



## Email Pre-Send Checklist

Why use a checklist?

A well-executed email campaign is an indication of quality that your recipients will use to measure against your brand. Whether you are responsible for sending out an email going to hundreds, or thousands, of recipients, you'll want to ensure a successful send and prevent common email marketing mistakes.

There are many factors to check and double-check and even those experienced at sending out emails prefer to have a checklist to make sure everything goes to plan. Use it to spot what you need to do in advance, or have it handy for when you're ready to launch your next email campaign. It's good practice to grab someone else to act as a second pair of eyes, and to schedule these checks at least a day in advance so that there's time to make changes if any crop up.

How do I check my Mailout in Engage?

From within the Engage Email Dashboard, load the Mailout you wish to send.

This checklist guides you through once you've loaded the content, selected recipients and you're ready for the final run-through.

Go to the Confirm screen to run through these checks.

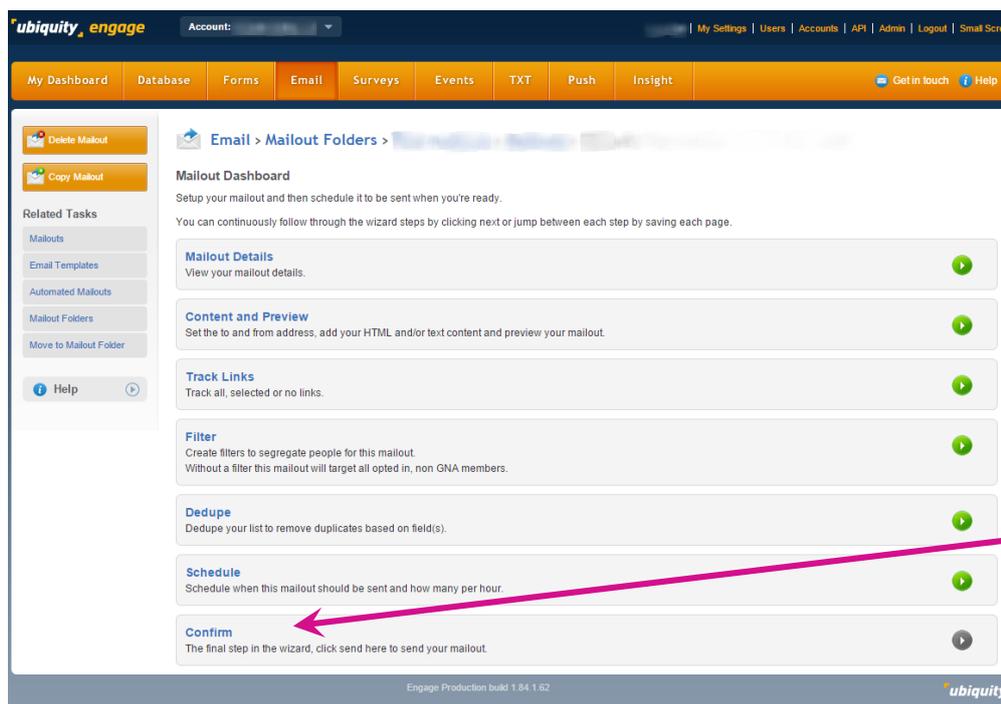
Be sure to save each step before moving to another page.

Handy hint: Using any of the save, back or next buttons will save changes.

Save

Back

Next



The screenshot shows the 'Email > Mailout Folders >' interface in the Engage dashboard. The 'Mailout Dashboard' section contains several steps, each with a green arrow icon: 'Mailout Details', 'Content and Preview', 'Track Links', 'Filter', 'Dedupe', 'Schedule', and 'Confirm'. A pink arrow points to the 'Confirm' step. The 'Confirm' step description reads: 'The final step in the wizard, click send here to send your mailout.'

Click on preview your mailout from the Confirm screen to send yourself a preview of the email so that you're ready for all these checks.

Preview





## EMAIL PRE-SEND CHECKLIST

Use this practical checklist to ensure everything is correct before you hit send.

### Key Considerations

- Have you checked:**
- Email has a clear purpose, is compelling and meets your original objectives
  - The Call to Action is powerful and obvious at a glance
  - Recipient list is up-to-date and has been imported correctly

### HEADER INFORMATION

- Header information**
- "From" name and email address are correct
  - "Reply-to" name and email address are correct
  - Subject line is compelling and matches the content
  - Pre-header text is present and enhances or summarises the email content

### MAIN CONTENT AND PREVIEW

- Content**
- All default content from your template is replaced (where applicable)
  - Content includes the last changes made
  - Proof read your email and check for typos and spelling mistakes
- Images**
- Alt tags (text describing an image when images aren't shown) are on main images / banners
  - Email with images turned off is easy to quickly read, understand and act on

### FUNCTIONAL TESTING

- Browsers and devices**
- Mobile version and content display as expected in the preview
  - Email displays correctly in major browsers\* (e.g. Chrome, Firefox, Internet Explorer, Safari)
  - Email displays correctly in major email clients\* (e.g. Outlook, Gmail, Hotmail)
  - ✓ *\*EasyEdit templates are tested by Ubiquity in all major browsers and email clients*
- Links**
- All links in the preview work and go to the correct site
  - Tracked links have friendly names and contain Google Analytics (if required)  
- go to [Tracked Links page](#) to check this
  - Unsubscribe or preference centre link is working and the opt out form is correct
- Data and personalisation**
- All swap out conditions are accounted for, including blanks, in data fields (e.g. First Name)
  - All dynamic content and personalisation display correctly (copy, image swap outs, etc.)

### SEND LIST

- Filter and de-dupe**
- Filter is correct and has the expected number of recipients
  - Additional opt out/unsubscribe fields are applied (if required)
  - Duplicate contacts are excluded (if de-duping is required)
  - You and your colleagues are included (if required)

### SCHEDULING

- Scheduling**
- Start time is correct and at a time the email is most likely to be read
  - Send rate is correct (if staggering is required)

### WEB FORMS AND LANDING PAGES

- Scheduling**
- Forms and landing pages include Google Analytics
  - All linked Engage forms/surveys/events or landing pages are correct, activated and tested on main browsers and on mobile
  - All triggered emails are tested and activated

### FINAL CHECK

- Final check**
- Final email has been approved
  - Final run-through of this checklist with someone else (two pairs of eyes are better than one)

✓ **WELL DONE!** If all boxes are checked, launch your campaign and view the Mailout report!

