Email Preference Center
Planning Workbook

Use this workbook to plan out your email preference categories, layout options, and think through any logic needed for your form.

Section 1: Brainstorm the email buckets.

Write out the types of emails you typically send each week/month/year?
This might be aspirational where you brainstorm types of emails you want to be sending too. Or you might already have a content strategy plan where these will be easy to list out. Otherwise try and be strategic with the categories of emails you choose. These will be the email preferences on the page and help with the member and prospective members' experience.

Section 2: Plan out your content cadence.

Of the types of emails you send, what is the cadence for each? Will you send one general update a month, one educational newsletter a month, etc.? Then write out what typically goes out the first week of the month, the second week of the month, etc.

The benefit of this planning is so that your members and prospective members are receiving emails on a cadence and begin to build trust with you.

Email Type	Send Cadence	First Week	Second Week	Third Week	Fourth Week

Section 3: Review example association Email Preference Centers and note what you like. Make note of the opt- out language, layout, & categories.

Examples:

1 **American Dental Association**

2 **The Association for Research in Vision and Ophthalmology**

3 **American Society of Plastic Surgeons**
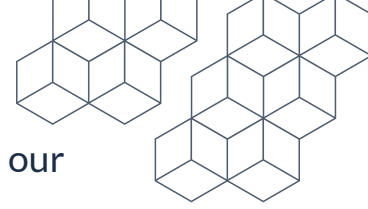
HighRoad Solutions' EPC Elevated Example:

Lead gen and/or client data collection

Frequency management

Member experiece

In-house advertising

Write down what you liked from the example association EPCs and from our elevated EPC:

Section 4: Think through any logic that the EPC might require.

1. Will you be using the email preference page for lead generation?

   ☐ Yes   ☐ No

2. Do you want to include progressive profiling?

   ☐ Yes   ☐ No

3. Do you have preferences that only some in your audience should see?

   ☐ Yes   ☐ No

4. Do you want to implement tracking onto the page from a Marketing Automation tool or Google Analytics, for example?

   ☐ Yes   ☐ No

5. Do you want to be able to give users the option to choose frequency for a particular newsletter?

   ☐ Yes   ☐ No

6. Do you want to give users the "option to pause receiving emails" vs. "opt out"?

   ☐ Yes   ☐ No

7. Would you care to have an in-house ad on the email preference center?

   ☐ Yes   ☐ No
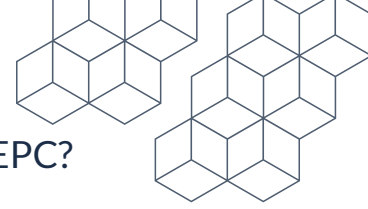
8. Do you assume opted in for contacts who have never visited the EPC?

☐ Yes ☐ No

9. Do you want to add a pop-up window when the confirmation button is clicked to opt out of all emails? Example: The pop-up might ask why they are opting out and give options like: you send too much email or I've switched careers, etc.

☐ Yes ☐ No

Section 5: Brainstorm progressive profiling questions.

Progressive Profiling is a way to ask your users new questions each time they interact with the email preference center. So if you had a list of five persona-revealing questions and a user has already answered two of your questions, the form will progress to the next set of two questions. These questions are a great way to lead into segmentation strategy and build out your personas.

Write out questions that will help you identify each user into what type of ideal member or perspective member bucket they fall into. Essentially these are persona-revealing questions. Focus on brainstorming 5-7 questions.

1.

2.

3.

4.

5.

6.

7.

Section 6: Fill out the "Email Preference Center" tab on the Business Requirements workbook based on your email categories identified in this workbook next.