

# Email Campaign - Worksheet

## Establish Your Overall Communications Goals

- **Audience:** Who specifically are we talking to? How do we need to talk to them?
- **Message:** What do we want to tell them? What are the essential details?
- **Visuals:** What does it need to look like or feel like? What assets do we have or need to source?
- **Action:** What do we want them to do? Is it clear and easy to follow the directions?
- **Fulfillment:** Are we ready to meet their expectations?
- **Schedule:** How often should we communicate with our audience?

## Get Your List in Order

- **Collecting Emails & Names:** Website sign-up forms, events, transactions, etc.
- **Segments:** Is there a reason to create a smaller group within the list?


## Make a Plan

### Campaign Summary:

- **Subject Line:**
- **From Name & Email:**
- **Short Summary (if you have pre-header text):**
- **Date and Time to Send:**

### Plan Details:

Story #1	
Image	
Title	
Body	
Call to Action + Link	



Story #2	
Image	
Title	
Body	
Call to Action + Link	

Story #3	
Image	
Title	
Body	
Call to Action + Link	



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