**Creating Company Partner Newsletter**

**Objective:**

To ensure the smooth and accurate creation of ProVal Tech's quarterly newsletter for distribution to partners, clients, and stakeholders.

**Procedure:**

1**. Access Sales and Marketing Folder:**

* Navigate to Sales and Marketing Folder on the company's shared drive.

**2. Locate Newsletter Template**

* Open the Marketing subfolder.
* Open the Newsletter subfolder.
* Click on the previous quarter's Newsletter Document.

**3. Create a Copy**

* Click "Make a Copy" to create an editable version for the current quarter.

4**. Edit the Rough Draft:**

a. Opening Page:

- Verify and update the quarter mentioned on the opening page.

b. Events Page:

- Add events attended during the quarter.

- Include a brief description of each event.

- Subheadings should clearly list the event and its location (bolded).

**c. What’s New Section:**

- Divide into two sections: Community and Service Delivery.

* Community Section:

- Include:

- Webinar details.

- Blogs published during the quarter.

- Contact JP for any additional partner-related updates.

- Highlight new hires or non-technical employee updates.

* Service Delivery Updates:

- Include:

- Technical Content updates.

- ConnectWise Automate Content (Create a ticket for Ryan Murphy).

- Kaseya Content (Create a ticket for Derek Joinak).

- Service Delivery Quarterly Updates (Create a ticket for James, Service Manager).

**d. Security Section:**

- System Administrator's Responsibilities:

- Create a ticket for the system administrator.

- If no Sys Admin, contact Vikram via email or Teams.

**e. Refer a Friend & Review Us Section:**

* Maintain as per previous editions.

5. **Approval Process:**

* Get the Word Document Rough Draft approved by Vikram.

**6. Transfer to HubSpot:**

* Log into HubSpot.
* Navigate to Marketing > Email.
* Select "Create Email" > "Regular".
* Choose "ProVal Tech Newsletter Template" and edit with approved content.
* Ensure all buttons have working links and add necessary pictures.

**7. Test and Final Approval:**

* Send a test email to yourself to review formatting and content.
  + - Send to JP or Vikram for final approval before distribution to partners.

**8. Distribution:**

* + - Once final approval is received, send the newsletter via HubSpot to the designated recipient list.

**9. Record Keeping:**

* + - Save a copy of the final newsletter in the Newsletter subfolder for future reference.

**Note:** Create tickets no later than a month in advance so you can get the materials needed to create Newsletter and have time to get it approved before the end of the quarter. We send these out around the last week of the quarter.

**Additional Note:**

* + - Ensure all updates are accurate, timely, and reflect the company's branding and messaging.
    - Seek clarification or guidance if needed during the process. (Vikram or JP)
    - Follow up on any outstanding tasks promptly to meet the quarterly newsletter distribution deadline.