
- Color breaks
- Varnish Plates
- Art Director paths
- Version information *(Production gets this information from Account/Matrix)*
- Studio Estimate *(usually available the day after Pre-Pro)*
- Studio work is normally started only after TPP approval by Client, but in order to keep on schedule, Studio often begins their work before TPP approval.
- Art for retouching directions *(if needed)*

- The PM sets up TEAMS meeting and invites Creative, Production, Account & Studio.
- The meeting invite must include a Spec Sheet, PDF of concept deck for reference and folder destination where all working files can be picked up.
- The Creative team places all working files in designated Sharepoint folder & shares the URL/destination with the full team, including the Studio.
- The Creative team MUST discuss all retouching needs during Pre-Pro. Additional retouching requests after this meeting will require additional funds and an additional estimate to be shared with and approved by the Client. *(We hope to avoid this at all costs)*
- Once the Studio TPP has been shared and approved by Eileen Brady, share it with the Account and Production teams.

Graphic Services

Enter all Graphic Services request on the GS Smartsheet including mechanical builds, retouching, color proofs, comps & DM release date.

Graphic Services Smartsheet:
https://app.smartsheet.com/sheets/P2mmhqgVMw9CMCVPCM6mJhx9P7HwCFc8vmWV5PH1

- All requests must be added to the Graphic Services Smartsheet as early as possible and as soon as the timeline and deliverables have been confirmed. Even if timing is unsure, or other specific details are not available, the job can still be added to to the GS Smartsheet.
- Add each deliverable of the campaign as separate entries on the GS Smartsheet. This will help the team track timing, details and next steps for the deliverable. *(example Proofs, Comps, Retouching & Mechanical Builds)*
- Add the Job Number and all activity dates including hand-off to GS, internal routing and Client review dates.
- Add Proofs, Comps and Retouching if needed. This information will also be included in the Studio Estimate the day after Pre-Pro.
- All job requests must be accompanied by a meeting/call with the GS team if needed.
- After each mechanical build in Ziflow, request actual burn from the Graphic Services team, specifically Cheryl Jackson. *(provided within 24 hours)*

Graphic Services & Tracking Studio Estimates

As part of a new initiative to keep DMs aligned with the original Studio cost, a new process has been outlined below:

- During Pre-Pro, all needs must be outlined accurately and in advance by the Creative and Production teams. *(Proofs, Comps, Mechanical Builds and Retouching)*
- If additional comps are requested by the Client, they should be included in the Studio Estimate.
- Studio Estimates are provided within 24 hours after the Pre-Pro meeting.
- If Account requests the studio Estimate earlier, it may not reflect additional requests discussed at Pre-Pro and may not be an accurate reflection of costs.
- There are 4 rounds of mechanical builds included in the Studio Estimate. Previously, there were only 3 rounds.
- We will not be billed for any missed comments by Graphic Services or incorrect builds. *(GS, PM and Account teams to keep track of revisions made)*
- For every mechanical round, the PM needs to ask Graphic Services if we are still aligned with the original Studio Estimate and GS will provide the burn status within 24 hrs. of the request.
- When art retouching is in progress, the PM must keep track of Studio hours after each round of revision, and keep all retouching PDF proofs/feedback for the duration of the project. If the Creative team requests additional retouching that was not discussed at Pre-Pro, remind them that it will need an additional estimate for Client Approval and alert the Account team right away.
- If retouching comments are extensive, ask Studio how many hours have been spent and determine if changes can be made within that time without going over the Studio cost. Let the Creative team know how many hours are still available and alert the Account team as soon as possible.
- The Account team may request an Additional Studio Estimate if alerted early on if additional hours/more work is required.
- Keep track of all requests for mechanical changes, retouching revisions and PDF proofs. The PM may need to create a detailed report outlining all project feedbacks if the project surpasses the original studio estimate in cost & effort.

Routing Mechanical PDFs in Ziflow

Once the creative working files and Spec sheet have been handed off to the Studio after Pre-Pro, they will begin building the R1 Mechanical PDF and start the retouching.

- The Studio will name the Mechanical PDFs according to a new naming convention using "R1, R2, R3," etc. *(Ziflow creates naming convention based on the file name)*
- GS should be alerted if FPO copy (For Placement Only) should be placed on unretouched images. *(Aesthetically, it may be better not to include for Client reviews)*
- All proofreading queries must be answered by a copywriter.
- The PM sends an email notifying GS that all comments have been entered and that they can start making the requested changes.
- The PM will add the request to the GS Smartsheet, including date submitted and due date.

Add the following teams to Ziflow Internal Reviews of the mechanical builds:

- Proofreaders (enter each mechanical round/deliverable review on the Proofreading Smartsheet)
- Creative team including ACD, Art Director, Copywriter
- Production - always include Eileen Brady
- Account team
- Graphic Services (Studio) – always include Cheryl Jackson – give "Manage" access to everyone in Studio

Routing Mechanical PDFs in Ziflow

Round 1 Mechanical PDF from the Studio for routing via Ziflow must include:

- Mechanical PDF with crops and slug
- Color Breaks Document *(attach this document PDF to your comment in Ziflow)*
- Varnish Plates for Production to review. *(attach this document PDF to your comment in Ziflow or email to Production)*
- Comp *(Production will alert the PM if a comp is needed on the first or second round of mechanical builds)*
- Creative team to provide PDF with retouching directions via email.

*Check with Studio on burn rate after each round. *(Mechanical Builds, Proofs, Comps, Retouching)* Refer to original Studio Estimate for reference.

Round 2 Mechanical PDF from the Studio for routing via Ziflow:

- All revisions/comments from last round must be checked and approved on this mechanical round
- No new comments should be flagged on this round unless absolutely necessary. Check with the Account team if edits should be made

- Color Proofs of retouching revisions to be mailed to designated team members by the Studio once approved on screen
- The Creative team reviews retouching proofs and provides final feedback or approval
- If art retouching is approved prior to this round, Studio will place the final art. If not, the art must be placed at latest on the third and final round.

*Check with Studio on burn rate after each round. *(Mechanical Builds, Proofs, Comps, Retouching)* Refer to original Studio Estimate for reference.

Round 3 Mechanical PDF from the Studio for routing via Ziflow:

- The final approved art is placed in the mechanical if not already provided in Round 2
- Account shares the Mechanical PDF with the Client for final approval to release to the vendor

*Check with Studio on burn rate after the final round and share the burn with Account. *(copy Petra Boden)*

DM Files Release

- Once the mechanicals are final/approved by the Client and Internal teams, Production will send a Mechanical Release Form (MRF) to the PM.
- The PM requests release of the DM files from Studio and provides them with the MRF.
- Studio collects the files and sends to the Production and the PM via WebCargo.
- The PM will send an email to the Production and Account teams (Subject Line: FILE RELEASE: JOB NUMBER/JOB NAME) Include the Webcargo link and the Mechanical PDFs attached for reference. Production will share the assets/info with the vendor.

- Production team is responsible for releasing the files to the printer and includes for reference:
  - **PDFs**
  - **Color breaks/Varnish Plates**
  - **File Location (Webcargo link)**
  - **Layered InDesign file**

- The PM saves all released files on Sharepoint.
- Proofreading request should be entered on the Proofreading Smartsheet. *(PDF Proofs usually arrive 1-2 days after release to vendor)*
- The PM will need the PDFs of the released files to send to Proofreading as back-up files to reference.
- The PM will request a Digital Comp from the Creative team shortly after the DM has been released to the vendor.

Mechanical Release Form (MRF)

A Mechanical Release Form will be provided by Production for the Studio prior to the release of files to vendor.

MECHANICAL RELEASE FORM

DATE: 5/26/17

REQUESTOR: Jen Pelosi

CREATIVE NAME: USPS FY17 Shipping Campaign DM – Mailing Label / Insert-mailer

JOB#: 10712022

FILE RELEASE DATE: 6/14/17

VENDOR: Sandy Alexander/Structural Graphics

E-MAIL NOTIFICATION:

- Jennifer.Pelosi@mrm-mccann.com
- Tony.Golding@mrm-mccann.com
- Arnaldo.Serrano@mrm-mccann.com
- Cady.Hurtzig@mrm-mccann.com
- Romina.DAmico@mrm-mccann.com
- Eileen.Brady@mrm-mcann.com
- Tennille.Martin@craftww.com

FILE FORM REQUESTED: InDesign6
Hi-res InDesign collected files posted to Webcargo. Please send low-res PDF and color break with the release e-mail notification.
Please provide (1) printout at 100% to production of the released files and color break(s).
Provide (1) set of color proofs at 100% to production.

THANK YOU.

The Routing Process After File Release to Vendor

- The Proofs will be mailed by the vendor to the Client, Creative & Production teams.
- The PM must request addresses where proofs must be mailed to and share the information with Production.
- Production will share a digital Routing Cover Sheet with the request that includes the deadline date.
- Production will also share a PDF Proof from the vendor for review.
- Proofreading will review a PDF Proof against the released files. *(PDFs of released files to use as reference)*

The Account team is responsible for routing and getting Client approvals for the following:

- Pre-printed Proofs
- Lives
- Mail OK's

**Please note, if the Lives only have the mailing address, Proofreading is removed from this cycle*

- If changes need to be made, the above steps are repeated until approved. USPS needs to approve any changes requested once art has been released to the vendor. No changes can be made until USPS approves the request.

Sample: Routing Cover Sheet

Production will provide a Cover Sheet with the PDF proofs for routing internally.

Routing Cover Sheet	
Date:	4/6/2017
Production Contact:	Tony Golding
Account Contact:	Christopher Saccone/ Danielle Harris
Project Manager:	Arnaldo
Job Number:	10597612
Creative/Package Name:	USPS-Informed Delivery Selfmailer
Stage (1st round, 2nd, etc.):	1st. Round Proofs
Component:	Selfmailers
Pre-Printed Code:	IDN417, IDN417-2
Laser Code:	
Marketing ID:	
Vendor:	RRD -Lancaster, OH (Cyril-Scott)
Scheduled Mail Drop Date:	4/19 & 5/10
Material Due Date:	
Need Approval By (day & hour):	**Mon. 4/10/17 by Noon**
Account: Please confirm below which changes marked on the proofs should actually be made	

MRM

Quick Links

Proofreading Smartsheet:

https://app.smartsheet.com/sheets/Fcw2cMgh8qQCQF9QvmH3JGgF3P5Qjqg7gCP8J951

Graphic Services Smartsheet:

https://app.smartsheet.com/sheets/P2mmhqgVMw9CMCVPCM6mJhx9P7HwCFc8vmWV5PH1

MRM NY USPS Ziflow:

https://mrm.ziflow.io

Ziflow Support:

support@mwgsolutions.com

PM Operations Folder on Teams (includes all forms & specs):

https://teams.microsoft.com/_#/files/General?threadId=19%3Abe432ae8e2c0433cab1409e1f3af51b7%40thread.skype&ctx=channel&context=PM%2520Operations

MRM Receptionist:

MRM.Receptionist@mrm.com

Webcargo URL (to send large files):

Webcargo.Interpublic.com

THANK YOU