Pre-Send Vetting Questionnaire for High-Volume Email Senders

Tell us a little bit about your company:

1. Who is your sales contact?

2. What's your company name and website URL?

3. Briefly describe your industry and business model

4. What other types of marketing messages do you send to your email contacts? *e.g. direct mail, SMS, push notifications*

Now share some details about your email program:

5. Will you send marketing email, transactional, or both?

- If transactional, what events will trigger an email to be sent? *e.g. password resets, order confirmations, account signups, etc.*

- If marketing, please describe the types of emails you will send. *e.g. daily/weekly newsletters, sale notifications, etc.*

6. Are you currently facing any challenges or issues with your email program? *e.g. emails going to the spam folder, high hard bounces rates, getting blocked by a mailbox provider like Hotmail*

Vetting Questionnaire (cont'd)

7. What domain(s) do you use in conjunction with your email program? If you're an agency sending on behalf of others, please include the domains of a few of your clients.

8. Do you have control over DNS records of these domains?

9. Do you use any of the following domain authentication protocols? SPF, DKIM, DMARC

10. Has your company sent email through an ESP before? If so, which ESP(s)? List all that apply.

11. What sending IP address(es) are used for your current email marketing activities?

Now, let's talk about list collection...

12. How does your company collect email addresses for email marketing purposes? Select all that apply.
    A) *Appends*
    B) *Co-registration or Affiliate*
    C) *3rd Party or Purchased List*
    D) *Upon Registration or Point of Sale*
    E) *Website or Newsletter Subscription*
    F) *Other - please share details*

13. **Does your company collect opt-in from recipients before sending emails?** Y/N

14. **Please share URLs to all subscription pages and specific details about how the subscription process works.**

15. **Do you send a confirmation email when someone joins your mailing list?** Y/N

Some questions about contact management...

16. **Do you remove inactive subscribers? If so, how often, and using what method?** Inactive contacts are those that have not opened or clicked one of your emails in a specific time period. This is sometimes called a sunset policy.

17. **Any other list management practices you're engaged in?** *e.g: third-party list validation service and/or in-house solutions*

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Vetting Questionnaire (cont'd)

Regarding your onboarding...

18. **Will you continue to send some volume through your current email provider, or do you have a hard deadline for your transition to be complete?**
    A) *Some volume staying with current solution indefinitely*
    B) *There will be a 1-2 month overlap*
    C) *I need to stop with my current solution by a certain date (please specify)*
    D) *I'd like recommendations about how to handle my transition*

19. **Within the first month of your onboarding, what is the peak sending volume you will you need to send on any given day?** *e.g. Less than 10k per day, Between 10k -- 100k, More than 100k, or It's complicated -- I'll explain in our next call*

20. **Please share the names (or roles) of team members who will be closely involved with the onboarding.**

21. **If you're willing to share them, please provide us with some of your recent sending statistics.** This will help us get a better picture of your current deliverability and enable our team to provide recommendations tailored for your needs.

22. **If you're willing to share it, please upload your mailing list (or share a breakdown of the destinations you send to the most, e.g. 40% Gmail, 22% Hotmail, etc.).** This enables us to provide you with more tailored guidance for the onboarding & warmup period.