Email Newsletter Checklist

Getting started:

1. Establish a free MailChimp account:
   - Terms and Conditions
   - Acceptable Use Policy
   - Privacy Policy
   - Set up initial account info

2. Create an email marketing plan:
   - Define your readers
   - Determine your content
   - Determine your sending frequency and goals
   - Make a schedule

3. Subscription lists:
   - Create your subscription list
   - Import email addresses (if established)
   - Set up a sign-up form
   - Publish your sign-up form
   - Invite people to sign-up
   - Establish segments as needed

4. Design your template:
   - Import the UGA Extension template
   - Finalize design in campaign editor
   - Customize colors and fonts
   - Include content that is reused

Making it happen:

1. Create your first campaign:
   - Assign a subscription list
   - Setup basic info
   - Choose template
   - Customize header
   - Hide/show pertinent info
   - Add and format content
   - Preview online
   - Preview in multiple email programs, devices, and email addresses
   - Proof content
   - Send
   - Set up archive folder
   - Add archive code to website
   - Promote

2. Evaluate campaigns
   - Monitor open and click rates
   - Monitor bounces, unsubscribes and complaints
   - Evaluate times of day opened
   - Evaluate patterns over time (peaks and valleys)
   - Adjust campaigns as necessary

3. Create campaigns in a series:
   - Replicate previous campaign
   - Update campaign name
   - Update subject line
   - Update subject for twitter/facebook
   - Add and format new content
   - Preview online
   - Preview in multiple email programs, devices, and email addresses
   - Proof content
   - Send
   - Add to archive folder
   - Promote
Email Newsletter Packet

Email campaign preview checklists

Use these checklists to check for problems in your campaign – before you send it.

Web Preview Checklist

☐ Does the campaign look okay in both web and mobile views?
☐ Is the table of contents showing the correct text?
☐ Are the correct sections of the template hidden?
☐ Do all placeholder items have the correct text?
  ☐ You should see no "|* |" text in the preview.
☐ Do all images and links fit inside the template without stretching it?

Test email checklist

☐ Are all links working and correct?
☐ How does the newsletter look in different email programs?
☐ Do paragraphs have clear breaks between them?
☐ Are all of the images showing up?
☐ Is the contact information correct?
☐ Are dates, times, and location for events correct?
☐ Is everything spelled correctly?

Final checklist

☐ If this is an RSS-driven campaign, have you set the correct RSS feed?
☐ Have you set the correct subscriber segment?
☐ Have you scheduled a delivery time?
☐ Have you reviewed a web preview and an email proof of your campaign?
☐ Have you made all final edits?
☐ Is everything linked that should be?

Additional information

Email newsletter DIY guide
This guide walks you provides guidance on topics from basic email newsletter concepts to working with templates. It is equivalent to the OIT Wimba sessions and includes links from the "Setting up an e-Newsletter Service" presentation.
http://www.caes.uga.edu/unit/oit/email-newsletters

MailChimp
Visit the MailChimp website for information about setting up an account and specific tutorials on using their web-based tools for creating email newsletters.
http://www.mailchimp.com
UGA Extension / CAES Newsletter Cheatsheet

Editable styles:

1. **Page, Preheader, Footer**
   a. Background
   b. Text
   c. Links
   d. Email border
   e. Logo background
2. **Header** (Image =600px wide)
   a. Background
   b. Text
   c. Links
   d. Issue info (date automatic)
3. **Main** (Image <=360px wide)
   a. Background
   b. Text
   c. Links
   d. Heading 1
   e. Heading 2
   f. Heading 3
   g. Heading 4
4. **Sidebar** (Image <= 160px wide)
   a. Background
   b. Text
   c. Links
5. **MonkeyRewards**

Toggle between options:

2. **Header**
   a. Image header
   b. Blog/RSS text header
1. **Footer**
   a. Logo options

Hideable content:

3. **Main**
   a. Regular content
   b. Blog/RSS content
4. **Sidebar**
   a. Share this (social media icons)
   b. In this issue: (table of contents)
   c. Sidebar text
Tips for creating campaigns

Process

- Establish a test list that has only your own email address(es). Assign this to your first campaign while you are experimenting -- just in case you accidentally send the campaign before you’re ready.
- Edit your text or have a coworker proof it before entering it into your newsletter.
- Use the live preview often while you work.
- Have a coworker read the newsletter again before you send it. You can’t edit this once it is sent.

Content

- Do not write out long URLs or “click here.” Write the name of the page or article you are linking to. Add a link on that text.
  - YES: Directions to our office
  - NO: https://www.google.com/maps/place/Hoke+Smith+Bldg/@33.9443401,-83.3795134,17z/data=!3m1!4b1!4m2!3m1!1s0x88f66d1d7a6d232f:0x889a1db27989eef9
  - NO: For directions to our office click here.
- Include a text-only version of your text with your campaign.
  - MailChimp will automatically make a text-only option from your content
  - You can edit this -- look for the text-only info on the campaign confirmation page.
- Consider whether you will include ALL of your text in the email or just a summary and link to more in-depth information.

Formatting

- Work from raw text that has no formatting.
- Clear all styling as soon as you copy content into a campaign.
- Use heading styles to set apart different sections.
- Use TOC headings to make a table of contents for your newsletter.

Images / Colors

- Include descriptive ALT text for all images. Type any text that is in your image. Be succinct.
- Avoid using images for large chunks of text. This is not email-friendly or accessible.
- Do not publish images that break the template. Use MailChimp tools to crop and resize!
  - Banner image = 600px wide (no border, margins or padding)
  - Main images <= 360px wide
  - Sidebar images <= 160px wide
- About choosing colors...
  - When creating header images or selecting colors, remember high contrast is best. You want all text in your newsletter to be legible.
  - Dark backgrounds behind large areas of text can cause eye strain. Avoid this.
  - Dark text on light backgrounds is best for large sections of content.
- Program colors:
  - Extension red - #cc0033
  - 4-H green - #1baa74
  - CAES red - #990000