Mailing procedure: flow chart

ROLES:

(I) INITIATOR
(usualy the account manager)

(D) DESIGNER
(to prepare assets, layout, MailChimp layout, sending, filling MailReport with results, syncying lists (and blacklist))

(A) AGENT
(sales person to process MailReport, updating addresses, calling leads)

(M) MANAGER
(supervising)

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1 Campaign

- lists are made per market segment
- grouped per country (a separate MailChimp account per country)
- all contact lists are kept in sync offline in J:/Boca Systems Europe/Commercial/10. MARKETING ----- moeten we nog controleren/-Mailchimp maillijsten/country_code/list_name/
- use each list max. once per month

2a List
(contacts)

2b Topic/Subject
(product, service, promotion, message...)

3 Layout

3.1 Subject line

3.2 Preview text

4 Time
(schedule send)

- usual send time
Tuesday 14:00

4.1 Priorities/Focus points

4.2 SENDING
(at scheduled time)

5 Monitor inbox

6 User activity timeframe
(waiting for 3 days)

7 Export activity results
(raw .csv data)

7.1 Convert .csv to .xlsx

7.2 Fill MailReport tabs
(separate MailReport for each list)

8 Save on J:
(raw .csv data + filled MailReport)

9 Send MailReport(s) to Sales

9.1 Take action on contacts

9.2 Consult with Initiator
(with account manager)

9.3 Send MailReport(s) back
(to designer)

10 Save on J:
(processed MailReport)

11 Check list updates
(additions to processed MailReport)

- sheet in same folder as all lists (J:)

12 Add unsubs, abused, hard bounces to blacklist on J:

13 Sync list updates to MailChimp

- bi-monthly updates

14 Export new contacts from Base & Remove blacklist contacts from Unit4

Replace general email addresses (info@, webmaster@, etc.) with personal email addresses. *For each tab you update, add a new column "Updates".*

• **Clicked tab:**
- check email address, first name, last name
- cold calling to all who clicked - "prospects/leads"
Purpose: check if we can offer a quote/sell our products/services.
- note down result in Update column

• **Unsubscribed tab:**
- check email address, first/last name
- if necessary add new email address & names with a new one, in the Update column

• **Bounced tab:**
- two types of bounces:
hard: mailbox doesn't exist
soft: mailbox full, bad or temporary not available
- check email address + first name + last name
- if necessary replace used email address & names with new
- find new address for all hard bounces, note down in update column
- find new address for all soft bounces, note down in update column

• **Abused tab:**
- check email address + first name + last name
- if necessary replace used email address & names with new

• **Notes tab:**
- note down unusual activity useful for others involved