



E-MAIL SUBSCRIPTION MANAGEMENT SYSTEM

## GovDelivery Setup Workbook

This document details the process and requests the necessary data to implement the GovDelivery system.

Client: Washington State Department of Transportation

Date: August 8, 2008

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## Overview of GovDelivery

The GovDelivery E-mail Subscription Management system turns any existing government website into a proactive communication tool by making it easy for site visitors to subscribe to receive specific items of interest by e-mail. Organizations use GovDelivery to alert subscribers by e-mail that new information has become available online, or when other information of interest becomes available.

This workbook includes descriptions of setup activities for GovDelivery , as well as materials to aid the client project manager in information collection. Organizations that license and use GovDelivery are referred to as “Clients” throughout this workbook. The project manager is referred to as the Partner Administrator.

As with any new system, it is helpful to have basic knowledge of commonly used words and phrases. The list below contains words and phrases used throughout this workbook:

### ***Definitions***

Subscription Item	A piece of information, typically tied to information on a web page, available for subscription. Each item represents a distinct group of subscribers.
Category	A hierarchical designation that allows Clients to display Subscription Items on the Quick Subscribe page.
Partner Administrator	The primary GovDelivery user at a Client organization. The Partner Admin may also be the Project Manager during setup.
Category Administrator	A user with access to the GovDelivery administration tools who is responsible for one or more Items and can create new Items.
Item Administrator	A user with access to the GovDelivery administration tools who is responsible for one or more Items.
Page Watch	A GovDelivery feature that watches online content and prompts administrators to send a bulletin to subscribers of the content when changes occur.
Client	GovDelivery customer with license to use GovDelivery .
Quick Subscribe	A GovDelivery hosted page, linked to from the Client website, which allows site visitors to view and sign up for all Client Subscription Items.
Bulletin	A message composed in and delivered by GovDelivery .

## Roles and Responsibilities

Several players contribute to a successful GovDelivery setup process.

<b>Position</b>	<b>Responsibilities</b>
GovDelivery Account Manager	<ul style="list-style-type: none"><li>• Serves as single point of contact for all questions or issues pertaining to GovDelivery , during setup and beyond</li><li>• Provides assistance and support materials to the Partner Administrator for setup</li><li>• Recommends placement of links to GovDelivery within the Client website</li><li>• Provides training of administration tools as needed</li><li>• Monitors system to ensure proper use</li><li>• Supplies on-going suggestions for improved usage of GovDelivery</li></ul>
Partner Administrator/Setup Project Manager	<ul style="list-style-type: none"><li>• Serves as primary point of contact for setup and continued expansion of GovDelivery</li><li>• Manages process of identifying subscription items for GovDelivery</li><li>• Approves client banners, graphics, and other information that will appear on pages generated by GovDelivery</li><li>• Approves category structure for subscription items</li><li>• Works with GovDelivery, Inc. to manage the placement of links to GovDelivery on the Client website</li><li>• Identifies who within the Client organization will be responsible for each subscription item</li><li>• Coordinates necessary training sessions</li><li>• Assumes role of Partner Administrator in GovDelivery to:<ul style="list-style-type: none"><li>▪ Add additional administrators</li><li>▪ Assign administrators to items</li><li>▪ Maintain the list of Client Categories</li><li>▪ Update items if appropriate</li></ul></li></ul>

## Overview

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There are several steps required to get started with setup. The first step is for the client to complete the GovDelivery Kick-off Meeting Worksheet. This information is then used to help plan the Kick-off Meeting, which officially starts the setup process. During the kick-off meeting your Account Manager will ask questions about existing website update procedures, as well as your plans for using the subscription service.

After the kick-off meeting the Account Manager will complete and distribute the [GovDelivery Setup Checklist](#), located on the next page, to complete a standard setup. A typical timeline is three to five weeks from kickoff to launch, however modifications can be made to meet specific needs. The actual timing and process that the Client follows depends on several factors, including the number of subscription items, size of the organization, and authority of the Partner Administrator.

# GovDelivery Setup Checklist

Client Name	Washington DOT
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Planned complete	Actual complete	Activity	Responsible Party
8/8/2008		Conduct <a href="#">Initial Interview</a> during the Kick-off Meeting	Client & GovDelivery
		Confirm information on the <a href="#">Subscription Items List</a> *	Client & GovDelivery
		Establish default outgoing e-mail settings	Client & GovDelivery
		System Data Load	GovDelivery
		Review web & e-mail template content	Client & GovDelivery
		Train Partner Administrators	GovDelivery
		Distribute <a href="#">Integration Plan</a> & Mock-up Pages	GovDelivery
		Train Category & Item Administrators	Client & GovDelivery
		Launch service by updating Client website with links to GovDelivery	Client
		Publicize Service & Website <a href="http://www.govdelivery.com/hidden/clientmarketing.html">http://www.govdelivery.com/hidden/clientmarketing.html</a>	Client & GovDelivery
		Provide Monthly Usage Statistics Reports (first 3 months post launch)	GovDelivery
Ongoing	Ongoing	Provide Quarterly Usage Statistics Reports	GovDelivery

\*The Account Manager will provide a formatted spreadsheet to confirm Subscription Items and their settings.

# Kick-off Meeting

## Overview

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To begin the setup process, the GovDelivery Account Manager will conduct a Kick-off Meeting with appropriate client personnel utilizing the Initial Interview Outline. The topics to be covered include establishing GovDelivery use and existing client workflows, defining scope of the project, and reviewing the Setup Checklist.

## Client Activity

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- Consider desired launch date and future vision
- Have knowledge of the current process for publishing existing web content
- Assist the Account Manager with determining GovDelivery feature use
- Consider the number of administrators who will need access to GovDelivery
- Approve steps in the Setup Checklist and estimate timelines

## GovDelivery, Inc. Activity

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- Review the GovDelivery features and capabilities if necessary
- Identify goals for initial launch date and future vision
- Acquire knowledge of Client's current process for publishing existing web content
- Assess Client's anticipated training needs
- Distribute the Setup Checklist with estimated timelines

## Initial Interview Outline

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Objective	Notes
<b>Establish GovDelivery Functions</b>	
Review the GovDelivery features & capabilities: <ul style="list-style-type: none"> <li><input type="checkbox"/> Review sign-up process/screens</li> <li><input type="checkbox"/> Page Watch</li> <li><input type="checkbox"/> Watch Tagged Content</li> <li><input type="checkbox"/> Administrative Functions</li> </ul>	
Determine Client goals <ul style="list-style-type: none"> <li><input type="checkbox"/> Desired Launch Date</li> <li><input type="checkbox"/> Vision for Growth</li> </ul>	
<b>Define Client Workflows</b>	
How is site content currently updated?	
Who is responsible for creating web content? Will those persons be communicating with subscribers?	
Approvals <ul style="list-style-type: none"> <li><input type="checkbox"/> Who approves changes to the website?</li> <li><input type="checkbox"/> How much time needed for approvals?</li> </ul>	
Testing <ul style="list-style-type: none"> <li><input type="checkbox"/> Will client be testing subscription service internally? Where/how?</li> <li><input type="checkbox"/> How long will internal testing last?</li> </ul>	
Support <ul style="list-style-type: none"> <li><input type="checkbox"/> How are general website inquiries handled today?</li> </ul>	
<b>Define Scope</b>	
Is there a defined list of subscription options? If no, what will be the areas of initial focus?	
Does Client have existing subscription lists that will be converted to GovDelivery ?	
Training <ul style="list-style-type: none"> <li><input type="checkbox"/> How many Partner Administrators?</li> <li><input type="checkbox"/> How many other Administrators?</li> </ul>	
<b>Next Steps</b>	
Finalize <a href="#">Setup Checklist</a> (pg. 6)	
Subscription Service Marketing Plans <ul style="list-style-type: none"> <li><input type="checkbox"/> Client Publicity Plan</li> <li><input type="checkbox"/> Client Publicity Contact Info</li> </ul>	

# Confirming the Subscription Items List

## Overview

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The main purpose of this phase is to identify the initial set of item titles and a category structure for inclusion in the subscription service launch. It is recommended to start with 25-100 items and increase the number over time. All efforts should be made to offer the most popular client content for subscription, identified using web analytics reports. See the [Suggested Subscription Items](#) on the following page for more information.

In the system, an Item represents a specific type of update available to subscribers. Each Item will have its own group of subscribers after the service is launched. Items are often, though not always, tied to specific web content. Your Account Manager, with the help of web analytics information provided before the Kick-off Meeting, will complete an initial inventory of your site for looking for potential Subscription Items. Once this inventory is complete you will be asked to review the information and modify it as necessary.

In addition to identifying potential Subscription Items, your Account Manager will suggest a category structure to organize the Items into meaningful groups. The resulting structure is used on your organization's Quick Subscribe page as a way to display all content available for subscription. Care is taken to make the structure intuitive and similar to your existing website design. See the [Category Structure](#) section for further recommendations and an example of a Quick Subscribe page.

## Client Activity

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- Use the [Suggested Subscription Items](#) as a reference for identifying Items and organizing them into a Category structure.
- Use the [Category Structure](#) list as a reference for finalizing your category structure.
- Finalize the Subscription Items List and provide to your Account Manager.

## GovDelivery, Inc. Activity

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- Provide Client with a draft Subscription Items List based on existing website content and analytics.
- Meet with the Client implementation team/staff as necessary to offer assistance and guidance.

## Subscription Items

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Your Account Manager will create and share a draft list of recommended Subscription Items, based on existing website content and website activity. The Client will review this draft, and either approve it or make necessary changes to it. To assist in this process, consider the following list of items typically offered by other GovDelivery Clients:

### **Newsletters**

- General Newsletter
- Department Newsletters
- Employee Newsletters

### **Press Releases**

- General Announcements
- Headline News
- Election Results

### **Reports/Studies**

- Criminal Statistics
- Fire Statistics
- Accident Reports
- Volunteer Reports
- Population & Demographic Reports

### **Public Works**

- Construction Projects
- Road Closures

### **Planning/Budgets**

- Transportation Plans
- Land Use Plans
- Client Budget
- Financing Statements
- Departmental Budgets

### **Meeting Agendas & Minutes**

- Council/Board
- Planning & Development Commission
- Parks & Recreation Commission
- Public Works Commission

### **Forms and Applications**

- Permit Applications
- License Applications
- Employment Applications

### **Brochures**

- Parks & Recreation Brochures
- Residents' Guide
- Youth Program Brochures

## Category Structure

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The category structure is designed as way for subscribers to easily view all content available for subscription. Viewed by the public on the Quick Subscribe page, the category structure is an organization of your individual items. Individual categories are not tied to specific web content as items are.

Category structure design criteria:

- **Appropriate number of categories:** The total number of categories should not be so large that a subscriber will find it tedious to view them all.
- **Appropriate organization and naming of categories:** GovDelivery supports categorization by hierarchy (departments), functional area, or some combination of both. The average website visitor should find the structure intuitive and easy to navigate.

Category structure guidelines:

- Each primary category can contain an unlimited number of sub-categories and/or item titles.
- A sub-category cannot contain sub-categories. (i.e. this is a two-tiered structure).
- Each Subscription Item can be located in multiple categories or sub-categories.
- Categories can be offered for subscription, which allows users to select all items and/or sub-category titles which reside below that category.
- Categories only display on the Quick Subscribe pages, and can be set to display 'closed' upon initial page draw if appropriate.

### Example Category Structure

Using the following example of a category structure, subscribers would be able to view the information on the Quick Subscribe page, as seen in Figures 1 and 2.

#### **Categories and Sub-Categories:**

Employment Opportunities

Forms and Applications (**set to display 'closed'**)

    Brochures

    Applications

Library News

Maps

Meeting Agendas & Minutes

Press Releases

    Financial Services

    Mayor

Reports/Studies

    Planning/Budgets

    Environmental Assessment

### Quick Subscribe

You may choose to receive e-mail when new content is published. Subscribe to content or content categories by checking the boxes below. Unsubscribe by un-checking the boxes.

When you are satisfied with your selection(s):

- Click the  button to continue.
- Click the  button to continue without adding additional subscriptions.
- Click [here](#) to change your e-mail address or other information in your profile without adding additional subscriptions.

- Employment Opportunities**
  - Current Job Postings
- Forms and Applications**
- Library News**
  - Library Events
- Maps**
  - Map to City Hall
- Meeting Agendas & Minutes**
  - City Council Meeting Minutes
- Press Releases**
  - Recreation Schedules
- Financial Services**
  - City Financial Services Press Releases
- Mayor**
  - Mayor's Updates
- Reports/Studies**
  - Environmental Assessment**
    - Lakeshore Development Updates
  - Planning/Budgets**
    - City Budget Information

See area of detail below

#### Subscription Preference

Send me file attachments. Preferred format

Send me links.

If you choose "Send me file attachments" and there are no attachments to send, you will still receive links to updated material.

[Help](#) - [Privacy Statement](#)

**Figure 1: Quick Subscribe**

- Employment Opportunities**
  - Current Job Postings
- Forms and Applications**
- Library News**
  - Library Events
- Maps**
  - Map to City Hall
- Meeting Agendas & Minutes**
  - City Council Meeting Minutes
- Press Releases**
  - Recreation Schedules
- Financial Services**
  - City Financial Services Press Releases
- Mayor**
  - Mayor's Updates

Category offered for subscription

Closed Category

Category

Sub-category

Subscription Item

**Figure 2: Quick Subscribe Area of Detail**

# Establish Outgoing Mail Settings

## Overview

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E-mail messages sent via GovDelivery come in two types- transactional and composed. Transactional messages are sent as the result of a subscriber initiated action, such as a sign-up to the service resulting in a welcome message. Composed messages, or bulletins, are initiated by administrators and can be modified prior to send. Bulletins are most often sent as a way to invite subscribers to view newly posted web content.

To encourage system standards, it is highly recommended that portions of both transactional and bulletin messages be consistent. The simplest way to achieve this is by setting header and footer standards for both the transactional and bulletin messages sent through the GovDelivery system.

## Client Activity

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- Complete the Establish Outgoing Mail Settings form provided to you by your Account Manager.
- If necessary, initiate modifications to your e-mail domain information as directed by your Account Manager.

## GovDelivery, Inc. Activity

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- Provide the GovDelivery Default Message Text form to complete.
- Meeting with client to answer questions regarding outgoing mail settings.

# System Data Load

## Overview

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The goal of this phase is to upload Subscription Items and Categories, as well as any related settings.

The GovDelivery Account Manager will coordinate the loading of all items and settings into GovDelivery . This process typically takes one week or less, however the number of subscription options and requested customization can extend the process. GovDelivery makes all efforts to minimize Client efforts during the data load phase.

**Note:** *Site visitors cannot begin subscribing to information until a Client places links to GovDelivery on its website.*

## Client Activity

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- Provide GovDelivery, Inc. with approved Subscription Items List.
- Provide existing subscriber lists to GovDelivery, Inc.

## GovDelivery, Inc. Activity

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- Load Subscription Item and Category information into GovDelivery .
- If necessary, load existing subscription lists to identified items.

# Review Web & E-mail Templates

## Overview

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After items and categories have been loaded into GovDelivery, the client will be able to review public-facing sign-up screens and transactional e-mails. The Account Manager will provide the client with necessary links to generate these pages and messages.

The pages used by subscribers to sign-up are hosted on GovDelivery's servers, and therefore changes to static content must be coordinated through your Account Manager. Please note that clients have complete control over the category/item structure on the Quick Subscribe page.

## Client Activity

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- Review the web and e-mail templates that make up the public-facing portion of the GovDelivery service.
- Attain internal approval for screen look and feel, as well as content of screens and e-mails.
- Document changes, if necessary, and provide them to the Account Manager.\*

## GovDelivery, Inc. Activity

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- Provide necessary links to client contact for reviewing subscription sign-up pages and transactional e-mail content.
- Provide guidance on what elements of the screens and messages can be modified by the client, and what elements can only be modified by GovDelivery.

\*Requesting changes to the static portions of web & e-mail templates will result in a minimum of 1 week launch postponement. Clients can request change to these templates at any time, even after the service has been launched.

# Partner Administrator Training

## Overview

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The goals of this phase are to ensure that Partner Administrators are fully trained on the GovDelivery product. Training sessions are typically conducted using both a web-based meeting service and telephone conference call. Your GovDelivery Account Manager will conduct all training sessions, and will provide all necessary technical documentation for the session and ongoing use of the system.

## Client Activity

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- Identify all individuals who need to be trained as a Partner Administrator, and coordinate a date and time to train those individuals
- Coordinate appropriate training spaces, typically a conference room with speakerphone, Internet-ready computer, and screen projector.

## GovDelivery, Inc. Activity

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- Provide customized training agenda.
- Distribute GovDelivery technical documentation, including the Administrator Manual and Quick Guide.
- If necessary, conduct test of web-based meeting service prior to first session.
- Conduct all training sessions.

# Integration & Testing

## Overview

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The goals of this phase are to ensure that all Client subscriptions are accessible by the public and the link interface between the Client website and GovDelivery works seamlessly.

## Client Activity

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- The Client Web Administrator or equivalent places links to GovDelivery on the Client website, initially in a test environment if possible. In addition to the [Integration Plan](#) presented by the Account Manager, the Web Administrator may use the snippets available online or in the [Snippet Structure](#) document.
- Client representatives test the links in the test environment, if possible.
- Notify Account Manager of any integration issues or desired enhancements.

## GovDelivery, Inc. Activity

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- Provide Client with Interface Plan and mock-up pages.
- Test all links from the Client website once they become available.

## Integration Plan

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The integration plan is used to establish subscription links between the client website and GovDelivery . The type of link depends on the location in the website and the desired effect. Links include:

- One-click subscriptions to individual items or categories
- Links to the Quick Subscribe page, the comprehensive list of subscriptions
- User Profile links, for users to make changes to personal information

The GovDelivery Account Manager will develop a proposal for link placement consisting of two parts:

1. Web page mock-ups indicating the proposed placement and content of links.
2. Consolidated Integration Plan of links, target web page, URL and content.

The mock-up pages designed by GovDelivery are most often the homepage, as well as at least one page that should contain one-click subscribe links. Other pages may be included as well, particularly if there are intricate setup steps involved (such as multiple one-click subscribe links per page, or links to a custom Quick Subscribe page).

When considering how best to implement the subscription service on your site, it is recommended that clients follow these best practices:

**1. Place an eye-catching subscription graphic/link on the home page.**

A high-impact graphic on your highest trafficked page - your home page - increases awareness of the system and promotes its use by web visitors. The mock-up pages will contain graphics that fit with the look and feel of your website.

**2. Place subscribe links on pages that have content offered for subscription.**

The integration plan lists each page that should have a subscription link, as well as what type of link it should be.

**3. Place subscription links adjacent to content and use specific labels for the links.**

The mock-up pages will show how placing links near content of interest promotes the service and ensures that web visitors will be able to subscribe to information that is relevant to them.

## Snippet Structure

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A Snippet is a short piece of html code that website administrators use to place links to the GovDelivery subscription service. Snippets follow a general pattern and can be easily modified to call up a different client or item. In the following examples, the client code is CLIENT. To use the majority of the snippets, simply replace CLIENT with your client code and other pertinent data (e.g. item code number). Variable pieces of the code are in red and italics.

<b>Action</b>	<b>Necessary URL</b>
Link to User Profile	<a href="http://service.govdelivery.com/service/user.html?code=CLIENT">http://service.govdelivery.com/service/user.html?code=CLIENT</a>
Link to Quick Subscribe	<a href="http://service.govdelivery.com/service/multi_subscribe.html?code=CLIENT">http://service.govdelivery.com/service/multi_subscribe.html?code=CLIENT</a>
One-click Subscribe (Subscribe to Category)	<a href="http://service.govdelivery.com/service/subscribe.html?code=CLIENT_C#">http://service.govdelivery.com/service/subscribe.html?code=CLIENT_C#</a>
One-click Subscribe (Subscribe to Item)	<a href="http://service.govdelivery.com/service/subscribe.html?code=CLIENT_#">http://service.govdelivery.com/service/subscribe.html?code=CLIENT_#</a>

# Category & Item Administrator Training

## Overview

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The goals of this phase are to ensure that remaining Administrators are fully trained on the GovDelivery product. Training sessions are typically conducted using both a web-based meeting service and telephone conference call. Your GovDelivery Account Manager will conduct all training sessions, and will provide all necessary technical documentation for the session and ongoing use of the system.

## Client Activity

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- Identify all individuals who need to be trained as either Item or Category Administrators, and coordinate a date and time to train those individuals
- Coordinate appropriate training spaces, typically a conference room with speakerphone, Internet-ready computer, and screen projector.
- Attend sessions to respond to internal process questions.

## GovDelivery, Inc. Activity

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- Provide customized training agenda.
- Distribute GovDelivery technical documentation, including the Administrator Manual and Quick Guide.
- Conduct all training sessions.

# Launching GovDelivery

## Overview

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Once all training has been completed, clients should add subscribe links to their site for the GovDelivery service. Adding the subscribe links, as outlined in the Integration Plan, marks launch of the system.

## Client Activity

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- Coordinate necessary resources to add subscription links on homepage and other recommended pages.
- Alert Account Manager when links have been added to client site

## GovDelivery, Inc. Activity

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- Provide assistance and expertise to client as links are being added to client site.
- Test all subscription links after they have been made available on the client site.

# Reporting on Usage Statistics

## Overview

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Your GovDelivery Account Manager will send monthly reports charting your GovDelivery statistics- number of subscribers, subscriptions, bulletins sent, etc. The Account Manager may also make suggestions for how to improve or change some of the statistics, such as making subscribe links more prevalent on your site to increase the sign-up rate. After three months your Account Manager will move to send reports on a quarterly schedule, and eventually twice a year. You can request detailed reporting at any time, or run available reports from within the GovDelivery administration tools.

## Client Activity

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- Review Usage Reports and pass the information on to other internal stakeholders.
- Implement suggestions given by the GovDelivery Account Manager.

## GovDelivery, Inc. Activity

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- Provide detailed reporting and analysis of usage trends.
- Suggest changes the client could implement to increase or change usage statistics.