



# **To Do's Before Setting Up An Email List**

A Check List

*From TechBasedMarketing.com*



## **A Note From The Author...**

After being in business for a few years, I've noticed that I've been carrying too many things in my head. When it was time to hand over the tasks to an assistant, I realized all this stuff that's taking up space in the old noggin has to be documented.

In an attempt to create systems that can be used to run the business without me, I've started making check lists. Many of the lists and documentation I've created are in a private wiki or documents only for staff viewing.

While setting up a email mailing list this week on [Aweber](#) – the system of my choice, I frustrated myself yet again. Because:

1. I had failed to prepare certain web pages before hand.
2. I had to use guess work to complete the setup.
3. I was flying by the seat of my pants way too much.
4. I had to use the default settings and promise to come back to finish the setup after completing something else. In my experience, this usually *never* happens. I often break the promise to myself.

The result, a subscription process that is *confusing* for subscribers, *not personable* and does not make the *most use* of prime real estate. Fed up, I created this check list so I can be prepared once and for all. Upon finishing the check list, the thought occurred to me that this would be helpful to you too. Hence... ta da!

Since I use [Aweber](#), the specifics e.g. where to setup signature lines are for [Aweber](#). If you don't use them, the check list should still be helpful as a 'big picture' list.

Will I release more check lists? Maybe, very likely I would. If you wish to be notified of new releases or updates, get on my email list. It's easy. Visit <http://techbasedmarketing.com> the signup is on the home page. Alternatively, visit my blog and subscribe to the RSS feed. Here is the blog <http://techbasedmarketing.com/blog/>. You can subscribe using a regular RSS reader or by email.

Cheers,



*P/S: By the way, if this was helpful for you, feel free to pass it along, blog about it or send it to your list.*

## **Web Pages To Create and Upload**

- **When delivering a downloadable** free gift, or paid product, create download page or upload the item to your web site.
  
- **Prepare a confirmation success page (if double opt-in)**
  - Desired so the whole subscription process seems to come from you. People will see this once they confirm to join your list.
  - Make the page look like part of the web site users subscribed from.
  - If offering a free gift or list is used to deliver paid product, do not give product/gift away here.
  - Tell them where and how to collect the gift.
  - Consider quick housekeeping message. Example: To ensure you receive your purchase/gift and are always kept up to date, remember to put our domain yourwebsite.com in your email white list.
  
- **Prepare a thank you page.** This is the page people see after they submit their information on you subscription form.
  - Be personable & clear with instructions.
  - When offering free gift or list is for paid product and list is double opt-in, do not to put download link here.
  - If not double opt-in, tell people how they will receive the product/gift or next steps.
  - Include contact information or information how to get support in case things go wrong.
  - If no gift/download/product, point subscribers to other quality resources on your blog/site.
  
- **Prepare a page for those who have already signed up.** This is a page subscribers will see if they are already subscribed to the list. Aweber churns out a standard error message that is not very useful for subscribers.
  - Be personable, thank them.

### *To Do's Before Setting Up An Email List*

- Tell them what happened, why they are seeing this page.
- If they are not receiving emails from you, tell them to check the usual stuff e.g. spam, white list etc.
- Tell them how to get help if they still are not receiving messages despite checking all of the above.

## **Things To Write**

- **Come up with a short list name.** 15 characters, letters, numbers and hyphen allowed.
- **Come up with a quick description.** Subscribers see this when they un-subscribe.
  - Make it succinct yet descriptive so they know what they are un-subscribing from.
- **Write a signature line.** This is set in each individual list under List Settings >> Global Fields.
- **Prepare verification message subject line.**
  - Something not too spammy. Something people will take note of and open.
  - Note: Aweber requires list name to be in the subject line.
- **Prepare short verification message** - the message sent after someone subscribes to your double opt-in list.
  - Make this personable.
  - Explain why they are receiving this message
  - Explain what would happen if they take action and when they don't take action.
  - Personalize the closing.
  - Be clear and precise.
- **Write Messages**
  - **Prepare thank you/welcome message.** The email people receive after

successfully confirming or subscribing to your list.

- ◆ Most people will read this email and begin to ignore later ones. Use this space wisely.
- ◆ If delivering gift/product - supply download link now or tell them how to access the download.
- ◆ Tell them what to expect by being on the list from here on out. What information will you be sending soon? Important when doing a autoresponder sequence where you already know what the next emails will be about.
- ◆ If broadcast only email, suggest some reading or download material from your site/blog. Introduce them to your products, freebies, content.

→ **Prepare Autoresponder Messages.**

→ **Write a short name** to label the form you will create to use on your page.

→ **Come up with an ad tracking code.** So you can track where the subscriber came from and evaluate your marketing efforts.

## ***Items To Decide***

➤ **The company name to use.**

➤ **The contact address** that goes at the bottom of all emails if you won't be using the default. Default for all new lists can be set from Accounts page. Current default is:

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➤ **Decide the method of display.** Is the form going to be in-line, pop-up, pop-under, exit pop, pop-over or lightbox.

➤ **Will subscriber skip first autoresponder messages?**

→ Start from message 1 or later?

→ Note: Subscribers will not receive welcome email if you select anything other than message 1.

- **Decide what you want to collect from subscriber.** Name and email? Email only? Other fields?

## **Information To Gather**

- **URL for your logo/header** if any. Needed in List Settings >> Settings >> Company Branding >> Logo URL.

→ Preferred so people don't get lost when they see a "different site".

- **Web site URL** to send people when they click the "Return to your company name".

- **URLs of web pages.**

→ Confirmation success page

→ Thank you page

→ Already signed up page

- **Color code from your web site.** Optional.

→ Preferred so people don't get lost when they see a "different site".

- **The "from" email address & "from" name.**

→ Found under List Settings >> Settings. Scroll to the bottom. Standard for all my lists is: