



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)
- UTMs(?)
- 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.