

# Email Checklist

When you are planning an email campaign, make sure you follow this five step process to ensure campaign success. Then, use the checklist below to confirm that your campaign adheres to industry standard practices and etiquette.

- 1. Define your goals.**  
Are you trying to motivate purchases, reinforce your brand, bring visitors back to visit your site, store or office, cue the reading of an article, prompt requests for more information, increase attendance for an event, obtain donations, appointments or sign ups for a service?
- 2. Define your audience.**  
Are you targeting a segment of your customer base or your entire house list? What are the needs, wants, and interests of those on your list? What is important to them? What will motivate them to take action?
- 3. Define your message.**  
Engage your recipients and deliver on their needs. Use what you know about recipients to determine how, and in what order, to describe and illustrate the benefits of your offer.
- 4. Define your vehicle.**  
Now that you understand your goal and your audience, how can you best communicate? Think about what kinds of campaigns you may use. You have many options including newsletters, holiday or seasonal promotions, preferred customer sales, new product or service announcements, press releases, event invitations, holiday greetings and more.
- 5. Define your delivery timing.**  
When is your audience most likely to open and read your message? While audiences vary, we have found that mid-day delivery is better than mornings or evenings. Choosing the right day of the week is also important. Often Tuesday and Wednesday achieve better results than the beginning or the end of the week. Your audience may be different, so do some testing to determine the delivery timing that is right for you.

Before you press the “send” button on an email campaign, review the following checklist and put your email campaign to the test.

## Permissions:

- Are you using a good permission policy? Make sure you have a preexisting business relationship and/or affirmative consent.
  - **Preexisting business relationship** - The recipient of your email has made a purchase, requested information, responded to a questionnaire or a survey, or had offline contact with you.
  - **Affirmative consent** - The recipient of your email has been clearly and fully notified of the collection and use of his email address and has consented prior to such collection and use.

### Your **"From"** and **"Subject"** Lines:

- Does your "From" line include your company name or brand?
- Is your "Subject" line the right length? (5-8 words, 40 characters including spaces)
- Does your "Subject" line incorporate a specific benefit?
- Does your "Subject" line include your brand (if for some reason your "From" line does not)?
- Does your "Subject" line create a sense of urgency?

### Your Email Copy:

- Is your email targeted, relevant and timely?
- Is your email personalized with the recipient's first name, last name or both, if appropriate?
- Is your email copy clear and concise?
- Does it contain a strong call-to-action?
- Does it focus on benefits?
- Does it create a sense of urgency?

### Important Details:

- Are you prepared to handle inbound email responses and questions resulting from your outbound email campaigns? Follow through is as important as the first contact. Do not miss the opportunity to open a two-way dialogue with these interested recipients.
- Have you used appropriate graphics while also making good use of white space?
- Have you proofread the "From" line, "Subject" line and email copy thoroughly?
- Have you checked all links to be sure they work properly?
- Have you previewed and sent yourself a test in both HTML, and text?

### CAN-SPAM Compliance:

- Does your email include a way for recipients to unsubscribe, e.g. an unsubscribe/opt-out link and/or instructions?
- Are you prepared to handle all unsubscribe requests within 10 days of the request?
- If you use multiple email products, or have multiple databases from which you send emails, are you prepared to process all unsubscribe requests across all lists?
- Are you using good mailing practices? Have you been honest and truthful?
- Have you used a legitimate header?
- Have you used a valid "From" address?
- Is your "Subject" line straightforward, vs. misleading?
- Is your physical address included in your email campaign?

When you can answer "yes" to these questions, you are ready to hit the send button and maximize your success. Congratulations! Now, you can sit back and enjoy your improved results!