

# 300 bees

bee on the map



## Email Marketing Checklist



### 1. Audience / Purpose

Send date: \_\_\_\_\_

#### Campaign goals:

- Create Awareness (awareness stage)
- Drive conversion (decision stage)
- Inspire evangelists (advocacy stage)
- Generate demand (consideration stage)
- Delight customers (adoption stage)
- Retention/Check-up (keep top of mind)

Purpose/ What I want readers to get out of this email: \_\_\_\_\_  
\_\_\_\_\_

#### Personas reached:

	1	2	3
Persona Name:	" "	" "	" "
Descriptor 1:	_____	_____	_____
Descriptor 2:	_____	_____	_____
Descriptor 3:	_____	_____	_____

#### What does each persona struggle with?

	1	2	3
Persona Name:	" "	" "	" "
Pain Point 1:	_____	_____	_____
Pain Point 2:	_____	_____	_____
Pain Point 3:	_____	_____	_____

## 2. Content

**Type of content:**

- Newsletter     
  Content Offer     
  Event     
  Promo Offer  
 Other: \_\_\_\_\_

**Our brand voice is:**

**Character:**

(friendly, warm, inspiring, playful, authoritative, professional)

\_\_\_\_\_

\_\_\_\_\_

**Tone:**

(personal, humble, clinical, honest, direct, scientific)

\_\_\_\_\_

\_\_\_\_\_

**Language:**

(complex, savvy, insider, serious, simple, jargon-filled, fun, whimsical)

\_\_\_\_\_

\_\_\_\_\_

**Purpose:**

(engage, educate, inform, enable, entertain, delight, sell, amplify)

\_\_\_\_\_

\_\_\_\_\_

Determine relevant topics:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**What can this post help each persona with?**

Note: May not be applicable to all

Persona name: 1 " \_\_\_\_\_ " "

Problem: \_\_\_\_\_

Solution: \_\_\_\_\_

1 " \_\_\_\_\_ " "

\_\_\_\_\_

\_\_\_\_\_

1 " \_\_\_\_\_ " "

\_\_\_\_\_

\_\_\_\_\_



**TIP**  
Emails that are relevant to the user drive 18x more revenue than general broadcast messages. (Outbound Engine)

Subject line: \_\_\_\_\_

\_\_\_\_\_

## 3. Subject Line

- Is the subject line less than 50 characters?
- Would the subject line entice you to click inside?
- Is the subject line personalized (if applicable)?
- Is the subject line related to the body text?



**TIP**  
Personalized subject lines make emails 26% more likely to be opened. (Experian)

**Preheader copy is your last chance to get that click!**  
Here are the coding goods:

```
<div style="display:none;font-size:1px;
color:#333333;line-height:1px;max-height:0px;
max-width:0px;opacity:0;overflow:hidden;">
Preheader copy goes here!
</div>
```

Write preheader copy that links the subject line to the email body:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# 4. Copy

Main benefits to highlight in your copy:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What do you want readers to do next? What is the CTA:

\_\_\_\_\_

- Is the copy brief and to the point?
- Is the copy consistent with your brand and determined voice/tone?
- Does body copy include personalized elements (if applicable)?
- Does the copy have a personal, human touch?



**TIP**  
Emails with one CTA increased sales by 1617%! (WordStream)

# 5. Design

- Is the design consistent throughout the email?
- Is the design consistent with your branding?
- Does it include one or two eye-catching, relevant images?
- Do the images have relevant alt-text?
- Is the email easy to read, with proper spacing, dividing lines, etc?
- Does it have a clear unsubscribe button?
- Does it have a clear "view online" link?



Add contact information for you/your business:

- Name
- Business name
- Business address
- Phone number

Add social sharing buttons

- Facebook
- Google +
- Twitter
- LinkedIn



**TIP**  
Emails with social sharing buttons have 158% higher click-through rates. (GetResponse)

# 6. Testing

Send a test email to yourself and check that:

- The links work properly
- The images display properly
- Spelling and grammar is correct
- The personalized elements display correctly
- "From" and "reply to" addresses are correct
- The email displays properly (and looks good) on mobile
- The HTML and plain-text version are consistent



Send a test email to a coworker and check that:

- The subject line is effective
- The message is clear and engaging
- The design and branding is effective
- The unsubscribe link is functional

# 7. Scheduling & Sending

Schedule your emails

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning	<input type="checkbox"/>						
Afternoon	<input type="checkbox"/>						
Evening	<input type="checkbox"/>						
Night	<input type="checkbox"/>						

- Make sure your email will be delivered to the correct segmented list



and now it's time to hit...

**SEND!** ➔



**TIP**  
 Want to know the best days & times to send B2B Marketing Emails? Find out at our blog at <http://bit.ly/2gRxxFv>