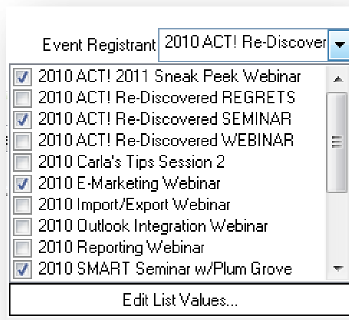
Event Email Marketing Checklist

Congratulations! Your company is planning an event. As you know, there is a lot of work to be done. However, using Sage ACT! and Swiftpage (aka ACT! E-Marketing by Sage or Sage E-Marketing for ACT!) you can more efficiently organize and track all of your event information. Below you'll find the checklist we use to plan our events. We hope it helps!

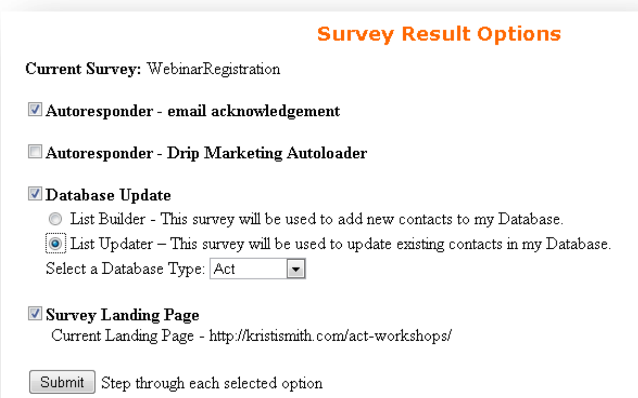
- ☐ Determine the event logistics and the registrant information you will need to collect for your upcoming event.

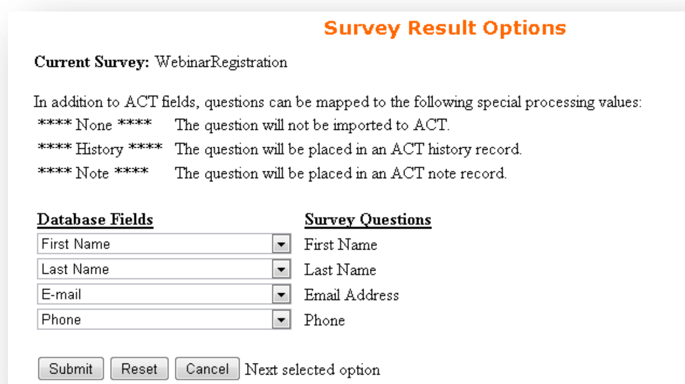
- ☐ Do you have a field in ACT! that you will use to record each piece of registrant information – for example, Payment Type or Event Name? If not, create a custom field for each piece. *For example, we have a custom field called 'Event Registrant' that lists all of our events on each contact record.*



- ☐ Using the Swiftpage Survey tools, build the registration form that you will use for the event.

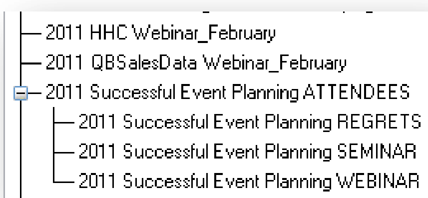
- ☐ In the survey tools, set your 'Survey Result Options' preferences. The feature we find most useful in event planning is the Database Update* option, which allows you to map each question's response back to a field in the contact's ACT! record – eliminating manual data entry. *This is where those custom fields come into play.* Use the List Builder option if your survey will be filled out by primarily new contacts and the List Updater if the responders are current contacts. (Note: You can also choose to have an auto-reply email sent to all registrants, have them added to a Drip Marketing campaign, and/or send them to a landing page after they submit a form.)

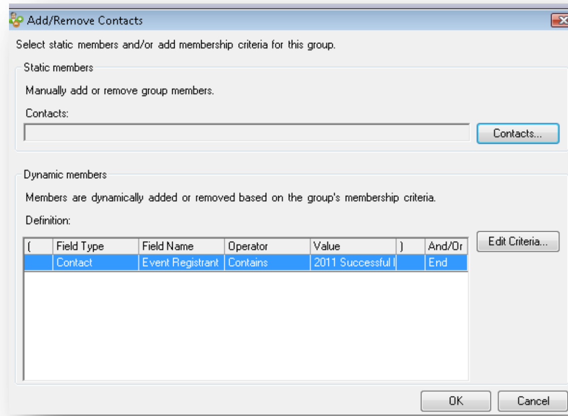




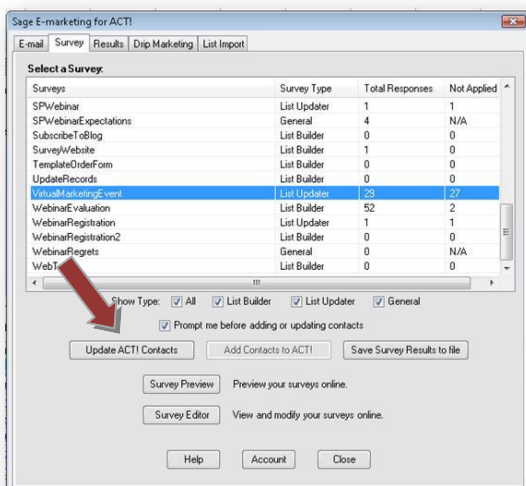
- ☐ Using the Swiftpage Template Editor, create your email invitations, reminders, post-event messages or any other templates needed. Include 'Register Now' text or an image and link it to your registration form.

- ☐ Create an event group in ACT! Set it up as a dynamic group and have your registrants automatically added to it when a certain field is filled out. *For our events, we actually create a group titled (Event Name) Attendees, and then create more targeted sub-groups under this to help us market more effectively. In our registration form, we have a question mapped to our 'Event Registrant' field. When we sync/update our survey results (next step), that field is automatically filled in, and the contact is automatically added to the appropriate group/sub-group.*





- ☐ Update/sync your ACT! contact records with their survey responses. Open your Swiftpage portal window in ACT!. Under the Survey tab, select 'Update ACT! contacts' (List Updater) or 'Add Contacts to ACT!' (List Builder), and follow the prompts. Now all the responses you've received up to this point will be reflected in each contact's record. Remember to sync your results daily to capture any new survey respondent information.



If you have questions or need help implementing any of these steps, we are happy to help. Please contact us at (847) 520-0860. We wish you much success in all of your events!

* Certain Swiftpage features are available only at the Pro and Team levels.