

Service Overview



Personalized Mail™

IMPORTANT UPDATES

DESCRIPTION OF CHANGE		LOCATION
Amendment v1.0	Posted on November 18, 2016	Effective on January 16, 2017
Introduced Data and Targeting module in the Personalized Mail Customer Guide.		Section 2 "Data and Targeting"
Updated to reflect 2017 prices.		Section 3 "Personalized Mail pricing"
Increased the Special Handling - maximum: <ul style="list-style-type: none"> width - Oversize (flexible) from 270 mm to 380 mm length - Oversize (rigid) and Dimensional from 300 mm to 380 mm. 		Section 4.1 "Measurements - Size and weight"

Changes and enhancements introduced in 2016:

DESCRIPTION OF CHANGE		LOCATION
Revision v1.1	Posted on May 30, 2016	Effective on May 30, 2016
Clarified sealing for envelopes and folded self-mailers.		Section 4.2 "Designing requirements"

When there is an amendment or a revision to the document, the version number will be modified as follows:

- an amendment increases the first digit in the version (e.g., version 2.0, 3.0)
- a revision increases the second digit in the version (e.g., version 1.1, 1.2)
- the version number restarts at 1.0 every January of a given year.

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PURPOSE OF THIS SERVICE OVERVIEW

This *Service Overview* is an outline of the *Canada Post Personalized Mail™ Customer Guide* available at canadapost.ca/cppmguides.

The *Customer Guide* forms part of the Agreement between the customer and Canada Post. It explains the qualifications and other terms and conditions under which this service is provided. Customers should ensure they are using the most current version of the *Customer Guide*, including all amendments and other applicable documents. It is the customer's obligation to meet all the requirements outlined in the Agreement.

NOTE: Some words and expressions used in this document have a specific meaning. See "Paying and Terms" module, *General Terms and Conditions*, Section 1 "Definitions" or the [Glossary](#) for the definition of specific terms referenced throughout this document and this Agreement.

SERVICE OVERVIEW

The "Service Overview" module is a quick reference document that provides a summary of key information pertaining to this service including, qualifying criteria, options, delivery standards, pricing, designing and mail preparation. This module can be used by customers, mail service providers and agencies to ensure that your mailing needs and expectations are met.

1 WHAT IS PERSONALIZED MAIL SERVICE?

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.

1.1 What is acceptable as Personalized Mail?

Personalized Mail mailings are acceptable when:

- all items have the same purpose and the same goal, the content does not have to be identical. The primary intention (main messaging) of the mail items is to motivate 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 8 pages or panels and meet Machineable Standard Personalized Mail service requirements.

To qualify as Personalized Mail service, mailings must:

- be deposited and paid for in Canada for delivery in Canada
- meet the Personalized Mail definition
- consist of a minimum of 500 items for Machineable Mail or 1,000 items for Special Handling mail.

1.2 What is unacceptable as Personalized Mail?

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

- Educational material may include; updates to professional handbooks, opinion surveys and census.
- Transactional communications may include: 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 a 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.

NOTE: The above examples are not meant to be exhaustive.

1.3 Delivery standards

Delivery standards are estimates of how long it will take for the mail to be delivered from the point of deposit to the destination points. These delivery standards are not guaranteed.

	IN BUSINESS DAYS		
	LOCAL	PROVINCIAL	NATIONAL*
Machineable Mail - Standard	3	4	5
Machineable Mail - Oversize Special Handling	3	3 - 5	4 - 8

* Excludes non-major urban centres, northern regions and remote areas.

For detailed information, visit [Delivery Standards](#) of the *Canada Postal Guide*.

1.4 Service features

A feature is provided as part of the basic service.

1.4.1 MAIL FORWARDING

Items that cannot be delivered as originally addressed because the addressee has moved will be forwarded to the addressee at no extra charge while there is a Mail Forwarding request in effect.

Mail bearing the name of the addressee followed by the words "OR OCCUPANT" or similar wording, or mail bearing a non-personalized descriptor, such as "OCCUPANT", will not be forwarded. In such cases, the item will be delivered to the original destination address.

NOTE: *Mail Forwarding* is not available for items in the Dimensional Personalized Mail category.

1.5 Service options

An option is a service enhancement that is not provided automatically as part of the basic service.

1.5.1 RETURN TO SENDER

Personalized Mail items that cannot be delivered as originally addressed will be returned to the sender if:

- the Return to Sender option was selected and paid for at the time the *Order (Statement of Mailing)* was created
- the item carries the correct RETURN POSTAGE GUARANTEED postal indicia. Visit canadapost.ca/indicia for more information regarding the postal indicia
- the item is addressed to an address which does not have a *Mail Forwarding* request in effect for that addressee, and
- only one return address appears on the outside of the item and that address is Canadian.

If there is no *Mail Forwarding* service in effect for the addressee and if the item does not bear the correct RETURN POSTAGE GUARANTEED postal indicia, the item will be treated as undeliverable and disposed of or recycled, as determined by Canada Post.

Mail bearing the name of the addressee followed by the words "OR OCCUPANT" or similar wording, or mail bearing a non-personalized descriptor, such as "OCCUPANT", will not be returned to the sender. In such cases, the item will be delivered to the original destination address.

NOTE: Return to Sender is not available for items in the Dimensional Personalized Mail category or metered items. Such items will be treated as undeliverable.

1.5.1.1 Return address

If a return address is used, it must be Canadian. Dual return addresses are also acceptable as long as there is one Canadian return address. However, if Return to Sender is requested, there must be only one return address showing and it must be Canadian.

NOTE: Canada Post does not return items to addresses outside of Canada.

The return address printed on the item may vary provided the mailing originates from the same mail owner (e.g. customer number must be the same on all items).

1.6 Undeliverable Personalized Mail items

Items are treated as undeliverable if:

- the item does not bear a complete and valid address
- the item is addressed to a non-existent address
- the item is refused by the addressee
- delivery is prohibited by law
- the item cannot otherwise be delivered to the address.

NOTE: Undeliverable Personalized Mail items will be disposed of or recycled, as determined by Canada Post. For more information, consult the [Undeliverable Mail](#) section of the *Canada Postal Guide*.

DATA AND TARGETING

2 DATA AND TARGETING

Data and Targeting provides a more in-depth look at Canada Post Data and Targeting Solutions as a component of Smartmail Marketing™. When a list is used wisely, businesses can target top customers, get their brand directly into the right hands, and boost profits in a cost-effective way

SOLUTIONS	DEFINITION
Canada Complete™	
List rentals from Canada Post offer you the ideal combination of accuracy, reach and targeting. With more than 14 million addresses available, you can send a campaign from coast to coast in Canada, or to specific high-potential customers close to your business. Choose to exclude your existing customers to maximize the value of your acquisition campaign.	
<ul style="list-style-type: none"> • Consumer lists • Business lists 	Cost-effective and accurate targeting of prospects based on a set of geographic, demographic, psychographic and behaviour criteria. Canada Complete lists provide access to Canadian residential, multi-unit building/apartment, and business addresses. Customers can choose from two Canada Complete list options: Consumers and Business (with the added option to target only Home Offices).
Data Management Services	
Canada Post Data Management Services correct and enhance the data hygiene of your mailing list. Start with Address Accuracy and then select additional data cleansing features to suit your business needs and budget.	
<ul style="list-style-type: none"> • Standard Services • Premium Services 	Corrects, completes and standardizes mailing addresses on your list. When your addresses are accurate, more of your mail can be delivered and reach the intended audience. Canada Post offers missing suite information (suite infill), name and address validation and other services that can increase deliverability and in turn drive a higher return on investment.
Licensed Data Products	
Provides geographic information to support your business objectives. Licensed Data Products let you work with the most current and updated monthly copy of Canada Post's address database. You can license it for use within your company or as part of a product or service you offer.	
<ul style="list-style-type: none"> • Postal Code Address Data • Point of Call Address Data • Postal Code Latitude/Longitude Data • Postal Outlet Data • Municipal Amalgamation Data 	Helps your business do many things, like validate addresses for mailing and data hygiene purposes, presorting your mail to save on postage, or by connecting demographic and location data to gather business insights. With the most accurate, complete, and up-to-date data available, you can use Canada Post Licensed Data Products for so much more than sorting mail.
Marketing Insights	
Provides customers the ability to gain insights into their customer database, their target market and trade area as well as review their marketing campaign performance.	
<ul style="list-style-type: none"> • Profile Analysis • Response Analysis • Penetration Analysis • Maps 	Helps with competitive positioning and overall market strategies.

For further information, visit the "Data and Targeting" module at canadapost.ca/cppmguides.

PRICING

3 PERSONALIZED MAIL PRICING

In order to access Personalized Mail prices, the customer must meet all applicable requirements, including specifications, Address Accuracy, and mail preparation and presortation requirements for Personalized Mail service.

Category	Price per Item					
Machineable	Standard¹ Up to 50 g			Oversize Up to 500 g		
	\$0.47			\$0.70 + \$0.0034 per g over 50 g		
Special Handling	Standard		Oversize		Dimensional	
	Up to 50 g	Over 50 g up to 100 g	Up to 500 g	Over 500 g up to 1.36 kg	Up to 500 g	Over 500 g up to 1.36 kg
	\$0.52	\$0.57	\$0.65 + \$0.0034 per g over 50 g	\$2.59 + \$0.0040 per g over 500 g	\$1.48 + \$0.0018 per g over 50 g	\$2.89 + \$0.0040 per g over 500 g
	Price per Item					
Option						
Return to Sender ²	\$0.01					

¹ Machineable Standard price also applies to Machineable Mini-catalogue.

² Return to Sender fee per item applies upfront to the entire volume declared in the Order (Statement of Mailing).

Qualifying Customers may have access to lower prices by signing an Agreement. For further details contact the Commercial Service Network. All prices are subject to applicable rebates, discounts, fees, surcharges, adjustments and taxes.

For further information, visit the "Pricing" module at canadapost.ca/cppmguides.

DESIGNING

4 DESIGNING PERSONALIZED MAIL

To be eligible as Personalized Mail, the items mailed must meet the criteria specified (content, format and physical characteristics) for the Personalized Mail service and must be prepared for mailing in such a manner as to prevent loss or damage to any item and permit easy verification of each item.

The Personalized Mail service is available in two categories:

- Machineable - available for Standard and Oversize mail items
- Special Handling - available for Standard, Oversize and Dimensional mail items.

4.1 Measurements - Size and weight

Items within a given mailing can have different sizes, weights and thicknesses provided the items remain within the same weight category. Each item within a mailing must originate from the same mail owner. Imperial equivalents are provided for convenience only.

MACHINEABLE MAIL						
SIZE / ITEM		LENGTH	WIDTH	THICKNESS	ASPECT RATIO	WEIGHT
Standard*	min.	140 mm (5.6 in.)	90 mm (3.6 in.)	0.18 mm (0.007 in.)	1.3:1	2 g (0.07 oz.)
	max.	245 mm (9.6 in.)	156 mm (6.1 in.)	5 mm (0.2 in.)	2.6:1	50 g (1.76 oz.)
Oversize	min.	140 mm (5.6 in.)	90 mm (3.6 in.)	0.5 mm (0.02 in.)	N/A	10 g (0.4 oz.)
	max.	380 mm (14.9 in.)	270 mm (10.6 in.)	20 mm (0.8 in.)	N/A	500 g (17.6 oz.)

* Square Envelopes are acceptable (min. size of 140 mm x 140 mm x 0.18 mm and max. size of 156 mm x 156 mm x 5 mm).

NOTE: Machineable Standard cards and self-mailers must be rectangular in shape.

SPECIAL HANDLING					
SIZE / ITEM		LENGTH	WIDTH	THICKNESS	WEIGHT
Standard	min.	100 mm (3.9 in.)	70 mm (2.8 in.)	0.18 mm (0.007 in.)	N/A
	max.	245 mm (9.6 in.)	156 mm (6.1 in.)	5 mm (0.2 in.)	100 g (3.5 oz.)
Oversize	min.	100 mm (3.9 in.)	70 mm (2.8 in.)	0.18 mm (0.007 in.)	N/A
	max. (flexible)	380 mm (14.9 in.)	380 mm (14.9 in.)	35 mm (1.4 in.)	1.36 kg (3 lb.)
	max. (rigid)	380 mm (14.9 in.)	130 mm (5.1 in.)	35 mm (1.4 in.)	1.36 kg (3 lb.)
Dimensional	min.	100 mm (3.9 in.)	70 mm (2.8 in.)	35 mm (1.4 in.)	N/A
	max.	380 mm (14.9 in.)	130 mm (5.1 in.)	55 mm (2.2 in.)	1.36 kg (3 lb.)

NOTE: Machineable Oversize cards must be sent using a Special Handling option.

4.2 Designing requirements

These requirements are intended to assist mailers and their suppliers to create mail items that are suitable for efficient processing by Canada Post.

	MACHINEABLE MAIL REQUIREMENTS	SPECIAL HANDLING REQUIREMENTS
	Standard Items	
Shape	Rectangular cards and self-mailers. Rectangular or square envelopes as per size specifications	Any, including odd shapes
Address orientation	Horizontal or vertical orientation	Horizontal or vertical orientation
Paper	No glossy finish	Any stock/coating
Graphics/colours	Some requirements apply	Any
Sealing	Envelopes: must be fully sealed on all sides Folded self-mailers: clip or spot seal acceptable (per specifications)	Optional
Quiet zone	Within and around the address block	Within and around the address block
Address fonts and types	Some requirements apply	Any, as long as human readable
Flexibility and firmness	Must be flexible	May be flexible or rigid
Enclosures	Must meet certain requirements	Any (except non-mailable matter)
Machine readability target	95%	Not applicable
Oversize Items		
Shape	Rectangular or square	Any, including odd shapes
Address orientation	Horizontal or vertical orientation	Horizontal or vertical orientation
Paper	Some requirements apply, even though coating is acceptable	Any stock/coating
Graphics/colours	Any	Any
Sealing	Must be sealed (envelopes/wrapper)	Optional
Quiet zone	Within and around the address block	Within and around the address block
Address fonts and types	Some requirements apply	Any, as long as human readable
Flexibility and firmness	May be flexible or rigid	May be flexible or rigid
Enclosures	Must meet certain requirements	Any (except non-mailable matter)
Machine readability target	85%	Not applicable

For further information, visit the “Designing” module at canadapost.ca/cppmguides.

Ensure each item, including any sample(s), is mailable and consider the following:

1. If the item contains a scented item, it must be sealed in such a manner that prevents the scent from escaping. Similarly, liquids and powders must be packaged appropriately. A scented item produced using micro-encapsulated scent infused ink/lacquers does not need to be sealed provided the scented area is covered or contained within the mailed item.
2. If it contains a common allergen item such as peanuts, sesame seeds, tree nuts (e.g. almonds, walnuts) or eggs, it must be packaged and labelled to minimize the potential for allergic reactions.

Visit “ABCs of Mailing” and “Non-mailable Matter” in the *Canada Postal Guide* for more information.

4.2.1 CREATIVE OPTIONS

Canada Post's Personalized Mail service enables customers to be creative with their Direct Mail campaigns. Die-cuts, tip-ons, video in print/digital advertising, repositionable notes, and scented mail are only a few of the possibilities that are available to engage recipients and help increase response rates.

PREPARING

5 MAIL PRESORTATION AND PREPARATION

Proper mail preparation is important to ensure that Personalized Mail items are processed and delivered efficiently. Adjustments and/or surcharges may be applied to improperly prepared mailings. The customer remains responsible to meet all applicable requirements. See the Paying and Terms module, *General Terms and Conditions - Section 5 "Criteria for Qualification"*.

Mail presortation is the process of placing items in an address-based order, grouping and containerizing the items based on a common destination. Mail presortation is required for Special Handling items only.

Mail preparation is the process of facing and containerizing the items and labelling the containers and shipping units. It helps ensure machineability of mail (where applicable), protection of mail, identification of the type of mail and ease of handling.

The following reference table provides a summary of the key requirements when preparing your mailing.

	MACHINEABLE MAIL REQUIREMENTS	SPECIAL HANDLING REQUIREMENTS
	STANDARD AND OVERSIZE	STANDARD, OVERSIZE AND DIMENSIONAL
Presortation software	Not applicable	Mandatory
Delivery Mode Code	Not applicable	Current version required
Grouping levels	Not applicable	DMD, DF, DCF, FCP and Residue
Minimum number of items per grouping	Not applicable	8
Separation of groupings	Not applicable	As per the presortation software (bundling, separator cards or edgemarking)
Labelling groupings	Not applicable	DMD,DF,DCF, FCP and Residue (Optional Endorsement Line [OEL] is also available)
Container levels	Not applicable	DF, City, DCF, FCP and Residue
Container type	Standard: letterflatainers (LFTs) Oversize: flats tubs	Standard: letterflatainers (LFTs) Oversize: flats tubs
	(In the event lids are not available, we recommend cardboard separators be used between each level to protect your mail items.)	
Placing groupings in containers	Not applicable	As per presortation software
Labelling containers	Mandatory (Unless containers are in a shipping unit and the shipping unit is clearly labelled [2D barcoded labels are optional].)	Mandatory 2D barcoded labels
Shipping unit levels	Not applicable	DF, City, DCF, FCP and Residue (If using shipping units)
Labelling shipping units	Mandatory	Mandatory

For further information, visit the "Preparing" module at canadapost.ca/cppmguides.

CREATING AN ORDER

6 CREATING AN ORDER (STATEMENT OF MAILING)

An *Order (Statement of Mailing)* must be properly completed and transmitted electronically using the Electronic Shipping Tools (EST). Non-transmitted *Orders (Statements of Mailing)* may be subject to a surcharge. For information on surcharges, visit the “Pricing” module at canadapost.ca/cppmguides.

NOTE: Delivery standards are calculated from the day of deposit (day 0) plus the number of business days required for delivery. The number of days excludes the day of mailing, weekends and statutory holidays. Weekend and statutory holiday deposits are considered deposited on the following business day.

6.1 Electronic Shipping Tools (EST)

Customers have the option of using either the EST Online version or the EST 2.0 version.

The EST software is free of charge and can be accessed online or downloaded (EST 2.0) through the Canada Post website at canadapost.ca/newuser. For technical enquiries, customers can call the Technical Help Line at 1-800-277-4799.

The following reference table provides a summary of the key requirements when creating an order.

	MACHINEABLE MAIL REQUIREMENTS	SPECIAL HANDLING REQUIREMENTS
Mailing Plan Import File	Optional	Mandatory
Electronic Shipping Tools (EST)	Mandatory	Mandatory
Minimum volume per deposit	500 items (phantom pricing will apply)	1,000 items (phantom pricing will apply)
Sample of mail item at time of deposit	Mandatory	Mandatory
Address Accuracy	Mandatory for over 5,000 items	Mandatory for over 5,000 items
<i>Order (Statement of Mailing)</i>	May be included on the same <i>Order</i> as Special Handling mail items	May be included on the same <i>Order</i> as Machineable Mail items

NOTE: To confirm that the items meet Canada Post’s specifications for Personalized Mail, one representative sample of each item with different physical characteristics (weight, size) must be submitted for review on induction. To verify the mailing is compliant prior to depositing, refer to our “[Self-Assessment Tool](#)” for Standard Machineable mail items or contact a Commercial Service Network (CSN) Representative at 1-800-757-5480.

For further information, visit the “Creating an Order” module at canadapost.ca/cppmguides.

DEPOSITING

7 DEPOSITING THE MAILING

Personalized Mail must be deposited in accordance with the requirements set out in the Agreement and its supporting documentation. If Personalized Mail items are deposited under a particular preparation option (Machineable Mail and Special Handling) and do not meet the requirements for that option, the customer may choose:

- to pay a surcharge, if applicable
- to re-work the mailing so as to meet the requirement
- to have the mail processed using another option, if the items qualify, or
- to use another appropriate Canada Post service.

7.1 Required at time of deposit

Each Personalized Mail *Order (Statement of Mailing)* must be accompanied by:

- two printed copies of the electronically prepared and transmitted *Order (Statement of Mailing)* or the original of a manually prepared *Order (Statement of Mailing)*
- sample(s) of the item, including all enclosures, attachments and wrapping, identical to the item being mailed.

Each deposit of Special Handling mail must include the exportable file of Mailing Plans generated and imported into the EST.

Customers are not required to complete an Agreement but must fill out an *Order (Statement of Mailing)* for each deposit. The customer's signature on the *Order (Statement of Mailing)* confirms that the customer has acknowledged and read the Terms and Conditions on the back of the paper *Orders (Statements of Mailing)* or included with the electronic *Order (Statement of Mailing)*.

7.2 Where to deposit

All items must be deposited with an authorized representative at the deposit location selected on the *Order (Statement of Mailing)*. Items cannot be deposited into street letter boxes or other mail receptacles.

Daily maximum volumes of mail apply for certain types of deposit locations.

RECEIPT VERIFICATION UNIT (RVU)	COMMERCIAL DEPOSIT CENTRES (CDC)*			CORPORATE POST OFFICE*		DELIVERY FACILITY
	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 1	LEVEL 2	
No maximum	2 shipping units**	3 shipping units**	7 shipping units**	5 containers	12 containers	N/A
	(monotainers/pallets)					

* This location type is not equipped to process mail received in monotainers or pallets that are double-stacked.

** A monotainer can accommodate approximately 48 letterflatainers (LFTs) (40 letterflatainers with lids) or 24 flats tubs.

A look-up tool called **Find a Deposit Location** is available at canadapost.ca/depositlocations to help you identify the right deposit location for your mailing based on Postal Code^{OM}, mail type and quantity. In addition, this tool will provide further information such as the deposit location address and deposit location cut-off times.

NOTE: Items deposited after the deposit location cut-off times are considered as being deposited on the next business day.

For further information, visit the “Depositing” module at canadapost.ca/cppmguides.

PAYING AND TERMS

8 PAYMENT TERMS AND TERMS AND CONDITIONS

Various payment method options are acceptable to Canada Post however, not all options are available to all customers and not all options are accepted at all Canada Post facilities. Refer to the Payment Terms for complete details.

Canada Post will provide, and the Customer will use, mail products and services specified in the Terms and Conditions for customers with a “Standing Offer Agreement” or the General Terms and Conditions for customers without a “Standing Offer Agreement”. Refer to the applicable Terms and Conditions.

PAYMENT TERMS	TERMS AND CONDITIONS	
Paying For Your Mailing	With a “Standing Offer Agreement”	Without a “Standing Offer Agreement”