



2014 MAIL AND DIGITAL PERSONALIZATION PROMOTION

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2014 MAIL AND DIGITAL PERSONALIZATION PROMOTION
PROGRAM REQUIREMENTS

I. BACKGROUND

“Personalization” continues to gain momentum in usage by marketers. It has helped to boost response rates and profitability in cross-media campaigns. Personalization assists marketers in driving conversion in their direct mail and on their websites. Adding a customized environment using dynamic content relevant to specific consumers’ wants and needs creates a compelling marketing interaction between the consumer and businesses. Personalization adds the ability to provide targeted messaging and improves the ability to track and measure responses. To ensure that marketing mail continues to be a relevant part of the marketing mix, the Postal Service encourages mailers to leverage tools and information in technologies that produce impactful and relevant mail for consumers. A mail campaign that leverages data to deliver relevant content to specific individuals and provides a personalized, mobile based experience heightens the opportunity of engagement with the consumer. This strategy provides substantial advantages and opportunities for innovation now and in the future.

II. PROGRAM DESCRIPTION

The 2014 Mail and Digital Personalization Promotion enhances the value of mail by encouraging mailers to use variable data printing (VDP) or other print technology that provides varying levels of mailpiece personalization and customization. Additionally, mailers are encouraged to utilize personalization through urls, webpages or mobile experiences with both messaging and content linked to the mailpiece, thereby enhancing the overall personalized experience for the recipient. Combining these technologies with a “personalized” experience can provide impact to brand value, consumer retention and acquisition, all of which improve the overall marketing experience.

Registration Period: March 15 – June 30, 2014

Program Period: May 1 – June 30, 2014

Discount Amount: 2% of eligible postage. The discount is calculated in *PostalOne!*[®] and applied to the postage statement at the time of mailing. The 2% discount is deducted from the postage amounts of qualifying product categories that are paid at the time of mailing. Normal postage prices listed in the published Price List (Notice 123) apply to the mailing and the discount is applied to those prices.

Eligible Mail Classes: First-Class Mail[®] presort & automation letters, cards & flats
Residual pieces paying single-piece price that are part of an automation mailing may also qualify for the discount.
Standard Mail[®] letters and flats
Nonprofit Standard Mail letters and flats
Where applicable, full service IMb mailings are required.

Ineligible Mail Classes: Periodicals (includes Pending Periodicals mail)
Bound Printed Matter
Media Mail
First-Class Mail and Standard Mail parcels
International Mail

III. ELIGIBILITY REQUIREMENTS

A. Mailpiece Content Requirements

The mailpiece must be personalized and/or customized to qualify for this promotion. The following criteria must be met to participate in the promotion.

1. The mailpiece must include information relevant and highly personalized to the individual recipient using VDP or other print technology.
2. The contents of the mailpiece must contain or be designed based on, factual and/or behavioral information about the individual recipient. The mailpiece must utilize specific information or attributes known of the recipient, such as, but not limited to:
 - name
 - age
 - birthday
 - buying behaviors
 - preferences
 - online behavior

*Mailings which contain mailpieces with limited versions and little (or minor) mailpiece variation that are segmented to large recipient groups based on general criteria **do not** meet these requirements. Additionally, the address block does not qualify as an identifier for personalization /customization.*

3. The mailpiece must contain a personalized url or mobile print technology, example QR codes, that directs the recipient to an active and unique website (see Webpage Requirements).

If mobile print technology such as QR codes, digital watermarks, Snap-tags, Datamatrix, etc is used the following requirements must be met:

Directional Copy Requirement: The mailpiece must contain text near the barcode or image providing guidance to the consumer to scan the barcode or image and information about the landing page. Examples include:

- a. Scan here to shop our mobile website
- b. Scan here for your special offer
- c. Scan the barcode
- d. Scan to download or redeem your coupon
- e. Scan here for special video experience

B. Webpage Requirements

The urls, webpages or mobile experiences must lead to a personalized landing page to qualify for this promotion. The following criteria must be met to participate in the promotion.

1. The destination webpage must provide highly personalized content that relates to the recipient.
2. The destination webpage must have a unique url that enables the mailer the ability to track and monitor individual web activity.

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3. The destination webpage must contain information relevant to the content of the mailpiece.

C. Mobile Technology Requirement.

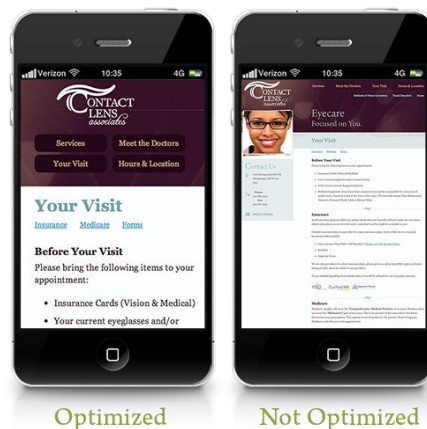
This requirement is necessary only if mobile print technology is used.

All qualifying mail containing a QR code, digital watermark or equivalent technology that when scanned by a mobile device must lead to a mobile optimized, personalized/customized webpage. The personalized/customized mobile optimized or personalized video content **must** be unique to the mail recipient and relevant to the overall messaging included in the physical mailpiece.

Mobile Optimization: The destination page(s) must reside on a platform that is completely mobile optimized. A Mobile Optimized Site is a website which is specifically designed for optimum performance when viewed on mobile device such as a smartphone or tablet. There are several commonly used techniques in developing mobile websites to bridge the differences between a full sized monitor and a mobile display. Participants must use these or similar techniques to qualify for the promotion:

1. Screen Size and Resolution is adjusted so that users do not have to scroll horizontally
2. Page sizes are compressed to enable faster downloading
3. Outbound links take users only to mobile optimized pages
4. Contrast and color scheme is adjusted for viewing on smaller screens and outdoor viewing.
5. Device detection directs mobile users to appropriately formatted content
6. Use menu options as opposed to free-text entry whenever possible

Example of Mobile Optimization



Links to a traditional desktop site do not meet the requirements for this promotion.

If you have any questions about the mobile optimization requirement, please contact the Program Office at mailingpromotions@usps.gov.

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D. Registration Requirements

Participants and/or Mail Service Providers (MSPs) must register on the Business Customer Gateway (BCG) via the Incentive Program Service (gateway.usps.com). Promotion participants must complete their registration (including agreeing to the promotion terms) at least 2 hours prior to presenting the first qualifying mailing and specify which permits and CRIDs will be participating in the promotion. The USPS Promotions & Incentives Program Office recommends that mailers register several days in advance of the first qualifying mailing.

NOTE: As part of the terms of participation, all mail owners must complete a survey about their participation in the promotion at the end of the promotion period.

Auto Enrollment (for Mail Service Providers): Electronic documentation (eDoc) enrollment using Mail.dat, Mail.XML, or Postal Wizard enables MSPs to enroll their clients in real-time when eDocs claiming the promotion are submitted. During postage statement finalization, *PostalOne!* will validate that the MSP CRID in the eDoc is enrolled as an MSP. The *PostalOne!* system will enroll the client(s) in the promotion based on the "For" field data in the eDoc, and will only then calculate the discount if there are no system Warnings. *PostalOne!* will perform By/For Warning validations and generate warnings for MSPs that are not registered and for invalid CRIDS or Mailer IDs. In the case of Warnings, *PostalOne!* will process the eDoc and allow the mailing without failing the file. However, *PostalOne!* will not apply the promotion discount to the mailing.

E. Mailing Submission Requirements

Documentation/Postage Statement

Mailings must be submitted electronically via mail.dat, mail.xml or Postal Wizard. Mailings submitted via Postal Wizard claiming the Full Service discount cannot exceed 9,999 pieces.

Mailings that are prepared and entered by an entity other than the mail owner must indicate the owner's identity in the electronic documentation ("eDoc"). The eDoc must identify the mail owner and mail preparer in the By/For fields by Customer Registration ID (CRID).

In a commingled, combined or co-mailing, separate postage statements must be used for mailpieces not meeting promotion requirements.

Combined and Commingled Mailings

Participating mailers will be required to affirmatively claim this promotion in the Incentive Claimed section on electronic postage statement submissions certifying each mailpiece meets all eligibility requirements. All mailpieces covered by a postage statement must meet all eligibility requirements.

NOTE: THE DISCOUNT MUST BE CLAIMED AT THE TIME OF MAILING AND CANNOT BE REBATED AT A LATER DATE.

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Combined and Commingled Mailings *(cont.)*

First-Class Mail and Standard Mail commingled, combined, and co-mail mailings (including MLOCR mailings) may only qualify for the Promotion if:

- all of the pieces commingled in the mailing meet program requirements, or;
- the mailings include multiple clients (or versions) but have separate postage statements generated for the mailpieces that contain mobile barcodes.

Mailing Date

Mail must be tendered for acceptance during the promotion period, May 1-June 30, 2014. Plant-Verified Drop Shipment (PVDS) mailings that are verified and paid for during the promotion period and qualify for the promotion will be accepted at destination entry postal facilities through July 15, 2014, when presented with appropriate verification and payment documentation (PS Form 8125). A PVDS mailing that qualifies for the promotion cannot have verification or the actual drop ship occur prior to May 1, 2014. Any qualifying mailing that is accepted and paid for prior to May 1, 2014 is not eligible for the promotion discount.

Postage Payment Method

Postage must be paid using a Permit Imprint or Precanceled Stamp permit. Some Meter Permit mailings may qualify. Every Door Direct Mail (EDDM) deposited at a Business Mail Entry Unit may qualify, but EDDM Retail mailings taken to local Post Office retail units are ineligible to participate.

Meter Mail/Precanceled Payment Option

Meter mailers who wish to claim the incentive must affix the appropriate reduced promotion amounts listed in the table below. Mailers must select the appropriate Affixed Method option as follows:

- VAR/CVAR Meter Mail: all options are available (Lowest, Correct and Neither)
- NonVAR/CVAR Meter Mail: only option available is "Neither"
- Precanceled: Only "Neither" is an option

Any net postage due for the mailing must be paid from an advanced deposit (permit) account.

Processing Category	Incentive Postage Amount Affixed
First-Class Mail Cards	0.20
First-Class Mail Letters auto and presort	0.25
First-Class Mail NM Letters	0.45
First-Class Mail Flats - auto and presort	0.35
Standard Mail Regular Auto/PRSRT/CR Letters	
Standard Mail Regular Auto/PRSRT/CR Letters	0.12
Standard Mail Regular Auto/PRSRT/CR Flats	0.13
Standard Mail Nonprofit Auto/PRSRT/CR Letters	
Standard Mail Nonprofit Auto/PRSRT/CR Letters	0.05
Standard Mail Nonprofit Auto/PRSRT/CR Flats	0.06

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IMb Requirements:

Where applicable, full service IMb mailings are required. See table below.

Mail Category	Full Service IMb Required	IMb Not Required
First-Class Mail Letters and Cards	Automation (5-digit, 3-digit, AADC, Mixed AADC)	Presorted (Machinable and Nonmachinable)
First-Class Mail Commercial Flats	Automation (5-digit, 3-digit, AADC, Mixed AADC)	Presorted (Machinable)
Standard Mail Letters – Carrier Route & Automation (includes Nonprofit)	Carrier Route (Saturation, High Density & Basic) Automation (5-digit, 3-digit, AADC, Mixed AADC)	
Standard Mail Letters – Nonautomation (includes Nonprofit)		Carrier Route (Saturation, High Density and Basic) Machinable (AADC & Mixed AADC) Nonmachinable (5-digit, 3-digit, AADC, Mixed ADC)
Standard Mail Flats (includes Nonprofit)	Automation (FSS, 5-digit, 3-digit, ADC, Mixed ADC)	Carrier Route (Saturation, High Density & Basic) Nonautomation (5-digit, 3-digit, ADC, Mixed ADC)

F. RESTRICTIONS ON BARCODE PLACEMENT

If print mobile technology such as QR codes, digital watermarks, Snap-tags, Datamatrix, etc is used the following requirements must be met:

The mobile barcode or qualifying mobile print technology can be placed on the inside or outside of the mailpiece. The barcode or mobile print technology cannot be placed on a detached address label (DAL) or card that is not attached to or enclosed within the mailpiece (e.g., unattached blow-in card).

The qualifying barcode or mobile print technology cannot be placed in the indicia zone or the barcode clear zone on the outside of the mailpiece. Additional guidance is provided below:

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Barcode Clear Zone

Barcode Clear Zone for Letters: The barcode clear zone for letters is defined in the Domestic Mail Manual (DMM®) section below. DMM design requirements (DMM Sections 202.5.1) must be met:

DMM® 202.5.1 Barcode Clear Zone: Each letter-size piece in an automation price or an Enhanced Carrier Route price mailing must have a barcode clear zone unless the piece bears an Intelligent Mail barcode with a delivery point routing code (see 708.4.3) in the address block. The barcode clear zone and all printing and material in the clear zone must meet the reflectance standards in 708.4.4. The barcode clear zone is a rectangular area in the lower right corner of the address side of cards and letter-size pieces defined by these boundaries:

- Left: 43/4" inches from the right edge of the piece
- Right: right edge of the piece
- Top: 5/8 inch from the bottom edge of the piece
- Bottom: bottom edge of the piece

A pictorial description of the barcode clear zone on letters can be found in Quick Service Guide 602 at the link below:

<http://pe.usps.com/text/qsq300/Q602.htm#1009536>

Barcode Clear Zone for Flats: For flats, the mobile barcode should not be placed within 1/8" of the actual routing Intelligent Mail barcode.

Indicia Zone

The "Indicia Zone" is two inches from the top edge by four inches from the right edge of the mailpiece; in addition, the mobile barcode should not be placed within two inches of the actual postage indicia when the indicia is not placed in the described "indicia zone."

Indicia Zone for Flats: For optimal processing, avoid placing the barcode, images, or tags in the destination address block and indicia.

Indicia Zone for Letters: The "Indicia Area" on letter mail is the top-right corner. The Postal Service's Barcode Sorters look for these Information-Based Indicia (IBI) codes in the zone 2" from the top edge x 4" from the right edge of the mailpiece. Barcodes, images, or tags cannot be used in this area.

G. REQUIREMENTS AT MAIL ACCEPTANCE AND POST-MAILING

At Mail Acceptance: The mailer must provide a hard copy, unaddressed sample of the mailpiece showing the placement of personalized/customized content and if mobile technology is used--the mobile barcode, image, or tag and directional copy to the acceptance clerk. If a mailing agent submits promotional mailings from multiple mailers, a hard copy sample of each mailer's mailpiece must be presented. All mailings are subject to standard acceptance and verification procedures and may be inspected for use of the personalization and customization requirement, emerging technologies, mobile barcodes, images or tags, etc. and directional copy.

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- Addressed samples will not be accepted (this is especially important for First-Class Mail as it would give the appearance of a piece that was paid for, but not delivered). If pieces are variably printed, one sample that is comparable to the mailing may be presented.
- If the mailer is unable to print an unaddressed mailpiece the mailer should remove a piece from the mailing, remove the address (e.g. place a blank address label over the address) and submit it at mail acceptance. As an alternative for Standard Mail, an addressed piece may be accepted if the mailer marks through the address and marks "USPS Promotion Piece Sample" on the piece.

Post Mailing Requirements: The Program Office will conduct a sampling of mailpieces collected at Business Mail Entry Units to verify that submissions meet program requirements. The Postal Service reserves the right to pursue a revenue deficiency for mailings that do not meet all program requirements, to unenroll the mailer from the program or restrict participation in future promotions.

Additionally, all mailers who receive the discount must retain an electronic or hard copy sample of the mailpiece until August 31, 2014, and if requested by the Postal Service, must forward such sample to the Promotion Program Office.

- If a mailing contains mail from multiple mailers, a sample of each mailer's mailpiece must be retained.

IV. TECHNICAL INFORMATION

For further technical information, please refer to the [Technical Specifications](https://ribbs.usps.gov/intelligentmail_schedule2013/releaseoverview2013.cfm) on RIBBS at: https://ribbs.usps.gov/intelligentmail_schedule2013/releaseoverview2013.cfm

V. PROGRAM OFFICE CONTACT INFORMATION

Further questions can be directed to the Program Office.

Email: mailingpromotions@usps.gov
Facsimile: 202-268-0238
Mail: US Postal Service
2014 Mail and Digital Personalization Promotion
P.O. Box 23282
Washington, DC 20026-3282

Information and resources will also be posted online on RIBBS and USPS.com at: <https://ribbs.usps.gov/index.cfm?page=mailingpromotions> and <https://www.usps.com/business/promotions-and-incentives.htm?>

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VI. REVISION HISTORY

<u>Date</u>	<u>Section</u>	<u>Reason for Revision</u>	<u>Version</u>
<u>5/6/14</u>	<u>III – E. Mailing Submission Requirements</u>	<u>Remove -</u> Basic Service pieces in Postal Wizard mailings are not subject to this limitation.	<u>1</u>