



# Welcome Series

## SCOPE

- Includes content strategy, copy development, and responsive design for up to three (3) messages.
- Includes set-up of up to (6) email acquisition sources (aka “subscription points”) to be used as trigger points for the Welcome Series. Each subscription point will need to be set-up to funnel subscriber information into Listrak. Depending on your website platform, subscription point integration options include a pre-built Listrak module (available for Demandware and Magento only), JavaScript, API, or HTML form code.
- Listrak will provide the necessary information required (JavaScript or Listrak module) to integrate your website with conversion tracking if this step has not already been completed for an existing Listrak solution. Listrak will perform up to two (2) rounds of technical integration verification.
- Set up of client’s account in Listrak will include:
  - Segmentation and external events
  - Dynamic or static coupons
  - Subscription settings
  - Up to six (6) Conductor Conversation threads for easier visual reporting
  - Saved messages
- Message content and creative will be provided by you or Listrak:
  - **Custom Creative - Listrak-provided:** If you opt to have Listrak generate a custom design for your message, you will be asked to provide job start information such as branding guidelines, promotional suggestions, product selections, copywriting, images, layout requests, etc. Copy can developed by Listrak copywriters, if needed. Upon request, Listrak can perform up to two (2) rounds of copy changes. Listrak will generate a design composition for your approval. If you desire creative modifications, Listrak will perform up to two (2) rounds of creative revisions to the messages based on your input. Revisions and/or designs beyond the two (2) included may incur Professional Services fees at the prevailing billable rate. Messages will be coded and a responsive version of each message can be developed by Listrak.
  - **Custom Creative - Client-provided PSD:** To make it easy for you to create your own mobile-friendly email creative, our design team has built several responsive-ready wireframes for your creative team to use as a guide. Simply select the wireframe option that best matches your needs and design within the bounding boxes (as indicated by the guide lines). All content must lie within the bounding boxes, as any content that extends outside a bounding box may render the design inappropriate for responsive use.
    - Please provide your designs to us in the original layered Photoshop PSD files, and send us 1 PSD file for each solution or message (don’t lump multiple designs into 1 file). When sending to us, include all fonts and linked images.
    - Please only design for desktop rendering; if you want responsive messages, the Listrak team has a thorough understanding of responsive email design best practices and will create design compositions for each message showing the mobile layout.

- After reviewing the PSD file(s) you provide to us, your project manager will let you know if anything in your design or content needs to change in order to be responsive or adhere to best practices. After your team makes these changes, send the files back to us. We will review once again and if everything is in order, we'll proceed to the next phase of the project. If your design still requires updates to be responsive or best-practice-friendly, you have two options: you can employ the Listrak team to analyze your design and content and provide you with another list of revisions your team needs to make, or you can choose to move on to the next phase of the project with the design as-is (not responsive). If you choose to employ the Listrak team to provide this second list of suggested edits, that time will be billable at the prevailing professional services rate.
  - Once the creative is finished and approved, all messages will be coded by Listrak.
  - All creative and copy you provide is assumed to be final and correct as-is, so all revisions (responsive or otherwise) will need to be completed by your team. If you need Listrak's team to make revisions for you, time spent will be billable at the prevailing professional services rate.
- Listrak will thoroughly complete all pre-deployment testing to ensure that the Welcome Series is deployed per your expectations.