



# Testing and Audit Worksheet

## Instructions:

This worksheet can be used to track when the Marketing and Compliance Teams review Expert Content and custom-created materials, and indicate which materials to use and when. Check out the [Expert Content Overview video](#), if you haven't already.

This worksheet is for you to track your progress and is not necessary to return it to your Total Expert project team.

**Note:** Reference the *QA Process for Testing Emails* document to test your emails; this document was sent with the Post Total Expert Email, Expert Content, & Intro to Campaigns Workshop email.

### Important:

The final step in this process is to release/publish the materials to your end users prior to Pilot and Full Launch. This can be found in the Actions button using either Team Setting or User Settings.

**Sample tracking:** See below for examples of information you may want to include

	Marketing Review/Notes	Compliance Review/Notes	Formatting Review/Notes	Disclaimers displaying	Logo displaying	Approval Flow	Released to users
<b>Emails</b> <i>The body of emails can be modified, if desired</i>	<i>Review date:</i> 6/9/21 <i>Pilot:</i> LPG MT, MPB, Holiday <i>Launch:</i> Listing Insights, Newsletters,	<i>Review date:</i> 6/17/21 <i>Notes:</i> Slight modifications needed to incorporate our voice	<i>Review date:</i> 6/10/21 <i>Notes:</i> emails displaying as expected in all email systems (Outlook, Yahoo, & Gmail) and in desktop and mobile	<i>Review date:</i> 6/14/21 <i>Notes:</i> minor update needed Update 6/16/21: update applied	<i>Review date:</i> 6/14/21 <i>Notes:</i> displaying as expected	<i>Review date:</i> 6/8/21 <i>Notes:</i> blank template tested and approval works as expected	<input type="checkbox"/>
<b>Print (flyers, postcards)</b>	<i>Review date:</i> 6/9/21	<i>Review date:</i> 6/17/21	<i>Review date:</i> 6/14/21	<i>Review date:</i> 6/14/21	<i>Review date:</i> 6/14/21 <i>Notes:</i> displaying as expected	<i>Review date:</i> 6/5/21	<input type="checkbox"/>



	<i>Pilot:</i> VA Loans Serving You SB & CB, EDDM, Rate Flyer Optimal Blue 0268, Infographics <i>Launch:</i> Rent Vs Own, Home Tour Checklist	<i>Notes:</i> No changes required	<i>Notes:</i> No changes required - font style & sizing is correct	<i>Notes:</i> minor update needed Update 6/16/21: update applied		<i>Notes:</i> n/a – not using approval flows at this time	
<b>Social Media Graphics</b>	<i>Review date:</i> 6/19/21 <i>Pilot:</i> Holidays for remainder of year <i>Launch:</i> Custom – Why Us	<i>Review date:</i> 6/22/21 <i>Notes:</i> No changes required	<i>Review date:</i> 6/19/21 <i>Notes:</i> No changes required - font style & sizing is correct	<i>Review date:</i> 6/19/21 <i>Notes:</i> minor update needed Update 6/16/21: update applied	<i>Review date:</i> 6/14/21 <i>Notes:</i> displaying as expected	<i>Review date:</i> 6/8/21 <i>Notes:</i> n/a – not using approval flows at this time	<input type="checkbox"/>
<b>Campaigns</b> <i>Components, emails, and timing can all be adjusted, if desired</i>	<i>Review date:</i> 6/28/21 <i>Pilot:</i> In Process, Lead General Purchase – Medium Touch, Holidays <i>Launch:</i> Listing Insights, Newsletters	<i>Review date:</i> 6/19/21 <i>Notes:</i> emails and texts approved	<i>Review date:</i> 6/19/21 <i>Notes:</i> emails and texts approved	<i>Review date:</i> 6/19/21 <i>Notes:</i> disclaimers approved previously in emails	<i>Review date:</i> 6/19/21 <i>Notes:</i> logo approved previously in emails	<i>Review date:</i> 6/28/21 <i>Notes:</i> n/a – not using approval flows at this time	<input type="checkbox"/>



Enter your tracking here:

	Marketing Review/Notes	Compliance Review/Notes	Formatting Review/Notes	Disclaimers displaying	Logo displaying	Approval Flow	Released to users
<b>Emails</b>	<i>Review date:</i>  <i>Pilot:</i>  <i>Launch:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<input type="checkbox"/>
<b>Print (flyers, postcards)</b>	<i>Review date:</i>  <i>Pilot:</i>  <i>Launch:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<input type="checkbox"/>
<b>Social Media Graphics</b>	<i>Review date:</i>  <i>Pilot:</i>  <i>Launch:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<input type="checkbox"/>
<b>Campaigns</b>	<i>Review date:</i>  <i>Pilot:</i>  <i>Launch:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<i>Review date:</i>  <i>Notes:</i>	<input type="checkbox"/>