



Checklist for Success with Outsourced Email Marketing Sending: A List of Client Items Needed and Explanation of the Campaign Sending Process

Section 1: Items Required from Client: Per Campaign

Section 2: Additional Detail on Items

Section 3: Selected Process Details of How WeSendIt Manages Your Sending for You

SECTION 1: Items for the Client to Prepare, Per Campaign

- A data file containing the email addresses and if possible names, salutations, and other demographic information you may want to include or to query on
- An email address suppression file (optional)
- A list of test email address(es) for test mailings to be sent to
- A list of seed email address(es) for the final mailing to be sent to (optional)
- Lists of segments (subsets) of email addresses. These segments may get different versions, or receive the email at different times of the day, etc.) (optional)
- All finished versions of the creatives (text, images, hyperlinks, etc.)
- From name & From email address: Acme Company <marketing@acmecompany.com>
- Replyto name and email address: Acme Company <sales@acmecompany.com>
- Email Subject line
- A date range to begin and end the campaign (over a period of minutes, hours, days, weeks)
- A date requested by you for us to provide you with your campaign reporting and performance
- Any special instructions (send slowly over several days, send all by 12 noon, split list, etc.)

SECTION 2: Additional Detail on Items

1. A **data file** containing the total recipients to be delivered to (email addresses, names, etc.)
 - This file should contain at least email addresses and any other applicable data which is going to be used within the campaign; names, data to be merged in for links, location segmenting, etc....
 - This file should have some sort of delimiter; comma, tab, semicolon, etc....
 - The file should contain the exact amount of email addresses the campaign is being sent to

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2. An **email address suppression file** (optional)

- The suppression file be a .txt file containing only a column of email addresses
- The suppression file can be a in delimited file as long as the file can be opened in Excel and does not exceed 1,048,576 lines.

3. A **list of test email address(es)** for test mailings to be sent to

- These should be all the addresses where the client wants to preview the message(s)

4. A **list of seed email address(es)** for the final mailing to be sent to (optional)

- These should be a list of addresses where the client wants a live copy of the final mailing delivered to, along with the actual recipients in the data file, so they can track when the mailing deploys and how the final mailing looks
- Seed lists can also include delivery services to independently verify delivery success statistics and provide deeper insight into campaign delivery and inboxing performance

5. **Lists of segments (subsets) of email addresses** (who may get different versions, or at different times, etc.)

- Segments should be labeled with unique identifiers, such as past clients, current clients, international clients, clients who has spent over \$1000, etc.

6. All finished versions of **your creatives**

- These should be an .html file or a .txt file containing HTML code
- A Text version of the message can also be included
- The versions should be considered final and complete when submitted to us
- We can make small changes to the creatives; corrections to typos, upload and source images with in the template, etc... but we are unable to make significant changes to the HTML message

7. **From name & From email address**

- Acme Corp <marketing@acmecorp.com>

8. **Replyto name and replyto email address**

- Acme Corp <sales@acmecorp.com>

9. **Email Subject line**

10. A **date range to begin and end the campaign**

- The client needs to specify a date and time (in EST) that the campaign will begin to deploy



11. A date requested by you for us to provide you with your **campaign reporting and performance**

12. **Special Instructions** (if any)

Any personalization that is within the subject line or greeting of the message.

Any merged in data from the data file within the message

A physical mailing address to be included at the bottom of the mailing

A/B/N split test instructions for multiple creatives

SECTION 3: Selected Process Details on How WeSendIt Manages Your Sending for You

Here are some parts of the process that show how we approach your email campaigns to make them highly effective:

1. Your WeSendIt Dedicated Email Expert communicates with you directly and collects and manages all the data and prepares the creative.

2. A date is set for the first test version to be sent to you for approval. Once received, you reply to us with any required changes, or approve the campaign to be sent on the defined deployment date and time.

3. Requested client changes are made to the email campaign, and a series of test messages is sent to your in-house review team until final approval is achieved by you, the client.

4. Your Dedicated Email Expert will confirm that we've received your approval and confirm that the mailing has been scheduled for the deployment date.

5. Your Dedicated Email Expert will also confirm the date for campaign reporting which will be enough time for the email campaign to be engaged with by the recipients/subscribers. It is recommended that enough time is taken so that all subscriber engagement is recorded (and recipients open and click on links, etc.) for the most accurate reporting.

6. Once deployed, the campaign will be monitored for any delivery issues (ISP blocks, excessive hard bounces, etc.). These issues will be resolved by the email delivery team experts at WeSendIt. Any email recipients which have temporarily failed are automatically retried by our system within the original deployment timeframe.

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