Checklists and simple how-tos are an easy and effective method to ensure a quality product goes out the door every single time. eComm's most successful users embrace checklists regardless of how many successful emails or events they have already sent or hosted.

**Marketing Cloud**

- Plan
- Test
- Audience & Sending
- For eComm Specialists

- Marketing Cloud Email Checklist [3]
Testing might be the most important step when creating your communications and events. Make sure your constituent experience is flawless by having your team test before the official
Follow the links for short reviews (including checklists) of important processes for correctly
delivering a message.

- **Update Audiences Quick Tutorial** [6] | If you send to Data Extensions (rather than Reports), be sure you are familiar with keeping them accurate (and CAN-SPAM compliant).
  - Sending to Reports? Viewing the audience in Salesforce to ensure accuracy before sending is wise.
- **Send Emails** [7] | For those who send via the Guided Send, step-by-step wizard (reviewed during new user training) or Salesforce Send Emails (a re-usable sending method).
  - Salesforce Send Email Quick Tutorial [8]
  - Guided Send Quick Tutorial [9]

- **Creating Data Extensions** [10] | eComm specialists are responsible for creating Data Extensions while users must run them before each send [6] to ensure there accuracy.

Cvent

- Plan
- Test
- Event Approval & Launch
- Fundraising Events
- For eComm Specialists

- Event Strategy Checklist [12]
Checklist

Event Builder

01

Gather Event Details in One Place

- Event Title
- Event Date/Time
- Event Location
- Event Planner Contact
- Graphics/Images
- Session details

02

Brainstorm the Registration Process

- What information would you like to collect from registrants?
- What is the capacity for the event?
- Will you allow guest/group registration?
- Is the event free or paid?

03

Create Engaging Visual Look and Feel

- On-brand colors, fonts
- Images, graphics, video
- Accessibility options for images and event
- Flow of the event on the website and registration process
Testing might be the most important step when creating your communications and events. Make sure your constituent experience is flawless by having your team test before the official
send.

Standard Events

Download Standard Event Checklist [13]?
Standard Event Electronic Checklist [14]?

The electronic checklist reviews the event invitation from Marketing Cloud AND the standard Cvent registration form along with post-registration communications.
# Event, Standard | Testing Checklist

## Checklist Item | Desktop | Comments | Mobile | Comments

The following items are to be checked on the event website.

- **Review Event Landing Page**
  - This should be the Summary webpage

- **Review Additional Pages**
  - These can be customized for your event

- **Images**

- **Check Links**

- **Social Media | OPTIONAL**

- **Contact Us Webpage**

After clicking “Register” on the Event Website you will be taken to the identity confirmation page.

- **Identity Confirmation Page**
  - First & Last Name and Email are required

The following items are to be checked after inputting your email address. This is the registration information page.

- **Overall Look**

- **Registration Questions**
  - Are all the necessary questions being asked?

- **Guests | OPTIONAL**
  - Test the guest feature - is there an error or not?

- **Sessions | OPTIONAL**

- **Optional Items | OPTIONAL**

- **Other Features | OPTIONAL**

The following items are to be reviewed after inputting your registration info. This is the registration summary page.

- **Overall Look**

The following items are to be checked after submitting your registration. This is the confirmation page.

- **Cancel & Modify Registration**

Check the following items in the registration confirmation email. This is triggered to your inbox upon registering.

<table>
<thead>
<tr>
<th>Registration Confirmation</th>
<th>Event Reminder</th>
<th>Post-Event Feedback</th>
</tr>
</thead>
</table>

- **Delivery**
  - Did the message go to your SPAM folder?

- **Subject / Line**
Express Events

Testing might be the most important step when creating your communications and events. Make sure your constituent experience is flawless by having your team test before the official send.

Download Express Event Checklist
Express Event Electronic Checklist

The electronic checklist reviews the event invitation from Marketing Cloud AND the express Cvent registration form along with post-registration communications.
### Event Approval & Launch [17] (quick how-to)
- Event Approval Checklist [18] (for free, paid and fundraising events)
  - Walk through the same checklist your eComm specialist uses while approving your events.
- What to check before opening registration [19] (from Cvent)

- Create a fundraising event [20]
- Event Approval Checklist [18] (for free, paid and fundraising events)

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Related Wiki Posts

- Add to Account [21]
- Submit Help Ticket [22]

Display Title:
Checklists & Quick Guides
Send email when Published:
No

Source URL: https://www.cu.edu/blog/ecomm-wiki/checklists

Links