# EM Campaign Standards & Best Practices

To make our messaging understandable and actionable, every communication should answer five questions quickly:

1. **Who needs this?**
2. **Why are they receiving it?**
3. **What do they need to know?**
4. **What should they do next?**
5. **When do they need to do it?**

A request is considered **ready to submit** when its objective, audience, exclusions, CTA, timing, and required source information are known.

The CRM team will also be able to ensure if we can reliably identify and communicate with the requested population with this information.

Please note requests must be made within 10 days of a requested send date.

# Audience and exclusion notation

AUDIENCE: Who should receive this?

INCLUDE: Required audience characteristics

EXCLUDE: Who should NOT receive this?

FILTERS REQUESTED: Status, program, campus, application stage, etc.

SOURCE/SYSTEM: Where the audience/filter information should come from

SEND DATE: Date/time or requested window

**Example**

AUDIENCE: Prospective undergraduate students

INCLUDE: Students with an incomplete application for Winter term

EXCLUDE: Students who have already completed their application

FILTERS REQUESTED: Application term = Winter

Application status = Incomplete

SOURCE/SYSTEM: Slate

SEND DATE: October 15

## Recommended message structure

**Opening:** Why this matters to the recipient.

**Details:** What, when, where.

**CTA:** One unmistakable action.

**Close:** Only necessary supplementary information.

- Be sure to include any necessary links or attachments

## Subject-line standard

Use these rules regardless of campaign:

**Do**

- Lead with information meaningful to the recipient.
- Make the subject accurately describe the email.
- Use a deadline when the deadline is genuinely important.
- Put differentiating information early.
- Keep the subject focused on **one idea**.

**Avoid**

- vague subjects such as “Important information”
- unnecessary institutional language
- multiple competing ideas
- excessive punctuation

**Test:** *Could the recipient reasonably predict what this email wants from the subject line?*

- **Examples:**
    - **Standard / Professional:** [Category/Tag]: [Action or Main Topic] - [Specific Detail/Date]
        - *Example:* Invitation: Open House on 10/3
        - *Example:* Action Required: Submit missing documents by March 1
    - **Status Update:** [Subject] - [Status/Milestone]
        - *Example:* Financial Aid – Ward package ready
    - **Question-Based (Drives Engagement):** [Question about core pain point or topic]?
        - *Example:* Quick question regarding housing
    - **Number/List Format (High Open Rates):** [Number] [Key Benefit or Action Steps]
        - *Example:* 3 steps to finalize your application

## CTA hierarchy

**Level 1: Primary CTA**

**Exactly one desired next action.**

Examples:

- Apply now
- Register for the event
- Complete your application
- Confirm your attendance

**Level 2: Supporting link**

Helpful but unnecessary to completing the primary action.

Example:

- “Review admission requirements.”

**Level 3: Reference information**

Resources that don't compete visually with the CTA.

If everything is styled like an action, **nothing is the primary action.**