Pre-send checklist and journey operating rules

A CRM send approval kit for checking audience, message, exclusions, and exit conditions

A practical IXC resource for adoption decisions and delivery

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Using this resource

Verifies the audience, message, conversion measurement, and stop conditions before a campaign send, and records everything up to the resend decision.

CRM marketers, campaign operators, and those responsible for send approval

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How to complete and reuse it

Read the criteria in this PDF, then fill the blank fields with your actual conditions and anything still unconfirmed. The Excel file for the same practice area has a worksheet for each resource. Keep the worked examples separate from real customer cases and confirmed quotes.

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Decide why you send and who to exclude first

Write the purpose of a send as the action the customer should take next. If you set only the recipients, the same message can overlap for customers who have already completed the action or who are in another journey.

For each campaign, write the entry condition, exclusion condition, conversion action, and exit condition in one sentence each. Compare the audience count with the previous send, and check for data refresh delays and condition changes at the same time. Even when the audience count looks reasonable, a wrong condition only shows up when you match sample users' properties against their actual behavior. Verify marketing consent and channel subscription status separately from business data.

Item	Review question	Evidence checked
Entry	Which action or state puts a customer in the audience?	Condition logic and audience sample
Exclusion	Are customers who already completed or declined left out?	Exclusion conditions and negative sample
Conversion	Which action counts as success?	Event definition and measurement point
Exit	If the customer converts or conditions change, does it stop?	Exit rules and re-entry test

> **Worked example**
>
> A first-purchase message goes to customers who have completed sign-up but not yet made a purchase. Test the case where the purchase-completed event arrives late, and decide how the exclusion condition will be checked just before the send.

Verify what actually arrives, not just the content

A preview and a real device can show different results. Make the items that change with language, app state, and user data your test targets.

Test target	Question to confirm	Evidence of a pass
Merge variables	Does the sentence still read naturally when a value is empty or long?	Empty and long values on the received screen
Links and deep links	Before and after login, do they open the right screen?	Actual navigation and fallback path
Language and time	Are the language and scheduled time zone correct?	Screens and arrival times by language
Channel status	How are customers who unsubscribed or never subscribed handled?	Exclusion results and failure logs
Personal data	Do sensitive values appear on shared screens?	Lock screen and message content

Do not limit test recipients to operator accounts that hold only well-formed data. Prepare approved test accounts that represent new, existing, converted, unsubscribed, and missing-variable conditions. When an error appears, determine whether the copy or the data needs fixing, and test again under the same conditions. Align the tracking values in links with the fields needed to identify the campaign.

> **Send caps across channels**
>
> OneSignal's Push frequency capping controls push frequency. Do not assume the same cap applies automatically to email or to external SMS and Kakao Alimtalk. Check each channel's rules, and the exclusion and deduplication handling on the relay server, separately.

Send approval worksheet

A different reviewer checks that the final settings match the test results. If the audience, copy, or send time changes after approval, recheck whatever changed.

Campaign send approval record

Approval question	Evidence required	Result and location	Reviewer and time
Are the audience and the exclusions correct?	Condition logic, audience count, and sample		
Do the received message and links work?	Tests by device, variable, and language		
Is it free of journey and frequency conflicts?	Campaign calendar and cap rules		
Are conversion and stop rules set?	Event and stop owner		
Is the scheduled version the final one?	Campaign ID and settings version		

Record the send status as READY, READY WITH CONDITIONS, or HOLD. For a conditional status, state clearly the items to resolve before the send and who owns each. If a risk of selecting the wrong audience, a missed unsubscribe, or a broken link remains, set it to HOLD and fix it. Link the approval record to the campaign ID and reuse it the next time the campaign is duplicated.

> **Do not hit resend straight away**
>
> If you see a delayed response or a failure, first check the actual processing status and the send identifier. A full resend can send a duplicate message to customers who already received it, so set the retry targets and the deduplication criteria.

After sending, watch both conversion and fatigue

Send requests, actual deliveries, clicks, and business conversions are different metrics. Campaigns can be compared fairly only once the measurement point and period of each metric are set.

- Right after the send, check the audience count, processing status, errors, and link behavior. If anything is off, use the stop-and-fix owner and contact path.
- Count conversions using the event and observation window set in advance. Align the counting rules for customers who had already converted and those exposed through several channels.
- Alongside any rise in clicks, check unsubscribes, complaints, and duplicate exposure. Even if performance is strong, adjust the conditions in the next experiment when customer fatigue grows.
- Where possible, review the effect with a comparison group and random assignment. Do not conclude a campaign's contribution from a simple before-and-after change alone.

An operations report records not only what was sent but which hypothesis was tested and what will change in the next send. Change only as many variables at once as you can still interpret, and link the reason for each decision to the settings. Keep records so that, even when owners change, no one repeats the same experiment or reapplies a condition that failed.

> **Campaign operations at IXC**
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> IXC carries out campaign planning and the calendar, send quality verification, A/B testing, and performance reporting in your own OneSignal account. The roles of the internal reviewer and the operations owner are set based on the send approval worksheet.

IXC

Publication and use

Based on your current campaigns, audience conditions, and recent send results, we discuss the send checks and the scope of monthly operations.

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www.ixc.co.kr/en/services/crm-campaign-operations

www.ixc.co.kr/en/assets/campaign-send-checklist

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IXC Managed CRM Campaign Operations

https://www.ixc.co.kr/en/services/crm-campaign-operations