



WORKSHEET

Email workflow requirements worksheet

Best Logistics Email Marketing Agencies: 7 Compared by Workflow (2026)

8 October 2026 · Vektor Group

Fill in one copy for each workflow before you speak to any agency. The workflow table on this page is an illustrative example; replace every cell with your own.

EXHIBIT 1

Field	What to write	Your answer
Workflow	Which of the five: new account prospecting, RFQ follow-up, lost quote nurture, customer updates or dormant account reactivation	
Trigger	The event that starts it, and where it is recorded: CRM, TMS or a shared inbox	
Audience and list source	Who receives it, and how each address was obtained	
Owner	The named person who answers replies, and how quickly	
Reply or action event	What counts: a reply with lane and dates, an RFQ, a booked load, a meeting or a demo	
Suppression handling	Where opt outs and refusals are recorded, and how every tool and every new list is checked against them	
Platform and CRM	The email platform and CRM you use now	

Field	What to write	Your answer
Ownership after setup	Which accounts, sending domains, lists, templates and automations stay in your name	

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