New Email Checklist

Marco Vescio - 2020-02-05 - E-mail

What details are required for each email?

The following is a checklist of items we need to successfully complete and schedule an email on your behalf. While some of these items are already known and included as part of your yearly strategic plan, any missing information could cause delays. Please be aware of these requirements and know that we will be reaching out for any missing details.

If you'd like to proactively confirm these details, please copy and paste the template below and send it back to us in your ticket. An example has been filled out to further assist you.

If you have any questions about the items below, you can find more details in our Guide - Getting Started with Email.

Email Checklist

[Email Name/Purpose]

[Subject]

[Send Date & Time]

[FROM Name]

[FROM Email Address]

[REPLY-TO Name (if different than FROM)]

[REPLY-TO Email Address (if different than FROM)]

[Preheader Text (if applicable)]

[A/B Testing (yes + rules, no)]

[Target Audience]

[Versions]

[Variables and fallback]

[Links (identify location in copy)]

[View in browser link? (yes, no)]

[Any changes to the standard footer?]

Email Checklist - *Example*

[Email Name/Purpose]

2020 Interim Donor Report

[Subject]

TEST A: <First Name>, join us! Interim Donor Report to be released soon.

TEST B: Interim Donor Report Deadline - Coming Soon

[Send Date & Time]

02/06/2020 @ 2 PM

[FROM Name]

John Smith

[FROM Email Address]

john.smith@organization.org

[REPLY-TO Name (if different than FROM)]

Sally Shells

[REPLY-TO Email Address (if different than FROM)]

sally.shells@organization.org

[Preheader Text (if applicable)]

It's not too late to add your name!

[A/B Testing (yes + rules, no)]

Yes, based on subject line (see above)

Winner decided by number of opens after 24 hours

Test population of random 15% split

[Target Audience]

All current fiscal year non-donors.

[Versions]

No versioning

[Variables and fallback]

<First name>, Fallback = Dear Friend

[Links (identify location in copy)]

- https://www.organization.com/donate
    - Top Banner
    - Button
- https://www.organization.com/donate/story
    - "Read Her Story" link in first paragraph

[View in browser link? (yes, no)]

Yes

[Any changes to the standard footer?]

Remove social media links for this email