

Campaign Readiness Checklist

Campaign Name	
Campaign Distribution Date	
Campaign/Project Lead	
Number of Emails to be Sent	
Brief Project Description	

Step 1 – Objectives

<i>Objectives</i>	List Goals	Measurement
Success Factors Identify measurable success factors (e.g., % viewed presentations; number of leads)		

Step 2 – Audience

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
Market Analysis	Ensure contact / email list support the intended audience and expectations set by the campaign Objectives	<input type="checkbox"/> Determine source of email list. (house list, rented, sales rep list)
Contact / Email	Evaluate the completeness of the contact / email list to be used for distribution	<input type="checkbox"/> Check that contact list has first and last name in separate columns <input type="checkbox"/> First and last name should be appropriately capitalized (not all caps or lowercase) <input type="checkbox"/> Confirm presence of all essential contact data (e.g., phone, address, company) that may be required within email message (tokens) or post-reporting
Cleansing and De-duping	Evaluate the accuracy of the contact / email list to be used for distribution	<input type="checkbox"/> Before converting email list to .csv, confirm removal of commas and other special characters that may prohibit .csv from being interpreted correctly

Step 3 – Process

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
Project Plan	Identify who will produce each piece, make sure they are aware of objectives and audience, set deadlines in order to meet the distribution date.	<input type="checkbox"/> Content developers identified and briefed <input type="checkbox"/> Content review process communicated and followed <input type="checkbox"/> Deadlines are met (if not then identify delays in process or production for future improvement)

Step 4 – Develop Content

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
<i>Creative Readiness</i>		
Email Messaging	<p>Evaluate message for consistency with campaign objectives.</p> <p>Ensure brevity and succinctness of email message and Rich Media presentation (Brainshark)</p>	<input type="checkbox"/> Include Rich Media (i.e., Brainshark) URL at the beginning and middle of email <input type="checkbox"/> Ensure email Subject draws attention without being trite <input type="checkbox"/> Determine format of email: HTML and/or Text <input type="checkbox"/> HTML design must have Text equivalent to accommodate non-HTML recipients <input type="checkbox"/> Message is honest <input type="checkbox"/> Message is consistent with campaign objectives.
Rich Media Content (i.e., Brainshark presentation)	Identify people responsible for Campaign content and who will be the 'author' for the presentation material	<input type="checkbox"/> Identify the author of presentation content <input type="checkbox"/> Identify the presentation source PowerPoint® presentation <input type="checkbox"/> Identify design of the sales person 'wrap slides' and who will be creating the 'wrap' slides (1 st , last, both) <input type="checkbox"/> Identify any sales person - specific tokens that need to be placed on wrap slides to customized the presentation <input type="checkbox"/> Identify expert speaker of core presentation and speaker(s) on wrap slides. Work with speakers

		<p>to record audio.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure company 'logo' is properly formatted in email (if HTML) and within presentation <input type="checkbox"/> Ensure sales person photos are provided and appear as custom content on the presentation. <input type="checkbox"/> Message is honest <input type="checkbox"/> Message is consistent with campaign objectives.
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Step 5 – Execution

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
Content Review	Identify audience for Campaign review and review content.	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure that the approval authority review the email message and the Rich Media (Brainshark) presentation. <input type="checkbox"/> Make modifications to the content should be handled at this point <input type="checkbox"/> Identify Proof Recipients <input type="checkbox"/> Send proofs <input type="checkbox"/> Content is honest <input type="checkbox"/> Content is consistent with campaign objectives. <input type="checkbox"/> Content is approved

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
Email Distribution	Identify email delivery vendor (customer provided or Brainshark-provided). Complete and submit Campaign request 'form'	<ul style="list-style-type: none"> <input type="checkbox"/> If using Brainshark as email vendor, complete the Campaign Request form <input type="checkbox"/> Identify blast dates and number of emails to be sent <input type="checkbox"/> Identify recipient id code to apply to presentation to track viewing on rich media presentation (Brainshark) <input type="checkbox"/> Avoid sending email blasts on Monday and Friday <input type="checkbox"/> Send test email to gauge response to subject line. <input type="checkbox"/> Take the time to evaluate the subject line, email message and rich media

		<p>presentation (Brainshark) to improve response on next blast</p> <ul style="list-style-type: none"> <input type="checkbox"/> Re-ensure all email lists are complete and formatted properly
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Step 6 – Evaluation

<i>Category</i>	<i>Description</i>	<i>Best Practice Checklist</i>
Reporting		
Frequency and Format	Identify format and frequency of requested reports	<ul style="list-style-type: none"> <input type="checkbox"/> Create .xls templates cross-correlating presentation viewing results and original mailing list <input type="checkbox"/> Produce 'bounce' reports after at least 48-hours <input type="checkbox"/> Identify report recipient(s) and frequency of report updates
Performance Measurement	Evaluate results against stated objectives	<ul style="list-style-type: none"> <input type="checkbox"/> Review report results against the original campaign objectives <input type="checkbox"/> Determine areas in process and/or content that can be improved for next campaign.