

Prepared for:

Prepared by:

Date: Vers:

Delivery

Customers

Customer Persona (Attach a separate sheet for each persona)

What customer pain point(s) are you solving?

Triggers

What triggers the email?

Frequency

How often are emails sent?

How many emails in campaign?

Timing

Time of day

Day of the week

Day of the month

Email Service Provider:

Integrations:

Targeting

List segments

Personalization

How will you build your mailing list?

A/B Testing

Goal: Why you're sending the email & desired outcome

Metrics: Define success & how you'll measure it

Cost:

ROI: