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Checklists & Quick Guides [1]

May 16, 2022 by Melanie Jones [2]

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]

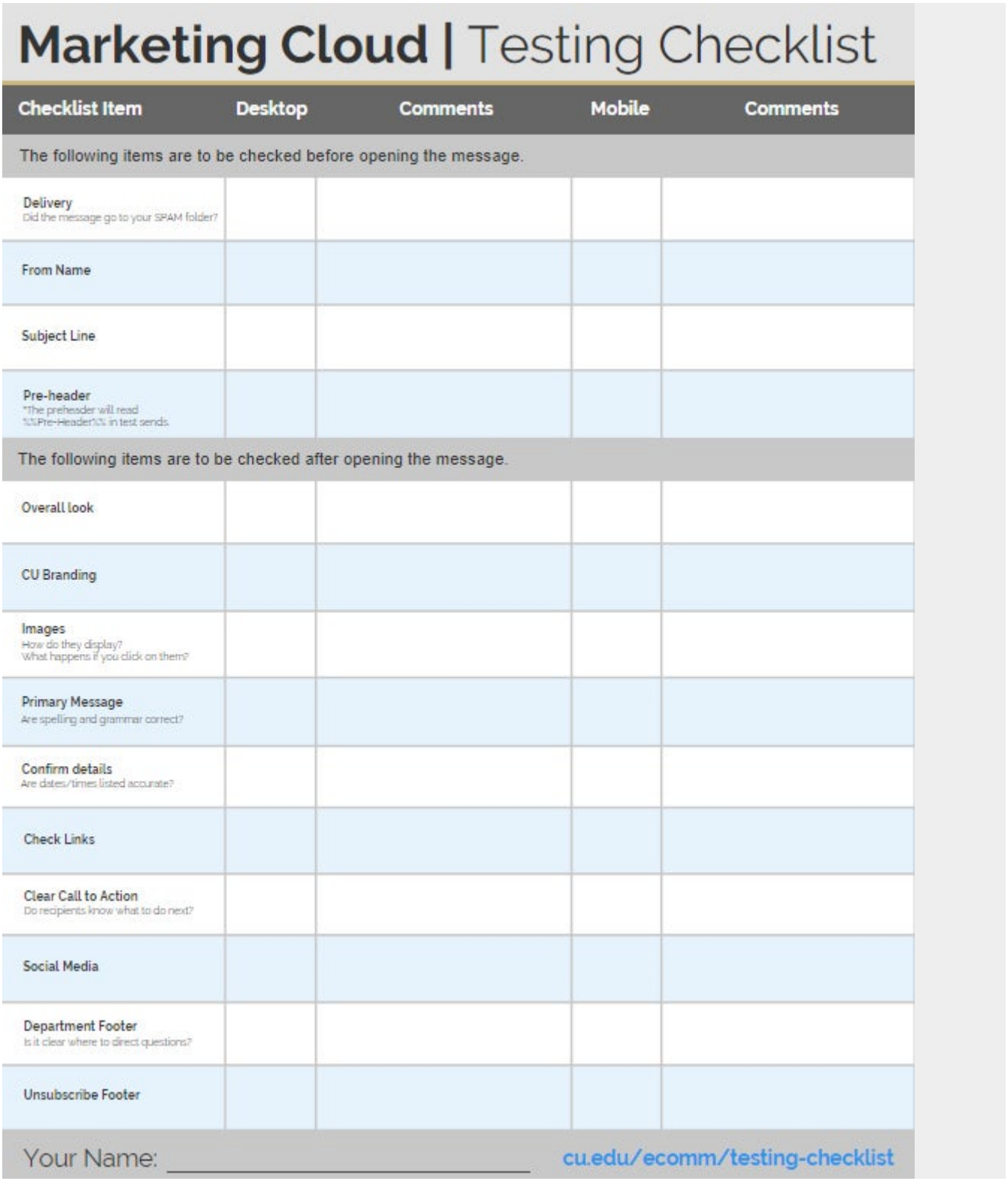


[3]

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

send.

Download [4]?
Electronic Checklist [5]?



Marketing Cloud | Testing Checklist

Checklist Item	Desktop	Comments	Mobile	Comments
The following items are to be checked before opening the message.				
Delivery Did the message go to your SPAM folder?				
From Name				
Subject Line				
Pre-header *The preheader will read %%Pre-Header%% in test sends.				
The following items are to be checked after opening the message.				
Overall look				
CU Branding				
Images How do they display? What happens if you click on them?				
Primary Message Are spelling and grammar correct?				
Confirm details Are dates/times listed accurate?				
Check Links				
Clear Call to Action Do recipients know what to do next?				
Social Media				
Department Footer Is it clear where to direct questions?				
Unsubscribe Footer				

Your Name: _____ cu.edu/ecomm/testing-checklist

[4]

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 familar 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
- eComm Specialists / Super Users

- Cvent Build Checklist [11]
- Event Strategy Checklist [12]

Checklist

Cvent Buil

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 Engag Visual Look a

- On-brand color fonts
- Images, graphic video
- Accessibility op images and eve
- Flow of the eve website and re process

[11]

University of Colorado Colorado Springs

CHECKLIST

EVENT STRATEGY

TIMELINE

- ☐ **8 weeks out:** Finalize planning of event details, graphics, verbiage for web/email, and finalize invitee list.
- ☐ **6 weeks out:** Begin marketing event.
- ☐ **5 weeks out:** Send eComm team requests for list uploads, audience builds, etc.
- ☐ **4 weeks out:** Send official email invitation to invitees.
- ☐ **3 weeks out:** Send email reminders to non-registered audience members.
- ☐ **2 weeks out:** Send "last chance" email reminders for final push for RSVPs.
- ☐ **1 week out:** Registration closes. Social media countdown to event.

REGISTRATION

- ☐ What information is required?
- ☐ What information is needed but not mandatory (i.e. submit a question to the speaker)?
- ☐ What is the capacity for the event?
- ☐ What information do the registrants need to receive in a confirmation email?
- ☐ If the event is virtual or has that option, make sure to provide hyperlinks/credentials.

COMMUNICATIONS

- ☐ **6 weeks:** Save the Date
- ☐ **4 weeks**: Official Invite
- ☐ **3 weeks:** Reminder
- ☐ **2 weeks:** Final Reminder
- ☐ **1 week:** Event Reminder to RSVPs
- ☐ **2-3 Days:** Know Before You Go
- ☐ **Day-of:** "See You Soon!"
- ☐ **Post-event:** Thank You & Feedback Survey

POST-EVENT

- ☐ Review attendance percentage.
- ☐ Review feedback survey responses.
- ☐ Notes on what worked well.
- ☐ Notes on what changes should be made.
- ☐ Review photos/video to share (if applicable).
- ☐ Create event overview for website, social media and/or Communique. (If looking to have Communique coverage, remember to submit a story idea to the Communications team beforehand for their awareness).



[12]

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.

Cvent, 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 question being asked?				
Guests | OPTIONAL Test the guest feature - is there a max or min?				
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**.				
Overall Look				
Cancel & Modify Registration				

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

	Registration Confirmation	Event Reminder	Post-Event Feedback
Delivery Did the message go to your SPAM folder?			
Subject Line			

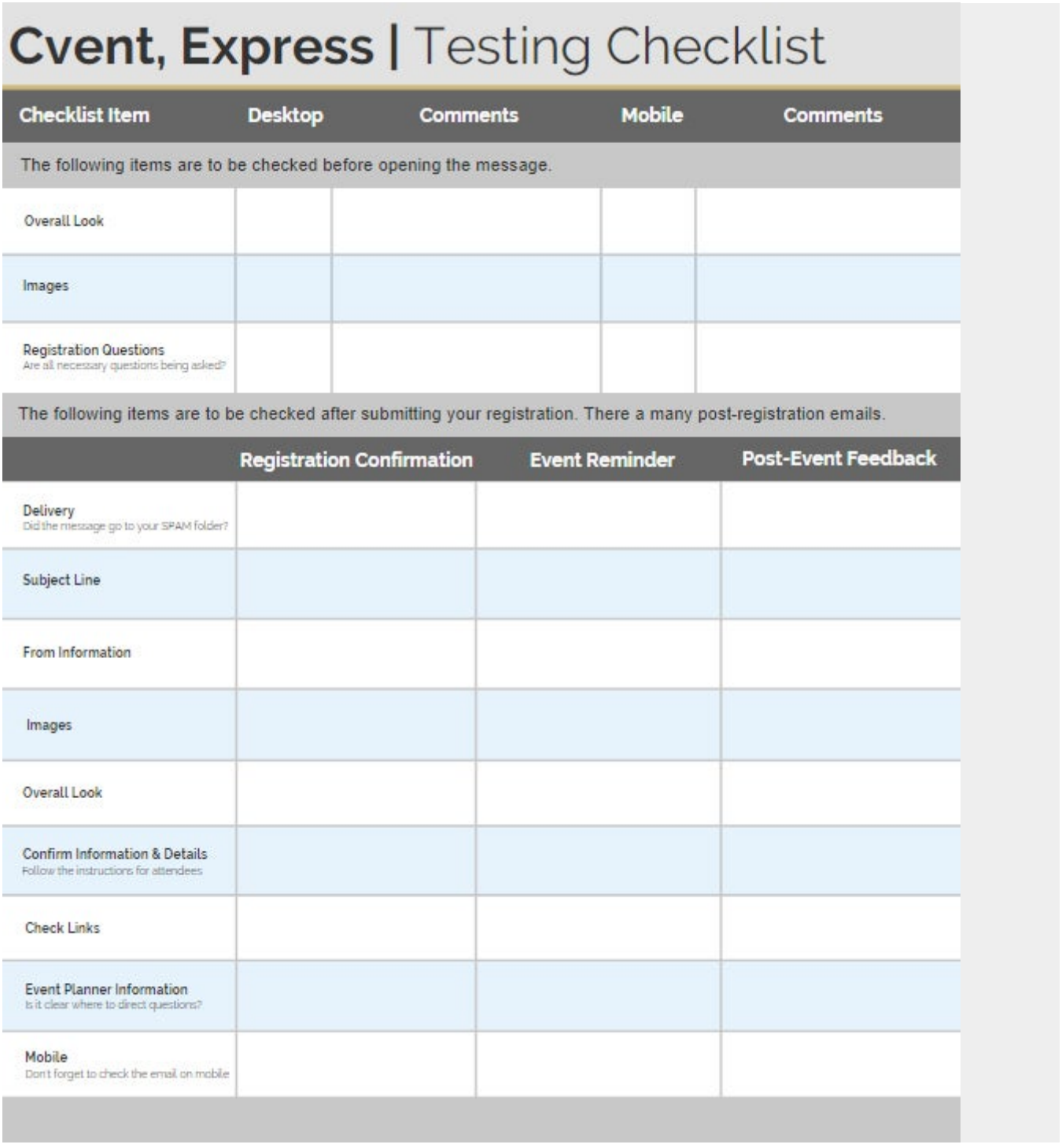
[13]

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 [15]?
Express Event Electronic Checklist [16]

The electronic checklist reviews the event invitation from Marketing Cloud AND the express Cvent registration form along with post-registration communications.?



Cvent, Express | Testing Checklist

Checklist Item	Desktop	Comments	Mobile	Comments
The following items are to be checked before opening the message.				
Overall Look				
Images				
Registration Questions Are all necessary questions being asked?				
The following items are to be checked after submitting your registration. There a many post-registration emails.				

	Registration Confirmation	Event Reminder	Post-Event Feedback
Delivery Did the message go to your SPAM folder?			
Subject Line			
From Information			
Images			
Overall Look			
Confirm Information & Details Follow the instructions for attendees			
Check Links			
Event Planner Information Is it clear where to direct questions?			
Mobile Don't forget to check the email on mobile			

[15]?

- 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]

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