Marketing, Events, and Registration Timelines

Best Practices

Planning: Consult your Marketing Manager/Coordinator and Events Staff early. It is important to consider the scope of your project and the length of time needed for the Project Planning stage to determine when to submit a Project Request Form *{about.uwadvancement.org/marketing/project-request}* . These timelines are built for the most common types of projects, not large, unique or complex projects which could require more planning time. We ask our campus partners use internal services for production only and website development needs.

MARKETING	Project Type/Tactics	Project Planning (forms, audience, plan)	Development (list, proofing, design, edits, review)	Production	Bulk Mail Services	TOTAL	Comments
PRINT Mailed Invite	*Invitations	1 - 3	5 - 6	2	2	13	includes inserts, envelopes / Account for lead time before event date, see Best Practices*
	*Postcard	1 - 3	5	1	2	11	Account for lead time before event date, see Best Practices*
PRINT Mailed Non-invite	Development Proposal Books	1 - 3	5 - 6	2	2	13	Large proposals with copy images and layout
	Solicitation Mailing w/ pledge card	1 - 3	5 - 6	2	2	13	Includes pledge card review with Gift Processing Team
	Letters (no copy)	1 - 3	3	1 - 2	2	10	Content developed from scratch, merge data printed externally
	Letters (copy provided)	1	2	1 - 2	2	7	Copy provided, merge data printed externally
PRINT Not Mailed	Brochure	1 - 3	5 - 6	2		12	Creative only; no mailing
	Flyer/One pagers	1 - 3	5	1		9	Creative only; no mailing
	Development Infographic Sheets	1 - 3	5	1		9	Generally no mail/email needed
	Envelopes (standard)	--	2	1		3	General envelopes, already in stock or easy to obtain
	Envelopes (sourcing)	1	3	2		6	Non-standard envelopes that require outsourcing from vendors
DIGITAL Invite	*Email Invitation (basic)	1 - 2	2	1		5	Account for lead time before event date, see Best Practices*
	*Email Invitation (advanced)	1 - 3	3	4		10	Account for lead time before event date, see Best Practices*
DIGITAL Non-invite	Web Content Development	1 - 2	2	1		3 - 5	
	Email (basic)	1 - 2	2	1		5	Standard template
	Email (advanced)	1 - 3	3	4		10	Customization in template
OTHER	Proofreading	--	--	1		1	
	Photography	1	--	1		2	Minimum 2 week notice, may require freelance photography
	Video	1	1-2	2 - 8		11	
	Badger Call Setup	1 - 3	5	Varies		Varies	

Vertical bands across Development columns labeled: Project Request · Kick-off · Final Approval. *Production column bands labeled:* Mailed · In-Hand (Not Mailed) · Sent or Published · Complete.

EVENTS & REGISTRATION	Project Type	Design	Planning/ Development	Refinements	Preparation	TOTAL	Comments
EVENT PLANNING	Basic	1	2 -3	2 - 3	1	6 - 8	mostly logistics and one or two stakeholders (meetings; Dean lunches/dinners)
	Moderate	1 - 3	3 - 4	2 - 3	1 - 2	8 - 12	logistics with program and several stakeholders (BHS showcase; regional faculty lectures; alumni learnings)
	Complex	6 - 8	10 - 12	6 - 8	4 - 6	26 +	complex logistics, multi-faceted program and many stakeholders (Homecoming, Reunions, BHS Fall Event)
	Registration Only		1	1		2	minimum of 2 weeks to create registration site

*Invitation Lead Time Best Practices

These best practices are built out from the event date.

Not all tactics below will be relevant for every event due to timeline, scope or budget.

Save the Date – Email: 12+ weeks before event, Mail: 10 weeks before event

Invitations – Mail: 6 weeks before event (allows 2 weeks for delivery), Email: 3-4 weeks before event, Reminder email: 1-2 weeks before RSVP date

Websites – Save the Date information posted at send and final content posted 6 weeks before event

Registration – Available 6 weeks before event

EXAMPLE:

WEEK	STAGE
20	Project Request - Planning begins
19	
18	
17	Kick-off - Development begins
16	
15	
14	
13	
12	Save The Date Email Sends
11	
10	Save the Date Print Mails
9	
8	
7	
6	Print Invite Mails
5	
4	Email Invite Sends
3	
2	Reminder Email Sends
1	Pre-Event Sends
0	Event Date
-1	Post Event Sends