NEW CLIENT ONBOARDING GUIDE

*A really good start for working with us—
whether you've done direct mail before or not.*

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INTRODUCTION

Welcome to Gunderson Direct, and thank you for choosing us to work on your business.

We want your programs to run smoothly. That's something we probably all have in common. So we put together this brief guide to explain how we do things here, provide a little insight into our process, and help set expectations.

You may not be using all of the services and processes listed here, so feel free to read only what's relevant. Our goal is to make the process transparent to you, address any issues or concerns with processes upfront, and avoid surprises all around.

Thanks, and we hope you find this helpful,
The Gunderson Direct Team

TIMETABLES

"We'd like to mail yesterday. Can you do that?"

That would be violating the laws of physics.

We're serious about getting your mail out on time. That's why we're serious about timetables. In fact, almost every meeting on your project ends with a next step referencing an existing timetable (or the need to update it).

Direct mail is the confluence of three quite different technologies coming together to make a physical, in-the-mail piece happen:

1. **Digital creative files** that need to be printer-perfect.
2. **Data files** for targeting, personalization, and addressing.
3. **Printing and personalization,** a manufacturing process that puts the above two technologies together.

It's complicated, and we know what it takes to get it right. Our timetables are built on both the steps that involve our clients and numerous behind-the-scenes processes that ensure accuracy, quality, legal compliance, and data security.

Please don't take timetables for granted, because we don't. If timing issues arise, we want to do everything we can to meet your deadlines. Let's talk about it.

P.S. Your timetable is really a *blueprint* for the steps we take on any given project. Consider it your guide to our process and project milestones.

CREATIVE BRIEFS

"Mail to a bunch of people and get us tons of business."

Wish it were that easy.

What if we told you that our goal is to mail to as few people as we can to get you the best results possible? We want to spend your money wisely, and that means homing in on your target with maximum efficiency. We pride ourselves on strategies to achieve that goal.

The creative brief helps us understand who we are talking to, what to say, what to offer, who to target, decision-making analytics, what to test, and … just about everything that informs the work we do for you.

Our creative brief is actually very efficient in providing that information. We find the best results come from a 3-step process:

1. **Client draft:** It won't take you long to do a draft. Please feel free to include any additional information to add to our understanding of the prospect and the category.
2. **Internal agency review:** We'll mull over your creative brief and likely come up with some thoughts or questions for discussion with you.
3. **Creative kickoff:** This is a meeting that includes your key internal stakeholders, plus the agency team; including the account team, creatives, and, if appropriate, data and production teams. It's your chance to walk us through your creative brief, add color commentary and insights, and answer our questions. The more we get out of this meeting, the better the results.

CREATIVE DEVELOPMENT

"And, here on my left, you'll see a Gunderson Direct prospect letter with insert that includes a rich offer and compelling calls to action."

Docent in the soon-to-be-established *Art of Direct Mail Museum.*

When the brief is done, the fun starts.

You want the prospect who gets your direct mail package to do something. Actually, a lot of things:

Open it … read it … understand what you're selling … why it's relevant to them … why it's better than the competition … take action now (rather than put it aside) … and then to buy, enroll, register, etc. By the way, your mailing also needs to be cost-efficient to produce and compatible with postal processing technology, or costs can skyrocket.

That's a lot to account for in one piece of communications. Every client is unique, and we want the creative representing them to be unique, too. You may see two or three creative alternatives in a meeting, but we may have tossed out just as many.

HOW LONG DOES IT TAKE?

New client DM—as we are getting to know you, your product, your brand, and your approval process—takes time. That's why we build in 2–3 weeks for that first creative presentation. Once we get to know you, we can be more efficient. Those time frames are reflected in your timetable.

We have a number of very experienced DM clients who engage us to try and beat a proven, successful control package. That's a good sign. We're always up for the challenge.

THE PROOFING PROCESS

"Wait. Didn't I approve this already?"

Yes, but no.

This section is especially important for clients who haven't enjoyed the direct mail production process before. Here's the bottom line—once the ink hits the paper, it's too late to change it. Same with personalization and variable data.

Upon your approval of the creative concepts, we generate printer files used in the printing process. Even though you've approved the creative, you still need to approve two sets of proofs:

1. PRINTER PROOFS

This is a PDF proof showing what the actual printed piece will look like before it is personalized and addressed.

- It's the last chance to make sure what's printed is what you approved. We'll ask you to check all copy and visuals for accuracy. Proofs require your approval before we move forward with printing.

You're not alone. Three sets of eyes review the work internally at the same time you do.

2. LASER PROOFS

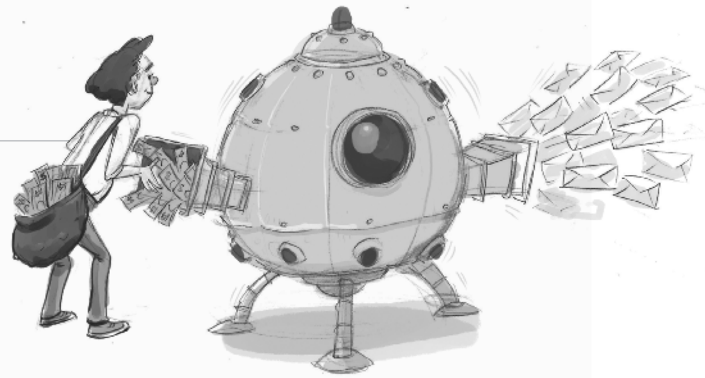
This happens after your mailing is printed. It shows the variable and address data in place on samples of the actual printed piece. Two things to review at this stage:

1. We will provide you the data used for personalization. You'll need to check that it is the data you expected and is being used correctly.
2. You'll see the laser personalization in place on the printed piece, so you can approve the font and the placement.

As you are looking it over, your account manager, print production manager, designer, and a representative of our data team are also tasked with approving the proofs.

Your account manager will oversee sending proofs and guiding this process.

POSTAGE



"Tell the post office to mail anyway; we're good for it."

Sorry, it's pay-to-play with the USPS.

One of the first things we do when we onboard your business is to issue an invoice for anticipated postage costs. Why do we do that? Simply because we need to pay the post office the day of your mail drop.

We recognize that postage is generally a pretty big chunk of the cost of a program, so this invoice can come under some scrutiny. That's why we get it to you early.

A few basic points about the postage expense:

- It's a pass-through to the U.S. Postal Service. Gunderson Direct does not profit on postage.
- We do everything we can to minimize postage expenses on your behalf by using postal software to sort your mail file efficiently.
- Payment is due one week before the mail drops. That's because your payment needs to clear so it is available for postage.
- We reconcile your postage expense at the end of the job to reflect the actual cost on your final invoice (which is usually very close to what we initially billed you).

LISTS AND DATA

"We want to target brown-eyed women who drink chardonnay, have two kids, prefer cats to dogs, and watch Thursday Night Football."

Are they lefties or righties?

SCENARIO 1: We are handling data for you.
Depending on the specifics of your job, any or all of these steps could apply:

- Consumer profile report.
- Modeling (sometimes multiple models for different vendors and lists).
- List research, analysis, and recommendations for your approval.
- List purchase (includes creating specific list order specs and contracts).
- Merge/purge (remove duplicates, your customers, and DNS files).
- Segmenting the file for testing and versioning.
- Sorting for mailing and mail file upload to the mail house via a secure channel.

That list of steps is for reference only. If you don't understand them all, that's okay (we are happy to explain). Much of it happens on your behalf behind the scenes to generate the final mail file. We could be dealing with half a dozen vendors in the process, too.

The point of the story: **Data is typically our longest lead time.** Clients often want to speed up the data portion of the job, and we push back because each step is crucial to make sure your data is accurate and delivering you the best possible prospects.

LISTS AND DATA *(CONTINUED)*

One last critical point: We **rent** prospect files for a one-time use for one project. They are not provided to the client to add to a database for future marketing initiatives or for in-house analysis. (When we do an analysis, the files stay with the vendor; we don't touch them). **Any use other than a one-time rental needs to be added into the rental contract.** Spoiler alert: the majority of list owners will not permit you to download and use their data for any marketing purpose beyond the rental.

SCENARIO 2: You are providing data to us.

At some point, almost every client will send us data. Sometimes it is the actual mail file. Other times, it's a customer file to be used for modeling, to purge customers from a mail file, or for matchback and analysis.

We take data security very seriously. It is our policy not to handle our client's data. We partner with data vendors who have the highest security certifications. Data is transferred from you (or your data team) via a direct link to their SFTP. We could list all the security acronyms our vendors adhere to, and you'd be impressed (once you looked them all up). So if your data or legal teams need documentation, please let us know.

Let's have a conversation before you send data to make sure protocols are in place so we know what we're getting and when and have the means to run appropriate checks.

MATCHBACK AND ANALYSIS

"As long as it's pretty,
we don't care if it works."

We dare you to say that to your CEO.

"What worked, what didn't, and what to do next" is the mantra for every mailing. From the minute we kick off a project, we want to make sure we are preparing to track and analyze the results from your mailings.

We'll talk about tracking, source codes, response curves, and more. Here is a heads-up so we are all on the same page:

- You want to make sure you are prepared to collect response data before the mailing drops. That's a discussion your account manager can lead.
- A unique identifying code for each mailed record is the best way to track response IF you can engineer the offer so responders need to use that code and you can capture it.
- Addresses are an obvious and important way to match a mailing to a customer list. If you won't be able to provide addresses, then let's discuss how we can work with proxy data or email addresses.
- Best case: you get us a customer file that we match the mail file to.
- Less-than-best case: you do your own data match. If getting us customer data is an issue, let's discuss how to handle the matchback part of the analysis before we procure your data.
  - List vendors will need to know upfront if you plan to take possession of their data for analysis.
  - We'll want to talk to your data team about best practices we employ for accurately matching the most records.

Matching your data is just the beginning. The fun starts when our data team slices and dices the raw data to report the obvious and tease the insights from what is often millions of data points. It's what gets our VP of Data out of bed in the morning.

ESTIMATING AND BILLING

"What great work,
we'd happily pay double."

From a dream Mike Gunderson, CEO, had one night.

Nobody gets a degree in marketing hoping to be reviewing invoices one day. We try to make this a painless process by:

- Estimating jobs for your approval, so you know what's coming.
- Issuing change orders promptly, when appropriate.
- Billing you in two clear stages:
  1. Upon approval of the SOW.
     – Postage, which is due to us 10 days prior to the mail going out (see the Postage section for why).
     – 50% of the job's total cost (excluding postage) per the approved SOW.
  2. A final invoice upon completion of the job after we have reconciled vendor invoices. This is for all approved expenses not previously billed.

You can help by giving us any information that will facilitate payment and minimize hassle in advance. Such as:

- Appropriate addresses, contacts, or other billing protocols.
- Setting us up with any billing software so SOWs are entered and invoices are appropriately submitted.
- A contact in AP so we can call them and not you if there are any issues.

Other than that, we appreciate you reviewing our invoices promptly and letting us know immediately if you see any issues.

THE CLIENT SURVEY

"If you're happy, I'm happy."

Gunderson Direct Account Executive

We take pride in what we do and want to be the best at it. We hope you get that sense with every interaction with our team. We're so serious about making sure you think we're doing a great job that at the end of every job, we ask for your feedback.

We'll send you a simple survey that ranks our agency across three criteria, plus gives you a field to fill in any comments you may have. It takes about a minute to complete, and we'll send you a $5 Amazon eGiftcard when you're done.

Your feedback is important to us. All we ask is that you are honest and fair.

FUN

"Never thought I'd say 'fun' and 'direct mail' in the same sentence."

Maybe now you will.

Hey, we have fun. So should you.

We know you've got a lot on your plate. We can't help you get that <*TPS Report*> right, but when it comes to Gunderson Direct, we hope you'll find that you're working with people who care, who make your life easier, and who you enjoy working with.

Thanks for reading this, and if anything is unclear, ask us.

Purpose:

We make opening the mail a rewarding experience.

Our Niche:

Delivering results by mail.

Our Values:

GUNDERSONDIRECT.COM