



## Email Best Practice Checklist

### Planning - High Level

- ☐ Email marketing goals and objectives defined
- ☐ Target audience determined
- ☐ Database / List segmentation completed
- ☐ Data Suppressions
- ☐ Email type (product code) decided
- ☐ Campaign user journey
- ☐ Check Motiva requirements
  - ☐ Simple, STAI, or MT?
- ☐ Content and CTA planned
  - ☐ For MT: Learning Objective: "What type of \_\_\_\_\_ has an impact on contact engagement"
    - ☐ Drop down in form with variables
  - ☐ Outline versions if using MT
    - ☐ Drop down of options
- ☐ Statistical baseline based on segment split?

### Planning - Copy & Creative

- ☐ (Design) Email & Landing Page template(s) chosen?
- ☐ Form(s)
  - ☐ Required, optional fields
  - ☐ Types of field validation that are needed
  - ☐ Is progressive profiling or a multi-step form needed?
  - ☐ Processing
    - ☐ Any transactional emails?
    - ☐ Does anyone need to be notified?
    - ☐ Lead routing?
    - ☐ Add to Shared List(s)?
    - ☐ Add to CDO(s)?
    - ☐ Webpage redirect?
    - ☐ Are there conditions to any of the processing steps that need to be considered?
- ☐ Imagery theme decided, stock images purchased?
- ☐ Email
  - ☐ Will email be HTML (custom) or Responsive Editor (WYSIWYG)?
  - ☐ Subject line(s)
  - ☐ Body
    - ☐ Copy
    - ☐ Personalization (if applicable)

- ☐ Field merges?
- ☐ Dynamic Content?
- ☐ Signature Layouts/Rules?
- ☐ Image-to-text ratio considered
- ☐ Spelling and grammar checked
- ☐ Spam words avoided
- ☐ Call-to-action clear
- ☐ Sender name
- ☐ Sender email address
- ☐ Bounceback address
- ☐ Reply to address
- ☐ Email Group chosen
- ☐ Message Testing versions
- ☐ Landing Page
  - ☐ Will LP be HTML (custom) or Responsive Editor (WYSIWYG)?
  - ☐ Copy
  - ☐ Vanity URL
  - ☐ Image-to-text ratio considered
  - ☐ Spelling and grammar checked
  - ☐ Spam words avoided
  - ☐ Call-to-action clear
  - ☐ Are a header and footer needed? Should the LP resemble an official website?
  - ☐ Are there any (tracking) scripts needed? Do they require any special configuration?
- ☐ Is all of the above clearly documented for build resources to execute on and QA against?
- ☐ Should assets sunset after a certain point in time?
  - ☐ Archive Email & Form?
  - ☐ Disable form submissions?

#### **Email Asset Creation**

- ☐ Subject line(s) are correct?
- ☐ Pre - header text is correct?
- ☐ Personalization (if applicable)
  - ☐ Field merges?
  - ☐ Dynamic Content?
  - ☐ Signature Layouts/Rules?
- ☐ Header & Footer selected?
- ☐ CMPID created
- ☐ SFID created (applicable for lead generation campaigns)
- ☐ UTM(s)(?)
- ☐ Sender name set?
- ☐ Sender email address set?
- ☐ Bounceback address set?
- ☐ Reply-to address set?

- ☐ Email group set?

### **Landing Page Asset Creation**

- ☐ Vanity URL set?
- ☐ Personalization
  - ☐ Field merges?
  - ☐ Dynamic Content?
- ☐ Form inserted if needed?

### **Form Asset Creation**

- ☐ Required, optional fields are set?
- ☐ Validation configured?
- ☐ Processing
  - ☐ Any transactional emails?
  - ☐ Does anyone need to be notified?
  - ☐ Lead routing?
  - ☐ Add to Shared List(s)?
  - ☐ Add to CDO(s)?
  - ☐ Webpage redirect?

### **Campaign Canvas Creation**

- ☐ Flow is logically correct?
- ☐ Step names clear?
- ☐ Steps are properly configured?
- ☐ Canvas settings and fields are correct?

### **Post Design Testing**

- ☐ Test email approval
- ☐ Link testing and tracking
- ☐ Correct sender name
- ☐ Correct sender email address
- ☐ Correct bounceback address
- ☐ Correct reply to address
- ☐ Email compatibility checked across browsers and devices
- ☐ Scheduled date and time set up
- ☐ QA segment
- ☐ QA campaign canvas
- ☐ Seed list sent to stakeholders?

### **Reporting**

- ☐ Wait 48 hours after step completion before analyzing performance
- ☐ Open Rate
- ☐ Click-through rate
- ☐ Unsubscribe
- ☐ Forms completions
- ☐ Leads generated

- ☐ Content views
- ☐ Web page views (product/industry/blog etc pages)
- ☐ Optimization Performance
  - ☐ Difference between baseline and optimization performance
  - ☐ Contact split for STAI
  - ☐ Control version for MT
- ☐ Content Insight Recording
  - ☐ Record the results of a Message Test in a central location for all other marketers to view.