

PLANNING CALL QUESTIONNAIRE - NONAPPEAL CREATIVE

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):

COPYWRITING

Who will write?

- What is the messaging?
- Have you obtain materials in advance if possible for copywriter to review?
- Have you obtained photos and sent to PM?
- 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?

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).

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