

Email marketing checklist

Six phases to sending the perfect email

Planning and strategy

Determine the **goal of your campaign**.

Here are some ideas:

- Education
- Sign ups
- Referrals
- Purchases
- Registrations
- Customer re-engagement

Dive deeper into [customer re-engagement](#) and [winback email campaigns](#).

Determine how you'll **measure your success**.

What are your KPI's? For example:

- Click-through rate (CTR)
- Unsubscribe rate
- Bounce rate
- Deliverability rate or inbox placement rate
- Subscriber lifetime value (LTV)
- Return on investment (ROI)
- Email list size or growth rate
- Conversion rate (CVR)
- Email [read rate/read time](#)
- Spam complaint rate
- Revenue per email (RPE)
- Revenue per subscriber (RPS)
- Churn rate
- Subscriber acquisition cost
- Email production time



Tip: With [Mail Privacy Protection \(MPP\)](#) inflating opens on Apple devices, consider engagement metrics other than open rates.

Our [Email Analytics Survival Guide](#) covers alternate KPIs to measure—including how to calculate them and more.

Segment your audience to maximize results.

These can be based on prospects vs. customers, geolocation, engagement activity, etc.

Ensure all **suppression or exclusion** lists have been applied.



Crafting your content

- Personalize your emails** with content relevant to your subscribers.

Tap into your data (and think beyond the first name). Here are some ideas:

- Personalized imagery
- Personalized birthday emails
- Demographic-based personalization
- Location-based personalization
- Personalization through click-data
- Personalization based on product feeds



Dive deeper:

- Learn how to utilize [CRM data for personalization](#).
- Got Google Shopping Feeds set up? Here's [how to use it for personalization](#) in your emails.

Need help getting started with personalization?

See how personalization starts with [getting your data in order](#).

- Use strong **calls-to-action (CTAs)**.

Highlight the value of what happens—beyond the click. Here are some ideas:

- Shop fall collection now
- Access your account
- Get 50% off today
- Start testing
- Learn more
- Start planning
- Show me how
- Run faster

We cover everything you need to know about [crafting a compelling CTA](#) in our guide.

- Consider how your **subject line, sender name, and preview text** work together to encourage subscribers to open.



“Your subject line, sender name, and preview text all work hand-in-hand. Think of your preview text as an extension to your subject line. Craft subject lines and preview text that work together and make sense when read together. And avoid repeating your sender name in your subject line or preview text.”

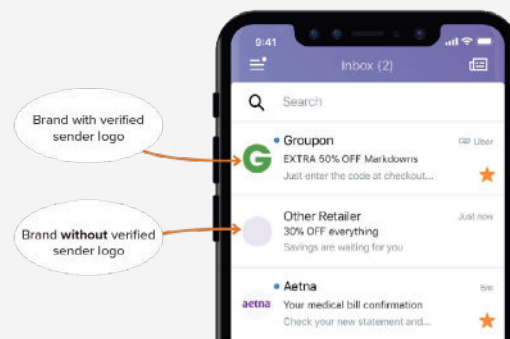
— **Jaina Mistry**, Director of Email Marketing at Litmus

Enhance your inbox view

- Use a recognizable and consistent **“from” name and address**.
- Verify that your **reply-to address** is friendly and active (i.e., not donotreply@brand.com).
- Optimize your **preview text**: Use our [preview text hack](#) in cases where copy is too long or short.

Take it a step further:

- [Brand Indicators for Message Identification](#) (BIMI) is an emerging email standard that enables the use of your logo within supporting email clients. Here's [how to set it up](#).



Optimize your design

- Check that your email **renders correctly** across mobile, desktop, and webmail environments.
- Make sure your **plain-text version** is visually attractive and has working links.
- Use **retina images** to ensure images load and are not blurry.
- Test **dynamic content** and personalization—and ensure you have fallbacks in place.
- Confirm that no images are broken and **ALT text** is in place.
- Test in **Dark Mode** to make sure your colors aren't inverted.
- Confirm **merge tags** work as intended and have fallbacks.
- Check your **load time**: try to keep under two or three seconds.
- Ensure your email file size is **less than 102KB** (or Gmail will clip your email).
- Ensure your **email is accessible** to screen readers and those with visual impairments.



Prepare your insights

- Check your links** to ensure they're working and being tracked appropriately (e.g. UTM parameters, if applicable)
- Add an **analytics code** to your campaign and ensure it's activated.

Get your email delivered

- Verify your subscribers have **explicit opt-in**.
- Follow all **applicable spam laws** for the countries where your subscribers reside.
This varies by country and region.
- Include **company contact information**, including a physical mailing address, to avoid spam filters.
- Check for **spelling and grammar errors**.
- Include a working **unsubscribe link**.
- Get a **reputation check** of your IP addresses and domain names.
- Run a **Spam Filter Test** to ensure email authentication records are in place.

For an in-depth look, download our [Ultimate Guide to Email Deliverability](#).

Bonus templates

Take your planning a step further

- Keep your team on track: our free [email brief and planning worksheet](#) will help you ensure your email's goal, messaging, audience, and timing are clear.
- Download our six free [subscription email templates](#)—fully optimized for over 100+ email clients, apps, and devices—including Dark Mode.



Everything you need to quickly create beautiful, effective emails.

[Get Started for Free](#)