

## PLANNING CALL QUESTIONNAIRE

Type answers into this document and save to the project folder on the **L: drive**.

Consultant informs PM, Gary and Jillian when the form is complete and you are ready to meet with the PM.

**CLIENT:**

**PROJECT:**

**DATE:**

**TARGET MAIL DATE:**

**CLASS OF MAIL (NP STD, FC, comingle):**

**QTY:**

### COPYWRITING

Who will write?

- What type of letter will be used (mission, testimonial, challenge, etc.) and what is the messaging?

- Who will sign?
- Have you obtain materials in advance if possible for copywriter to review?
- Will there be photos?
- Will we provide email copy/design?

If so, what is the timing of the emails?

Should email addresses be provided with the mailing list and return to the customer?

### SEGMENTATION

- Will there be an RTC?
- What segments and versions will there be in the NP and the RTC?

- Will there be variable fields in the letter versions?

### PACKAGE / PRINTING / DESIGN

- What is the package size and package elements? List each item.

- Who will design each piece?
- Will there be any special outer envelope design elements?
- What elements will we print?
- What will the customer or the customer's printer provide any materials?

## FOR THE LAUNCH CALL

- Is the Copywriter required for the call?
- Is the Creative Director required for the call?

## DATA

- Will there be a rental list?  
If so, work out the details or have a proposal ready for the call (unless we are repeating a prior rental list).
- Will an analysis be done later of the mailing (requires buy-in by Gary)?  
If so, what fields are required to be kept with the mailing list for analysis?
- How will ask strings be handled?
- How many version(s) of reply forms will there be?
- Will there be a last gift reminder sentence on the reply form?
- Will there be annual giving check boxes on the reply form?

## FOR FIRST TIME CLIENTS

- Does the customer already have a PROPOSAL/QUOTE? Is it in the root folder?
- Style guide requested (or is this left to the Planning Call email from the PM)?
- Did you ask for sample data?

## NOTES