

Email planning

CHECKLIST

Define your purpose & goal

- Is this a stand-alone message or 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 this email be from? What 'from name' will have 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 subject and 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 and 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-heads? What are they?
- Is your body copy concise enough? Could you use bullets to make multiple points?
- What are your CTAs? Is it punchy/compelling enough?
- Is your message 'Outlook' style or using graphics? Do those graphics add meaning?
- Will you have secondary messages or additional softer CTAs?

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 you want to tell them?