
Newsletter Email Campaign Setup Policy & Workflow

1.0 Policy Objective & Scope

The objective of this policy is to define a standardized, compliant workflow for the creation, review, approval, and deployment of all newsletter email campaigns sent by the company. This policy ensures that every campaign adheres to the Canadian Anti-Spam Legislation (CASL), respects subscriber privacy under PIPEDA, and maintains brand consistency.

This policy applies to all employees, contractors, and third-party agencies who create, edit, approve, or send email newsletters on behalf of the company. It covers all email marketing platforms used by the organization, including but not limited to Mailchimp, Constant Contact, and HubSpot.

2.0 Roles & Responsibilities

- **Marketing Coordinator:** Responsible for drafting the newsletter content, selecting the target audience segment, and scheduling the initial send date.
- **Marketing Manager:** Reviews the draft for brand alignment, messaging accuracy, and CASL compliance (including unsubscribe link and sender identification). Provides final approval for deployment.
- **IT Administrator:** Ensures that the email marketing platform is properly integrated with the company's CRM and that subscriber data is handled in accordance with PIPEDA. Manages technical deliverability settings (SPF, DKIM, DMARC).
- **Legal & Compliance Officer (or designated delegate):** Conducts a spot-check audit of at least one campaign per quarter to verify ongoing CASL compliance.

3.0 Core Rules & Guidelines

- Every campaign must include a clear, functioning unsubscribe link that processes opt-out requests within 10 business days as required by CASL.
- The sender name and email address must accurately identify the company and not be misleading.
- No campaign may be sent to purchased, rented, or scraped email lists. All recipients must have provided explicit or implied consent as defined by CASL.
- All subscriber data must be stored in the company's approved CRM or email platform and must not be exported to unsecured personal devices.
- A/B subject line testing is permitted only if the variant does not contain deceptive or misleading content.
- Campaigns must be scheduled for delivery during business hours (8:00 AM to 6:00 PM local time) unless prior approval is obtained from the Marketing Manager.

4.0 Step-by-Step Procedure / Workflow

1. Marketing Coordinator logs into the approved email marketing platform and creates a new campaign using the company's standard newsletter template.

2. The Coordinator populates the campaign with content: subject line, preheader text, body copy, images, and calls-to-action. All external links must be tested for accuracy.
3. The Coordinator selects the target audience segment from the CRM, ensuring the list only contains subscribers with valid consent. The list size and source are documented in the campaign notes.
4. The Coordinator schedules a test send to a small internal QA list (including the Marketing Manager and IT Administrator) and verifies rendering on desktop, mobile, and major email clients (Gmail, Outlook, Apple Mail).
5. The Coordinator submits the campaign for review via the SwitchDesk approval portal, attaching a brief summary of the target list, consent source, and any A/B test parameters.
6. The Marketing Manager reviews the campaign within 24 hours. They check for brand consistency, factual accuracy, CASL compliance (unsubscribe link, sender info), and overall tone. They either approve or request revisions with specific comments.
7. If revisions are requested, the Coordinator makes the changes and resubmits for a second review. The Manager must re-approve before the campaign can proceed.
8. Once approved, the Coordinator schedules the campaign for the agreed-upon send date and time, ensuring it does not conflict with any other scheduled company communications.
9. On the send day, the Coordinator monitors the campaign's initial delivery for the first hour, checking for bounce rates, spam complaints, and open rates. Any anomaly (e.g., >5% bounce rate) must be reported immediately to the IT Administrator.
10. After the campaign is fully sent, the Coordinator archives the campaign report (including open, click, bounce, and unsubscribe metrics) in the shared Marketing drive under the appropriate month and year folder.

5.0 Documentation & Compliance

1. All campaign approvals and revision requests are logged in the SwitchDesk portal, creating an auditable trail of the review process.
2. Campaign performance reports are saved as PDFs and stored in the company's encrypted cloud storage (e.g., SharePoint or Google Drive) for a minimum of two years to satisfy CASL record-keeping requirements.
3. The IT Administrator conducts a quarterly audit of the email marketing platform's subscriber database to remove any records that have been inactive for more than 24 months or that have hard bounced repeatedly.
4. The Legal & Compliance Officer performs a spot-check audit of one campaign per quarter, reviewing the consent records, unsubscribe processing time, and sender identification. Findings are documented and filed in the Compliance shared folder.
5. Any CASL-related complaint received from a subscriber or regulatory body must be escalated to the Legal & Compliance Officer within 24 hours and logged in the company's incident tracking system.

Regulatory Disclaimer: This document is a generic administrative template provided for educational purposes. The end-user assumes all liability for reviewing, adapting, and validating all protocols against organizational policies.