**Preference Center Questionnaire**

Below is a list of information and assets that Pierry will need to design and develop your custom preference center. Please answer these questions in-line using a different color.

1. It is standard to have an introduction at the top of the page so users know what they are looking at. Please let us know what you’d like that verbiage to say or if you’d like to leave it out. This is an example we could use:
   * Welcome to your email preference center. Use the form below to keep your contact information up to date or to let us know which type of communications you'd like to receive. \*\*May need to revisit this statement based on the design you create.\*\*
2. What fields would you like to include for collecting contact/personal information? Other than first name, last name, and email address (which are always required), please indicate what other fields are required as well.  Some examples are below:
   * First Name
   * Last Name
   * Email Address
   * Zip Code
   * Physical Address (Street, City, State, Zip code)
   * \*Mobile number (will be added at a later phase)
3. How many email subscription options would you like to have listed and what are the names of those lists?  (How many email lists are there that people can choose to subscribe to?)

* Make Your Moment
* United We Win (current name)
* To unsubscribe from ALL communications from United Way xxx (local area) – note this is a master unsubscribe.

1. Other than contact, personal, and subscription information, what other data points would you like your preference center to collect? Please indicate which points would be required.

* N/A

1. As part of scope, the preference center, upon accessing a customer’s record, will pre-populate personal information into input fields and also indicate the subscriptions that the customer is opted into and out of. Please indicate any other customer-data driven information you want displayed on this page.

* If the information is pre-populated, what’s the user flow if that’s not the person’s information? Can we include a “Not Amy Ganderson? Please click here”

1. The preference center can display Success and Error messages upon clicking “submit.” There are a few methods by which these messages are displayed: Text displayed on same page, Pop-up message. Please provide copy instruction for Success and Error cases.

* Can we setup a confirmation page?
* Success page: “Your email preferences have been updated per your request. Please allow up to 10 business days for these changes to take effect. The following changes were made: You have UNSUBSCRIBED from xxxx. Thank you.”
* Error page: Can you advise on the use case and language? If there is an error for whatever reason, we need to give people another way to opt-out of our emails.

1. Does the custom preference center need any links to external pages (e.g. home page URL in logo)?  If yes, please provide link copy, logo, URLs, and placement instructions.

* Individual local logos should link back to their main homepages. The logo should be dynamic, since we’d like to setup one form. Please confirm you received these from Fifty & Fifty.
* Mile High: <http://unitedwaydenver.org/>
* Twin Cities: <https://www.gtcuw.org/>
* Central Indiana: <http://www.uwci.org/>
* Central Ohio: <https://liveunitedcentralohio.org/>
* Greater Cincinnati: <http://www.uwgc.org/>
* Milwaukee: <https://www.unitedwaygmwc.org/home>
* St. Louis: <http://www.stl.unitedway.org/>
* Sun Coast: <http://unitedwaysuncoast.org/>
* National Capital: <http://www.unitedwaynca.org/>
* Toronto: <http://www.unitedwaytyr.com/>
* Bay Area: <https://uwba.org/>
* Salt Lake: <http://www.uw.org/>
* Kansas City: <http://www.unitedwaygkc.org/>
* Central Carolinas: <https://uwcentralcarolinas.org/>
* Northeast Florida: <https://www.unitedwaynefl.org/>

1. Does the page need links to social media? If yes, please indicate which social platforms and provide their URLs.

* In the footer, with icons. We’ll supply a separate list for this. Each local UW manages their own social media accounts.

1. Is there any legal copy/information that needs to be included on the page? If yes, please provide the copy.

* Terms of use should be included. Include “Privacy Policy” in the footer linking back to <http://www.unitedway.org/privacy-policy>. Note, for our Canadian partner we may switch out the link to their website. We’ll confirm that piece.

#### When you return this questionnaire, please also send us the following assets: (provided by Fifty & Fifty)

1. Vector or large PNG logo
2. Brand style guide or list of company colors if you don’t have a style guide
3. Font files (.OTF or .TT files)
4. Any sample design materials or emails that you are currently sending, as well as the designs / links to your current preference centers.