Hit send with confidence checklist

drop solid

Email template checklist

Step 1: Test email builder

- [ ] Is there a link to a webversion present?
- [ ] Is there an unsubscribe link present?
- [ ] Does my template take into account the different "content types" that I need for various types of emails?

Step 2: Test email client

Recommended to use an email testing tool for this purpose to capture all major email clients, screen sizes, spam traps, etc. without loosing a huge amount of time in doing so.

- [ ] How does my layout render in dark mode?
- [ ] How does my layout render on major email clients?
- [ ] How does my layout render on mobile devices?
- [ ] What is my spam score (requires actual content to be in the template)?

Just before you send email checklist

Step 3: Check email settings

- [ ] Is the subject line correct?
- [ ] Is the plain text version up to date?
- [ ] Do all the links in the text version start on a new line?
- [ ] (For multilanguage) Is my language set correct?
- [ ] (For multilanguage) Is my email linked to the other languages?
- [ ] Are my UTM fields correct?
- [ ] Are the from and reply address correct?
- [ ] Do I need to use "Owner as mailer"?
- [ ] Is the email category correct? *

Step 4:
Preview in browser

- ☐ Quick layout check: eg images ok, text wrapping in titles or on buttons
- ☐ Content check: no more lorem ipsum or typos?
- ☐ Do all my links work and open in a new window?

Step 5:
Send test to segment

- ☐ Do I receive the email in the right language?
- ☐ Does unsubscribe work ok?
- ☐ Does personalisation work ok?

Step 6:
Check before hitting send (email) or publish (campaign)

- ☐ Is my email or campaign segment correct?
- ☐ Double check the count in the segment overview!
- ☐ Is my email published or is the publish date correct?
- ☐ Is there an unpublish date set? **

Additional checks

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

*email categories are convenient for reporting across emails, e.g. to compare click rates across all your newsletters, nurturing, campaign or to exclude transactional emails

** not setting an unpublish date will cause the email to be sent once to all contacts that are added to the segment at a later point in time shortly after they are added to the segment.