

Project Name

Project Name

Point of Contact

First Name

Last Name

Email

Project Overview

Spell out the “what” of the project. Make it short, and to the point. What is the problem you are looking to solve?

Objective / Goals

How will you measure success? Determine your KPIs and set goals for each.

Target Audience

Who are you trying to reach with this email? What is the primary/secondary audience/persona?

Key Messages & CTA

What are the key points that you want to communicate? What action do you want your readers to take, and how will you get them to do it?

Budget

List out any associated costs, if applicable. E.g. For copywriting, design, etc.

Inspiration

Was this project inspired by something else? Include links and images here for additional context.

Key Components & Considerations

List ideas and things to consider here. E.g. What will you A/B test? Do you want to include GIFs? What time of day should the email go out?

Mandatories

List out any required elements. E.g. company fonts, logo, colours, social icons and links, etc.

Tone & Voice

What does your brand’s voice sound like? E.g. Playful? Serious? How do you want your audience to feel?

Timeline / Project Schedule

First Draft: MM/DD/YYYY

Second Draft: MM/DD/YYYY

Final: MM/DD/YYYY

Once the team has agreed on key milestone dates, build out a more detailed project schedule in a project management software, like Asana.