



Creating Your Email Governance Journey

If your organization

- sends too many mass or automated emails*
- finds that your emails are being clicked on less and less
- doesn't know which emails are "working" (and what that means)
- doesn't have consistent processes for deciding what emails to send and not to send
- doesn't have established roles for making decisions

You would benefit from email governance!

*These messages include:

- communications about or marketing of an association product, service, or program, or member benefit
- member renewal process
- lead journey
- member donations
- email newsletter containing industry news
- email newsletters from the organization's publications

You may feel daunted or hesitant about taking on a governance project. That's why we have built each step with great care. This process will ensure that the people inside your organization requesting or creating emails understand your challenges. In addition, this process gives them the confidence, skills, and support to use email as a more effective channel.

This workbook lays out the steps of an email governance journey. The goal is to help you start to think about how your organization might implement each step.

If you have questions or need additional guidance for your email governance journey, please don't hesitate to reach out!

Thank you,

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Email Governance Journey Workbook

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1. Staff and management buy-in

There are several reasons why it's key to start with this step:

- Staff and management from multiple departments gain awareness of the challenges together.
- Staff and management from multiple departments craft solutions together.
- Everyone knows what will happen, creating support at all levels of the organization for the changes.

The best way I've found is to build this in to a project kick-start – an email “summit.” (In addition, create a project mantra and repeat it regularly:

“We are doing this WITH you, not TO you.”

The summit should be

- one day, in person
- attended by all staff members who request, create, send, or measure mass or automated emails
- part of the day attended by the organization's management – directors/VPs of each department, and ideally, the CEO

Also have 1 or 2 note-takers.

Email summit agenda

Current state of our in-box

Executives should attend this segment

Data about volume, most-clicked, least-clicked, number of unsubscribes and complaints. This should be for all mass/automated emails from all departments using all systems/platforms.

Your thinking: Do you have this information today?

- Yes, for all departments and systems/platforms
- Yes, but only for some departments and systems/platforms
- No

What would you need to do to get the data?

How to make the emails deliver on the vision

What are the organization's biggest opportunities to achieve our vision?

This is a small-group exercise. Divide participants into 5 groups (ideally, ensuring that people in the same department are in different groups).

Each group works on brainstorming possible opportunities based on one of the following:

- What can we eliminate?
- What can we limit?
- What can we reevaluate/reconsider?
- What can we start?
- What can we improve?

During the brainstorming, advise groups that they should not worry about what is feasible today.

Readout and vote

Each participant gets 5 votes – usually, the easiest way is with sticky dots. Participants can put one or multiple dots on ideas.

Then record the 5–10 ideas with the top votes

Discuss: What changes are needed to make these ideas happen?

Present top ideas to executives

Usually, some executives are able to stay for the entire day, but most cannot. Since the executives would hear about the current state, they know there is room for improvement. And since the people in their departments actively participated in thinking of solutions, the executives are highly likely to support the solutions and the changes needed to make them happen.

Depending on the organization’s culture, there may be very enlightening discussions during this final segment.

Your thinking: Would this type of event work at your organization? If not, why not?

2. Collaborate with departments

Meet with each department that requests, creates, or supports emails to share information about or promote their products, services, offerings, information, or resources. This typically includes:

- Research
- Advocacy
- Education
- Meetings
- Publications
- Membership
- Foundation
- Affiliated organizations – chapters, etc.
- (Marketing)
- (IT)

Before each meeting, share information about how that department’s emails are performing – deeper and more specific than what was shared at the summit.

Meeting agenda:

- Honest discussion about which of THEIR emails are working and not working.
- Identify what to consolidate, scale back, or eliminate.
- Explore other methods for reaching audiences.

These meetings establish a partner relationship, one where the email team is a knowledgeable part of the solution – not simply the ones who execute requests.

Your thinking: Does the list of above include all the groups currently sending mass emails to member and non-member audiences? If not, what groups are missing?

Can you envision having these discussions with each group? What do you expect to find?

3. Develop sustainable processes

Create an intake process

This usually starts with an email request form – often followed by a discussion. The name of the form itself establishes that it is a request, not a demand.

The form must include

- Purpose of the email
- Goal (selected from a list)
 - What action is each email designed to inspire?
- Audience (selected from a list)
- Desired timing
- Content – as much as possible
 - Subject line, pre-header, body text, images

Ideally, the form is created with software that can also support the rest of the email process. SmartSheet and Wrike are two examples of commonly used software.

Your thinking and work: Do you have an intake form and process?

- Yes, and all departments always use it
- Yes, but only some departments use it, and not all the time
- No

Have you defined a set of goals and success metrics for all emails?

- Yes
- No

Have you defined a single set of audiences for all emails?

- Yes
- No

Measure email performance

Once the organization has delineated typical goals for emails, it's critical to follow up and measure whether the emails achieved the goals:

- Did the recipients do what we hoped?
- Which metrics are worth tracking, and which are not?
- What can we measure today? Some are a work in progress

Your thinking and work: Do you measure the performance of all emails?

- Yes
- No

Develop an email content calendar

With an email content calendar, everyone can see what other emails are scheduled to be sent on any day, week, or month.

In addition to the calendar itself, you'll need a set of policies enabling the organization to set limits to the number of emails sent on any given day:

- Organizational priorities:
 - Tier 1 (mission-critical): Member acquisitions and retention
 - Tier 2 (program-related): Events, courses, advocacy, etc.
 - Tier 3 (general interest): Promotional or partner content
- Order of submission
- Deadline sensitivity
- Audience size and engagement level

This transparency achieves several purposes:

1. Motivates people to be more judicious about sending unnecessary emails.
2. Invites people to combine their message with others going to the same audience or serving the same purpose.
3. Enables the email team to prioritize messages based on strategic importance, audience size, and deadline sensitivity.

Your thinking and work: Do you have a central content calendar for all emails?

- Yes, and all departments always use it
- Yes, but only some departments use it, and not all the time
- No

Do you have policies for all emails enabling you to decide which ones to send and not send on a given day?

- Yes
- No

Define a streamlined, reasonable workflow

Over time and without guidelines, email workflows can get out of hand. “Just one more review” for image placement or copy reviews by multiple departments individually – does this sound familiar?

Too many review cycles can result in time-consuming, expensive reworking of emails, especially when personalization is involved.

Streamlining the workflow – limiting reviews to 2 or 3 – creates discipline among those who create or approve email text and design.

Your thinking and work: Do you have a consistent workflow for all emails?

- Yes, and all departments always follow it
- Yes, but only some departments use it, and not all the time
- No

Initiate quarterly meetings

In keeping with the “with you, not to you” philosophy, it is important to meet with everyone on a regular basis. These meetings should start as soon as the project starts and continue indefinitely.

Usually, a quarterly cadence works because it doesn’t put an unsustainable burden on everyone. It’s often enough to keep the effort top of mind, ensures buy-in, and improves the skills of everyone involved in the organization’s emails.

Content of the quarterly meetings:

- Share metrics from recent emails – positive and not
 - celebrate successes
- Introduce new policies and practices – a few at a time
 - What each new practice entails
 - How to do it
 - Examples of before and after
 - How it will improve results
- Review findings from recent changes

This type of open communication – a best practice in managing every type of change -- reinforces change readiness and increases acceptance.

Your thinking and work: Do you meet to share information with email creators and requesters on a regular basis?

Yes

No

4. Document best practices

During the previous steps, you would have defined audience segments and goals. In addition to displaying these in the email intake form itself, it's also helpful to store the lists.

Having a central, accessible place to store all best practices

- helps the organization's emails become more aligned
- makes it easier to educate new contributors and remind everyone
- facilitates evolution, as necessary

In addition to audience segments and goals, the best practices document should record:

- Naming conventions for emails
- Sender names
- Calls to action
- What emails should be combined vs. stand-alone
- Email frequency/ cadence
- Content calendar process and guidelines
- Content best practices – words to avoid, etc.
- Legal requirements

Your thinking and work: Have you documented a set of naming conventions for emails that anyone sends?

- Yes
- No

Do you have a predefined set of sender names for all emails your organization sends?

- Yes
- No

Do you have a predefined set of calls to action for all emails your organization sends?

- Yes
- No

Have you defined criteria for which emails could be sent as stand-alones, rather than as part of a consolidated email (newsletter, for example)?

- Yes
- No

Have you defined criteria for how frequently to send different kinds of emails – program promotions, membership renewals, etc.?

- Yes, for all types of emails
- Yes, for some types of emails
- No

Have you documented the process people must follow for email intake and content calendar?

- Yes, for all types of emails
- Yes, for some types of emails
- No

Have you documented current best practices for words to avoid so your organization's emails won't be marked as spam?

- Yes
- No

Have you documented legal requirements, so the organization's emails comply with CAN-SPAM and other laws?

- Yes
- No

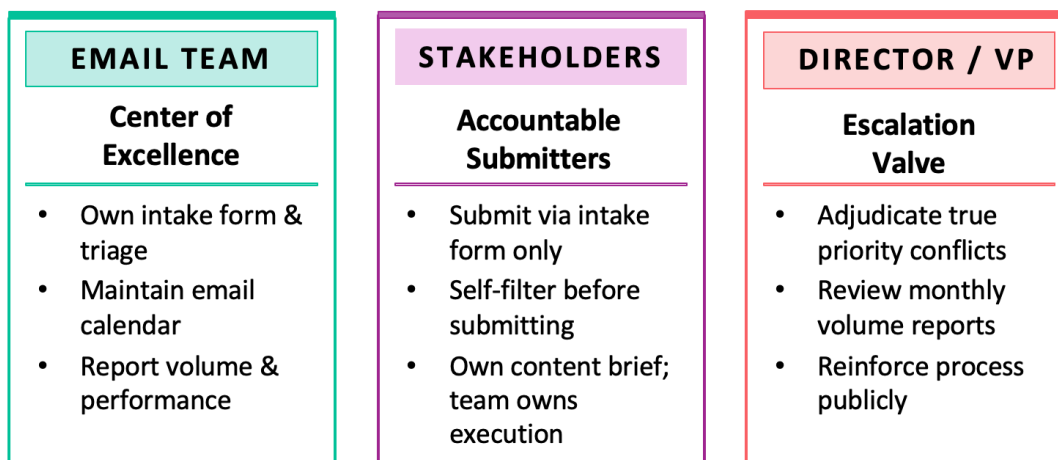
5. Define roles

Part of the governance process is to empower the email team to play a more consultative role in the organization.

Before governance, organizations typically operate in silos:

- Stakeholders make all the decisions about what emails they send, who they go to, and when
- Email team is seen only as order-takers – no decision or guidance
- Each department manages their emails separately

An example set of aligned roles:



Your thinking and work: Have you defined each group's roles clearly?

Yes

No

6. Roll out over time

This project represents a lot of changes!! In order to make them stick, you will likely want to introduce new practices over time – say, a one-year period – rather than all at once.

A common cadence is to implement a set of new practices each quarter. This approach helps people understand and get used to new practices, a little at a time – and makes the process more manageable for everyone.

Sample rollout schedule:

Q1:

- Email calendar rules and guidelines
- Email goals
- Legal requirements and CAN-SPAM handout

Q2:

- New email workflow process
- Email and data naming conventions

Q3:

- Audience selection for emails
- Calls-to-action

Q4:

- Measuring email success
- Email frequency
- Email sender names

Your thinking and work: Has your organization had success for projects by using a graduated rollout?

Yes

No

Outcomes of email governance

- Everyone knows what they are and are not responsible for
- Everyone has a process to follow in getting their emails scheduled, created, reviewed/approved, sent, and measured
- All emails are measured against their goals, so individual senders and the entire organization can know what to improve
- The organization's emails go to audiences that want them – increasing their chances of being opened, read, and acted on
- The organization sends fewer unnecessary and unsuccessful emails

Governance takes time and counsel

Organizations often find it helpful to engage a consulting partner in the governance process for emails – as well as for all content from all corners of the association.

Content Company has helped many organizations with their governance.

If you have questions or need additional guidance for your email governance journey, please feel free to contact me:

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About Content Company

Content Company is a content and digital strategy firm based in Chicago. Founded in 2001, Content Company helps content-rich organizations ensure that their content is relevant, sustainable, and effective, in order to both meet their organizational goals and satisfy the needs of their top-priority audiences.

Our work is informed by two philosophies:

1. We believe that effective content must be grounded in audience needs. That foundation allows an organization to connect with key audiences and ensure that they truly understand the organization's value and take advantage of it. And by knowing the needs of its top-priority audiences and creating measurable goals for all content, an organization can make data-driven decisions about content: messaging, topics, channels, formats, etc.
2. We work in close partnership with clients. A key part of our role is in facilitating conversations and asking questions that help clients arrive at a smart, sustainable solution.

As a leading content strategy consultancy, we have developed a methodology for helping organizations create and implement policies and practices that can enable them to achieve content strategy success quickly and sustainably.

President and Chief Strategist: Hilary Marsh



Hilary has specialized in digital communications since 1996 and is a digital content strategy pioneer.

From 2005 to 2011, she was the managing director of REALTOR.org, the member website of the million-member National Association of Realtors, overseeing the website and creating the association's social media strategy.

Hilary is a frequent speaker on content strategy topics at national and international conferences including ASAE's Annual, Communications, and Technology conferences; Association Media & Publishing Annual Conference; DigitalNow; Confab; Content Strategy Forum; Lavacon; and IA Summit. She has developed and taught content strategy courses for Kent State University, the University of Strasbourg, and the Society for Technical Communications.

She co-authored "Association Content Strategies for a Changing World" (2019), an ASAE Foundation on study content strategy adoption and maturity in associations, and chapters in the 4th and 5th editions of *Professional Practices in Association Management* (2021 and 2026).

Select client list

We have worked with a variety of associations, including:

Academy of Medical-Surgical Nurses

Aircraft Owners & Pilots Association

American Association of Nurse

Anesthetists

American Bar Association

American College of Cardiology

American College of Radiology

American Medical Association

American Speech-Language-Hearing
Association

American Water Works Association

Association of Diabetes Care &
Education Specialists/Danatech

Coastal & Estuarine Federation

CompTIA

Endocrine Society

Florida Association of Realtors

HIMSS

Institute of Food Technologists

ISPOR

Million Dollar Round Table

National Association of Convenience
and Fuel Retailers

Water Environment Federation

Water Quality Association

ZERO TO THREE