



# EMAIL MARKETING

tips, hacks, strategies, tools,  
techniques to make the most  
of your email marketing campaigns



18 Checklists to help you setup  
a winning email marketing campaign

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# DIY CHECKLISTS

## Checklist 1 - Selecting Your Email Service Provider

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*One of the most crucial steps in email marketing is selecting an email service provider whose services and products match the needs of your business. An effective ESP provider will not only provide the platform for your email categories (including inbox, sent, draft, and spam) but further allows you the flexibility to automate your email campaigns among other necessary email functions. The growth and popularity of email marketing has fostered a subsequent increase in the number of email service providers and this therefore calls for a keen eye when selecting your preferred ESP. Some ESP options in the market include Constant Contact, Gmail, Yahoo Mail, Outlook, iCloud Mail, Zoho Mail, GMX and Proton Mail. Here is a guide of the most essential factors to consider when selecting an email service provider for your business.*

### Part 1 - Integration, Security, Budget, and Support

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Ensure your selected ESP is affordable.                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Check that the selected ESP offers a payment plan.                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Ensure your selected ESP offers 24/7 support.                           | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Check the reviews of the ESP to determine the ESP's tech response time. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Ensure the ESP provides a unique IP address.                            | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 1 - Selecting Your Email Service Provider

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 6 | Check for compliance with GDPR regulations.                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Ensure the ESP can be integrated with your selected CRM system.                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Check for integration ability with generator apps for opt-ins and landing pages. | <input type="checkbox"/> | <input type="checkbox"/> |

### Part 2 – Automation Tools

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 9  | Check that the ESP contains the emails analytics dashboard.    | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Determine whether the ESP allows for email automation.         | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Look out for the availability of the survey or pool generator. | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Ensure your selected ESP can host your images.                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Check for the ability to run AB tests on your emails.          | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Ensure the ESP has image editing tools.                        | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 1 - Selecting Your Email Service Provider

15 Check whether list segmentation is possible. ☐ ☐

16 Ensure the ESP allows for personalization.. ☐ ☐

### **Part 3 – Metrics and Delivery Rates**

17 Check that the ESP allows social tracking. ☐ ☐

18 Ensure the ESP allows for real-time tracking. ☐ ☐

19 Check that the ESP has a ESP's average delivery rate percentage score of 98% and above. ☐ ☐

### **Part 4 – Analytics and Reports**

20 Ensure your selected ESP provides basic metric reports. ☐ ☐

21 These include bounce, open, and click-through rates. ☐ ☐

22 Check that the ESP reports the unsubscribe rate and spam complaints. ☐ ☐

23 Determine whether the ESP provides the geographic location of users who open your emails. ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 1 - Selecting Your Email Service Provider

24 Check for availability of click maps and device statistics.

☐ ☐

### **Notes:**

*When selecting your ESP, a good place to start is to define the goals and objectives of your business. This will guide you into identifying the needs of your business and therefore help in determining the exact features you need your selected ESP to offer. By defining your goals, you will understand the metrics and tools you require from an ESP such as deep analytics, tools, segmentation, and automation among other myriad features of email marketing.*

Notes



# DIY CHECKLISTS

## Checklist 2 - Testing Email Deliverability

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*A lot goes into enhancing the deliverability of your email. However, most people dwell too much on improving the CTA, the subject line, and maximizing the engagement and open rates of their emails without paying much attention to the factors that boost the actual deliverability of the emails. To this end therefore, it is important to analyse the factors that enhance or inhibit the ability of your emails in terms of ending up in your target audiences' inbox. Reports have indicated that about 20% of emails fail to reach the intended audiences' inbox in that (without taking the necessary steps) most emails end up in the spam filter. This therefore undermines and marginalizes the effect of your campaigns and as such, it is imperative to maximize your email deliverability before undertaking other optimization options. This checklist provides a guide for the factors to address when testing the deliverability of your emails.*

### Part 1 – Authenticating your Email

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Set up DNS to authenticate your domain name.                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Consider using domain hosting providers for domain authentication. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Hosting provider options include DigitalOcean, GoDaddy, Name.com.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Enable sender policy framework (SPF).                              | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Consider using DKIM signature for outbound emails.                 | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 2 - Testing Email Deliverability

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 6 | Check that you add Domain Keys Identified Mail (DKIM) to see MX and SPF records. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Evaluate your records regularly using tools such as Policy Record Tester.        | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Ensure your subdomain is registered and used for email activity only.            | <input type="checkbox"/> | <input type="checkbox"/> |

### Part 2 – Email Readability and Accessibility

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 9  | Avoid using complex words and sentences.                | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Check that your emails are personalized.                | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Countercheck your emails' legality and GDPR compliance. | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Create a consistent send schedule for your emails.      | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Check that your marketing campaigns are integrated.     | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Ensure your "from" name is branded.                     | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# **DIY CHECKLISTS**

## Checklist 2 - Testing Email Deliverability

- 15 Check that your videos in the emails include texts and captions. ☐ ☐
- 16 Use language and tools that are engaging. ☐ ☐
- 17 Check that your email is free of spam words. ☐ ☐

### **Part 3 - Feedback, Deliverability, Quality**

- 18 Identify spam traps and configure a clean email list. ☐ ☐
- 19 Include clear unsubscribe options. ☐ ☐
- 20 Evaluate your sender reputation. ☐ ☐
- 21 Optimize your IP for success. ☐ ☐
- 22 Check that your inbound opt-in process is optimized. ☐ ☐
- 23 Maintain a dedicated IP allocation for inbound email campaigns. ☐ ☐

### **Notes:**

*Notes*

# **DIY CHECKLISTS**

## Checklist 2 - Testing Email Deliverability

- *Make a point of checking your deliverability before initiating your email campaigns (whether automated or not).*
- *Check your email deliverability during the campaign.*
- *Consider using deliverability testing tools.*
- *Options in the market include Glock Apps, SendForensics, Mail-Tester.com, Spamcheck, Mailtrap, MX Toolbox.*

Notes



# DIY CHECKLISTS

## Checklist 3 - Checking Sender Authentication And Whitelisting

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Failure to authenticate your sender identity in your emails increases the chances of your email going to spam. It is important to ensure that you maintain an accurate and consistent sender name in all your emails to prevent them from being sent to spam. By ensuring that your sender identity is authenticated, you prevent email phishing and spoofing. Your email should contain specific information detailing who you are or your company name in order to avoid fines for being in violation of the CAN-SPAM Act. It is also important to stick to one consistent name and avoid interchanging the sender name between your personal name and the name of your company.*

*Email whitelisting is another strategy of improving email deliverability and ensuring your emails do not end up as spam and it entails adding email addresses to your approved list. This checklist provides a guide for authenticating your sender name and email whitelisting:*

### Part 1 – Checking Sender Authentication

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Have you enabled the Sender Policy Framework (SPF)?                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Have you signed the Domain Keys Identified Mail (DKIM) signature?       | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Have you created a roadmap for the IPs from which you send your emails? | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 3 - Checking Sender Authentication And Whitelisting

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 4  | Have you included a DMARC policy that assures your list of your authentication?                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 5  | Do your email (sub) domains contain valid MX records detailing the mail server responsible for receiving mails? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Are your email abuse and postmaster addresses setup?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Have you created feedback loops to monitor arising complaints?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Have you created a DNSA record to allow your sending domain to resolve to an IP address?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Is there a developed roadmap of the IPs from which newsletters are sent?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Is your identity as the sender hidden?  | <input type="checkbox"/> | <input type="checkbox"/> |

### Part 2 – Whitelisting

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 11 | Is the privacy policy for the sending domain accessible to the public?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Have you included a third party accreditation process to provide access? | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 3 - Checking Sender Authentication And Whitelisting

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 13 | Are you whitelisted with the major ISPs?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Have you set measures to ensure complaining users are unsubscribed?           | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Have you considered IP warming to develop your reputation?                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Have you created filters that prevent sending your emails to spam?            | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Have you checked filters that ensure your emails are marked as important?     | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Have you counterchecked the eligibility of your contacts before whitelisting? | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Do you have a suppression list?   | <input type="checkbox"/> | <input type="checkbox"/> |

### Notes:

*Consider using tools such as WP Mail SMTP plugin to authenticate your emails.*

Notes



# DIY CHECKLISTS

## Checklist 4 - Email Deliverability Tools And Technology

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*Email deliverability tools and technologies refer to the software and technologies that have been developed to enhance email deliverability, boost the click-through and open rates, avoid spam, as well as enhancing the reputation of the sender. While the main servers of an ESP may contain features that make it easy for you to send emails to your list, most of them lack some of the more advanced and relatively effective tools and software that are instrumental in boosting your email deliverability. As such, it is important to check out the availability of such tools and software when selecting your ESP providers. For an email deliverability software or tool to be effective, it should be able to evaluate your account and flag out any potential issues, provide solutions for the optimization of your email against spam, and offer metrics that are instrumental in boosting your reputation, as well as the deliverability of your emails. Here are the software and tools to look out for when considering email deliverability.*

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Check that your IP is static/dedicated to boost your volumes.                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Ensure your outgoing emails are signed with DKIM.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Use the retry feature to address greylisting and temporary failures.                          | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Consider throttling your number of emails hourly to observe compliance with ISP restrictions. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Use IP warming to create a sending history and build your reputation.                         | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 4 - Email Deliverability Tools And Technology

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 6  | Use tools and software that boost email address verification.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Select tools that offer DMARC analytics.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Check the tools/software's ability for inbox placement testing.                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Check for availability of email templates and creative features and guidelines.                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Check the ability of the tools to verify/validate recipients.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Ensure the tool/software's ability to integrate with other marketing and email testing software. | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Check for marketing automation options in the tools/software.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Check for email previewing capabilities.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Ensure the tool/software provides deliverability alerts.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | The tool reports on number of unsubscribes, complaints, and the delivery rate.                   | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 4 - Email Deliverability Tools And Technology

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 16 | Check for the provision of advanced whitelisting and blacklisting monitoring.               | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Ascertain the software's ability in reporting on bounce rates (soft and hard bounce rates). | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Check for tools/software that foster multi-parts emails (containing text and HTML).         | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Ensure the tool/software has features that offer email optimization and content testing.    | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Look out for reporting on the open rates and click-through rates.                           | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Check the tool/software's abilities on reputation reporting.                                | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Check that the tool/software provides "in-f light" analysis.                                | <input type="checkbox"/> | <input type="checkbox"/> |

### **Notes:**

- Consider using both the free and paid tools and software.*
- Options for free tools and software include SendForensics and Mailtester.*

Notes





## Checklist 4 - Email Deliverability Tools And Technology

•Paid options include Litmus, Twilio SendGrid and Spark Post.

Notes



# DIY CHECKLISTS

## Checklist 5 - Counter Checking Email Content

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*It is important to countercheck your emails before sending to avoid making errors and mistakes that can compromise the content therein, the deliverability, as well as the sender's reputation. Errors and mistakes, however minute affect the deliverability of your email and thus compromise the impact of your email campaigns. For instance, poor quality content, typos, and wrong formats of images, graphics, or design of your header can largely affect how your email is perceived and further affects your competence and reputation as a sender. As such, it is always important to carry out an extensive counterchecking before sending your email to ascertain that every aspect of your email campaign is done according to book. Professionalism and commitment to detail is key in email marketing and as such, it is important to countercheck every detail of your email campaign in order to flag out and address any arising issues. Here are factors to countercheck before hitting the send button.*

- 1 Countercheck the date and time (schedule) to ensure it is the right time.

☐ ☐

### Email Components

- 2 Check for typos and personalization in your subject line.

☐ ☐

- 3 Ensure your pre-header is updated and is devoid of typos.

☐ ☐

- 4 Check that you have included correctly linked social icons.

☐ ☐

Notes



# DIY CHECKLISTS

## Checklist 5 - Counter Checking Email Content

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 5 | Update necessary details in your footer.               | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Check that the unsubscribe link is included.           | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Ensure the physical location is included in the email. | <input type="checkbox"/> | <input type="checkbox"/> |

### Email Content

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 8  | Confirm personalization for improved deliverability.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Confirm that there are no spelling and grammar errors. | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Check that you have a text-only version of your email. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Countercheck your headline for errors and links.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Double check your 'From' name.                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Countercheck your dynamic tags for personalization.    | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Countercheck your CTA.                                 | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 5 - Counter Checking Email Content

15 Check the CTA links to ensure they are working. ☐ ☐

16 Re-evaluate your compliance with CAN-SPAM. ☐ ☐

17 Check that the email campaign is optimized for mobile users. ☐ ☐

### **Email Lists**

18 Ensure there are no contacts that should be removed from the list. ☐ ☐

19 Check that all your subscriber fields are aligned. ☐ ☐

20 Include permission reminders in the email to show the subscriber opted in. ☐ ☐

### **AB Testing**

21 AB test your email design and contents for optimization. ☐ ☐

22 Send yourself a test email for inbox previewing. ☐ ☐

23 AB test the entire campaign. ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 5 - Counter Checking Email Content

24 Send email campaign links to your team.

☐ ☐

### **Notes:**

• *Tools such as Grammarly are instrumental in checking typos and grammar errors.*

Notes



# DIY CHECKLISTS

## Checklist 6 - Email Monitoring And Reporting

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*An effective email service provider should provide you with the necessary tools and metrics that allow you to monitor and subsequently test the performance of your email campaigns. Further, the ESP should provide extensive reports that enable you to monitor and draw insights from your email deliverability metrics. It is worth noting however that in order to take actions on the reports and insights gathered, it is necessary to have processes in place that guide you into the appropriate actions and approaches to undertake when you have gathered the reports and insights from your ESP. Email monitoring and reporting is crucial to the success of your campaigns in that it digs into the performance of your email campaigns, analyses the engagement trends, provides an overview of the health of your email lists, and ultimately guides you into formulating strategies and tactics that help drive your email deliverability. This checklist delves into the most suitable metrics and reports you should consider tracking in order to enhance your email deliverability.*

### Part 1 – Monitoring Plan

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Check that your campaign goals and objectives are measurable.          | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Determine the most viable performance metrics for your campaign.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Ensure you have a schedule for monitoring and evaluating your metrics. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Keep email performance and subscriber activities at the center of your | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 6 - Email Monitoring And Reporting

monitoring.

- 5 Align your preferred metrics to your goals. ☐ ☐

### Part 2 – Email Performance

- 6 Monitor your campaign's open rates to evaluate how well your emails are received. ☐ ☐

- 7 Monitor the click-to-open rate (CTOR) to analyze the value of your content. ☐ ☐

- 8 Check the unsubscribe rate to determine whether or not your content resonates with your email list. ☐ ☐

- 9 Monitor your click-through rate to analyze the strength of your CTA and content value. ☐ ☐

- 10 Check your deliverability trends by analyzing your domains. ☐ ☐

- 11 Analyze the cost per acquisition (CPA) to determine the level of your campaign's success. ☐ ☐

### Part 3 – Your Subscribers' Activities

*Notes*



# DIY CHECKLISTS

## Checklist 6 - Email Monitoring And Reporting

- 12 Evaluate your email list's growth over time. ☐ ☐
- 13 Use your pre-built segments to identify your active subscribers. ☐ ☐
- 14 Identify the disengaged and unsubscribing users to formulate retargeting strategies. ☐ ☐
- 15 Monitor email bounce rates to determine the quality of subscribers. ☐ ☐

### Part 4 – Email Viewership/Engagement

- 16 Consider tracking how subscribers are viewing your content. ☐ ☐
- 17 Track engagement by email domain. ☐ ☐
- 18 Consider tracking engagement based on the platform subscribers are using to engage with your content. ☐ ☐
- 19 Track engagement by client to better understand your list. ☐ ☐
- 20 Track engagement over time to determine appropriate times to send email campaigns. ☐ ☐

*Notes*





# DIY CHECKLISTS

## Checklist 6 - Email Monitoring And Reporting

21 Monitor the spam score measures to optimize deliverability.

☐ ☐

22 Evaluate the customer lifetime value (CLV) of your clients.

☐ ☐

### **Notes:**

- *Your goals and objectives should determine the metrics you select for evaluation.*
- *When monitoring your KPIs, consider both the on-mail and off-mail KPIs.*
- *Consider using tools such Google Analytics to measure off-mail metrics.*

Notes



# DIY CHECKLISTS

## Checklist 7- Avoid Spam Filters

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*Several factors or elements can increase the odds of your emails being marked as spam. Needless to say, when your emails constantly end up in the spam folder, it compromises the deliverability, overall performance of your email campaigns and ultimately inhibits the growth of your email list. It is therefore essential to countercheck your emails before sending to your subscribers to minimize the likelihood of being marked as spam. The increasing number of hackers and spammers invading people's inboxes has prompted internet service providers to be vigilant in flagging out suspicious email behaviors and as such, any errors in your emails can push your emails in the spam folder. Always countercheck your email against ISP's predefined set of rules and guidelines to determine whether your email is compliant to avoid being flagged as spam. This checklist highlights the factors to address to prevent your emails from being flagged as spam.*

### Click Baits in your Subject Line

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Avoid misleading claims in your subject line.                            | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Check that your email is devoid of deceptive subject line.               | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Check that there are no concealed texts in images to trick spam filters. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Avoid including random characters in the subject line (hashbusting).     | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 7- Avoid Spam Filters

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 5 | Avoid writing your subject line in all caps.                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Check that your subject line contains relevant SEO keywords.      | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Eliminate spam words in your subject line and email body.         | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Proof your subject line and body for spelling and grammar errors. | <input type="checkbox"/> | <input type="checkbox"/> |

### Email Design

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 9  | Ensure there is enough space between your texts and images.      | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Check that the text to image ration is balanced.                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Check your emails' responsiveness.                               | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Avoid including attachments especially when sending mass emails. | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Consider compressing your email contents for easy loading.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Avoid using iframe tags and flash.                               | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 7- Avoid Spam Filters

- 15 Ensure your email does not contain unsupported HTML tags and JavaScript. ☐ ☐

### Content and Accessibility

- 16 Ensure your campaigns are targeted. ☐ ☐

- 17 Include opt-in options for recipients of your email. ☐ ☐

- 18 Check that your email list is clean. ☐ ☐

- 19 Stick to a consistent and appropriate. ☐ ☐

- 20 Ensure your email address is verified. ☐ ☐

- 21 Protect your domain from phishing incidences. ☐ ☐

- 22 Check that you have DKIM and SPF record. ☐ ☐

- 23 Test your emails regularly using spam checkers. ☐ ☐

- 24 Ensure your IP's return path certificate is certified. ☐ ☐

*Notes*



# DIY CHECKLISTS

## Checklist 7- Avoid Spam Filters

- 25 Avoid buying email lists. ☐ ☐
- 26 Remove inactive subscribers from your list and. ☐ ☐
- 27 Ensure you are not blacklisted before sending your emails. ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 8 - Setting Up And Checking Feedback Loops

Project Name: \_\_\_\_\_ Date: \_\_\_\_\_

Yes No

*A feedback loop (FBL) refers to a services offered by your ESP that allows you to receive comments and feedback from your email recipients, mostly complaints or when the recipients of your email hits the junk or spam button in their inbox. One of the main aims of the feedback loop is to enable you to maintain a clean email list by either removing subscribers who keep complaining about your emails or by alternatively formulating effective retargeting strategies for such users. The FBL is invaluable to the sender in the sense that it allows you to re-evaluate your content, as well as sending schedule and guides you towards creating tailored content that resonates well with your subscribers. Further the FBL allows you to remove complaining users from your list who ultimately increase your spam score. This checklist provides a guide for setting up and checking your feedback loops.*

### **Part 1 – Setting Up FBLs**

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Ensure you own the IP/domain or you have admin rights for you to register for FBL. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Check that the RDNs of an IP match the domain used.                                | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Ensure your IP is reputable for you to be eligible for FBL.                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Check that there is a postmaster email address or a working abuse.                 | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 8 - Setting Up And Checking Feedback Loops

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 5  | Check that you have a designated an email address to receive spam complaints.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Ensure you have a sent email campaign to your email list.                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Automate complaint processing by setting up a spam complaint processor.         | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Setup your FBL to automatically deactivate complaining subscribers.             | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Check that you have access to a DNS management.                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Ensure you have selected your preferred format for receiving complaints.        | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Available formats for the above include original messages, ARF, or attachments. | <input type="checkbox"/> | <input type="checkbox"/> |

### Part 2 – Checking FBLs

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 12 | Analyze the number of complaints rates for each campaign.                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Evaluate the aggregate complaint data to point out deliverability issues. | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 8 - Setting Up And Checking Feedback Loops

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 14 | Analyze changing/increasing complaint rates regularly to identify the causes of such increases. | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Check the complaint stats by domain.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Ensure your branding is consistent to minimize complaints.                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Ascertain that your subscribers are aware of receiving emails from you during the signup.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Check that your subscribers are aware and agree with your email schedules and frequency.        | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Analyze your signup methods (if multiple) to ensure none provokes complaints from subscribers.  | <input type="checkbox"/> | <input type="checkbox"/> |

### Notes:

- Most ESPs offer FBLs to senders with a higher volume.
- The FBL services vary with the ESP.
- Available ISP feedback loops providers include Gmail, Zoho, Hotmail, Yahoo, Roadrunner, Tera, AOL, Earthlink, Comcast.

Notes





# DIY CHECKLISTS

## Checklist 9 - Email Segmenting For Deliverability

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Email segmentation is one of the most effective strategies for enhancing the deliverability of your emails. Segmenting entails categorizing your email subscribers into smaller segments based on similarities in their characteristics. Segmenting is instrumental in that it allows you to send tailored and targeted contents to specific groups as opposed to generalizing your emails. In addition to influencing users' interests in your content, segmenting further boosts your email deliverability, as well as inbox placement. To this end therefore, segmenting creates more leads and further increases click-through and open rates. When segmenting your list, it important to pay attention to details such as the level of engagement, sign up method and demographics among others in order to effectively formulate strategic email marketing approaches. Align your metrics to the performance of your list to maximize the performance of your campaigns. Here are tips for email segmentation to boost deliverability.*

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Use subscribers' geographic data to base your segments. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Create location-specific promotions for specific users. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Send targeted time-based emails based on time zones.    | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Segment your lists based on gender.                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Use subscriber engagement rates to base your segments.  | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 9 - Email Segmenting For Deliverability

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 6  | Use subscriber responses to segment lists for retargeting.               | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Base your segments on your users' social statuses.                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Tailor your segments based on users' signup method.                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Segment active subscribers to send targeted rewards.                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Segment your subscribers based on their purchase history.                | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Use the lead magnet opt-in data to base your segmenting.                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Use subscribers' purchasing patterns when creating your segments.        | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Segment your users based on amount spent.                                | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Use cart abandonment (behavior) to segment and send targeted emails.     | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Use your subscribers' position on the sales funnel to segment your list. | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Segment new subscribers.   | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 9 - Email Segmenting For Deliverability

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 17 | Base your segmentations on the nature of your subscribers i.e. VIP shoppers willing to purchase premium products. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Segment the discount shoppers (motivated by discounts) to send targeted discount and promotional emails.          | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Send retargeting emails at the inactive subscribers.  | <input type="checkbox"/> | <input type="checkbox"/> |

### **Notes:**

*Also, consider segmenting your list based on the activity of your subscribers in order to identify the appropriate frequency for sending them emails as in the examples below:*

Notes



# DIY CHECKLISTS

## Checklist 10 - Minimizing Email Bounce Rate

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Email bounce rate refers to total percentage of the number of addresses that did not receive your email for various reasons. While email bounces compromise the effectiveness of your email campaigns, a certain percentage of the bounce rate (about 2%) is considered healthy. Bounce rates are categorized as either soft bounces or hard bounces. The soft bounce (healthy) is often temporary and is mostly a result of the email server being overloaded. In most cases, soft bounces become successful after multiple resending attempts by your email service provider. Hard bounces are however considered permanent and pose more serious consequences to your email campaigns. While your ESP will often try to remove email addresses that lead to hard bounces, it is important to regularly check your subscriber list to keep it clean and to further countercheck your emails for errors before sending. This checklist provides a guide on how to minimize your email bounce rate.*

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Have you verified your email lists?                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | How often do you clean up your list?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | How reputable is your IP address?                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Is your domain verified?                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Have you included double opt-ins to minimize fake emails? | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 10 - Minimizing Email Bounce Rate

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 6  | Is your email content spam free?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Do you have segments based on engagement rates?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Have you considered launching retargeting and re-engaging campaigns for your dormant subscribers? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Have you AB tested your subject line and email copy?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Do you have a set schedule for sending your emails?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Have you identified the appropriate frequency for your different segments?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Are you using free sender domains?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | How reputable is your ESP?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Have you tested the design of your CTA and landing pages?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Are your emails engaging?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Have you removed email addresses that lead to hard bounces from your                              | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 10 - Minimizing Email Bounce Rate

list?

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 17 | Is your opt-in focused and relevant to your target audience?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Does your signup form contain a good captcha system?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Do you monitor and evaluate email deliverability and performance regularly?                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Have you considered including drip sequences in your emails?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Do you send your subscribers an "update profile form" to record changes in their email addresses? | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Have you consulted third party list verification services?  | <input type="checkbox"/> | <input type="checkbox"/> |

**Note:**

•Consider using a professional domain for your business as opposed to the free ones the likes of Gmail or Yahoo.

•Emails from free domains have a higher likelihood of being marked as spam.

•Tools such as Sendinblue send form to your list in order to record changes in email addresses.

Notes



## Checklist 10 - Minimizing Email Bounce Rate

- *Consider tools such as campaign monitor for your third party list verification services.*

Notes



# DIY CHECKLISTS

## Checklist 11 - Enhancing Your Sender Reputation

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*One of the factors that affect your email deliverability is your reputation and credibility as the sender. For starters, ISPs evaluate your reputation as a sender to weigh your likelihood to send unsolicited emails and as such, a bad reputation will automatically land your email in the spam folder if your reputation is not solid. A bad reputation not only compromises the effectiveness of your email campaigns but further inhibits your ability to grow your email list and this ultimately affects your business. ESPs provide you with a set of IPs (that are shared by thousands of accounts) for sending emails and each IP has a reputation, which informs email servers whether the source can be trusted. It is worth noting however that while private IPs can be purchased, they are highly priced and as such most people prefer the free IPs. This checklist highlights factors to consider in order to enhance your sender reputation.*

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Check that the email subject and preheader are non-generic and relevant.                | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Avoid using a noreply sender.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Check that your whitelist is automatically activated to boost your sender reputation.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Ensure your checklist does not contain email addresses that have been passive for long. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Avoid sending emails to addresses that have not given consent.                          | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# **DIY CHECKLISTS**

## Checklist 11 - Enhancing Your Sender Reputation

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 6  | Countercheck your email addresses to ensure they are correctly typed.                          | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Avoid spam complaints from your recipients.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Minimize the number of unsubscribes from your list.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Ensure your content is of high quality.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Leverage tools in the market to check on your sender reputation.                               | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Check that proper authentication is added to your accounts.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Grow your email list organically   | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Clean your email list regularly.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Check that you are not using sender names that are meaningless such as "sales" or "promotion". | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Include an unsubscribe link within the footer.   | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# DIY CHECKLISTS

## Checklist 11 - Enhancing Your Sender Reputation

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 16 | Test your subject lines to increase the open and click-through rates.                              | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Develop a schedule and frequency for sending emails that is neither too nagging nor too scattered. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Formulate strategies that boost your engagement rates.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Use the SPF, DMARC, and DKIM for authentication.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Avoid ISP spam traps.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Monitor and manage your reputation.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Select an ESP that automatically handles hard bounces and FBLs.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 23 | Evaluate your ESP's relationship with ISPs and other servers.                                      | <input type="checkbox"/> | <input type="checkbox"/> |

### Notes:

•Tools such as ReputationAuthority, TalosIntelligence and Google Postmaster Tools provide reports and scores regarding your sender reputation.

•Use tools such as Sender Score and BarracudaCentral to track your IP performance and reputation.

Notes



## Checklist 11 - Enhancing Your Sender Reputation

*Notes*



# DIY CHECKLISTS

## Checklist 12 - Improving Your Email Open And Click Rates

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Email open rate refers to the percentage of people opening a given email out of your total subscribers while the click-through rate CTR is the number of people that have at least clicked a link in your emails. Both the open rates and the CTR play a crucial role in the success or failure of your email campaigns in the sense that the success of your email marketing campaigns can be effective when subscribers open the lists and subsequently click on the links. Your open rate has an impact on the click-through rate in the sense that when your emails are opened, the chances of clicks are higher and as such, it is important to prioritize strategies that foster higher open rates. With the CTR being the second most important element of email marketing (next to the open rate) you should formulate strategies that help boost your CTR. Here are strategies and factors to consider in order to increase your open rate and CTR.*

### Step 1 – Boosting your Open Rates

#### Subject Lines

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | AB test your subject lines for optimization.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Personalize the subject line with the user's name. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Keep your subject short.                           | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 12 - Improving Your Email Open And Click Rates

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 4 | Make the subject line captivating and thought-evoking.                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Include emojis and symbols in the subject line to make it more appealing. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Avoid deceptive subject lines.  | <input type="checkbox"/> | <input type="checkbox"/> |

### **Email**

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 7  | Check that the delivered content is of high quality. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Optimize for previews.                               | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Check that your email addresses have been verified.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Clean your email list regularly.                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Avoid 'bait and switch' tendencies.                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Optimize your emails for different device sizes.     | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 12 - Improving Your Email Open And Click Rates

- 13 Set a frequency and schedule for your emails. ☐ ☐

### **Step 2 – Boosting your CTR**

- 14 Ensure your emails are scannable. ☐ ☐

- 15 Avoid hiding crucial information on images. ☐ ☐

- 16 Check that your email is mobile-friendly. ☐ ☐

- 17 Ensure your emails are interactive. ☐ ☐

- 18 Consider including incentives or bonuses to boost clicks. ☐ ☐

- 19 Social buttons also enhance CTR. ☐ ☐

- 20 Include images and numbers to foster curiosity. ☐ ☐

- 21 Check that your email design is unique. ☐ ☐

- 22 Optimize your CTA button for clicks. ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 12 - Improving Your Email Open And Click Rates

23 Include links to your social media handles at the bottom of the email.

☐ ☐

24 Personalization and list segmenting also impact CTR.

☐ ☐

*Notes*



# DIY CHECKLISTS

## Checklist 13 - Optimizing Inbound Opt-Ins

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*Email marketing is without doubt one of the most sought after marketing strategy in the modern world. Opt-in email marketing entails the use of incentives such as lead magnets to influence potential leads into consenting and providing their email addresses thus adding to the growth of your email list. Inbound opt-in comprises of single opt-in and the double opt-in. while both approaches are primarily aimed growing your list through the provision of incentives, the single opt-in approach takes on a relatively faster and easier process in that the lead fills in the opt-in form and leaves an email address to join your mailing list. The double opt-in approach however is longer and requires an extra step through which the lead completes the registration process by clicking through a link sent to their email address. The double opt-in process is a safer approach in terms of eliminating fake addresses and including dedicated and genuinely interested leads in your email list. When optimizing your inbound opt-ins, be sure to address the following:*

### Part 1 – The Opt-in Form

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Optimize professionalism in your opt-in form.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Opt-in form should only request for basic information e.g. the name and email address. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | The value of the incentive should be included in the form.                             | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Include a description in the form that is both clear and concise.                      | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# **DIY CHECKLISTS**

## Checklist 13 - Optimizing Inbound Opt-Ins

- 5 Check the visibility of your opt-in form. ☐ ☐
- 6 AB test your opt-in page for optimization. ☐ ☐
- 7 The colors included in the form should depict your brand. ☐ ☐
- 8 Use bullet points and professional fonts your opt-in form's description. ☐ ☐

### **Part 2 – The Headline**

- 9 Your opt-in form headline should be unique. ☐ ☐
- 10 The headline should clarify on the purpose of the opt-in. ☐ ☐
- 11 Ensure there is a pre-headline that specifies the incentive offered to subscribers. ☐ ☐

### **Part 3 – Incentive and Content**

- 12 Include privacy policy in your opt-in form. ☐ ☐
- 13 Ensure your incentive is valuable to the target clients (consider a ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 13 - Optimizing Inbound Opt-Ins

freebie).

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 14 | Create an attractive and interesting CTA.                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Check that your incentive instills FOMO among your leads.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Personalize the opt-in page to make it more engaging.           | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Check that the opt-in page is optimized for mobile users.       | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Create a captivating 'subscribe' button.                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Optimize the color, design, and size of the 'subscribe button'. | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Create gated content to boost subscription rates.               | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Create content that addresses your leads' pain points.          | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Use exit intent pop ups.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 23 | Include social proof in your opt-in form.                       | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 14 - Engagement Frequency And Contact Filters

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Engagement frequency depicts the number of times and the number of emails you send to your email list within a specified time (daily, weekly, monthly, and quarterly, etc.). Engagement frequency can impact your email deliverability positively or negatively based on how well you understand your subscribers and the quality of your list segments. To this end, there is a likelihood of either undersending or oversending emails and both scenarios can either be positive or negative.*

*In a similar vein, the application of contact filters is also influenced by your list segments. Contact filters are central to the success or lack thereof your email campaigns based on your ability to segment your lists in terms of similarities in needs, preferences, and characteristics. Effective application of contact filters boosts your conversion rates, as well as the propensity to make purchases. This checklist provides a guide for setting your email engagement frequency and the application of contact filters.*

### Part 1 – Engagement Frequency

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Have you segmented your audience based on engagement levels?              | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Do your subscribers have the freedom to select their preferred frequency? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Are your email campaigns automated?                                       | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 14 - Engagement Frequency And Contact Filters

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 4  | Have you carried out AB tests for increased and reduced engagement frequency?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5  | Are there visible changes in the growth of your email list when the frequency is reduced or increased?                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Have you determined the appropriate frequency for your active subscribers?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | What are the industry benchmarks for effective engagement frequencies?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Have the complaints rates been monitored under reduced and increased engagement frequencies?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Have you considered applying frequency analyzers and analytical models to determine most appropriate engagement frequency? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Is your content based on quality as opposed to quantity?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Do your engagement frequency best practices guard against spamming?  | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 14 - Engagement Frequency And Contact Filters

### Part 2 – Applying Contact Features

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 12 | Are your contact filters based on your audiences' demographics?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Have you based your contact filters on past purchasing patterns?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Have you considered the audiences' stages in the sales funnel and life-cycle when applying your contact filters? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Have you excluded unengaged contacts from your email campaigns?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Is your email list cleaned to optimize deliverability?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Do the contact filters reflect similarities in terms of the signup source?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Have you excluded low-quality contacts from your list?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Are your contacts up to date with the changing standards and technologies?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Are the filters optimized for deliverability?  | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*

# **DIY CHECKLISTS**

## Checklist 14 - Enagagement Frequency And Contact Filters

21 Is your contact list maintenance automated?

☐ ☐

*Notes*



# DIY CHECKLISTS

## Checklist 15 - A/B Testing Email Design, Style, Fonts, Headers

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*A richly designed email creates a notion of value and appeal to the target audience and is thus characterized by higher conversation, open, and click-through rates thereby boosting your email deliverability, number of leads, and sales volumes. To ensure your email design, style and fonts are captivating to your target audience, it is necessary to carry out AB tests. AB tests encompass sending different variations to your subscribers to determine which of the options is more appealing and predisposed to capture the attention of your subscribers. Insights gathered from AB testing are instrumental in not only understanding your target audience but in enhancing the deliverability of your emails and overall performance of your email campaigns. More importantly, AB testing creates insights into how your subscribers react to changes, which is instrumental in your decision-making process moving forward. This checklist provides a how-to guide for AB testing your email campaigns.*

### Step 1 – Design

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Should your CTA button contain a full-width or smaller button? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Where should you position the CTA button?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | What color is most appropriate for the CTA button?             | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Should the size of the CTA be tall or smaller?                 | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 15 - A/B Testing Email Design, Style, Fonts, Headers

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 5  | Should the email layout encompass a single column or multiple columns? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Have you AB tested the background colors for your email?               | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Are your social media buttons AB tested?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Are the images AB tested for size and variety?                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Should secondary information be included in the email content?         | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Have you tested price variations?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Should you use hyperlinks or buttons?                                  | <input type="checkbox"/> | <input type="checkbox"/> |

### **Step 2 – Content**

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 12 | Should the tone of your content be casual or authoritative? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Should your content be accessible (gated or not gated)?     | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*





# DIY CHECKLISTS

## Checklist 15 - A/B Testing Email Design, Style, Fonts, Headers

14 Have you AB tested the placement and structures of your social buttons and testimonials? ☐ ☐

15 Should the pricing be subtle or direct? ☐ ☐

### Step 3 – Images

16 Should your visuals be smaller or large? ☐ ☐

17 Are your graphics and images AB tested to match with the context of the email? ☐ ☐

18 Is the alignment for the images tested (right, center, or left alignment)? ☐ ☐

### Step 4 – Typography

19 Should the styling encompass strikethroughs or complementary fonts? ☐ ☐

20 Is the header content tested? ☐ ☐

21 Are the font sizes and styles tested? ☐ ☐

*Notes*

# **DIY CHECKLISTS**

## Checklist 15 - A/B Testing Email Design, Style, Fonts, Headers

### Step 5 – Layout

- 22 Should the accompanying forms be longer or shorter? ☐ ☐
- 23 Has the navigation menu been tested? ☐ ☐

*Notes*



# DIY CHECKLISTS

## Checklist 16 - Purging Your Email List

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*Purging your list is one way of improving engagement by removing inactive addresses from your list. Purging involves conducting regular analysis and cleaning of your list in order to enhance email deliverability by reducing bounces and spams and thereby fostering responsiveness and increased interactivity with your email recipients. Characteristically, purging enables you to understand the needs and demands of your subscribers, thus giving you the opportunity to develop tailored products and services. Further, it safeguards your reputation as a sender in the sense that purging sends the notion that you are committed to eliminating spams and engaging with your email recipients. This therefore ensures that you are dealing with subscribers who are genuinely interested in your products and services as opposed to wasting your time and resources on passive and disengaged subscribers. This checklist highlights factors to consider when purging your list.*

### Emails

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Eliminate contacts who no longer engage with your emails.                       | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Ensure your email list is standardized, trustworthy, usable and comprehensible. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Countercheck email addresses for typos and any other errors.                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Get rid of fake and outdated email addresses.                                   | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 16 - Purging Your Email List

### Segments based on Engagement

- 5 Consider segmenting your contacts based on their engagement. ☐ ☐
- 6 Request your contacts to indicate their communication preferences. ☐ ☐
- 7 Request additional opt-ins from your least engaged subscribers. ☐ ☐

### Identifying Unhealthy Contacts

- 8 Identify contacts who never open your emails. ☐ ☐
- 9 Look out for regularly hard bounced contacts in your list. ☐ ☐
- 10 Identify and remove contacts who have frequent soft bounces. ☐ ☐
- 11 Remove contacts who did not opt-in. ☐ ☐

### Errors

- 12 Check that all necessary info is entered in the right fields. ☐ ☐

*Notes*



# DIY CHECKLISTS

## Checklist 16 - Purging Your Email List

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 13 | Maintain consistent formatting.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Watch out for data decay.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Constantly updating changing email addresses and contacts in your list. | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Check and eliminate duplicate emails from your list.                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Regularly monitor and evaluate your email marketing statistics.         | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Analyze your spam complaints and unsubscribes.                          | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Send re-engagement campaigns to your passive contacts.                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Automate your email campaigns.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Include subscription option.  | <input type="checkbox"/> | <input type="checkbox"/> |

### **Notes:**

•Consider sourcing the services of email list cleaning tools.

Notes



## Checklist 16 - Purging Your Email List

•Options in the market include Snovio, Tye, Xverify.

Notes



# DIY CHECKLISTS

## Checklist 17 - Setting Up Surverys For Your Email List

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes      No

*One way of boosting engagement with your clients is by setting up surveys that create an opportunity for you to better understand your subscribers in terms of their needs and preferences, their online behavior, as well as their perception and comments regarding your products and services. Surveying your list puts you in a better position to adopt strategies and approaches that are bound to boost engagement rates thus enhancing the performance and success of your email marketing campaigns. The effectiveness of a survey is influenced by myriad factors including the type of industry and the nature of your products and services and as such, there is no one-style fits all in terms of the nature of survey you undertake. However, there are several standard approaches and strategies that work across industries. This checklist therefore seeks to evaluate the most viable approaches when surveying your list to boost email deliverability.*

- |   |  |                          |                          |
|---|--|--------------------------|--------------------------|
| 1 | Set clear goals and strategies for your survey.                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Ensure your survey has a clear title.                            | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Ensure the survey is an extension of your products and services. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Avoid sending too many surveys.                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Include your brand's design and color palette in the survey.     | <input type="checkbox"/> | <input type="checkbox"/> |

Notes

# **DIY CHECKLISTS**

## Checklist 17 - Setting Up Surveys For Your Email List

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 6  | Conduct extensive research to determine the nature of questions to ask your list.          | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Include incentives in the survey to boost participation.                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Stick to open questions that will help you understand your list better.                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Use different surveys for your different list segments.                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Ensure your survey has a title that clarifies your intentions for carrying out the survey. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Ask questions that are relevant to your target audience and your brand.                    | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Request feedback from your subscribers during or after the survey.                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Keep the title of the survey short and captivating to boost participation.                 | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Consider personalizing the survey.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Analyze data from your survey to further create segments based on the survey results.      | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 17 - Setting Up Surverys For Your Email List

- |    |  |                          |                          |
|----|--|--------------------------|--------------------------|
| 16 | Check that your surveys are optimized for mobile users.                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Send 'Thank you' emails to your subscribers for participating in the survey. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Avoid including too many questions in the survey.                            | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Develop an engaging and interesting survey.                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Optimize simplicity and ease of navigation and avoid use of complex words.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 | Test the mapping and functionality of your surveys.                          | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 | Ensure your survey is professional.  | <input type="checkbox"/> | <input type="checkbox"/> |

### **Notes:**

- Use tools such as Survey Piping when personalizing your survey questions.
- Tools such as Google Forms and Survey Monkey come in handy in terms of guiding you on the most viable survey questions to ask.
- Consider using tools such as Salesforce for deeper analysis of survey data.

Notes



## Checklist 17 - Setting Up Surveys For Your Email List

*Notes*



# DIY CHECKLISTS

## Checklist 18 - Re-Engaging Emails

Project Name: \_\_\_\_\_

Date: \_\_\_\_\_

Yes No

*Re-engagement email campaigns are mostly viewed as a last attempt at attracting the attention and engagement of passive subscribers before purging your list. Re-engagement emails therefore involve targeted campaigns and win-back emails aimed at rebuilding relationships with subscribers, which is considered easier than trying to recruit new subscribers. Your re-engagement campaigns therefore should focus at reminding your contacts of your value proposition and this calls for a re-evaluation of your email contents, your CTA, and subject line. It is worth noting that lower engagement by your subscribers might not necessarily infer a lack of interest in your content. It could also imply that your subscribers are not impressed or captivated by what you are posting and as such, a strategic move would entail evaluating different contents. This checklist highlights the factors to consider when purging your list.*

- |   |   |                          |                          |
|---|---|--------------------------|--------------------------|
| 1 | Ensure your email content demonstrates your value to the passive subscribers.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Identify what influenced your contacts to minimize engagement with your content | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Evaluate your email strategies to identify factors that minimized engagement.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Check that your content addresses their (passive subscribers) pain points.      | <input type="checkbox"/> | <input type="checkbox"/> |

Notes



# DIY CHECKLISTS

## Checklist 18 - Re-Engaging Emails

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 5  | Consider sending gifts in your win back emails.                           | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Invite specific feedback from your passive subscribers.                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Request for reasons for their disengagement.                              | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Include a bold and clear CTA in your re-engagement emails.                | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Use only one CTA button to avoid nagging and overwhelming recipients.     | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Check that your subject line captures the attention of your subscribers.  | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Personalize your subject line by including the name of the recipient.     | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Review the length and tone of the subject line to make it more appealing. | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | AB test your CTA and subject line to determine the most suitable.         | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Use actionable language in your re-engagement emails.                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Develop segments based on the activity of your subscribers.               | <input type="checkbox"/> | <input type="checkbox"/> |

*Notes*



# DIY CHECKLISTS

## Checklist 18 - Re-Engaging Emails

- |    |   |                          |                          |
|----|---|--------------------------|--------------------------|
| 16 | Consider sending freebies in your re-engagement emails to incentivize your passive subscribers. | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Carry out surveys requesting specifications on the nature of content your contacts want to see. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Provide subscribers with your social media links.   | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Offer subscribers the option to pause email communication for a specified period.               | <input type="checkbox"/> | <input type="checkbox"/> |

### **Notes:**

- After sending your re-engagement campaigns, wait for several weeks.*
- Should the subscribers fail to respond within the given time frame, remove their email addresses from your list.*

Notes