



Ultimate Email Marketing Checklist

It's time to send your email marketing campaign. But what questions should you ask before pulling the trigger? Our email marketing checklist is here to help you catch segmentation errors, broken links, and everything in between:

1

Define your goal.

Do you want to increase awareness? Drive sales? Boost retention? Whatever the goals, decide on them before you create and send an email.

2

Check your subject line.

Your subject line is arguably the most important element of your campaign. Ensure it conveys the essence of your email smartly and concisely.

3

Choose the right "From Sender" option.

The right sender name will significantly impact your open rates. In fact, our [Global Messaging Engagement Report](#) found that it is the most influential factor.

4

Add preheader (preview) text.

Your preheader text (also known as preview text) is the copy that appears right next to your subject line. It's [the third most important piece of real estate](#) in the inbox. Don't overlook it!

5

Choose the right list.

Sending a win-back campaign? Only select recipients who didn't previously engage with your content. The wrong list could lead to mass unsubscribes and spam reports.

6

Clean your target list.

A cleaner list is a more effective list. Scrub your list for unengaged recipients, bounced and invalid email addresses, and [more](#).

7

Exclude certain recipients.

Even after your list is clean, you'll need to make exclusions. If you send an exclusive promotion to a group of non-eligible recipients, you'll have some not-so-happy email replies.

8

Enable A/B testing.

Don't know if the CTA button should be red or green? Create an A/B test with both and see which gets more opens. A/B testing lets you optimize everything from your subject lines to your email design.

9

Verify your unsubscribe link works.

Every email needs a working unsubscribe link. But don't think in black and white — your unsubscribe button should [take recipients to an email preference center](#), where they can choose to receive some but not all emails.

10

Polish your email copy.

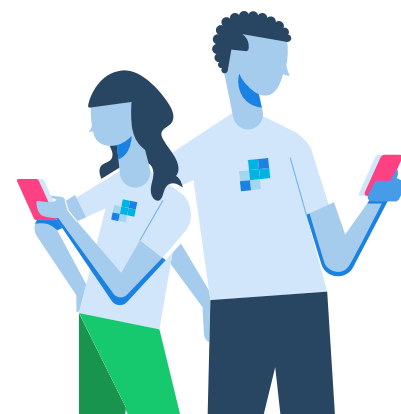
Your email needs solid proofreading. But take it a step further with copy optimization — confirming all your copy is as compelling as possible. Need help? [Follow our tips for writing copy](#).

11

Get a second opinion on the design.

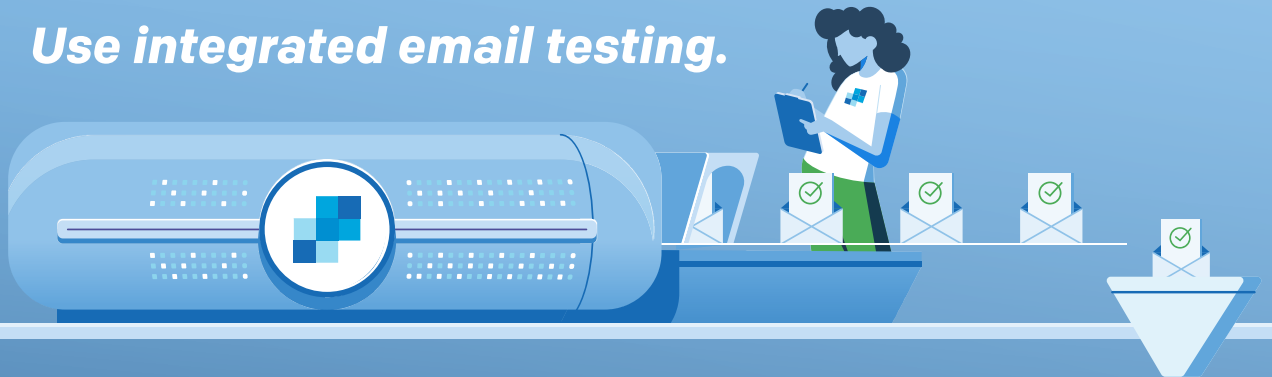
Whether you used a [pre-made email template](#) or had a designer handcraft a brand-new creation, getting another pair of eyes on your design is always a good idea.

TWILIO
SendGrid



12

Use integrated email testing.



Manually sending to a test inbox may be cheap, but it's time consuming. Consider investing in an integrated solution that offers comprehensive testing right in your email editor.

13

See how emails render in every inbox.

When testing, don't forget to see how your email displays across different inboxes to ensure a flawless look no matter the destination.

14

Bump up your spam score.

If it looks like spam, it may not even make it into inboxes. Use a spam-filter testing tool to scan your email and identify elements inbox providers don't like.

15

Check every URL.

Broken links are extremely off-putting. So check every link — but keep in mind, doing it manually is slow and laborious and software can do it faster (and better).

16

Review accessibility elements.

When you don't craft emails thoughtfully, individuals with certain disabilities can't read them. So be sure to align with [best practices](#) for accessibility.

17

Verify the send time.

Confirm your email is going out on the right day, at the right time. Not sure when that would be? Check out [the Best Time to Send Your Email Campaign](#).

18

Send a test email to another human.

While we all love technology, a manual test email is a good final check. Send one to a colleague, manager, etc.

19

Press send.

Yup, sometimes people forget to press send! Don't be one of them.

20

Monitor metrics.

Track your open rates, bounce rates, conversion rates, click-through rates, unsubscribes, and spam reports.

21

Write down learnings and takeaways.

Make sure you record all your data, so you can leverage it to make the next campaign better.

22

Repeat.

Remember, email success is a journey — so put this list to work on the next campaign, and the next one, and the next one...



To learn more, check out the full blog post [here](#).