

Email Marketing Checklist

An email marketing checklist for planning, testing and sending a campaign that converts.

Plan the campaign

- Define the goal and the single action you want recipients to take.
- Choose the audience segment and exclude anyone who should not receive it.
- Confirm subscribers have opted in and you comply with consent rules.
- Decide the offer, message and primary call to action.
- Set the sender name and reply-to address recipients will trust.

Write and design

- Write a clear, specific subject line that earns the open.
- Add preview text that complements the subject line.
- Keep the message focused on one main goal.
- Use a single prominent call-to-action button.
- Confirm the design is mobile-responsive and on brand.
- Add alt text to images in case they do not load.

Personalize and check links

- Verify personalization and merge tags render correctly.
- Click every link to confirm it goes to the right page.
- Add tracking parameters to links for attribution.
- Confirm any dynamic or conditional content displays properly.
- Include a working, compliant unsubscribe link.

Test before sending

- Send a test email to yourself and a colleague.
- Check rendering on desktop, mobile and a major webmail client.
- Proofread the subject line, body and sender details.
- Run a spam check to reduce the risk of filtering.
- Confirm tracking and goals are set up to record results.

Send and schedule

- Choose a send time based on past engagement data.
- Confirm the correct, final audience segment is selected.
- Double-check the campaign name for internal reporting.
- Schedule or send the campaign.
- Verify the send started and check for any delivery errors.

Measure and improve

- Review open, click and conversion rates after sending.
- Monitor unsubscribe and spam-complaint rates.
- Compare results against your goal and past campaigns.
- Note what to test next, such as subject line or send time.
- Follow up with engaged recipients or re-engage non-openers.