[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Email Campaign Checklist

Work through this checklist for [Email campaign name] in order, and do not send until every item is checked or deliberately marked as not applicable with a reason. The checklist covers the audience and list, content and design, deliverability, testing, send settings, and the review after sending. Record the owner and the date completed for each item so any gap can be traced afterwards.

Campaign details

Campaign name: [Email campaign name]

Campaign purpose: [Purpose of this email campaign]

Audience or list: [Audience or list this email campaign will be sent to]

Planned send date and time: [Planned send date and time for this email campaign]

Campaign owner: [Full name and job title of the campaign owner]

A. Audience and list

Done	Check	Owner	Date completed
	Permission confirmed: every recipient has given permission to receive this type of email, and the list was not purchased or rented.	[Full name of the owner of this check]	[Date this check was completed]
	Suppression lists applied: unsubscribed addresses, hard bounces, and complaints from previous sends are excluded.	[Full name of the owner of this check]	[Date this check was completed]
	Segments checked: the segment matches the campaign purpose, and a count of recipients has been reviewed for plausibility.	[Full name of the owner of this check]	[Date this check was completed]
	Duplicates removed: the list contains no duplicate addresses that would send	[Full name of the owner of this check]	[Date this check was completed]

	the same person the email twice.		
	Exclusions applied: internal test addresses, staff addresses not on the list, and any excluded groups are removed.	[Full name of the owner of this check]	[Date this check was completed]

B. Content and design

Done	Check	Owner	Date completed
	Subject line checked: clear, honest about the contents, within the planned length, and free of misleading claims.	[Full name of the owner of this check]	[Date this check was completed]
	Preview text checked: supports the subject line and does not repeat it word for word.	[Full name of the owner of this check]	[Date this check was completed]
	Sender name checked: recognisable to recipients and consistent with previous sends.	[Full name of the owner of this check]	[Date this check was completed]
	Body copy proofread: spelling, dates, prices, names, and the offer all match the landing page.	[Full name of the owner of this check]	[Date this check was completed]
	Personalisation tested: every merged field has a fallback value so no recipient sees a blank or a field name.	[Full name of the owner of this check]	[Date this check was completed]
	Call to action checked: one primary action is obvious, and its wording matches the landing page.	[Full name of the owner of this check]	[Date this check was completed]
	Images checked: every image has descriptive alternative text and the message still makes sense with images switched off.	[Full name of the owner of this check]	[Date this check was completed]
	Footer checked: unsubscribe link, preference centre link,	[Full name of the owner of this check]	[Date this check was completed]

	and sender postal address are present and working.

C. Deliverability and authentication

Done	Check	Owner	Date completed
	Sender authentication verified: sender policy, signing key, and domain policy records are published and aligned for the sending domain.	[Full name of the owner of this check]	[Date this check was completed]
	Sending domain reputation reviewed: recent complaint and bounce indicators for the sending domain have been checked.	[Full name of the owner of this check]	[Date this check was completed]
	Spam score checked: the message has been tested against spam filters and any flagged issue has been fixed.	[Full name of the owner of this check]	[Date this check was completed]
	List hygiene confirmed: inactive addresses have been handled under the agreed rule rather than mailed regardless.	[Full name of the owner of this check]	[Date this check was completed]
	Sending volume planned: the send size and rate fit the warming state of the sending domain or address pool.	[Full name of the owner of this check]	[Date this check was completed]

D. Testing before sending

Done	Check	Owner	Date completed
	Test send completed to addresses across several mailbox providers and device types.	[Full name of the owner of this check]	[Date this check was completed]
	Rendering checked in the major mailbox applications on desktop	[Full name of the owner of this check]	[Date this check was completed]

	and on mobile.		
	Mobile layout reviewed on a real mobile device, not only by resizing a desktop window.	[Full name of the owner of this check]	[Date this check was completed]
	Dark mode rendering checked, and text remains readable where dark mode inverts colours.	[Full name of the owner of this check]	[Date this check was completed]
	Every link clicked in the test send and confirmed to reach the intended page with correct tracking parameters.	[Full name of the owner of this check]	[Date this check was completed]
	Landing page reviewed for consistency with the email offer, price, and dates.	[Full name of the owner of this check]	[Date this check was completed]
	Reply-to address checked: it is monitored, and replies will be answered.	[Full name of the owner of this check]	[Date this check was completed]

E. Send settings and schedule

Done	Check	Owner	Date completed
	Send date, time, and time zone confirmed against the audience location and the campaign plan.	[Full name of the owner of this check]	[Date this check was completed]
	Send to the correct segment confirmed in the sending tool, not only in the plan.	[Full name of the owner of this check]	[Date this check was completed]
	Scheduled automation and triggers checked so no other message fires by mistake at the same time.	[Full name of the owner of this check]	[Date this check was completed]
	Send approval recorded: the named approver has signed off the final test version.	[Full name of the owner of this check]	[Date this check was completed]
	Fallback plan agreed: what happens if the send fails part-way or a serious	[Full name of the owner of this check]	[Date this check was completed]

	error is spotted after sending.

F. After sending

Done	Check	Owner	Date completed
	Delivery, bounces, and complaints reviewed within one working day of the send.	[Full name of the owner of this check]	[Date this check was completed]
	Opens, clicks, and conversions recorded against the targets set for this campaign.	[Full name of the owner of this check]	[Date this check was completed]
	Unsubscribes processed and suppression lists updated from this send.	[Full name of the owner of this check]	[Date this check was completed]
	Errors logged: any broken link, wrong detail, or complaint is recorded with its cause.	[Full name of the owner of this check]	[Date this check was completed]
	Follow-up action decided: the next step for engaged recipients and for non-responders is recorded.	[Full name of the owner of this check]	[Date this check was completed]

Send decision

Ready to send: [Send decision: ready to send, or not ready, with the reason]

Approved for sending by: [Full name and job title of the person who approved sending]

Date of approval: [Date sending was approved]

Sign-off

Prepared by: [Full name and job title of the person who prepared this document]

Date prepared: [Date this document was prepared]

Approved by: [Full name and job title of the person who approved this document]

Date approved: [Date this document was approved]