

UniversiTE Live! Email Block Locking Breakouts

Please assign the following personas to learners on your team:

Driver (assigned ahead of time for each group)	Logs into the platform, shares their screen, and walks the group through the demo
Leader	This person will guide the group through the discussion, take notes, and report back to the larger group.
Timer	This person will keep the group on track and informed of time milestones.
Investigator	Takes down any unanswered questions about the functionality that should be brought back to the larger group.

Driver - Demonstration

Log into TE as a Marketing Admin | **Timer: 13 minutes**

1. Select the *Simple Template* basic content template from the email template gallery.
2. Name it: Email Block Locking Team #
3. Add and lock a photo.
4. Keep the text element unlocked and add a variable placeholder for greeting the recipient with their first name and including a sign off with the LO's first name.
5. Center the button element, add a CTA in the text of the button, and link the button to our TE company website. Lock the button.
6. Add a single-branded footer.
7. Add a subject line and preheader text – you decide if they should be locked or not.
8. Publish the email to a demo loan officer user and give them access to edit.

Log into TE as a Demo Loan Officer | **Timer: 7 minutes**

1. Log into the demo loan officer account and go in to send the email that was just published to them.
2. Note how the interface indicates what is locked and unlocked.
3. Update the primary email text. Notice where/how the editability works for loan officer users.
4. Send the email to a test contact (or attempt/pretend to).

Leader – Discussion Prompts

Consider the following questions | **Timer:** 5 minutes

1. What different use cases can you think of for fully unlocked email templates, partially unlocked templates, and fully locked templates? In these cases, what types of elements might be more commonly locked? What types would be unlocked?
2. How could new element locking change the overall strategy of how email templates are used? Do they change for direct email sends only, or could the strategy change for how campaigns are built and used?
3. What other features need to be considered to fully understand the impact of email element locking?

Investigator – Outstanding Thoughts & Questions

Record any outstanding, unanswered, or interesting thoughts and questions to bring back to the group.