THE
BEHAVIORAL
INSIGHTS
TEAM

Go For Launch Checklist

Before you launch your trial, think through all of the steps that will happen if everything goes according to plan. Then make a checklist of all the ways you can confirm that those steps will go smoothly before launch and everything you can do after launch to confirm they happened like you planned.

Below is a more generic checklist for what you may want to include in your checklist which you can adapt accordingly to meet the requirements of your trial. In the subsequent pages, we go into more depth for each step in the checklist.

Launch date:
Date checklist completed by: (*Launch date - 5 days)*
Team member completing checklist:

1. **Send a test message to your project team**
   - ❏ All content is correct
   - ❏ All photos were rendered correctly
   - ❏ All the links are functional
   - ❏ If sending an email, all messages went through, nothing in spam filters
   - ❏ If sending a postcard or letter, all addresses on your contact list are valid postal addresses
2. **Test your tracking technology (link tracking, clicks, views, etc.)**
   - ❏ The tracker correctly reports your measure
   - ❏ If measuring clicks, you can determine which clicks originate from each version of your communication (letter, postcard, facebook ad, email).
     - ❏ Help pages for mailchimp, facebook ads
   - ❏ You've recorded how many times the link has been clicked before you launch your trial (or reset if possible)
3. **Carefully match your treatment and control groups**
   - ❏ All addresses or other contact information appear formatted correctly
   - ❏ The correct number of addresses or contacts are in each distribution list
   - ❏ The correct email addresses, contacts, or groups are in each distribution list
   - ❏ Each distribution list or treatment group is paired with the correct intervention
4. **Verify the launch by including your own contact information**
   - ❏ You added a different email or contact information to each distribution list or group, and noted which groups should get which versions of the message

1. Send test emails to your project team

Before you launch your trial, it's important to test the processes you'll use to send your communication. We've included some common checks below but each trial is different. Spend some time to think about if there's anything additional you should test for your trial.

For an email trial, send sample emails to a few project team members and ask them to confirm that everything looks right. As much as possible, adhere to the protocol you'll follow when you actually launch--if you'll be using Mailchimp or scheduled delivery in your trial, use those in your test. Remember, your recipients will engage with these messages in a lot of different ways: they'll use different email providers, have different spam blockers, and use different browsers to open the links. Test out how your emails will look in as many of these conditions as you can.

For a letter trial, you'll want to perform many of the same checks as with an email trial. Though you won't be able to confirm the end to end process for your recipients.

Make sure you do the following checks:

- ❏ All content is correct
  - -If mail merged, sender name & email address, and recipient name are correct
  - -No typos, incorrect dates, formatting errors
- ❏ All photos were rendered correctly
  - *- Check a variety of email providers*
  - *- Check how a mobile version of the email renders, look on a variety of phones and operating systems if possible*
  - *- If printing your communication, check resolution, colors when in hard copy*
- ❏ All the links are functional
  - *- Check using a variety of browsers and operating systems*
  - *- For a paper communication, hard type the links into a web browser take you the correct location)*
- ❏ If sending an email, all messages went through, nothing in spam filters
  - *- Check by sending to addresses with a variety of email providers (e.g. @gmail, @yahoo, @city)*
  - *- Check at least one address that doesn't have the sender in its address book*
  - *- If an email does get caught in a spam filter: check to see if you've used a no reply address, if there are many inactive emails on your list, if you've included a lot of pictures or different fonts, if you don't have a way for recipients to unsubscribe--all of these make it more likely your email is sent to spam*
- ❏ If sending a postcard or letter, all addresses on your contact list are valid postal addresses
  - *- If mailing residential addresses within the city, confirm no out of state zip codes*
  - *- Confirm addresses have a postal number, street name, city, state, and zip code*
  - *- To spot check any specific addresses, you can use the UPS address verification tool*

2. Test your tracking technology

For an email trial, you can complete this check when you send your test emails; one by one, click on the tracked link in each of these emails and then check your tracker to make sure your engagement has been noted and accurately shows when you click a treatment email versus a control email.

For a letter trial, you can manually check that the links you've included take recipients to the correct webpage. If you're using different web addresses to record whether the click origin is from a treatment or control letter, confirm that the links are associated with the correct letters.

Before launch, make sure you record the number of clicks that have already been registered so that you don't include the times you tested your link as part of your trial results.

When you test your links, make sure:

- ❏ The tracker correctly reports your measure
- ❏ If measuring clicks, you can determine which clicks originate from each version of your communication (letter, postcard, facebook ad, email).
    - ❏ Help pages for mailchimp, facebook ads
- ❏ You've recorded how many times the link has been clicked before you launch your trial (or reset if possible)

3. Carefully match your treatment and control groups

You should already have a set of email addresses or mailing addresses for your sample that are clean, formatted properly, free of duplicates, and randomized. Create two distribution lists, one for your control group and one for your treatment group, and upload them to your email platform or share with the team that will be mailing your letters.

When you create your distribution lists, ensure that:

- ❏ All addresses or other contact information appear formatted correctly
- ❏ The correct number of addresses or contacts are in each distribution list
- ❏ The correct email addresses, contacts, or groups are in each distribution list
- ❏ Each distribution list or treatment group is paired with the correct intervention

4. Verify the launch by including your own contact information

Add your email or mailing address to one distribution list and one of your project team members to the other. This way you'll know when the emails go out or letters are received. It's helpful to put a different email or address on each list; by using two different emails or addresses you will be able to verify which list got which communication.

Before you upload your final distribution lists, make sure:

- ❏ You added a different email or contact information to each distribution list or group, and noted which groups should get which versions of the message

Once you launch, it's important that you don't influence the results by engaging with the communications you've sent. If you like, you can open both the treatment and control emails, view them, and click on each link once. However, if you do this it is very important that you note this interaction, and subtract it from your final outcome measures.