

Intelligent Mail® Symposium

Preparing for Intelligent Mail

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➤ 1 – Acquire Knowledge

- 2 – Understand your Mailing Practices
- 3 – Engage Stakeholders
- 4 – Analyze Options, Determine ROI
- 5 – Analyze, Plan, Execute

- Postal Service™, Mail Service Providers and Vendors
 - Find out what they have to offer
 - Determine potential business fits
 - Obtain details, details, details...
 - Incorporate discovery into YOUR Intelligent Mail® project plan
- Needs and Resources
 - Determine current practices
 - Document future expectations & constraints
- Training

- Determines the names and addresses used
- Designs the mailpiece
- Prints and constructs the mailpiece
- Prepares the mailing
- Presents the mail to the Postal Service™
- Receives data distributions from the Postal Service
- Uses in-house and/or third party software

- What do you mail?
 - o Invoices, notices, marketing mail, catalogs, packages, etc.
 - ✓ Requirements for letter, flat, automated, non-automated, and all mail classes
- How is your mail produced?
 - o What processes are done:
 - ✓ In-house,
 - ✓ partially in-house,
 - ✓ using a mail service provider for some or all processes
 - o Printing, finishing, mail preparation and sorting, etc.

- How do you acquire, use and update the addresses you use on the mailings?
- Where is the address source?
 - **Who owns it?**
 - **Who updates it?**
 - ✓ Address cleansing
 - ✓ Move Update
 - ✓ Regular business changes
 - **How it is managed?**

- Work with your various mail service providers and vendors to ensure they are knowledgeable about your business needs and impacts.
- Ensure mail service providers and vendors are also aligned with the changing USPS™ requirements and impacts.
- Establish a communication plan with mail service providers and vendors.
 - o to keep you informed of changes/impacts
 - o to keep them informed of changes to your business

Intelligent Mail® Basic or Full-Service option

- Basic replaces PLANET Code® and POSTNET™
 - No additional information is required but some additional data may be included
- Full-Service allows for:
 - Requires IM barcodes on all pieces, trays, sacks, containers, and electronic documentation
 - Full-Service ACS™
 - ✓ Limited timeframe for Standard Mail® and Periodicals
 - Free start-the-clock
 - ✓ Free induction container visibility scans (where available)

- The costs and benefits of staying with POSTNET™ barcodes, at least for a while
- The costs and benefits of the Intelligent Mail® Basic option
- The costs and benefits of the Intelligent Mail Full-Service option
- The costs and benefits of any postal services that you use or may want to use
- USPS® rules and standards governing what can be mailed at what rates and the consequences of errors

- The type(s) of mail you want to send using Basic or Full-Service Intelligent Mail barcodes
 - Each mailing project may be different
- How will the Full-Service uniqueness of data – 45 or more days – be managed?
- How to begin a transition plan with your mail service provider?

- Incorporate expectations and constraints
- Establish the target date and priorities
- Determine internal and external resource needs and allocate
- Determine procedural, operations and technical changes and opportunities
- Establish test criteria and procedures
- Determine implementation sequence through applications and customers
- Define timeline
- Incorporate testing and validation

- How much will you be able to handle?
 - o Mailer ID assignments
 - o Database management uniqueness of data
 - o Information Technology (IT) resources
 - o Print capabilities
 - ✓ Mailpieces, tray labels, container placards
 - o eDoc creation and transmission
 - o Testing

- Which services will your mail service provider be offering?
 - Basic or Full-Service IM™ barcode
 - Start-the-Clock, ACS®, Confirm®
- When will they be ready?
- How does this impact your business plan?

For each mailing project, determine who is going to...

- Construct the IMb™ data
 - Manage uniqueness
- Print IMb on mailpieces
- Print IMb tray and container labels
- Create and present Electronic documentation (eDoc)
- Receive the data for
 - Start-the-Clock
 - ACS data
- Manage Mailer ID's

Mailers will need timelines for themselves and their various mail service providers

- Mail owner timelines
 - For those functions that are done in-house
- Mail service provider
 - What your mail preparer has
 - Use this to discuss their preparedness
 - Is everything covered?

- Planning to use a mail service provider? If so, talk to them while you are still planning.
 - Do they have their own Mailer ID? If so, would it be better for you to use theirs or apply for your own for the mailpieces/handling units/containers?
 - Do you plan to participate in Full-Service ACS™, OneCode ACS® or OneCode Confirm®?
 - What services will the mail service provider offer?
 - ✓ Basic and/or Full-Service
 - ✓ Start-The-Clock feedback
 - ✓ Full-Service ACS, OneCode ACS® and/or OneCode Confirm®

- Mail service providers can assist their customers with the MID and CRID application process by:
 - o Asking customers if they plan to use ACS® or OneCode Confirm®
 - o Discussing the management of Data Uniqueness
 - o Affects the use of MIDs and Serial Numbers
 - o Assisting with completion of the application

Questions?