



30-Point Production Checklist

PRE-PRODUCTION

1. Partnership kickoff – Live meeting or conference call to be held between the Client and Production Solutions (PS) to discuss the following:
 - Client source documents (i.e., campaign strategy/notes/mail schedule/print grid)
 - Yearly Strategy
 - Estimated bidding quantities (for non-contract pricing)
 - Specialty Items Needed
2. Client's team's source document reviewed by PS – It is PS' responsibility to:
 - Highlight any potential production concerns – compare art to specifications
 - Use production notes to create mockup of package(s) - if necessary
 - Reference past jobs for consistency
3. Budget and schedule to Client's team – PS to use production notes and estimated quantities to confirm budget (includes potential cost savings and detailed production schedule). If working off annual plan, budget revisions made for new art, specs, quantities, etc. if needed. PS also references contract pricing.
4. Budget review and approval by Client's team – Client's team feedback used to edit as needed until budget is approved. PS does not send a budget as contract pricing is used. An ATP is sent to Client's for approval within 48 hours of art receipt.
5. Client's team to send draft art to PS, if available.
6. PS draft art review – PS is responsible for confirming the following:
 - Scanline positioning, if needed
 - Art matches production notes received for budgeting
 - Art meets all Client's brand guidelines and art SOP requirements

7. Client's team to provide mail plan and lettershop instructions – Includes segmentations, postal treatment, insertion order, dollar build, and data instructions. PS is responsible for confirming the following:

- Counts match print quantities
- Insertion orders match package naming conventions
- Address, salutation build, and dollar build instructions are present and understood

8. PS to send Authorization to Proceed (ATP) to Client's team for review and approval

LIVE PRODUCTION (Non-Renewal)

9. Client's ATP approval. Due: ATP is sent with counts and Final Budget, approval needed in 48 hours

10. Client's team to post final art to PS FTP site. Due: X weeks* (depending on package type) prior to mail date. *Typically 4-5 weeks prior to mail date for traditional package types.

11. Final art review by PS – PS responsible for confirming the following:

- Art matches specifications (based on draft art and production notes)
- Art meets all Client's requirements

12. PS to send proofs to Client's team for review.

13. Proof review and approval by Client's team

- Due: Within 1-2 days of receipt of proof
- Proofs will come from your PS Account Manager with a proof slip to confirm specifications
- Email approval to be provided

14. Client's team to send data files to PS (file layout and NCOA/CASS reports)

15. PS to send counts and dumps to the Client's team for review

16. PS to send Postage Request. Based on estimated counts or actual, depending on timing, Mailshop package count, postage class (First Class, Standard or Nonprofit) and will include cost for Stamped Reply Envelopes (SREs), if needed. Postage Request will also indicate the date funds are due.
17. Counts, dollar builds, and dumps review and approval by Client's team
18. PS to send print samples to Client's team (as they become available) upon request.
19. Print sample review by Client's team. PS is responsible for pointing out any issues. It is a PS SOP to ensure that print samples are reviewed by the PS team BEFORE imaging personalized components or inserting
20. Personalization setups sent to Client's team for review. PS to ensure that setups meet Client's expectations as outlined by PDF art and client source documents
21. Personalization setup review and approval by Client's team. Client's team to send edits/approval to PS
22. Insertion orders sent to Client's team for review. Scans typically sent, but physicals can be provided upon request. Physicals can be provided with additional time in the schedule.
23. Insertion order review and approval by Client's team
24. PS to send live pull to Client's team for review and approval. PS to ensure lives match the approved physical insertions. If there are issues or concerns, PS to notify Client's team immediately.

PRODUCTION PLUS – RENEWAL MAILINGS ONLY

25. After release of art and data, all production and QC mentioned above is handled by the PS team.

POST-PRODUCTION

26. Samples shipped to Client's team. Due: Within 7-8 days, post-mail date (No samples sent for Renewals)
27. PS to provide on-demand mail tracking updates. Automatically generated preferred reports and/or Clients can have system access
28. PS to provide package costs to Client's team (No package cost for Renewals)
29. PS to provide inventory disposition. PS will send inventory report post-mailing detailing remaining quantities for each component Inventory reporting is sent upon request and dispersed at that time
30. PS to send production invoice to Client's team. To include postage reconciliation, postage refund and postal mailing certifications

SAMPLE