

Advertising by Mail



When to say YES! – That's Personalized Mail™



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INTRODUCTION

How is Personalized Mail™ defined?

The Personalized Mail service is a proven and effective direct marketing and advertising medium that offers customers the ability to personalize their mailing and tailor their promotional messages to specific consumers or prospects.

Personalized Mail mailings must be consistent with the definition of the Personalized Mail service. The mail items must all have the same purpose and the same goal, the content does not have to be identical.

Personalized Mail mailings are defined as mailable items, that have the primary intention (main messaging) of motivating an individual to take action by:

- promoting a product, service, program or event
- soliciting donations or contributions
- reporting on financial performance, primarily for promotional purposes, or
- supporting your loyalty card program. Includes all mailings relating to loyalty card programs. Excludes credit and/or debit cards with or without reward points.

Mini-catalogues are acceptable as Personalized Mail. A Mini-catalogue is defined as printed matter with a list of items for sale containing item description, item numbers and/or prices. Mini-catalogues must contain a minimum of eight pages or panels and meet Machineable Standard Personalized Mail service requirements.

How will Personalized Mail benefit you?

Personalized Mail is an excellent direct marketing medium for getting your message across to your customers. There are several ways the use of Personalized Mail will support your marketing efforts:

- **Target customers:** Personalized Mail allows you to target specific individuals based on your desired criteria, and to engage with them in a two-way dialogue. It allows you to concentrate on your best customers and prospects, which is important. It costs more to recruit new customers than it does to keep the ones you have.
- **Motivate:** Your marketing item should encourage a response from your customers by making an offer and providing an easy means for action. It doesn't just generate interest; it can close the sale.
- **Measure:** The success of your advertising campaign can be accurately measured in terms of response rates and sales, which allows you to determine the return on investment for each of your programs. Count the coupons redeemed (in store or online). Include a unique QR code or URL for mobile and website visits that show how well your mail item worked.
- **Reduce waste:** Because campaigns can be measured, Personalized Mail allows you to focus your budget on those programs that are yielding the highest return on investment.
- **Personalize:** It shows your customers that you are aware of their likes and dislikes, and will help make your customer communication items even more relevant, thereby increasing response rates and return on investment.

WHEN TO SAY YES! - THAT'S PERSONALIZED MAIL™

1 PROMOTIONAL VERSUS NON-PROMOTIONAL

As you have read in the introduction « How is Personalized Mail defined? », all items must have the primary intention of motivating an individual to take action by promoting a product, service, program or event. To determine whether your items qualify as Personalized Mail, it is important for you to understand how we determine the main intent to be promotional or non-promotional.

1.1 Is the primary intent of the item promotional?

To determine whether the main intent of your mail item is promotional, you must ask the question, "What is the main message that the recipient will respond to when they receive the item?" ***If the intent is to motivate an individual to take action and buy or acquire a product or service, use a specific program or to contribute to or support a cause or event, it is promotional and therefore acceptable as Personalized Mail.***

Examples of promotional marketing campaigns:

- Acquisition mailings - These items are designed to reach prospects and acquire new customers and to create new business.
- Customer retention mailings - items designed to retain your current customer base.
- Promotion of a specific product, service, program or event designed to make people choose your offering in preference over others.
- All mailings related to loyalty programs (exception: credit and/or debit cards with or without rewards points).

Examples of promotional items that qualify as Personalized Mail include:

- information from a CD/DVD club promoting membership and/or the purchase of new releases;
- material from a charitable organization soliciting donations;
- a brochure advertising an upcoming conference and offering a discount for anyone who reserves before a specified date;
- an invitation from a long-distance phone provider to try their services;
- a company's annual report;
- a profile of a candidate sent by a political party prior to an election;
- a calendar promoting the services or products of a local business;
- a sample of a new skin cream and a discount coupon valid for the next purchase.

1.2 Is the primary intent of the item non-promotional?

Items with the primary intent to provide businesses and consumers with educational material, transactional or informational communications are unacceptable as Personalized Mail.

Education materials may include; updates to professional handbooks, opinion surveys and census mailings.

Transactional communications may include: invoices, receipts, tax forms, proxies, fulfillment of products or services, paid subscriptions, replacement of renewal cards (i.e. credit and/or debit cards) identification cards and thank you mailings that are not part of a loyalty program.

Informational communications may include: recycling or waste calendars, recall notices, annual reminders, notifications of changes, renewal notices and election (voting) notices.

2 PERSONALIZATION AND CREATIVITY

While your items need to meet the definition of Personalized Mail, you can get creative by customizing your messages. Items within a given mailing do not need to be identical in content or uniform and may in fact have different sizes, weights, and thickness provided the items:

- remain within the same weight band and size category;
- originate from one mail owner (e.g. the customer number in the indicia must be identical on all mail items); and
- are within the same mail preparation category (e.g. all mail items are prepared as Machineable or prepared as Special Handling).

Personalized Mail allows you to target your mailing, ensuring you reach the customers who are most likely to respond to your offer. And, by focusing on your best customers, you won't always have to be seeking new ones, which is important, because it costs more to recruit new customers than it does to keep the ones you have.

3 ASSESSING YOUR ITEMS AGAINST THE PERSONALIZED MAIL DEFINITION

Let's examine some categories of commercial mailings to see whether or not they qualify for Personalized Mail.

3.1 Financial performance reports / Annual reports

Reports on financial performance will qualify as Personalized Mail provided the information is sent out for promotional purposes.

The following are acceptable as Personalized Mail:

- Reports on financial performance intended primarily for promotional purposes, such as annual, semi-annual, and quarterly reports of mutual funds and corporations, prospectuses, and segregated fund reports mailed by insurance companies. The intent of sending out these reports is to demonstrate the performance of the investments and promote additional products or services that may be of interest to their clients.
- Annual reports sent by an Association or Business to promote past performance in an effort to retain or attract new members. Often these reports will promote upcoming events or programs. The intent is to motivate an individual to take action which meets our definition.

The following is not acceptable as Personalized Mail:

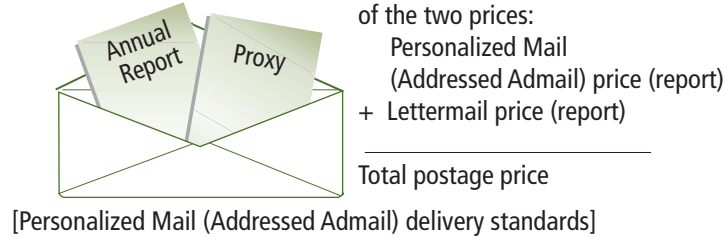
- Annual reports sent to members informing members of industry relevant information and to report on what has occurred over the past year. These items do not promote upcoming events and are not intended to attract new members. A report with the primary intent of education does not meet the content definition for Personalized Mail.

For example...

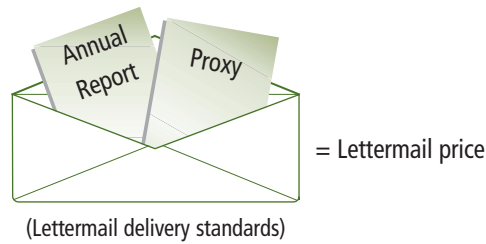
ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
A stockbroker uses an annual report as part of a promotional mailing to encourage the purchase of a company's stock.	Yes	By showing their target audience the performance of their portfolio it encourages future purchases or current clients to invest more.
A business or association wishes to send an annual report to members to report on last year's successes and to promote the upcoming year's events.	Yes	The intent is to retain the membership by promoting past performance and upcoming events.
A political figure wishes to send an annual report to their constituents.	Yes	Typically the intent is self-promotion with a goal of re-election. They are providing their constituents with evidence of past performance and likely future plans.
A proxy is enclosed with an annual report.	No	Proxies are not promotional in nature.

Proxies are not acceptable as Personalized Mail because they do not promote a product or service. If an organization has to mail a proxy and an annual report, there are three options:

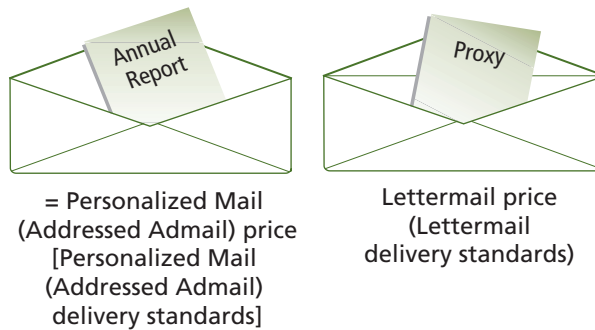
Option 1: One envelope contains both items - the annual report, which is mailed at the Personalized Mail price, and the proxy, which is mailed at the Lettermail price.



Option 2: One envelope contains both the report and the proxy, and the two items are mailed together at the Lettermail price.



Option 3: The annual report and the proxy are mailed separately at the applicable prices.



3.2 Loyalty Card Program Mailings

Loyalty marketing is a program that rewards customers for making purchases from the same vendor or company with the goal of:

- lowering the turnover among users,
- maximizing existing customers spend,
- expanding the customer base.

Mail items related to loyalty or retention campaigns can be mailed as Personalized Mail when they have the primary intent of motivating an individual to take action by:

- promoting a product, service, program or event,
- soliciting donations or contributions,
- reporting on financial performance, primarily for promotional purposes.

Additionally, loyalty card programs that are open to the general public (professional associations do not qualify) can mail all their communications related to the program through Personalized Mail.

This includes, but is not limited to:

- membership acquisition,
- membership card fulfillment solicited,
- membership card fulfillment unsolicited,
- loyalty card renewal/replacement,
- changes to existing loyalty program,
- changes to overall program (all members),
- changes to an individual's status level/benefits,
- membership card statement,
- summary of points with promotional offer,
- transaction details,
- Thank you, Birthday and Christmas cards to members with or without promotional offering,
- welcome kits with or without promotional offer,
- rebates related to the program,
- fulfillment of items (within the size and weight band for Personalized Mail) earned through points accumulated on your card.

Important:

Customers with loyalty programs linked to a debit or credit card cannot mail non-promotional items such as statements, cards, welcome kits, etc. as Personalized Mail because the primary intent of these cards is transactional.

For example..

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
A Dental Association wishes to send a training kit to members of their association.	No	The item itself is used for educational purposes and does not qualify as Personalized Mail.
A grocery store wishes to send their privacy policy to members that benefit from a points card program.	Yes	The grocery store points card is available to the general public and has the goal of retaining customers and increasing their spend. Therefore it qualifies as part of our loyalty program.
A municipal co-op wishes to mail the rebate cheques earned through participating in the program by shopping at retailers included in the co-op.	Yes	Participation in the municipal co-op program is available to the general public and encourages members to shop locally.

3.3 Catalogues / Mini-Catalogues

All catalogues, whether they are paid for or provided free of charge, that promote a product or service are acceptable as Personalized Mail.

Our Machineable Mini-catalogue is an excellent acquisition tool, ideal for eCommerce companies to provide a listing of samples of products/services on offer. Personalized Mail's Mini-catalogue is defined as:

- Printed matter with a list of items for sale containing item description, item numbers and/or prices. Mini-catalogue must contain a minimum of eight pages or panels and meet the Machineable Mail - Standard Personalized Mail service requirements found in the "Designing" module at canadapost.ca/cppmguides.

Mini-catalogue is a cost effective way for our customers to drive on-line and off-line sales. It allows companies to cut mail and production costs without sacrificing circulation or frequency.

3.4 Calendars

Calendars that include promotional content and are sent to current prospective customers or potential donors can be sent as Personalized Mail.

If the intent of the calendar is to motivate an individual to take action by promoting a product, service, program or event or to solicit donations or contributions it qualifies as Personalized Mail. If the intent is to distribute information it would not qualify.

For example...

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
A real estate agent or local business wishes to send a calendar to prospective or current clients with their name and contact details prominently displayed.	Yes	The intent is to stay "top of mind" to prospective clients and the well branded calendar will bring in new or repeat customers.
A charity organization wishes to send calendars that display specific "draw" dates or key events relevant to the charity.	Yes	The intent is to promote the events listed in the calendar and solicit contributions for the charity.
A municipality wishes to send a calendar that contains information about their various programs and services including their waste and recycling pick-up dates.	Yes	Provided there is significant promotion of the specific programs and services (intent is to motivate recipients to act) this can qualify as Personalized Mail.
A municipality sends out recycling and waste calendars with pick-up dates and information on what qualifies as "recycling" or "compost".	No	The main intent is to communicate the pick-up dates and ensure residents understand what qualifies for the various programs. It does not contain content that would motivate an individual to take action beyond what they are currently doing.
A University or College wishes to send a course calendar containing the names of specific programs with dates and times.	No	This calendar is sent to provide students with the course dates and times. There is no content promoting the school or the specific programs included.

3.5 Newsletters

Promotional newsletters are acceptable as Personalized Mail. Information contained in the newsletter must promote a specific product, service, program or event or motivate an individual to donate or contribute to a cause.

Newsletters with the intent to provide businesses and consumers with educational material, transactional or informational communications are unacceptable as Personalized Mail. If the main intent of the newsletter is to communicate information, inserting a request for a donation, a coupon or a call to action does not change that intent.

For example...

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
A realtor wishes to send a monthly newsletter updating customers about the real estate market and properties recently sold or listed. The last page of the newsletter lists the names and phone numbers of the real estate team for those readers who would like further information.	Yes	The intent is to provide the information prospective buyers may need to entice them to list their current home or to purchase a new home.
Two thousand members of a regional pharmacists' association receive a newsletter three times a year. The newsletter contains information about new drugs and summarizes articles from medical journals.	No	The purpose of the newsletter is to provide information on subjects of interest to the members.
An investment broker wishes to send a newsletter that contains articles of interest related to the services offered by the firm. After each article, there is a note saying, "If you require further information, please call our office at 1-800-555-1212."	Yes	The intent of the mailing is to provide information on various services motivating clients to sign up for the various services.

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
To promote one of their environmental funding programs, a government department wishes to send newsletters that describe past projects supported by the program, how to apply for funding, and why this program is important.	Yes	The intent of the mailing is to promote the program and the content contains information on how individuals could apply for fundraising.
A university alumni newsletter contains descriptions of current and future projects, general news of interest to alumni, profiles of successful alumni and a regular feature about one of the university departments.	No	The intent of the mailing is to provide information of interest to current alumni. There is no specific program or event being promoted by the content.
A university alumni newsletter describes the importance of alumni contributions, explains how proceeds from fundraising activities are spent, describes the various ways alumni can contribute to the university, and requests continued financial support. The newsletter reinforces the importance of its fundraising program and to request donations.	Yes	The intent of the mailing is to solicit donations and contributions from current alumni and the content is to motivate individuals to provide financial support.
A newsletter from a provincial member of a legislature or parliament targeting constituents to update them about activities the member has participated in on their behalf and to encourage them to call with any issues or concerns, or for information on government services.	Yes	Typically with these items the intent is self-promotion with a goal of re-election. They are providing their constituents with evidence of past performance and likely future plans.
A customer subscribes to a financial newsletter that gives advice about the stock market.	No	Paid subscriptions are fulfillment and do not qualify as Personalized Mail.

3.6 Fulfillment

Items that are mailed as a result of fulfillment of an order for a product or service are not acceptable as Personalized Mail.

Exceptions: The following items have the main intent to sell the recipient a product or service and therefore qualify as Personalized Mail:

- promotional catalogues, paid or unpaid;
- sample boxes or product samples requested by a customer;
- fulfillment of a promotional product procured through a specific promotion that contains significant product branding where the intent is to keep the brand visible to the consumer. (i.e. cereal box promotions).

In the below table you will find several examples that help distinguish fulfillment from advertising.

Examples of fulfillment:

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
Vicki signed up for a DVD/CD club and purchased three items. Can the items be mailed as Personalized Mail?	No	The items were purchased and are being sent as fulfillment of the sale.
Josyane calls an airline and asks to join their frequent flyer club. The airline sends Josyane a "welcome package" containing an introductory book explaining how the program works, information on the membership benefits, upgrade certificates, and a membership card. Can this package be mailed as Personalized Mail?	Yes	The welcome package is part of the airline's frequent flyer club which is acceptable as part of a loyalty program mailing.
Kyle calls a 1-800 number to receive a tourist package promoting P.E.I. as a holiday destination. Can this package be mailed as Personalized Mail?	Yes	Kyle has not bought the ultimate product being advertised - a holiday in P.E.I. He is receiving an advertising item.
Morgan completes a Business Reply Mail card requesting an Internet provider to send her software that provides 20 hours of free Internet access. Can the software be mailed as Personalized Mail?	Yes	The item is considered a sample.

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
Joanne signed up for an Internet service and the company wishes to send her the software. Can the company send the software as Personalized Mail?	No	Joanne has purchased the product and has ended the advertising relationship.

3.7 Surveys

Mail items that have the intent to collect consumer information can qualify as Personalized Mail provided the information collected will be used to motivate an individual to buy or acquire a product or service, or to contribute to or support a cause.

Opinion and census type surveys have the intent of collecting information to be used for planning or educational purposes and do not promote the sale of a product or service, therefore these types of surveys do not qualify as Personalized Mail.

For example...

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL	RATIONALE
A bank is promoting a credit card. As part of the promotion the recipient is asked to respond to the questions on the application form.	Yes	The questions relate to the item being promoted and will help customize future product or service offerings.
Ian receives an employee satisfaction survey.	No	The survey is intended to collect information for educational purposes.
A political party wishes to send a survey asking questions about their political opponents.	Yes	The intent of the mailing is to promote the party sending out the survey and not to use the data for educational purposes.
An energy company wishes to send a survey looking to understand consumer preferences around their various products and services.	Yes	The intent of the mailing is to use the information to customize offers and services to specific customers.
A market research firm is conducting a consumer preference survey regarding household purchase patterns.	Yes	The information gathered from this survey will be sold to relevant industries to target prospective buyers for their products. The end result will generate offers and campaigns to sell products or services.

3.8 Greeting or Thank You cards

Businesses often send out greeting and seasonal cards to existing or prospect customers as a means of keeping their brand top of mind or to encourage traffic to their store location. Cards sent for this purpose must contain the brand or logo of the business and should contain contact or address information. These cards do not necessarily need to include a specific offer to qualify. Thank you cards sent out after purchase to stimulate a subsequent visit or to thank a donor for a contribution to encourage additional donations can also qualify as Personalized Mail.

For example:

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL?	RATIONALE?
A Christmas card sent from a dental office to their customer base.	Yes	The intent is to stay top of mind and relevant to their customers.
A charity wishes to send a thank you note with the tax receipt for the donation.	No	The main intent of the mailing is to provide the donor with their tax receipt which is Lettermail.
A charity wishes to send a thank you note for a donation without a tax receipt.	Yes	The intent of this mailing is to thank the donor and to encourage further donations.

3.9 Welcome Kits

Welcome kits are typically packages that are sent to customers who have recently signed up for a service or made a significant purchase with a business. When the package contains significant details to promote the use of the program or service or provides incentive for recipients to sign up for additional programs or services these can qualify as Personalized Mail.

When welcome packages only contain account information or terms and conditions of the purchase, these will not qualify as Personalized Mail as the intent is only to provide relevant information to the subscriber or purchaser.

For example:

ITEM DESCRIPTION	QUALIFIES AS PERSONALIZED MAIL?	RATIONALE?
A satellite radio company wishes to send a package welcoming the new subscriber and provides all the relevant channel information. They also include the "premium" options available for an additional fee.	Yes	The intent is to encourage the use of the program as well as to increase sales by upselling the premium options.
An automotive company wishes to send a welcome package to someone who has entered into a new lease agreement. The package contains the vehicle manual and the terms and conditions of the lease.	No	The purpose of the welcome package is only to provide information about the vehicle and the terms and conditions of the lease.

SUMMARY

Use the following chart as a guideline in determining "When to say Yes - That's Personalized Mail™".

PERSONALIZED MAIL SUMMARY	
Personalized Mail mailings are defined as mailable items, that have the primary intention (main messaging) of motivating an individual to take action by: <ul style="list-style-type: none"> • promoting a product, service, program or event • soliciting donations or contributions • reporting on financial performance, primarily for promotional purposes, or • supporting your loyalty card program. Includes all mailings relating to loyalty card programs. Excludes credit and/or debit cards with or without reward points. Mini-catalogues are acceptable as Personalized Mail. A Mini-catalogue is defined as printed matter with a list of items for sale containing item description, item numbers and/or prices. Mini-catalogues must contain a minimum of 8 pages or panels and meet Machineable Standard Personalized Mail service requirements.	
Acceptable*	
<ul style="list-style-type: none"> • Information from a CD club promoting membership and/or the purchase of new CD releases; • items with the intent to solicit donations or contributions; • a brochure advertising an upcoming conference and offering a discount for anyone who reserves before a specified date; • an invitation from a long-distance phone provider to try their services; • annual reports reporting on financial performance; 	<ul style="list-style-type: none"> • a profile of a candidate sent by a political party prior to an election; • a calendar promoting the services or products of a local business; • a sample of a new skin cream and a discount coupon valid for the next purchase; and • all mailings related to loyalty card programs such as card fulfillment, changes to program, transaction details such as points accumulation (exception: credit and/or debit cards).
Not Acceptable*	
Educational material: <ul style="list-style-type: none"> • updates to professional handbooks; • opinion surveys; and • census mailings. Transactional communications: <ul style="list-style-type: none"> • invoices; • receipts; • tax forms; • proxies; • fulfillment of products or services; • paid subscriptions; • replacement or renewal of cards (i.e., credit and/or debit cards); • identification cards; and • thank you mailings that are not apart of a loyalty program. 	Informational communications: <ul style="list-style-type: none"> • recycling or waste calendars; • recall notices; • annual reminders; • notifications of changes; • renewal notices; and • election (voting) notices.

* Please note these lists are not meant to be exhaustive.

If you are unsure whether your items qualify as Personalized Mail, we encourage you to have your mail items assessed by contacting our Commercial Service Network (CSN) at 1-866-757-5480. Each item is individually assessed against our Personalized Mail definition and qualifying items will receive an approval ticket number that can be added to your Order (*Statement of Mailing*) to ensure smooth induction.

NOTE: When an item is assessed and determined to be Personalized Mail it is that individual item that is being approved and not the over-all campaign or marketing initiative.

Business solutions from Canada Post

DELIVERING MESSAGES	ADVERTISING BY MAIL	PARCEL SERVICES
<p>From regular mail to electronic mail, Canada Post offers a full range of products and services to help you deliver your message. Whether your message is going to the same city, across the country or to another country, our extensive network provides the most reliable and convenient way to get it there.</p> <ul style="list-style-type: none"> • Lettermail™ • Priority™ • Publications Mail™ • Xpresspost™ • Priority™ Worldwide • Xpresspost™ - USA • Xpresspost™ - International 	<p>Canada Post provides a full range of services to help you zero in on target markets or cover households in the province or across Canada with no waste and no duplication.</p> <ul style="list-style-type: none"> • Neighbourhood Mail™ • Personalized Mail™ • Business Reply Mail™ • Canada Complete™ • Mini-catalogue 	<p>Canada Post's range of parcel delivery services offers a smart shipping solution for all your shipping needs. You can choose the service and options that best suit your needs and budget.</p> <ul style="list-style-type: none"> • Priority™ • Xpresspost™ • Expedited Parcel™ • Regular Parcel™ • Priority™ Worldwide • International Parcel™ • Xpresspost™ - USA • Xpresspost™ - International • Expedited Parcel™ - USA • Small Packet™ • Tracked Packet™

* Please note these lists are not meant to be exhaustive.