

PLANNING WORKSHEET · 1 OF 2

Brief a mailing clearly

Use this worksheet to agree the piece, audience and deadline before artwork or recipient data is transferred.

01 / Purpose and response

What should the recipient do?

Audience or recipient segments

Response route: phone, URL, QR or reply piece

02 / Quantity and versions

Estimated number of recipients / packs

Versions or segment rules

Any extras for stock or damaged pieces?

03 / Printed components

- ☐ Postcard or invitation
- ☐ Letter and envelope
- ☐ Folded leaflet or self-mailer
- ☐ Booklet, insert or multi-piece pack

Finished size, pages, folds, stock, finish

04 / Packing and dispatch

Pack order and outer packaging

Delivery or handover locations

Carrier / postal route to confirm

05 / Work backwards from the handover date

Artwork ready

Proof approval

Required dispatch or collection

Who signs off?

Useful first message: send the goal, format, approximate quantity, number of versions and required handover date. Ask us to agree the data route separately. **Do not attach a live recipient list to the public contact form.**

PRODUCTION CHECKLIST • 2 OF 2

Check before the run

A clear approval record reduces the risk of the wrong version, address or insert reaching a recipient.

01 / Recipient data

- ☐ Purpose and lawful basis checked by list owner
- ☐ Suppression and duplicate rules applied
- ☐ Only necessary fields exported
- ☐ Secure transfer and named access agreed
- ☐ Return or deletion instruction agreed

02 / Test every variation

- ☐ Dummy long name and address checked
- ☐ Blank optional field checked
- ☐ Every segment / version checked
- ☐ Window and address position checked
- ☐ QR, response URL and phone tested

03 / Artwork and pack

- ☐ Dates, prices and contact details signed off
- ☐ Final artwork version labelled
- ☐ Bleed, safe area and fold checked
- ☐ One representative pack per variant
- ☐ Contents, order and orientation checked

04 / Reconciliation

- ☐ Approved input count recorded
- ☐ Exceptions and rejected records resolved
- ☐ Produced / spoiled pieces recorded
- ☐ Completed packs counted
- ☐ Handover evidence agreed

Sign-off details

Customer approver / date

Pack matrix reference

Final artwork reference

Approved record count

Next step: read the full guidance at theprintcentrewarrington.co.uk/mailing-services-warrington and [/mailing-data-checklist](https://theprintcentrewarrington.co.uk/mailing-data-checklist). Confirm the actual production and data-handling arrangement with the team before sending the list.