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UCCS | Lunch and Learn: eComm Handouts [1]

November 2, 2022 by Melanie Jones [2]

UCCS hosted a Lunch and Learn session for users in Sept. to review email and event best practices including three checklists for quick-reference. Keep them on hand to help have your next email send or event go successfully.

- Marketing Cloud Email Checklist [3]
- Cvent Build Checklist [4]
- Event Strategy Checklist [5]
    - Timeline
    - Registration
    - Communications
    - Post-Event

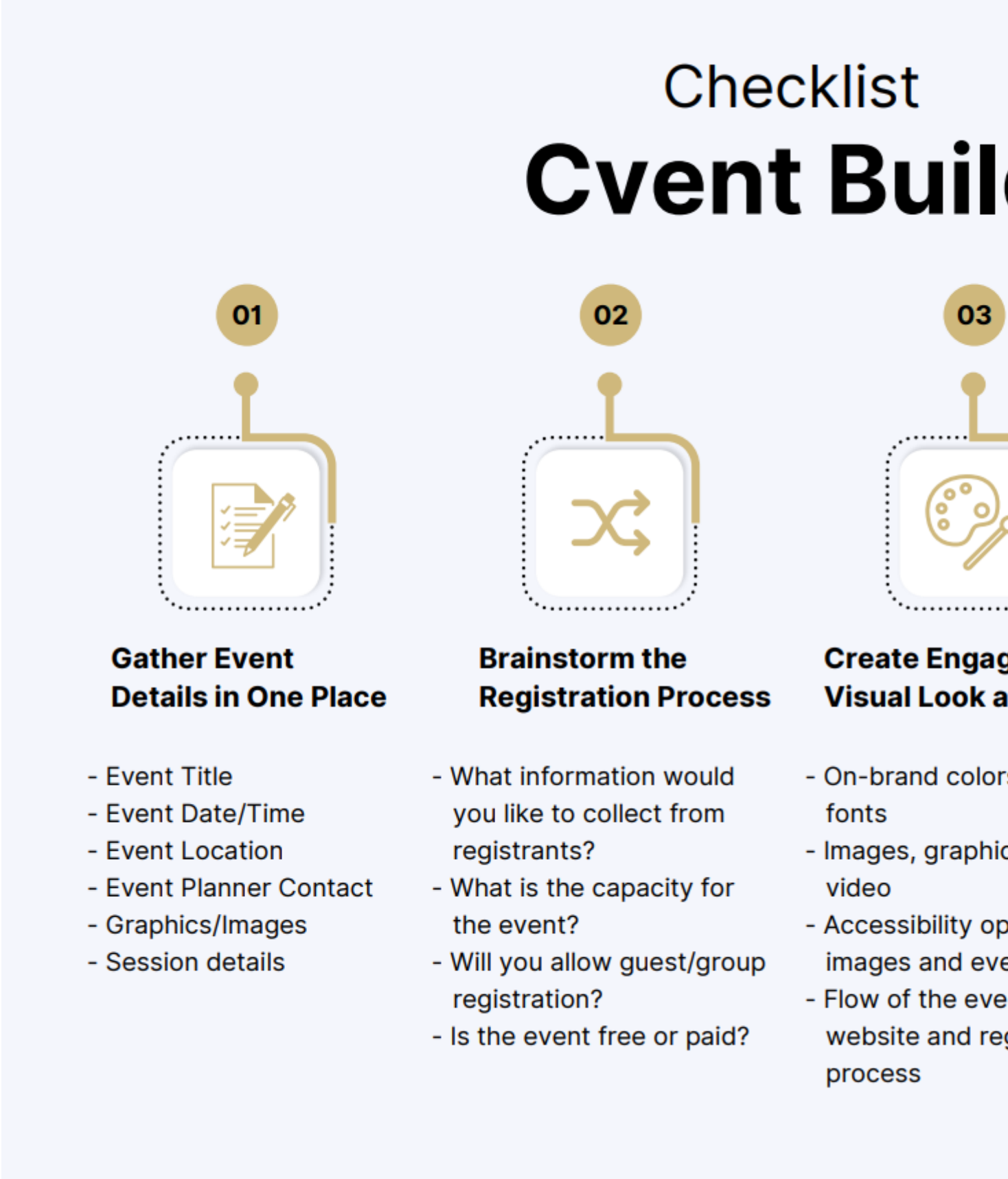
Marketing Cloud Email Checklist



[3]

Download Marketing Cloud Email Checklist [3]

Cvent Build Checklist



[4]

Download Cvent Build Checklist [4]

Event Strategy Checklist

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).



Download Event Strategy Checklist [5]

Related Articles

- Marketing Cloud Image Best Practices [6]
- CU Anschutz | Lunch and Learn: Email Design Tips and Tricks [7]

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