Informed Address (IA) Work Group #191

Session #15
Wednesday, April 1, 2020
**10 – 11 a.m. EST**

Agenda

Discussion Topics

1. Opening & Agenda

2. Review IA Block and IMb

3. Discuss IA Code Prefixes

4. Review IA Operations Pilot

5. Review IA Digital Contacts and B2C Download Requirements

6. Discuss IA Data Characteristics and Best Practices

IA Envelope: Address Block

The IA-encoded address block may evolve to include increasingly less human-readable information.
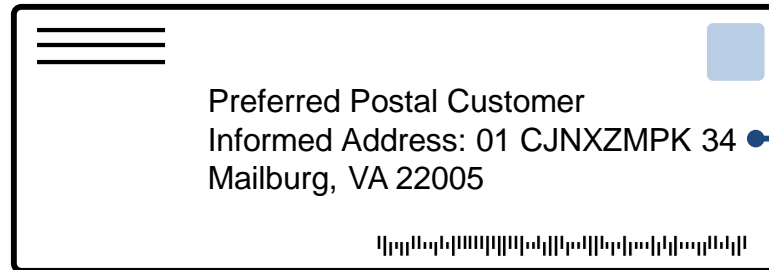
Near Term:

Preferred Postal Customer
99*01 CJNXZMPKY 34
Mailburg, VA 22005
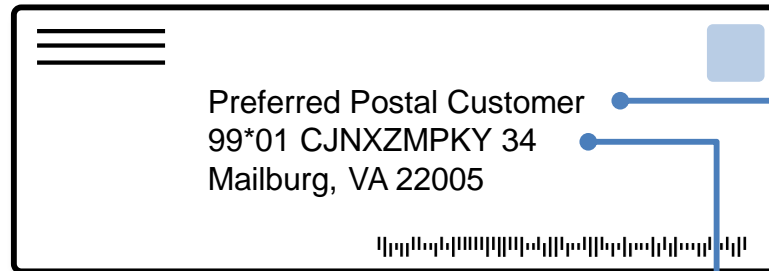
The first line can also be removed or anonymized (e.g., "Preferred Postal Customer")

The IA code contains human-readable house and apartment numbers

Mid Term:

Preferred Postal Customer
Informed Address: 01 CJNXZMPK 34
Mailburg, VA 22005

99* may be replaced by a descriptor such as "Informed Address."

Long Term:

Preferred Postal Customer
Informed Address: 01 CJNXZMPK 34
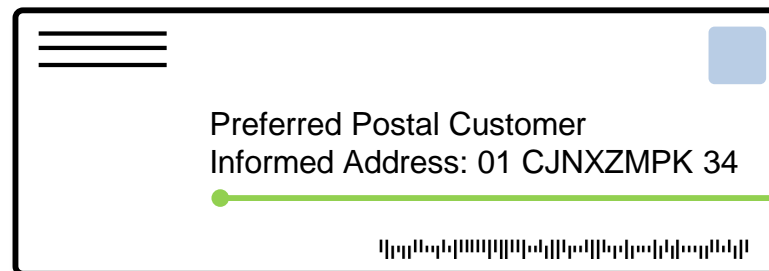
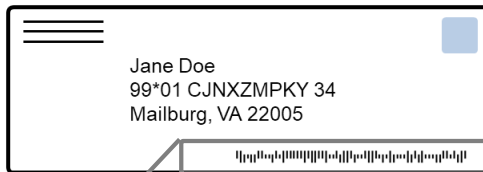Cities, states, and ZIP codes will be removed from the address block

In the latest USPS plans for nationwide scale, the routing code will be constructed using a real ZIP5 and a tokenized 6-digit ZIP+4 and DPBC provided by USPS.

Jane Doe
99*01 CJNXZMPKY 34
Mailburg, VA 22005

IMb Construction

FIGURE 1: Large mailer with 6-digit Mailer ID

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Barcode ID [2N]		Service Type ID [3N]			Mailer ID [6N]						Serial Number [9N]									Routing Code [none,5,9, or 11N]										

FIGURE 2: Small mailer with 9-digit Mailer ID

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Barcode ID [2N]		Service Type ID [3N]			Mailer ID [9N]									Serial Number [6N]						Routing Code [none, 5, 9 or 11N]										

USPS is working with stakeholders and consumers to define IA prefixes beyond the pilot.

Proposed IA Prefixes

- 99* *(currently, for pilot)*
- IA Code
- IA Mail
- eAddress

Preferred Postal Customer
PREFIX HERE 99*01 CJNXZMPKY 34
Mailburg, VA 22005

These codes will be provided to UG 5 so that they can be identified as Informed Address and programmed correctly for CASS Cycle O.

USPS is conducting a pilot of Informed Address to validate the operational feasibility of processing and delivering anonymized mailpieces.
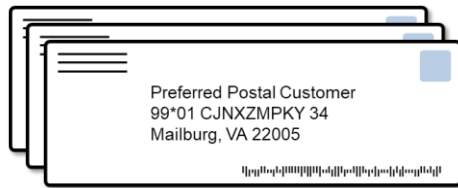
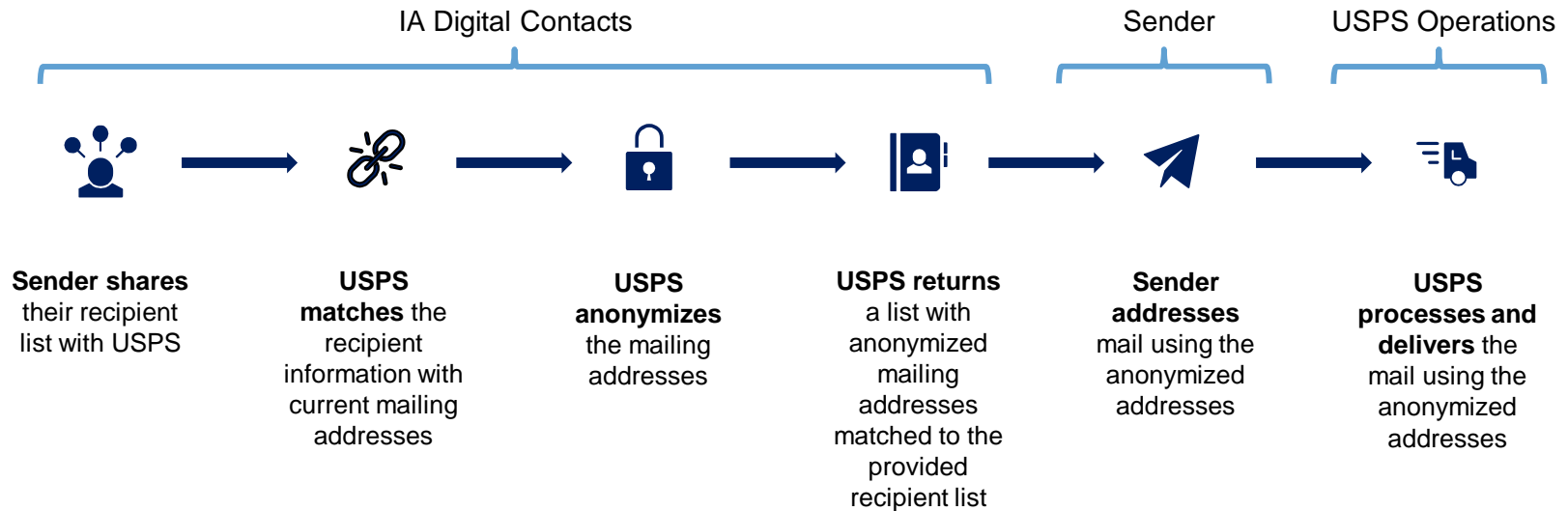|		
USPS will mail about 3,000 mailpieces with anonymized addresses using Informed Address technology	IA-encoded mailpieces will be processed at the Merrifield Processing & Delivery Center	Carriers will deliver the mailpieces to consumers in Northern Virginia

The IA Digital Contacts capability, which is currently in development, will match email addresses (and eventually other contact information such as social media handles) to anonymized mailing addresses.

IA Digital Contacts | Sender | USPS Operations

Sender shares their recipient list with USPS

USPS matches the recipient information with current mailing addresses

USPS anonymizes the mailing addresses

USPS returns a list with anonymized mailing addresses matched to the provided recipient list

Sender addresses mail using the anonymized addresses

USPS processes and delivers the mail using the anonymized addresses

USPS is currently exploring 3 use cases for Digital Contacts.

B2C
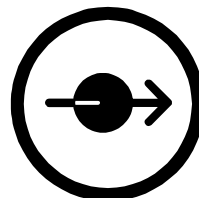
C2B2C

C2C

USPS will roll out IA services to its products incrementally beginning with Marketing Mail Letters & Cards.

USPS is currently determining the requirements for the records download.

Proposed Records Output Fields

- JobID
- Email Address
- Tokenized street address (primary address line beginning with *99**)
- Last Line City
- Last Line State
- Last Line ZIP5
- IMb routing code 11 (tokenized)
- Expiration date for anonymized address

Preferred Postal Customer
99*01 CJNXZMPKY 34
Mailburg, VA 22005
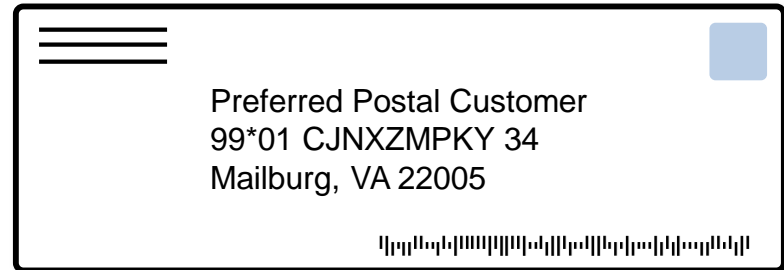
Note that USPS will return an output for all records uploaded, regardless of whether a matching address was found.

Is the proposed output sufficient for mailers to prepare automated letters?

IA Data Characteristics

Informed Address data have a number of characteristics that are important to the collection, storage, and usage of IA data.

1. Store all IA data separate from other systems.

2. Informed Address records can be identified by:

   - Special Informed Address Prefix, i.e., "IA Code" (TBD)
   - Expiration date
   - An associated 11 digit routing code assigned by the IA service

3. If run through CASS:

   - DPV code = blank
   - DPV Footnote code ="IA"

4. A valid IA record must have:

   - Mailing date > Expiration date
   - Full 11 digit routing code
   - IA address prefix
   - Barcode type 82 (mailer assigned)

Below are several recommendations for storing and using IA records.

IA Records Storage

- When Informed Address records are used for multiple mailings (until they expire), mailers should store this information in a database separate from their regular, non-IA addresses.

- All IA records are required to have a full, 11-digit routing code and an expiration date.

IA Records Usage

1. If mailing the IA list as its own mailing, skip CASS & NCOALink and just presort and mail IA records that will not expire prior to the mailing date.

2. In most cases, the list will be merged in with other records and/or mailings going through routine processing (so included with other mail to a MSP with MASS processing).

   - The pull of IA records for use in the mailing should include evaluation of expiration date vs. the intended mailing date and must include the ZIP+4 and DP.

   - If/when pieces go through CASS/MASS or NCOALink, IA addresses will be skipped, passing data from input to output.

Through customer service / purchasing channels / other data entry, the biggest concern is that recipients will receive an IA mail piece and believe they can use the IA address, thus using it in response to an offer, or even worse, using it in response to an offer from a different mailer.

IA Data Entry
Collecting IA codes from IA envelope recipients would cause issues in the following areas:
- Address line must include a recognized prefix in addition to the IA code
- CASS should return DPV= blank and include DPV Footnote of IA
- No expiration date information
- Missing ZIP+4 & DP

IA Data Usage
1. All sources of data entry should be updated to watch for and detect an IA address, either via CASS (DPV Footnote of IA) or direct inspection of the street address for the IA indicator. When found, prompt the user that this type of address cannot be used, and request the actual mailing address.
2. Expecting that some will still slip in, when processing a mailing that should have no IA addresses, make sure that all IA addresses are identified and processed accordingly (which includes suppressing from the mailing).
   - If already suppressing all records where DPV = blank, then no change is needed to also suppress the IA addresses.

Just as IA addresses can slip into a mailer's list / data, they could slip into other sources such as purchased lists, lists from partners, and lists from clients.

Best Practice

1. When evaluating or processing a list / data, make sure that all IA address are flagged, removed, or suppressed.

2. Make it a requirement of the source to do this work prior to sending the list / data in the first place.

Next Steps

Appendix

We will schedule a review of each of the following items.

	Topic	Status	Next Steps
1	How will IA impact CASS now and with CASS Cycle O?	In discussion	Return with feedback from Address Management
2	How will Informed Address be handled by Presort Software and what postage tier would it qualify?	In discussion	Return with feedback from BMEPT
3	How will MSP dedupe a IA and how will IA be handled with multiple Informed Delivery subscribers at a single address?	In discussion	Draft process flow based on discussion. Document proposed data elements.
4	What is timeframe for IA code?	In discussion	
5	How long are IA codes usable for a specific consumer? What are the options and what makes sense?	In discussion	
6	Will IA coded mail be trackable through Informed Visibility?	In discussion	
7	What data will be reported for Informed Offers campaigns?	In discussion	
8	Will consumers reached by IA encourage marketing to continue to communicate digitally with this group rather than add them to hard copy mailing list?	In discussion	
9	What impact will IA have on ID open rates or subscription rates if consumers have concern about USPS 'selling' addresses to marketers?		
10	How will marketers attribute IA with response?	In discussion	
11	How are consumers being informed about the platform?	In discussion	

We will schedule a review of each of the following items.

	Topic	Status	Next Steps
12	Will the USPS share the algorithm or method for deriving/appending the replacement code with MSPs to help facilitate the de-duplication process?	Closed	
13	Can Informed Addressing impact a Mailer's Scorecard?		
14	How does this platform/concept address new privacy laws such as GDPR and the California Consumer Privacy Act of 2018? Is there a correlation?		
15	What impact does the USPS feel this may have on list marketers/brokers/service providers?		
16	How will Informed Addressing impact other value added products such as vanity address for business and other B2B and B2C services other than customer targeting through shared preferences?		
17	How will IA codes be priced in the future-state version of the pilot?		
18	Could changes to CASS create mailer scorecard problems?		
19	What are the use cases for Informed Address technology?	In discussion	
20	What are the implications of Informed Address to package consolidators? How will they continue to do address management?		
21	How will USPS manage it's package platform, including data, payment, etc.?		

S#	Date	Topics
1	03/22/19	Kick off meeting to discuss charter, list of issues/topics, and meeting cadence
2	04/5/19	Deduplication, Presort, and CASS™ Certification
3	04/19/19	CASS™ Certification and Informed Offers Pilot (Consumer Experience)
4	05/17/19	Deduplication, IA Code Duration, and Informed Offers Pilot (Technical Backend)
5	05/29/19	Tracking IA Codes with Informed Visibility, Data Reporting for Informed Offers, and Informed Address Use Cases
6	06/26/19	Building consumer awareness of IA, customer acquisition (physical vs. digital), and IA measurement/reporting
7	07/10/19	Consumer Research on Informed Offers and Informed Address, and Informed Address Pilot Overview
8	07/24/19	Current State Reporting for Informed Delivery and Informed Offers, and Future State Reporting Discussion
9	10/16/19	Processing Mailers' IA Mailing List Requests
10	11/7/19	Intelligent Mail Barcodes
11	12/11/19	IA Mailing Lists
12	1/21/20	Digital Contacts, STIDs, and eDocs
13	2/4/20	IA Use Cases
14	3/4/20	IA Envelope and Digital Contacts