



# Digital Print Capabilities

Cheetah Messaging

Last Modified: November 2021



## Version History

Version	Date	Description	Reviewed / Approved by
1.0	March 2018	Initial release	Cheetah Digital Product Management
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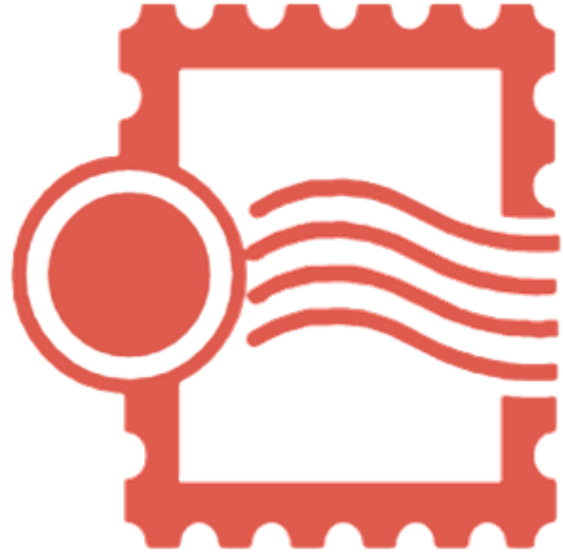
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# 1 Introduction

## Overview

The purpose of this document is to provide a high-level overview of the Digital Print capabilities offered by the Cheetah Messaging platform.



## Print Channel

Online marketing, such as email, SMS, and social media, has clearly supplanted print marketing in recent years, in terms of reach, quantity, and importance. Even so, the Digital Print channel (sometimes called “Direct Mail”) remains an important component in many clients' cross-channel marketing strategies.

### Benefits

The Digital Print channel offers several unique benefits. A printed mail piece is a physical, tangible item, which allows it to stand out in an era dominated by intangible, ephemeral marketing messages, such as emails or text messages or web banners. A consumer may pause to give that printed piece more careful attention than online messages.

Somewhat ironically, print can almost be considered “non-traditional” these days, given the dominance of online marketing. The novelty of a physical mail piece can differentiate your message in the consumer’s mind.

By managing your Digital Print efforts through Messaging, you gain access to all of the platform’s cross-channel capabilities, reporting, and analytics. Digital Print can be particularly effective when used in conjunction with other marketing channels. For example, Digital Print can be used to reach a consumer when your contact information in other channels fails, such as a bounced email address, for example.

In addition, performing the data merge through Messaging can be significantly less expensive than having the print vendor run the data merge.



## Challenges

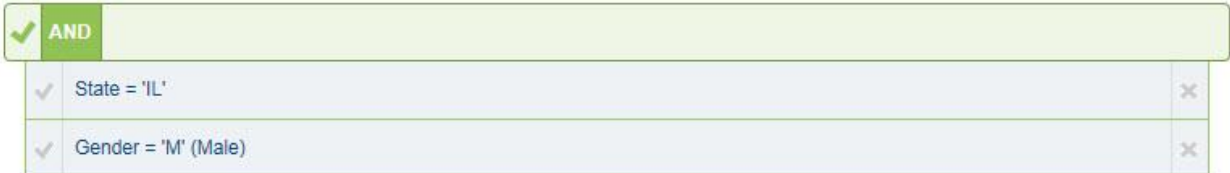
Marketers need to be aware of the unique challenges posed by the Digital Print channel, and the use of terrestrial addresses to contact consumers.

Because of the costs associated with printing, binding, and mailing your print piece, your Print Campaign must be as efficiently targeted as possible to the desired audience. Messaging offers a graphical, drag-and-drop interface to define your audience of intended recipients.

Through this interface, you build a Filter, which consists of a set of criteria, or business rules, that defines who you're looking for. You can target your recipients based on demographic information, geography, activity data, or aggregated data such as sums or counts. When the platform applies your Filter, it searches the database for consumers that match the Filter's criteria.

A Filter can be very simple, such as "male customers from Illinois," or it can be very complex, such as "female customers from Illinois or Wisconsin who purchased red or brown shoes via the web within the last six months." Filters are reusable across Campaigns and channels.

### *Messaging – Filter screen*



✓ AND	
✓ State = 'IL'	✕
✓ Gender = 'M' (Male)	✕

An important concern in any Print Campaign is the quality of the name and address data. Mail pieces sent to invalid postal addresses, or sent to the wrong person, or multiple pieces sent to the same address, all result in wasted print and postage costs. Print audiences in Messaging are processed through a series of steps designed to improve the deliverability of your Campaign (see [Name and Address Processing](#) below for more details).

Also, you should take advantage of all the postage discounts that the U.S. Postal Service (USPS) makes available to print marketers. For example, the USPS offers a significant discount if you apply a "Postal Pre-Sort." This process is designed to sort the mail pieces



into "delivery sequence order" prior to sending them to the postal processing facility. When you pre-sort your mailing, you're arranging the mail pieces into the order that the mail carrier will use when he or she actually delivers the mail. Postal Pre-Sorts that are integrated into Messaging can be defined and reused across multiple Print Campaigns.



## 2 Print Campaigns



### Overview

This section describes the features and capabilities of the Print channel in Messaging.

Like most of the channels in Messaging, you begin the Campaign process by defining the type of Campaign -- either a one-off Campaign, an event-triggered Campaign, or a date-driven Campaign -- then establishing the audience of recipients (by means of a Filter) that you want to receive your message.

Many of the subsequent steps in the Print Campaign life cycle are unique to the Digital Print channel, and are described below in more detail.

### Content

Unlike other channels such as Email or SMS Text, you don't build a Print Campaign's creative content within Messaging. Instead, this content must be developed using some other publishing software. Messaging integrates closely with the Pageflex Studio® publishing tool, which provides some additional functionality (see [Pageflex Integration](#) for more details), but you can use any publishing software capable of generating a print-ready output.

#### Personalized URLs

Messaging supports the use of Personalized URLs, or PURLs. A PURL is a webpage that uses personalization values to create a unique URL for each recipient of your Campaign. PURLs add a personalized touch to your marketing strategy with the goal of being easier to remember, and garnering more attention from consumers.



The PURL can be built from any field (or fields) in your database, such as the consumer's first name and last name (for example: "www.yourdomain.com/johnsmith").

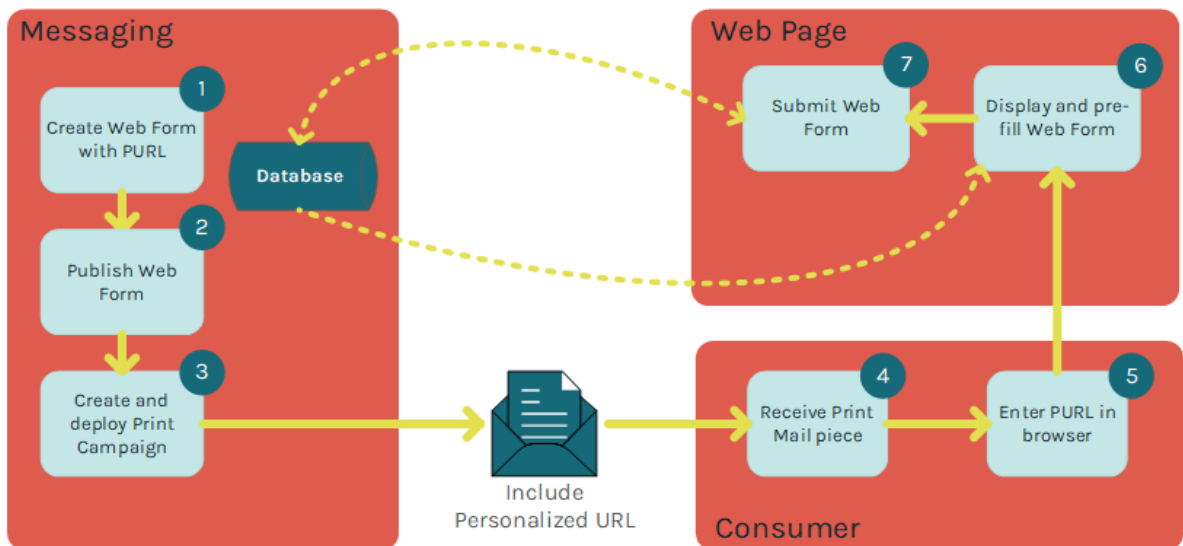
**PURL Set Up** Generate Personalized URLs for this campaign

PURL

URL Type

PURLs are often used to improve results from Print Campaigns. On the direct mail piece, you can print a Personalized URL that contains the consumer's name, and encourage the recipient to browse to this URL. Within Messaging, PURLs are used in conjunction with Web Forms, which can be pre-filled by pulling information about the consumer from the database.

The following diagram depicts this process of using a Web Form with PURLs. In this example, the PURL values are sent to consumers through a Print Campaign. When the customer browses to his or her own custom URL, the platform authenticates the customer's identity, in order to pre-fill the fields in the Web Form.



## Proofing

Messaging can generate test versions of a Print message, prior to actually launching and deploying the Campaign. These test versions, called "proofs," are used to check the appearance and content of the message, and to verify that personalization fields are correctly populated. Within a Print Campaign, the system will create one or more sample print pieces in PDF format, which are then accessible from the "Proofing" section of the Campaign screen.

By default, the platform will use the main Campaign audience to select and populate proofing records. However, you can optionally designate an alternate audience from which to select the records that should be used for generating proofs. This alternate audience is defined through the use of a separate Filter.

## Name and Address Processing

With online marketing, finding duplicate individuals in your Campaign audience is relatively simple, and usually involves a byte-for-byte match on the contact information. For example, the email address "rob.smith@gmail.com" is treated as a different person than "robert.smith@gmail.com."

Finding duplicate recipients is more complicated in the Digital Print channel because the same name, or the same postal address, can be represented in multiple ways, all of which are valid, and all of which can represent the same person. For example, consider the following three sets of contact information:

Rob Smith	Robert Smith	R Smith
123 East 3rd St	123 E Third Street	123 E. Third St.
Chicago, IL 60001	Chicago, IL 60001	Chicago, Ill 60001

The names and street addresses are different, and would be treated as different individuals if you were performing a byte-for-byte match. And yet, a human viewer would say that these three sets of contact information probably represent the same person at the same address.



When you create a Print Campaign in Messaging, your audience of intended recipients is processed through the following series of steps intended to cleanse and standardize the name and address components:

1. **Name Parsing:** Consumer names are messy, with many odd and inconsistent spellings. To improve the quality of the matching and de-duplication process, the system will parse and cleanse the input names to make them as consistent as possible. The Name Parsing step makes spelling corrections of known words, identifies nicknames (“Rob” vs. “Robert”), removes certain words that aren’t meaningful (like “occupant” or “family”), and flags vulgar words.
2. **Address Correction:** As noted above, the same postal address can be represented in many different ways, all of which are considered valid. In order to better identify duplicate postal addresses, the system will standardize the address elements into a common format. The Address Correction process matches a consumer’s postal address against CASS-certified data (“CASS” stands for “Coding Accuracy Support System,” which is a certification system from the USPS for address validation). This process will standardize the address elements, and can also supply missing address components (such as street directionals), and make corrections to the ZIP code.
3. **Change of Address:** Your list of consumer addresses is checked against NCOA<sup>LINK</sup> – a USPS-provided database of individuals, families, and businesses that have moved within the last 48 months. Matches to this database will be flagged to indicate that this consumer no longer lives at the provided address.
4. **Deliverability Score:** Based on the results of the name and address processing steps described above, the system assigns a Deliverability Score that indicates the quality of the postal address, and the likelihood of the individual living at that address. This score ranges from “1” (Address is very good; Name and Address combination is validated) to “8” (Address is very poor - likely undeliverable).



# Postal Options

When configuring the Print Campaign, you can define the following postal-related options:

- **Postal Pre-Sort** -- This process is designed to sort the mail pieces into "delivery sequence order" prior to sending them to the postal processing facility. The USPS offers significant postage discounts to marketers who pre-sort their Campaign.
- **Print Piece** -- If your print shop vendor requires specific criteria about the piece being printed (such as its size and weight dimensions, delivery schemas, etc.), you can define that information within a Print Piece. The system will send a file containing the Print Piece parameters, along with the Campaign output file, to the print shop vendor.
- **Estimated Drop Date** -- Enter the date when you expect your mail piece to be delivered to the Post Office.
- **CASS / NCOA Date** -- Enter the date when you will process your audience addresses through CASS / NCOA.

# Output Options

The concept of launching and deploying a Campaign has a different meaning in the context of a Print Campaign, as opposed to other channels. When you deploy an Email Campaign, or an SMS Text Campaign for example, the platform begins sending the messages to the recipients. Within the Print channel though, launching the Campaign generates the Campaign output. A Print Campaign has two different output format options:

- A "print-ready" output file called a Variable Digital Print file that can be sent to a print vendor.
- A data file that uses either a custom one-off file layout, or a pre-defined file layout.

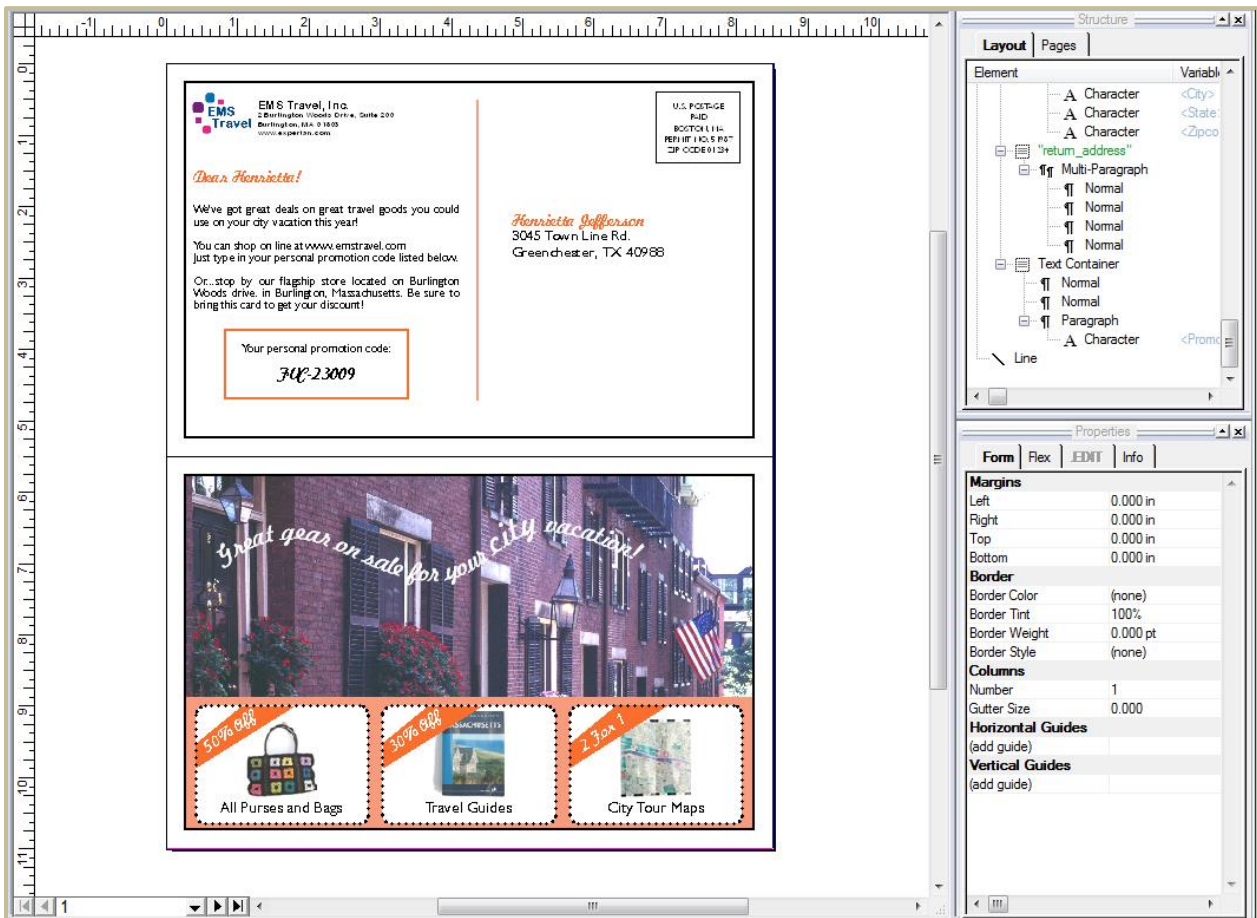
With each of the above options, you can define the destination where the output file is to be delivered, such as the FTP server of the print shop vendor who will print the mail pieces



for your Campaign. You can optionally define multiple destinations; for example, you might need to send one copy of the file to the print shop, and one to your internal auditing department.

## Pageflex Integration

As noted above, Messaging integrates closely with Pageflex Studio 8 for creating your Campaign content. Pageflex Studio is a flexible publishing application that lets you build your mail piece, and insert variables that represent dynamic content, such as the recipient's name and address, or a special coupon code, for example.



If you build your Print Campaign creative content in Pageflex Studio, you can bring that content into Messaging by means of a special asset type called a "Print Template" that instructs the platform on how to handle the Pageflex Studio content.



Pageflex Studio supports the use of personalization in the Print content. If you're using personalization, the variables in the Pageflex job will need to be "mapped" to their corresponding fields in your Messaging database as part of the Print Template.

**Travel Goods Print Template**  
Print Template

Table: Recipient  
Ready to Use  
This print template is ready to be used

PRINT TEMPLATE EDIT

Save Save As Rename Delete Import Project Download Files Set to Draft

Actions Files Status Tags

add tag

Add New Column Add Multiple Columns

Type	Header	Value
Static	City	{{home_city}}
Static	Coupon1	{{promo_code}}
Static	Coupon2	{{promo_code}}
Static	Coupon3	{{promo_code}}
Static	CustomerID	{{promo_code}}
Static	Destination	{{promo_code}}
Static	DestinationType	{{promo_code}}
Static	Firstname	{{name_first}}
Static	ID	{{promo_code}}
Static	Lastname	{{name_last}}
Static	State	{{home_state}}

When you create your Print Campaign, you need to select your Print Template as the source for the Campaign.

Content Preview Change

Print Template  
**Travel Goods Print Template**

Production Job

OMR Page # (sheets of paper per record)

The Preview feature in the Campaign screen lets you verify the appearance and layout of the mail piece. The system displays an actual PDF of your Print content, along with any




personalization fields. You can test the personalization fields by entering your own test values to see how they appear within the Print content.

**Message** ✔ Draft  
This campaign has not been launched

CAMPAIGN EDIT OPTIONS RESPONSES **PREVIEW CONTENT**

Message Type Refresh Close Preview  
Tools Close

Preview refresh preview valid [ 2:50:31 PM ]

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0

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**John Smith**  
120 Main St  
Apt 1  
Chicago, IL 60001

**Personalization Options**

First Name

Home Address

Home Address

Home City

Home State

Home ZipCode

Last Name

Promo Code

**Dynamic Content**

There are no Dynamic Blocks for

