Campaign Mapping Worksheet

Please complete one set of questions for each planned, partially built, or fully built campaign.

Question	Response
What is the name of this campaign?	
Who within your organization is responsible for maintaining the campaign?	
Who is the intended audience of the campaign?	
What is the goal of the campaign?	
What are the success criteria for achieving the goal?	
Is this campaign replacing an existing campaign?	
Will this campaign potentially be triggered by another campaign?	
Will this campaign potentially trigger another campaign?	
What is the duration of the campaign?	
How many communications (email or SMS) are being sent during the campaign?	
What is the cadence at which communications are sent?	
Is the campaign using Expert Content?	
If no, have the necessary emails been created?	
How are contacts being assigned to the campaign?	
Will the campaign assign tasks or notifications to loan officers or partners?	
If yes, what tasks or notifications will be assigned?	
What scenarios would cause a contact to come off the campaign?	
Will you be checking for email activity, such as contact unsubscribed, email opened, or link clicked?	
Has any testing been conducted on this campaign?	

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