Preparing print assets for personalization in Mindmatrix

Readying your marketing and sales assets for to be personalized in Mindmatrix is the first step you should take after completing an asset audit with your Sales and Marketing enablement onboarder.

This guide will show you what features to keep, and what to remove for any print asset you need to personalize in Mindmatrix.

Step 1. Identifying assets for personalization.

The Mindmatrix services team will help you setup your marketing and sales assets. To ensure that clear guidelines are followed as part of the setup process, you should complete the marketing and sales asset setup sheet reviewed during the onboarding process. Click here to download a copy in Excel.

This sheet will clearly allow the team to

- Title your assets correctly
- Accurately tag assets
- Ensure that the correct assets are recommended for users throughout the sales process

Step 2. Remove any branding images that you do not want your sales users or resellers to use on any assets.

If you do not want your assets to display as co-branded on assets, remove these from print pieces before organizing them for import into Mindmatrix.

Step 3. Review assets and make sure there is space left for personalization.

Below is the standard personalization format for any assets.

First Name Last Name

Title

Phone Number

Email Address

Company Name

You may request a different personalization standard, but remember to review this with your Onboarder before submitting your work order.

Step 4. Provide examples of personalization.

Your Onboarder may help you do this in a review call. Below is an example of personalization instructions.

Finally, review a sample of a personalized piece with your onboarder that represents the different asset types that need to be imported. Once this is approved, you can submit your work order to setup new assets in Mindmatrix.