

Foundation for Automation

Setting up a trigger marketing campaign using variable digital printing

Mainstream direct marketing finally has discovered full-color, variable digital print. The volume of full-color digital print continues to jump and has become the fastest-growing direct marketing medium. The reason for its growth is no secret to firms that are driven by results. Variable targeted content increases response rates and gives marketers tremendous flexibility in changing messaging and creative to match the marketing opportunity.

While more marketers are using full-color VDP for trigger acquisition and loyalty programs, many still struggle to implement anything more complex than postcard campaigns. These marketers are not realizing the great benefits of this emerging technology because of the requirements for setting up these programs. The biggest stumbling block is the unfamiliarity with what is required to create and implement them.

With the right partner and maybe a slight reorganization to the marketing team, anyone can take advantage of this growing application. By understanding a few top-line concepts about VDP program development and setup, you can establish a foundation that

allows full utilization of VDP in varying content and leads to lower costs for ongoing program management.

Right-Brain/Left-Brain Development Strategy

The easiest way to explain the workflow for sophisticated trigger-based VDP programs is to use the right-brain/left-brain analogy. This is easier for direct marketers to understand since they constantly have to balance the concept of keeping the creative team, brand marketers and account services people (right brain) in concert with the data services, analytics and production support teams (left brain) to be successful. Both sides of the marketing organization must be utilized to be successful, but their processes, motivations and methodologies could not be more different. The key is to understand the differences of the groups and then develop processes that call on their strengths without wasting time on areas of non-interest and non-impact.

Team Setup

Prior to program kickoff, both teams should have a thorough understanding of the program and its objectives. A top-line understanding of the program

will help the teams during development and allow them to focus on their areas of responsibility without losing sight of the other's goals.

The creative team's responsibility is to deal with creative assets, layout and messaging. At the same time, the data team will deal with data sourcing, file layouts, business rules and analytics. Both teams will be involved with pre-production auditing/proofing. The project workflow is best visualized as a river that breaks into parallel creeks and then comes back together. Both "creeks" should be coordinated to work concurrently and complete their steps as close to the same time as possible.

Step 1—For the creative team, most programs start with its being provided as many of the creative assets as available. These assets will be electronically warehoused in an asset management system for use throughout the program. Basic steps like naming conventions, as well as processes for posting and changing images, proofing, and approvals for use are all established during this step. The service provider immediately will start providing press proofs for review and color management. (Proofing off of a digital press is necessary since most print files were developed for traditional printing and not digital. Digital printing will change the look of these files, so proofing and adjusting images may be necessary if quality is a requirement.)

The sheer number of creative assets often will take up much of the time

(continued on page 42)

VDP SET-UP: CONCURRENT PROCESSES

Development Processes	Creative Process Steps	Data Process Steps
Step 1	Asset Management & Proofing	Data Sourcing & Transmission
Step 2	Layout	Variable Programming
Step 3	Pre-Production Audits	Pre-Productions Audits

PRODUCTION

(continued from page 41)

spent on program development. Once images are approved, press settings and proofing documents are finalized and used for quality control on all follow-up pieces. These individual assets are combined during the composition phase to create truly variable printed pieces.

Also during Step 1, the data team is developing and confirming all the data sources. In many complex VDP programs, this can include combining multiple data sources such as customer information, purchase history, some type of scoring or demographics input, offer matrices, and other sources. File layouts are determined and tested. Finally, transmission protocols are established for dealing with how the data is passed to the provider, taking into account several factors including security and reporting.

Step 2—For the creative team, this step begins after a majority or all of the digital assets are approved for use. It will generate a mechanical similar to that used on a traditional print project to give the service provider a basis for the layout and areas of static and variable content. This can be given in native formats such

during this step to take advantage of the variable output ability. As an example, for an auto client's program, 10 distinctive vehicle creative layouts were submitted to show variances to images, offers and creative.

With the data file layouts in hand, the provider will start the most important portion of the process—VDP programming. This programming process will be the intelligence behind the execution and will determine the output content. Not just if-then statements, but creative elements, such as formatting and changes to the layout, are coded at this time. Most complex programs require a comprehensive matrix be developed to house the programming commands and triggers to build the individual pieces. The marketer's data team must be constantly available during this step to ensure any technical issues that arise

(continued on page 44)

While more marketers are using full-color VDP for trigger acquisition and loyalty programs, many still struggle to implement anything more complex than postcard campaigns.

as InDesign or Quark to allow subtle creative nuances to be transmitted. The mechanical is important to the provider's programming team, since it will be the basis for VDP programming. Note that for many complex VDP programs, multiple creative layouts will be submitted

PRODUCTION

(continued from page 42)

are addressed quickly. In many cases, weaknesses in the data are discovered and corrected.

Step 3—For both teams, pre-production audits are the most important quality-control step during the entire setup process. Most complex VDP programs may allow as many variations as the number of data records provided. For most enterprise programs, it will be near-impossible and impractical to review each individual record. The marketer and the service provider will determine a reasonable sample of records that can be used to ensure accuracy. Two sets of identical sample records are printed and submitted for review; one set goes to the creative team, the other to the data team.

Creative audits are reviewed as press proofs to ensure that all the digital assets are being printed correctly, match the sign-offs done during Step 1 for quality and generally meet the standards.

Formatting, variable-content-to-static-content comparisons and match-to-mechanicals are included in this review. Audits are actual printed records from the production device, so what you see is what you get. Due to the Step 1 proofing, there should be no surprises—though it is not unusual for there to be several rounds of audits prior to actual launch.

While the creative right brains are looking at layout and color, the data team left brains are diving into accompanying spreadsheets, confirming that the VDP programming logic is translating to the printed pieces. Depending on the number of variable fields, this could take hours or days. The initial setup requires stringent review of each provided audit to ensure accuracy. This step shows weaknesses in the data sources and allows corrections prior to launch. Like the creative audits, several revisions usually are required before final approval.

The pre-production audits process lays the groundwork for future audit protocol. Similar to Web site development, vari-

able printed content constantly should be changing and refreshed to maintain relevancy to the marketer's audience. These changes will be confirmed and approved using the same protocol established during the setup phase.

Launch

Once the pre-production audits are approved by both teams after the revisions process, a live test is done. This live test uses either a seed list or a control group. The live test is extensively reviewed by the combined marketing team (creative and data join back together). Once the test is authenticated as accurate, the program is ready to launch and transition to a managed program phase. Based on the hard work and diligence of the setup process, the program should be easy to change and manage on an ongoing basis. ■

Jim Liszewski is president of Dallas-based digital print provider WMSG. He can be reached at jim@wmsginc.com.