# ALGONQUIN COLLEGE

# Marketo Email Request Checklist

Follow this checklist to be ready with all you need for a successful email request on the [Marketing Project Request Form](#). Complete submissions are required to kickstart your project request. Note that the turnaround time for email requests is 10 business days. Ready further out? No need to wait. We LOVE requests with lots of lead time. Select "Email/Newsletter in Marketo" as your Project Type.

At the end of this checklist, you'll also find a glossary to help you understand common email terms, including those specific to AC's use of Marketo.

**Questions?** Lean on your strategic advisors for support.
Email [digitalcomms@algonquincollege.com](mailto:digitalcomms@algonquincollege.com).

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- ☐ **Goal/Purpose**
  What are you trying to achieve by sending this email? Does it need to be an email, or is there a different or better way to communicate with your target audiences? Remember to make your goal SMART (Specific, Measurable, Attainable, Relevant, Time-Based).

- ☐ **Target Audience(s)**
  Define who you are trying to reach. It is difficult to be all things to all people, so make sure to think critically about who you really need to communicate with. These are your email recipients and their needs, combined with your goals, should drive your content.
  - ☐ Custom audience required? Include an Excel spreadsheet with your custom list. At minimum, include separate columns for first name, last name and email. When applicable, include another column for student ID. Double check your data to ensure no bouncebacks – make sure all email addresses are in a valid email format, remove duplicates, and look for blank fields and typos.

- ☐ **Sender Information**
  - ☐ Sender's Email (Email From) – *whose email address should this email come from? This should be a valid Algonquin College email address.*
  - ☐ Email Reply To – *what email address should be used for replies? Note that no-reply is unavailable).*
  - ☐ Sender's Name (Email From Name) – *the name displayed in your contacts' inboxes, e.g., Algonquin College Recruitment.*

☐ **Send Date** – *when should this be sent? Is the send date flexible?*

> **NOTE:** The Digital Communications Team does its best to ensure no target audience receives too many emails at once. This can be difficult with the number of emails being sent College-wide, so we appreciate flexibility when possible. The team also seeks to optimize all email send dates and times to achieve the best results for all of our clients.

☐ **Subject Line** – *keep this short and sweet, and start with action-oriented verbs.*

☐ **Email Header Image** – 1200x600 pixels; accepted file types: jpg, jpeg, png; max. file size 20 MB.

> **IMPORTANT**: If you need a design for this, you must submit a separate Marketing Project Request for the graphic(s) from our Creative Team. They require lead time of 10 business days for graphics to be completed. Our Campus Services, Experiential Learning and Innovation, and Student Support Services divisions have their own request forms for this type of request. *The email header image should be in hand to include alongside your email request.*

> **TOP TIP**: In the rare case a quick turnaround on a time-sensitive email is required, it's a good idea to have generic email header images designed for your area or content (e.g., "IEC Update" or "Financial Aid").

☐ **Will you need a reminder email?** If yes, on what dates should the reminder email(s) go out?

☐ **Email Message(s)**
Your email content and call-to-action should both align to your target audience's needs and your goal(s) for sending the email. You may submit content directly in the form field, or by attaching a Word doc.
- ☐ Email content
- ☐ Clearly defined call-to-action with link
- ☐ Accessibility requirements met (i.e., appropriate language level, descriptive hyperlinks, alt text for images, etc.)
- ☐ All links are live/published and accurate to the content
- ☐ Does your email make sense for all target audiences? If not, provide custom messages for each target audience (e.g., on-campus versus online learners, international versus domestic learners, etc.)
- ☐ Has everyone who needs to review and approve the email already done so? Content should be submitted only after approval from all interested parties. The email proof the Digital Communications team will send the submitter should be used to confirm layout and send details only

> **NOTE:** Emojis are fun, but Marketo doesn't like them. For now, we need to keep content and subject lines free of emojis.

> **TOP TIP:** A Word doc is a great way to submit content when you have multiple versions of an email or email campaign to request. Email request submissions should only be tied to one message/goal or event/initiative at a time. Do not submit multiple emails in one Marketing Project Request if they do not relate to one another.

## You're now ready to submit!

Complete the [Marketing Project Request Form](#) at least 10 business days' ahead of the send date of the first email in your submission. Then, get ready for any clarifying questions from the Digital Communications Team.

## Next up? It's proofing time

The Digital Communications Team will send you a proof (via email) of your email ahead of the send date. Quick feedback and approvals mean the project can stay on schedule. Make sure as the submitter, you share the proof with everyone who needs to see it and that you collate everyone's feedback to send back to the Digital Communications Team in one email response.

> **TOP TIP:** While many of our employees read emails in a desktop format, many learners read emails in a mobile format. Make sure to proof the email in both desktop and mobile.

# Glossary

## A

**A/B Testing:** A method of comparing two versions of an email subject line, from address and more, to see which one performs better.

**Applicant:** A future/prospective student who has applied to at least one program at Algonquin College.

**AODA:** Accessibility for Ontarians with Disabilities Act. Established in 2005, this act sets out requirements all organizations must follow to ensure accessibility for people of all abilities.

**Automated Email:** Pre-set emails triggered by user behaviour or specific conditions.

## B

**Blacklist:** A list of IP addresses or domains that are blocked from sending emails.

**Bounce Rate:** The percentage of emails that cannot be delivered to the recipient's inbox.

# C

**Call-to-Action (CTA):** A short phrase or button encouraging the reader to take action.
**Campaign:** A series of coordinated emails with a unified goal.
**CASL:** Canadian Anti-Spam Legislation. Established in 2014, this legislation reinforces best practices in email marketing and combats spam and related cyber threats.
**Clicks:** A metric that measures how many times a link in an email is clicked by recipients. They differ from email opens, which only measure how many people look at an email.
**Click-Through Rate (CTR):** The percentage of recipients who clicked on a link within the email.
**Click to Open %:** Percentage of emails that were opened and had a link clicked in the email. This measures the relevancy and context of an email by taking the number of unique clicks divided by the number of unique opens, and then multiplying by 100 to show it as a percentage.
**Custom List:** An Excel spreadsheet provided to the Digital Communications Team for recipients/target audience(s) not available within our customer relationship management (CRM) platform (Salesforce), e.g., external partners or a select group of students that cannot be identified by a status code or other available criteria. Provide first name, last name, email address and if applicable, student ID. Ensure all email addresses are in a valid email format, remove duplicates, and look for blank fields and typos

# D

**Deliverability:** The ability to successfully deliver emails to recipients' inboxes.
**Double Opt-In**: A process where a user confirms their subscription via a second confirmation email.

# E

**Email Performance:** A measure of how well an email campaign performs. It is determined by analyzing data from the campaign. Email performance metrics can help understand how recipients engage with emails and can be used to improve email campaigns.

# F

**Footer:** This section is located at the very end of the email. It includes the college's address, an unsubscribe link, and useful details like contact information and social links.
**Full-time Student:** A registered student with a full course load. SIS std load: F
**Full-time Program:** A program with a set number of courses per term. Program category 01, 04, 06, 09

# G

**GDPR:** General Data Protection Regulation. Established in 2016, this regulation harmonizes data privacy laws across Europe and must be followed by all organizations communicating with target audiences in Europe.

## H

**Hard Bounce:** Permanent email delivery failures, typically due to invalid addresses.
**Header:** It is the area in which important information is entered above the email content area.
**Hyperlink:** A link from one piece of information to another, e.g., linking to a webpage within an email.

## I

## J

## K

## L

**Lead**: A future/prospective student who has not yet applied to Algonquin College.
**List Segmentation**: Dividing an email list into smaller groups based on criteria like demographics or behaviour.

## M

**Marketo:** Adobe Marketo Engage (Marketo). The marketing automation platform (MAP) used at Algonquin College, designed to manage leads throughout the student journey, enabling the creation of personalized campaigns, optimization of content, and tracking of results for more effective engagement.

## N

**Newsletter:** An email that goes out consistently that provides updates, news, tips, other helpful information, and ways to take action in response to the content of the email newsletter.
**No-reply Email:** An email address that can send emails but not receive them.

## O

**Opens:** A metric that measures how many people have opened an email.
**Open Rate:** The percentage of recipients who open an email.
**Operational Email:** An email that communicates critical information to clients, regardless of whether they have opted out of marketing emails.
**Opt-In**: A process where a user confirms their interest in receiving information from an organization. This may be specific to a certain kind of information only, or more broadly for any communication from the organization.

## P

**Part-time Program:** A program with a flexible number of courses per term. Program category 02, 07
**Part-time Student:** A student registered in a part-time program.
**Partial Load:** A student registered in a full-time program with a smaller number of courses (60% or less)
**Personalization:** Tailoring email content to individual recipients using their data, e.g., using a recipient's first name in a greeting.

## Q

## R

**Recipient:** The person(s) who you are sending your email message to.
**Reminder:** A message that assists users in remembering essential information or encourages them to be aware of approaching deadlines or events. It differs from resend as a reminder usually has different content elements from the original email.
**Resend:** Send the same email to recipients who didn't open the original.
**Redeployment:** Sending a slightly modified version of an email to a segment of a list or to those who didn't engage.
**Registered:** A student currently enrolled in a program with a course load. SIS status 000.

## S

**Salesforce:** The customer relationship management (CRM) platform used by Algonquin College.
**Sender:** The person or department who has an email message to share with others.
**Soft Bounce:** Temporary delivery issues, like a full inbox or server problems.
**Spam Complaint:** When a recipient marks an email as spam, hurting the sender's reputation.
**Status Code:** Used by the Registrar's Office to determine the stage of the student lifecycle.
**Student Lifecycle:** Maps a student's journey from prospect/lead through to graduate/alumni. Truly cyclical, graduates/alumni often become prospects/leads for program pathways and additional credentials.
**Subscriber List:** A list of people who have opted in to receive emails.

## T

**Template:** A pre-designed email setup that includes core brand elements, headers, and footers. It can be filled in with text, messaging, and design components specific to the campaign.

## U

**Unsubscribes:** The number of users who choose to no longer receive emails by opting out.
**Unsubscribe Rate:** The percentage of recipients who opt out of future emails.

## V

## W

**Whitelist:** A list of approved email addresses or domains that are allowed to send emails.

## X
## Y
## Z