

A checklist for your automated email campaigns

While it's exciting to launch your new email campaign, a small part of you will likely always be nervous to press send. Give yourself some confidence with our email checklist for sending your next campaign.

Scheduling

- Date and time** – Consider time zones and any other emails you've scheduled.
- Testing** – Test sends to identify the optimal send time for your audience.

The foundations

- Subject line** – Make it catchy and informative, but also try to keep it short.
- Preheader text** – Use this valuable space as an additional way to entice opens.
- Content / Assets** – Are your links and forms working?
- Triggers** – Ensure all triggers are set up correctly throughout the workflow.
- From address** – Is the from name recognizable and going to an inbox checked regularly?
- Unsubscribe links** – Avoid poor sender reputation and make unsubscribe links clear.
- Internal awareness** – Have you told your internal teams all the details of your campaign launch?
- Cadence** – Prevent email overload and ensure you're placing delays between sends.

Your audience

- Personalization** – Think beyond their name. How else can you make your email specific to the reader?
- Target list** – Segment your list and send only to the most interested audience.
- Suppressions** – Are there any lists or audiences you need to suppress from this message?

Your content

- Design time** – Is your email designed to best achieve your goals?
- Body copy** – Check for typos and create attention-grabbing copy.
- Formatting** – Is your email enhancing the user experience?
- Images** – Use images to boost the reader experience, but make sure they're not overwhelming your message.
- CTAs** – Make sure your CTA is prominent and encouraging conversions.

Test

- Team testing** – Get a second set of eyes (or a third and fourth!) to check for any errors.
- Links** – Are all your links working correctly?
- Devices and Email Clients** – Check your emails to ensure they format correctly on all devices and email clients.

Reporting

- Define** – Know the metrics you want to track before launching your campaign.
- Track** – Track performance metrics throughout your campaign to quickly identify any issues and make adjustments right away.

Ready to improve your email program?
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