

Email Marketing Campaign Checklist

All the important steps you need to consider before pressing send.

Step 1 - What's the goal?

- Email goal: BUY READ SHARE CONNECT OTHER_____
- Call to action: _____
- How is success determined: _____
- How will success be measured: _____

Step 2 - Is it a Regular or A/B Test campaign?

- Regular Campaign: YES NO
- A/B Test Campaign: YES NO
- Element your testing: PERSONALISE SUBJECT LINE TIME DAY

Step 3 - Any list segmentation?

- Entire list: YES NO
- Segmented: YES NO
- What is the segment your targeting: _____

Step 4 - Name your campaign

Internal reference only.

- Campaign Name: _____

Step 5 - Subject line

Write out 3/4 subject lines. Pick the best or choose 2 if your A/B testing your subject line.

- Subject Line 1: _____
- Subject Line 2: _____

Step 6 - Email preview

This appears under your subject line and give the email reader a short quick summary of what's in the email and why they should open it.

- Email Preview: _____

Step 7 - Choose a template, add content and images.

Content:

- Relates to the goal.
- Uses the call to action.



- Matches content calendar.
- Include links to your website.
- Strong introduction.
- Uses short sentences.
- Spell checked.

Images:

- Images relate to the content.
- Links added to Images.
- ALT text added to images.

Style:

- Apply branding elements: logo, brand fonts, brand colours.
- Formatting applied: Use bold, underline, italics, Headings

Social links:

- Facebook link updated with your Facebook url.
- IG link updated with your IG url.
- Email link updated with your email address.
- Website link updated with your Website url.

Compliance tab;

- Update Mailing address, copywrite and subscription details.

Step 8 - Preview and test email

- Preview: Desktop and mobile check of design and layout.
- Test: Send a test email. Final proof and check all links are working in received test email. Any time sensitive info is updated. ALT text is working on images when not displayed.

Step 9 - Schedule email and social media

- Schedule email: If testing Time or Day ensure they are different for A/B Testing.
- Social media: Post on socials reminder about email, provide link to sign up form.
- Results: Review and report on email marketing campaign results.