



Creating a Coaching Email

There are five main steps involved in creating a coaching email in the EMC:

1. Build the Message
2. Select the Audience
3. Review Delivery Details
4. Send Message to Delivery Queue
5. Review Delivery Stats

This document will cover **Step 1 – Building the Message**.

1. Build the Message

- o Message Information – title, description, purpose
- o Envelope details – sender name & email, reply to name, subject line
- o Select Stationery – pre-determined template with branded header and footer
- o Compose Content - html and text versions
- o Send Review Email – test links and functionality
- o Approve the message

Note: The WYSIWYG Editor (What You See Is What You Get) functions differently depending on the browser being used. (Firefox, IE, Chrome etc.) It is recommended that Firefox be used when creating emails and working with the WYSIWYG Editor.

Login to the EMC and select the event you would like to manage.

- Click on the **Event Emails** tab.
- Click **Edit Coaching Emails**, under the Related Actions menu.

The screenshot shows the EMC interface for 'Daffodil Dash - Columbia Valley 2016'. The top navigation bar includes 'Event Center', 'Event Web Site', 'Event Emails' (highlighted with a yellow circle), 'Customer Service', and 'Reports'. A '+ Switch To Another Event' link is also present. The main content area is titled 'Your Event Emails' and lists actions: 'Edit Coaching Emails' (circled in red with a blue arrow pointing to it) and 'Preview Autoresponders'. Below this, a list of email types is provided: Coaching Emails, Autoresponders, Suggested Messages, and Email Groups. A note at the bottom states: 'Note: For assistance with these tasks, click the Help link above the top navigation bar.'



- Click on **Create a new message**, under the Related Actions menu.
- Alternatively, if an existing email or template exists that is suitable:
 - Click **Copy**
 - Update the message details
 - Click **Copy Message**
 - Click **Edit** under the Action menu.

The screenshot shows the 'Event Emails' management interface. In the 'Related Actions' sidebar, 'Create a new message' is highlighted. The main area displays a 'Message List' with the following table:

Message	Action	Status	Type	Tentative Schedule	Last Modified
Amanda TEST Subject: Sample Email for EMC Training	Edit Copy Delete Archive Preview	Draft	Coaching - participants	No Tentative Schedule	7-Jun-2016 4:49:09 PM by Ms. Amanda Oldershaw
Test	Copy Preview	Draft		No Tentative Schedule	20-Oct-2015 5:43:00 PM by Cheryl ADMIN Maranda

1. Message Information

- **Message Name** – give the message a name that describes the purpose.
- **Description** – add a description. It's helpful to add the subject line here, as it will show in the Message List on the main page.
- **Type** – select the type of email from the dropdown menu.

The screenshot shows the 'Message Information' form for the 'Amanda TEST' message. The form includes the following sections:

- 1. Message Name:** A text field containing 'Amanda TEST'. A note states: 'Enter a name for the message. It will appear in the message list. This is not the Subject line.'
- 2. Description:** A text area containing 'Sample for EMC Training'. A note states: 'Include a description to help identify the purpose or the email. It's helpful to add the subject line here so it shows in the main list of emails.'
- 3. Type:** A dropdown menu with 'Coaching - participants' selected. A note states: 'Select the message type from the drop down menu.'

At the bottom, there are 'Next' and 'Cancel' buttons. A note says 'Click next' with an arrow pointing to the 'Next' button.



2. Envelope

- **Sender Name** – Add the name of the Sender. This could be the Event Name, the organization name (Canadian Cancer Society), or the Event Coordinator's Name. Make it relevant and recognizable to the recipient.
- **Sender Email Address** – Add an email address that is recognizable to the recipient. The generic event email or the Event Coordinator's email. Make sure it's a "cancer.ca" email address. Do not use a personal email address.
- **Reply to Email Address** – This is the email that will be sent if the recipient replies or responds to the email. Make sure this is an email address that is regularly monitored. It can be different than the sender email.
- **Message Subject** – Add a subject line that is short, sweet, and intriguing. Many people will decide to open an email based on its subject line. It has to convince the recipient that reading the email is worth their time. Personalization can be used in the Subject Line.
- Click **Next**

Welcome back Amanda Oldershaw [Click here to login](#) [Help](#)

Event Center | Event Web Site | **Event Emails** | Customer Service | Reports | [+ Switch To Another Event](#)

Event Emails > TeamRaiser Emails: Daffodil Dash - Columbia Valley 2016: Messages > Amanda TEST | Daffodil Dash - Columbia Valley 2016

1. Message Information
- 2. Envelope**
3. Stationery
4. HTML Content
5. Plain Text Content
6. Send Review Email
7. Approve

*** 1. Sender Name:**
Enter the name to display in the From area of the email header and inbox of message recipients.
English French
Daffodil Dash
Add the name of the Sender. This could be the Event Name, Canadian Cancer Society, the Event Coordinator's Name. Make it relevant and recognizable to the recipients.

*** 2. Sender Email Address:**
Enter the email address to associate with the Sender Name in the From area of the email header and inbox of message recipients.
To avoid deliverability issues, do not enter a @yahoo.com or @aol.com email address. For more details, refer to the [Yahoo DMARC policy](#).
daffodildash@bc.cancer.ca
Add an email address that is recognizable to the recipient. The generic event email or the Event Coordinator's email. Make sure it's a "cancer.ca" email address. Do not use a personal email address.

3. Reply-To Email Address:
Enter the email address where replies to the message will be sent. The Sender Email Address will be used by default if empty.
daffodildash@bc.cancer.ca
This is the email that will be sent if the recipient replies or responds to the email. Make sure this is an email address that is regularly monitored. It can be different than the sender email.

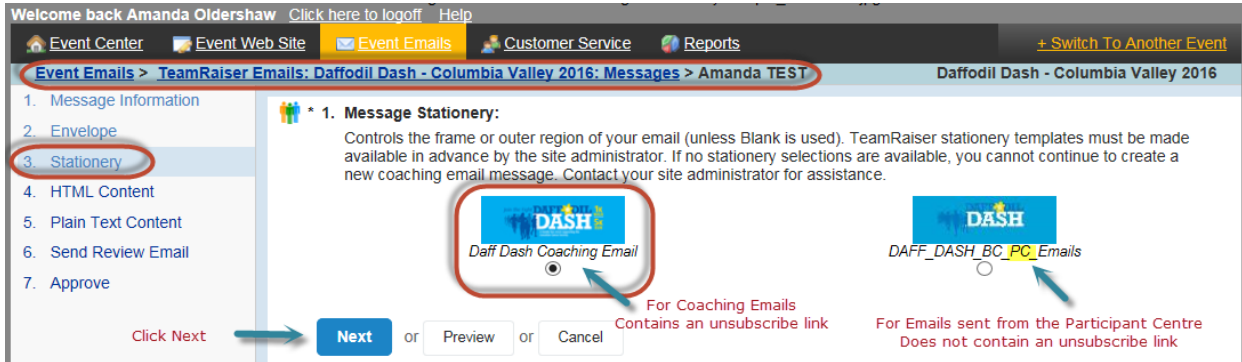
*** 4. Message Subject:**
Enter the phrase or select a personalized option to display in the Subject area in the email header and inbox of the message recipients.
English French
Sample Email for EMC Testing
Select Personalization Option
Add a subject line that is short, sweet, and intriguing. Many people will decide to open an email based on its subject line. It has to convince the recipient that reading the email is worth their time.

Click next **Next** or Cancel



3. Stationary

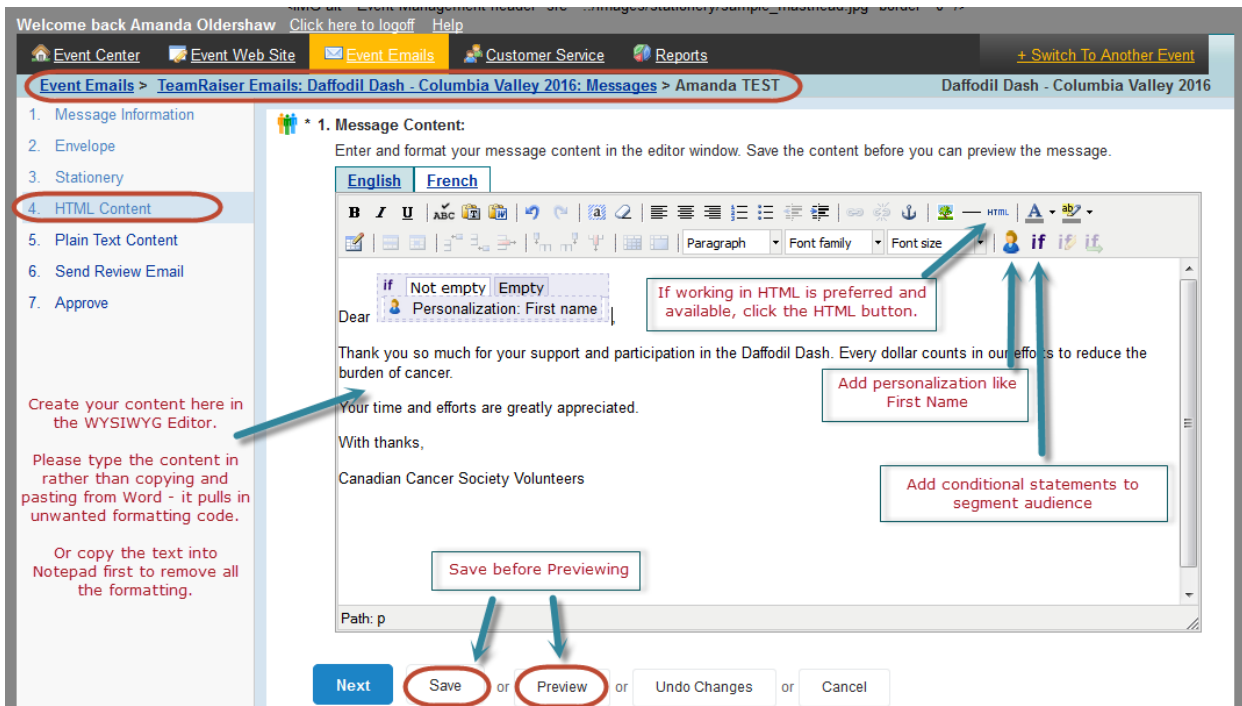
- **Message Stationary** – This is the outer shell of the email that contains the branded header and the footer with an unsubscribe link (a system requirement).
- **Select** the Stationary that indicates it's for **Coaching Emails**.
- Click **Next**



4. Message Content

Note: It is recommended that **Firefox** be used when working in the WYSIWYG Editor. The best option, if available, is work directly in the HTML code.

- **Message Content** – Type the body of the email into the content area of the WYSIWYG Editor. **Do not copy and paste from Word.** Word pulls in unwanted formatting code and can be very frustrating to work with. Either type the text in to the content area, or copy the text into Notepad first. This removes all the formatting. Then copy from Notepad and paste into the Editor. Format the text within the editor.





Adding Personalization

It is best practice to add personalized information into participant emails. The easiest item to personalize is to add in the participant's first name.

- **Place** the cursor where the first name will be entered. For example, after Dear (space) and before the comma.
- **Click** the Personalization Icon (picture of a person's head and shoulders).
- **Select** Biographical, under the Group Column.
- **Select** First Name, under the Type Column.
- **Type** in alternative text to display if the First Name field is blank in the database. (i.e. Friend, Supporter, Cancer Fighter)
- **Click Insert once**, and then close the window. (the Personalization window will not automatically close)
- Review the content for accuracy of placement.
- Click **Save**.
- Click **Preview**, if desired.
- Click **Next**

Note: DO NOT TRUST PREVIEW. Preview windows show differently depending on the browser used. **Do not trust them.** It's best to send yourself a test/review email to assess how the email will appear to viewers and adjust the formatting from there.

Insert Personalization

Select the Personalization Type that you want to insert and then select the specific Personalization. You can also provide text to display to constituents when the Personalization is empty. Click Insert to finish.

Group	Type
Additional Information	User Name
Biographical	User Password
Constituent	Password Reminder Hint
Donation History	Member ID
Email	Last Login Date
Home Address	Title
Membership	First Name
Phone	Middle Name
Rewards	Last Name
TeamRaiser	Suffix
TeamRaiser Registration Questions	Professional Suffix
	Nickname
Work Address	Maiden Name

Text to display when empty Optional text to display when the selected Personalization is empty. For example, you can specify "Friend" when First Name is empty.

Click Insert

To add images and/or links to pdf documents or other websites, please see the procedure [Adding Links and Images to an Email](#).





5. Plain Text Content

Plain text emails consist of just plain and simple text. The system requires a Plain Text version of an email to be created before sending.

Note: Always convert/update the plain text version after the HTML has been finalized and/or updated.

- **Plain Text Content Conversion** – this will convert anything in the HTML Content Area into a plain text format
- **Plain Text Formatting of Message Content** – preview what the text that has been converted. Sometimes it's necessary to clean the content up by removing spaces etc. Depending on how the HTML content translates.

On this screen:

- **Click** Convert to Plain Text.
- **Click** Next.

Welcome back Amanda Oldershaw [Click here to logoff](#) [Help](#)

Event Center | Event Web Site | **Event Emails** | Customer Service | Reports | [+ Switch To Another Event](#)

Event Emails > TeamRaiser Emails: Daffodil Dash - Columbia Valley 2016: Messages > Amanda TEST | Daffodil Dash - Columbia Valley 2016

1. Message Information
2. Envelope
3. Stationery
4. HTML Content
- 5. Plain Text Content**
6. Send Review Email
7. Approve

1. Plain Text Content Conversion:
Click the button to remove HTML formatting in the message content and create the plain text formatted version.

Convert to Plain Text *Click Convert to Plain Text*

*** 2. Plain Text Formatting of Message Content:**
Review the plain text version of the message content in the editor window. Make changes to spacing and add introductory text to links. Changes will be lost if you click Convert to Plain Text again.

[English](#) | [French](#)

```
Dear <convio:choose>
<convio:when test="notEmpty" selected="selected">
<convio:op><convio:session name="1"
param="first_name"></convio:session></convio:op>

<convio:then><convio:session name="1"
param="first_name"></convio:session></convio:then>
</convio:when>
<convio:otherwise >Friend</convio:otherwise>
</convio:choose>,
```

Leave this code in - it's the personalization coding.

Thank you so much for your support and participation in the Daffodil Dash. Every dollar counts in our efforts to reduce the burden of cancer.

Your time and efforts are greatly appreciated.

With thanks,

Canadian Cancer Society Volunteers

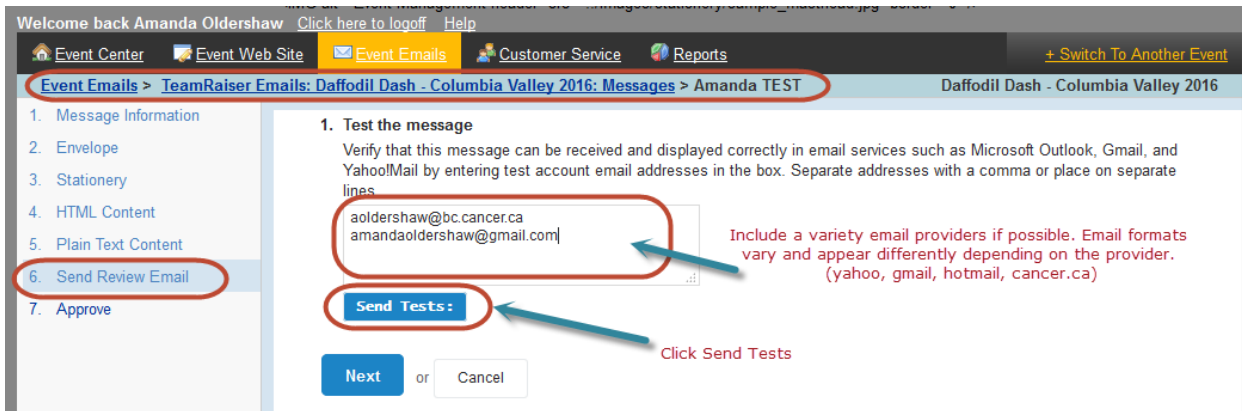


6. Send Review Email

- **Test the message** – send a test message to review the content and formatting of the message. Check your subject line and the Sender Name and email.

Note: Include a variety email providers if possible. Email formats vary and appear differently depending on the provider. (Yahoo, Gmail, Hotmail, cancer.ca etc.)

- **Type** in the email addresses that will receive a review email.
- **Click** Send Tests.
- **Check** the inbox of email addresses included to review email.
- If edits are required, go back to **4. HTML Content** and **5. Plain Text Content** to implement the changes and send another review email to check changes.
- **Click** Next



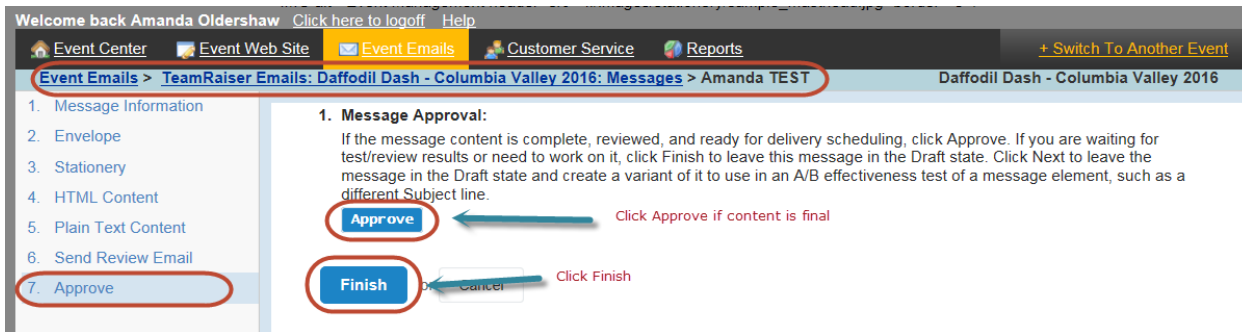


6. Approve

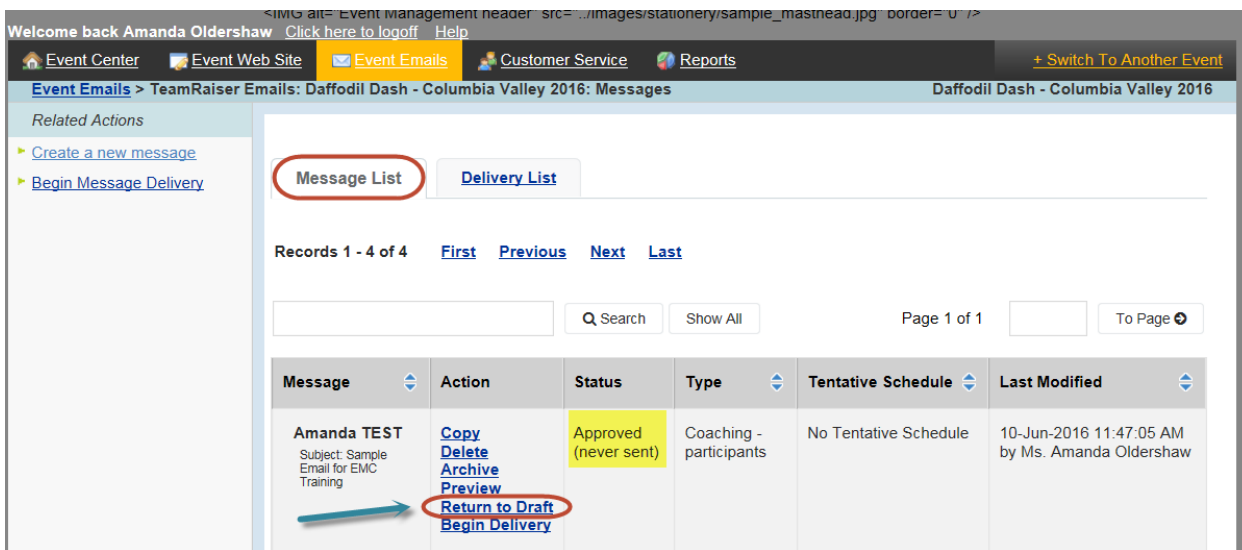
- **Message Approval** – A message must be approved before the audience can be selected and sent to the queue. Once a message has been Approved, it can no longer be edited.

Note: the following warning may appear **“The sender email address does not match the recommended value”** This warning can be ignored if the sender email address is from a cancer.ca email address.

- **Click** Approve.
- **Click** Finish.



Note: An approved message can be moved back into a Draft by clicking Return to Draft if further edits are needed, then re-approved.



To set-up the Audience and Delivery see – [Setting up Email Audience and Delivery](#)