



e-shot[™]

Email Planning Checklist



Email planning checklist

This simple one-pager will help serve as a prompt to ensure that you have thought of everything as you devise your campaign. Use this in conjunction with our Pre-flight checklist and you can be confident that you have dotted all your i's and crossed all your t's and your recipients will get the best experience.



Define your purpose & goal

Is this a stand-alone message part of a wider series?

What is the purpose of the message - what action do you want subscribers to take?

What will motivate this action: authority, scarcity, social proof, reciprocity, unity?

Which subscribers should receive the message?

When should the subscribers receive the message? Particular day or date?

Is there a particular time the message should be sent? Immediately? AM? PM?

How will you measure the success of the email? Engagement? Downloads? Revenue?



First impressions

Who will the email be sent from? What 'from name' will have the greatest effect?

Where will replies go/be managed? Don't use a do-not-reply@

What is your subject line? Are you going to run an A/B split test?

What is your preview text and how does this build on the subject line?

Does the subject and the preview have appropriate word count for audience devices?

Is the message designed with audience's client/device in mind?

Is your message accessible? Does it work with or without images?



Content & creative

- What is the one thing that you want your audience to take from the email?
 - Is your headline clear and concise?
 - Are you going to use sub-head? What are they?
 - Is your body copy concise enough? Could you use bullets to make multiple points?
 - What are your CTAs? Is it punchy/complelling enough?
 - Is your message 'Outlook' style or using graphics? Do those graphics add meaning?
 - Will you have secondary messages or additional softer CTAs?
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The bigger picture

- Should your message follow a template or have a unique design?
 - Does every aspect of the email have a purpose?
 - Where does the email fit in the buyer journey?
 - What are the follow up actions to the various engagement levels?
 - Are you keeping your subscribers' needs in mind?
 - Does this email build trust and enhance the brand messaging?
 - Are you telling the subscriber something they want to hear or something that you want to tell them?
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“Email is an essential communication channel. We’ve seen increased email engagement throughout the pandemic, and this looks set to be a trend that is here to stay. Having a specialist like e-shot share their wealth of experience adds expert knowledge that can help us keep ahead in the ways we serve our residents and raise the standards in our sector.”

*Alix Macfarlane,
Chair Of LG Comms,
Head of Communications & Engagement
West Sussex County Council*

How e-shot can help

Recommended resource: Our Accessibility Checklist

For many businesses email accessibility is a significant concern. Use our simple list of checks to make sure that you have the basics right to ensure that every recipient gets a great communication experience.

[Learn More](#) 

Cyber Incident Communications Response Checklist

[Learn More](#) 

Email Healthcheck - Free for Local Authorities

[Learn More](#) 

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