**CM / Deployment process**

1. **New clients**

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* 1. EDS team leader or deployment lead to create and sign off on a new CRF and deployment checklist for all new clients
  2. CM to circulate the onboarding checklist to allow the EDS team lead to highlight the areas we need for first deployment and to jointly work with the CM on completing the deployment section of the onboarding document
  3. EDS to own any ESP training sessions ensuring we have all the information we need to complete campaigns accurately and effectively on the platform

1. **Start of any dynamic mailing, complex project or non BAU email ( especially large volume)**

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2.1 CM to discuss mailing requirements with deployment team [lead for the account](file:///\\192.168.1.4\alchemy\production\deployment_\Client_Leads_) (including a data rep if appropriate also) before any HTML is built. The outcome of this meeting will help determine how the HTML is built and what the data requirements are

2.2 If client requires a number of static emails all to be sent at the same time – with slight variants in creative, also discuss this with the deployment team as it may be ‘smarter’ to set these up as dynamic mailings

**2.3 Technical projects:**

Such as trigger emails and abandoned cart emails. All technical projects should go through Omarr & Robin in the first instance, so they can help CM’s scope the projects, identify questions we need answering from clients or ESP’s, and identify which resources we might need to complete the project.

2.4 There is an initial brief/questionnaire completed by the client and used on any scoping calls with clients. Please bring in Omar or Robin onto these calls

2.5 Omar and Robin will then help you complete the technical brief.

Documents can be found here >> [..\..\..\Project\_Process\_](../../../Project_Process_)

2.6 Additionally please give Canda/EDS a heads up (when client briefs you) on any non BAU projects - particular any large volume or complex mailings so EDS can schedule and plan resource in advance of project being briefed into EDS

1. **CRFs must be complete, accurate and kept up to date**

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* 1. The CRF must contain all the required information on a campaign, as this is what the deployment team use to set up the campaign in the ESP platform.
  2. The EDS team member to add their initials to the ‘to do sheet’ on the CRF to indicate they have worked on project
  3. CM’s to begin to transfer all CRF’s to the new master, tailoring it to the clients specific requirements

**Eg of CRF**

[Z:\2012\talktalk\\_assets\CRFs\TalkTalk\_New\_CRF.xlsx](file:///Z:\2012\talktalk\_assets\CRFs\TalkTalk_New_CRF.xlsx)

[Z:\2012\charles\_tyrwhitt\\_masterCRF\CT\_master\_CRF.xlsx](file:///Z:\2012\charles_tyrwhitt\_masterCRF\CT_master_CRF.xlsx)

[..\..\..\..\2012\sainsburys\_bank\\_assets\CRF\SB\_CRF\_new.xlsx](file:///\\192.168.1.4\alchemy\2012\sainsburys_bank\_assets\CRF\SB_CRF_new.xlsx)

**Key things to be completed on all CRF’s are:**

* 1. Exact mailing name and project number
  2. Deployment date and time
  3. Name of Segment/data (s)list to be targeted
  4. Final counts of each data segment to target
  5. From address and friendly from
  6. Reply to address
  7. Any personalisation
  8. Subject line (Sanity check SL against creative/offer)
  9. If split test – this should be stated also with details of each SL
  10. Details of any tracking
  11. Details of any/all dynamic rules to be targeted
  12. Names of Suppression lists
  13. Name of seed lists (do we need to deploy to seed first?)
  14. Name of approval list
  15. Is mailing to be scheduled or sent?
  16. Any throttling amounts?
  17. Unsubscribe links

Ultimately, the final deployed campaign must reflect what is in the CRF.

**3.4 DEPLOYMENT CHECKLIST**

* All Campaigns to have a deployment checklist on and a ‘to do sheet’ on.
* The deployment checklist is ‘owned’ by the EDS.
* The EDS to ‘tick’ off on all steps to show they have checked everything pre-deployment
* The EDS to sanity check the SL against the creative/offer
* All emails with personalisation and dynamic content should be thoroughly tested and previewed before sending for approval to the client and before deployment. A test list should be created ( if not provided by the client) to enable these tests to be made
  + Is all the correct data being pulled through into the email?
  + Check each version of the personalised email to ensure all info is correct
  + Check there are no hardcoded data values in the HTML file
* The EDS and CM to tick off again on all steps at deployment stage – this should be recorded on the CRF, so we have a record on the server
* (So one ticklist for the EDS to check pre-deployment and another ticklist for the CM and EDS to complete @deployment stage)
* The EDS should regularly check and update this checklist with any additions – informing the CM they have done so.
* CM and EDS to not make any assumptions on requirements. Always ensure everything is 100% checked and signed off by the client
* The CM will then make sure the updated checklist is on the CRF’s going forward

1. **All tasks, however trivial must appear on the deployment whiteboard.**

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4.1 Whiteboard link - <http://192.168.1.5/whiteboards/index.htm>

An explanation of the whiteboard tasks can be [found here](file:///\\192.168.1.4\alchemy\production\campaign_manager\process\internal\Deployment_whiteboard.docx)

4.2 Add client name, project number, task to be completed and the time to be completed by.

4.3 Email deployment team will not engage in a project unless it is added to the whiteboard.

Black jobs - Add jobs for the day in ‘black’ at the start of the day so the deployment team have visibility of all campaigns due for deployment that day. If there is a chance it will go out that day or be scheduled that day please add to the whiteboard. All must be added by 12.00 for the day.

Green jobs – Ready to be worked on

Red Jobs – Top priority jobs. To be started on before any other jobs, and to be jumped on asap. **The CM to ALWAYS flag with Canda verbally any red jobs** that are added to the board

Grey jobs – Job is on hold. The deployment team will email the CM to let them know why.

1. **Add tasks which require more detail than is on the whiteboard to CRF cover sheet**

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* 1. We should state all ‘details of tasks to be completed’ on the CRF cover sheet. [Deployment\_to\_do\_coversheet.xlsx](file:///\\192.168.1.4\alchemy\aw_employees\Claire_Rollinson\Processes\Deployment_to_do_coversheet.xlsx) this sits on the first tab of all CRF’s
  2. EDS – to tick off when tasks have been completed on the ‘to do’ sheet inputting their ‘initials’ under the ‘done’ column

(Note – please do not create traffic to do docs as we do with other production teams)

* 1. ‘Other’ jobs – such as investigation type requests. These can be communicated to deployment team via email. Please add project number in the subject line and add to the whiteboard as normal adding ‘see email’ in the whiteboard comments field.

1. **Jobs should only be placed on whiteboard once CRF has been completed**

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6.1 'Initial set up and on house test' jobs must always have a CRF – ‘other’ and ‘DM rendering’ jobs are only exception, where deployment is not required

1. **Deployment and testing QA**-------------------------------------------------------------------------------------------------

**7.1 Initial set up and test:**

Deployment team to set up email (html and text) and/or forms on the client’s ESP, as per the CRF provided (initial set up)

They then send a set of inhouse tests for the CM to check the email, and testers to test rendering and links.

**7.2 Testing board**

* CM to brief testing job onto the **testing whiteboard** <http://192.168.1.5/whiteboards/index.htm>
* Always **add subject line** of the email to be tested in the ‘comments’ section of the whiteboard.
* Indicate whether a ‘full test plus mobile’ ‘full test’,’ render test only,’ ‘links only’ or ‘re-test’ is required.

**7.3 Render issues or further amends needed to HTML?**

* Any amends to HTML once the email has been set up should be completed by the HTML team, then ‘regrabbed’ by the deployment team for further in-house tests or approval mailings.
* The job will also need to be retested – but please point out on the testing board which areas need to be tested, so the tester DOES NOT retest the entire email

**7.4 Internal testing complete?**

* When internal QA completed approval emails are sent to the client’s approval list. ( always check which approval list the campaign should be sent to)
* All emails and LP should be thoroughly QA’d before sending to the client for approval
* For any emails with personalisation or dynamic content, tests should be completed to ensure it is all pulling through all data as expected
  + Emails should be previewed with all personalisation checked before deployment
* Client to check and approve (CM and EDS to check) set up of email (from address, unsubscribe, tracked links, text version, hosted version, etc.)
* Only once client has signed off approval mailings should email be set up to be deployed

1. **Deployment of emails**
   1. EDS to manage all aspects of deployment and set up of email. CM to be second set of eyes on checking CRF against details in the platform
   2. EDS to work through deployment checklist ensuring all points have been completed and double checked.
   3. Complex dynamic emails to be checked by Senior EDS before deploying
   4. A Deployment leader for the account should always be available during set up & will stay till the email is deployed.
   5. CM and EDS to tick off on CRF when mailings are scheduled as they are done so, when scheduling multiple versions so mailings are not missed.
   6. EDS to send a screenshot of scheduled mailings to CM, who in turn sends to the client for confirmation of what was sent.   
      This screenshot acts as confirmation that a deployment was sent. ( No screenshot, no confirmation)
2. **If emails are scheduled**:
   1. Majority (if not all) ESP’s have a function to allow you to set up an automated email notification, notifying you that a scheduled email has been sent or ‘failed’
   2. On EVERY scheduled deployment please can we ensure we set up an email notification. The AW client alias should be added and the email address of the EDS or [EDS@alchemyworx.com](mailto:EDS@alchemyworx.com).   CM’s please speak to EDS about setting these up
   3. This step to be added to all deployment checklists with immediate affect
   4. The CM and EDS who set the mailing up, then should check this email was received and all was fine with deployment

If the scheduled email is due to go out ‘after work hours’ please add your personal email address so you can check it was sent out ok

* 1. CM should check they receive a seed copy. Please ensure the AW client alias address is on ALL client seed lists.

1. **Work together to prioritise Team Campaigns**

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Please be mindful and aware of all campaigns on the board. If you have queries/concerns about priorities please speak to Claire R/Lisa R/ Kate R/Canda who will help prioritise

1. **Include project number in the subject line of all internal emails**--------------------------------------------
2. **Deployment team**--------------------------------------------
   1. To be proactive in communicating with CM’s when jobs are completed on the deployment board and to help identify any issues they may forsee with a campaign
   2. Deployment team to notify CM’s when jobs are complete via an email screenshot
   3. Deployment to assign their name against a project they own. Deployment will work through the jobs on the deployment in chronological order so if their name is listed twice they will be working on the job ‘highest’ on the board
   4. EDS to proactively highlight to CM’s if out-times on the board cannot be met to allow a discussion on priorities to take place

**Further notes:**

* Data team should upload all data lists and segments and provide counts once suppressions have been applied – these are the final counts supplied to clients