**New Client Brief**

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| **Client Details** | |
| Client |  |
| Company Contact Details |  |
| Billing Details |  |
| Purchase Order |  |

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| **Key Contacts – Campaign, Technical, Billing** | | | | |
| **Name** | **Job Title** | **Email Address** | **Telephone** | **Contact For** |
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| **Alchemy Worx Services** | | | | | |
| Strategy and Consulting | ☐ | \*Design | ☐ | Audit | ☐ |
| HTML | ☐ | \*\*Deployment | ☐ | Reporting | ☐ |
| Data Upload | ☐ | Data Cleanse | ☐ |  |  |

\* If Design is required please see section 2 for additional assets

\*\* If Deployment is required please see section 3 for additional details required

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| **Rate card** |
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| **Background** |
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| **Project Details** |
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| **Production Requirements**  **Short term** |
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| **Long term** |
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| **Assets (non creative)** |
| REQUIRED FROM CLIENT: |

**2. CREATIVE REQUIREMENTS**

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| **Creative assets required from client** | | | | | |
| Logo (eps, ai or hi res version) | ☐ | Colours (RGB or Hexidecimal) | ☐ | Photographic elements (hi res) | ☐ |
| Fonts (actual file or name so we can source if necessary) | ☐ | Graphic Elements - pings, bugs, icons (eps, ai or hi res versions) | ☐ | Brand Guidelines (pdf) | ☐ |
| **Location of assets:**  (Folder on server) |  | | | | |

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| Single minded proposition  (Who  Why  What) |  |

**3. DEPLOYMENT DETAILS**

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| **Platform/FTP Access** | | | | |
| Platform/Version |  | | | |
| ESP login URL |  | | | |
| ESP Username(s) |  | ESP password(s) supplied | Y or N | |
| FTP\* login URL |  | | | |
| FTP\* Username(s) |  | FTP\* ESP password(s) supplied | | Y or N |
| Additional Notes |  | | | |

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| **Platform Support Details** | |
| ESP Account Manager |  |
| ESP Support Details |  |
| Default time zone |  |

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| **Email Authentication** | | | | | | | | | | | | | | |
| IP Address(es) |  | | | | | Dedicated | | | ☐ | Shared | | | ☐ | |
| Sending domain(s) |  | | | | |  | | | | | | | | |
| Authentication | PTR | ☐ | SPF | ☐ | Sender ID | | ☐ | Domain Keys | | | ☐ | DKIM | | ☐ |
| 3rd party authentication? |  | | | | | | | | | | | | | |

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| **Envelope Options** | |
| From address |  |
| Friendly From Name |  |
| Reply to address |  |
| Bounce Address |  |
| Header Encoding |  |
| Message Encoding |  |

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| **Campaign Structure and Mailing Activities** | | | | | | | | |
| Campaign Naming convention? |  | | | | | | | |
| Folder structure? |  | | | | | | | |
| Asset naming convention? |  | | | | | | | |
| Mailing Type | Push | ☐ | Triggered | ☐ | Transactional | ☐ | Other |  |

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| **Data | Import Process** | | | | | | | | | | | | | | | |
| Data Upload Method | Manual FTP | ☐ | | Manual ESP UI | | | ☐ | | Automated Scheduled | | | ☐ | Direct DB Connection | | ☐ |
| If other/bespoke please describe |  | | | | | | | | | | | | | | |
| Data Management | New list per Campaign | | | | | ☐ | | Master Database | | | | | ☐ | | |
| Import Method | Add New | | ☐ | | Update/Insert | | | | | ☐ | Overwrite | | | ☐ | |
| DB/ List Name(s) |  | | | | | | | | | | | | | | |

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| **Data | Definitions** | |
| Data schema (comma separated) |  |
| Primary Key |  |

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| **Data | Personalisation** | |
| Personalisation Used |  |
| Default Salutation (if fields empty) |  |
| Further details |  |

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| **Data | Dynamic Content** | |
| Data fields used for Dynamic Content |  |
| Further details |  |

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| **List Hygiene | Unsubscribe and Soft Bounce handling** | | | | | | |
| Unsubscribe Method | Unsubscribe Link | ☐ | Preference Centre | ☐ | Reply to | ☐ |
| Further details *i.e. location of preference centre/ method* |  | | | | | |
| Suppression List |  | | | | | |
| Soft Bounce Handling |  | | | | | |

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| **Approval & Seed list** | |
| Approval List |  |
| Seed lists |  |

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| **Link Tracking** | | |
| Third Party Tools | Web Analytics |  |

This form to be used until a campaign has been deployed for the client – then information is to be transferred onto a CRF.

CRF’s to be used for each campaign thereafter, with this form being used as a reference