Campaign Thinking - Email Checklist

The following checklist gives you the step-by-step process for creating a successful email campaign as part of your overall marketing campaign.

STAGE 1 - EMAIL STRATEGY AND SCHEDULE

☐ 1. **Clarify Campaign Objectives and Mountain WHO, WHAT, HOW**
Always begin with the end in mind. Where does this email campaign fit into the larger scheme of the campaign? And what Mountain is this for? WHO is your target audience and what is your Ultimate Desired Conversion activity?

☐ 2. **Research**
Seek first to understand. In addition to clarifying the objectives of the campaign, you also want to do any research that will help you understand your WHO - what previous emails / campaigns got a good open rate and strong conversions with this same WHO? What were the topics, subject lines, times of day, styles, approaches you might want to repeat or model? What type of emails got LOW interest or caused HIGH unsubscribes that you might need to avoid? What Deep Dive Survey (DDS) or other market language do you have access to? Immerse yourself in that language and really begin by first making that "imaginative leap" into the mind of your ideal client.

☐ 3. **Map out Send Schedule**
This is the armature of your campaign and will inform all the remaining steps in this process. What are you sending when? Perhaps you need to work around other emails in your calendar or specific holidays or other factors in the calendar. How many emails will you send? How far apart will they be? Think about not just this campaign but the larger context of how often people are hearing from you overall. Create a document and list out the proposed date for each email you will send.

☐ 4. **Confirm Segmentation Strategy**
Who are you sending these emails to? Do you need different emails for different segments? For example "Anyone who has spent at least $1 with us" as one segment and "Anyone who has NOT spent at least $1 with us" could require very different emails.Or perhaps you have some people on your list you wish to EXCLUDE because they are being on boarded or part of another campaign or have already bought the product you are promoting. Think about your various segments and who needs to get what. Add these segmentation notes to your document for each of your proposed send dates.

5. **Map out Story Arc and Messaging**
   Now you know the number of emails you are sending and any special requirements for different segments of your market, you begin the creative process of thinking about what each email will say. Make notes on your document for each email. This is a creative and iterative process, so this can take some time and you may want to go back and change earlier email topics as you work your way through the campaign. That's normal. You can use a variety of approaches to this including Connect, Reassure, Orientate, Switch On, Move Forward, the Soap Opera Sequence of Andre Chaperon, the PLF launch approach, the Story Brand approach and many other strategies for your email sequence messaging. This can be a great time to get expert feedback on your campaign.

6. **Finalise Segmentation per Email**
   By completing Step 5 you may find there are some tweaks you want to make to the way you plan to segment each email, so go back over your sequence now and finalise the segmentation for each message.

7. **First draft**
   Complete your first draft, aiming here to get subject lines and preview copy first ideas in as well. Don't worry too much about getting it perfect at this stage. Aim to get your main ideas down and see how it flows.

8. **Percolate and Review**
   Take some time to read over what you have written. Step away or do another task or "sleep on it" if you feel you need more time to percolate. Often many great ideas will come to you during this part of the process. You can also ask for expert input and feedback here from a colleague or advisor.

9. **Second draft**
   Now it's time for your second draft. Here is where you aim to get your campaign as final as possible.

10. **Percolate and Review**
    If needed you can spend a little more time percolating and reviewing your email content. Double check with your original goals and make sure you are still on track.

11. **Final draft**
    Complete your final draft. It is ideal if you can have your content as complete as possible before loading to your EMS to avoid too much back and forth inside the EMS where changes can be harder and more time consuming to make. At this point you also Step outside of writing/creating mode and look at your email sequence with an "editor's eye" - what can be removed? Do you have clear CTAs? Do you have links in all required emails? Are you subject lines as compelling as possible? Are you creating any possible SPAM or deliverability issues with your content?

STAGE 3 - EMAIL PROOFING AND SENDING

☐ 12. **Proof**
Check for typos, make sure you have subject lines in place and that all your information is correct eg dates, links etc.

☐ 13. **Load to EMS**
Ensure the content is loaded into your Email Service Provider, with relevant segmentation and send dates.

☐ 14. **Test**
It is crucial that you send a test email to check formatting, how it appears on mobile and desktop, deliverability, look and feel and to do one final read over.

☐ 15. **Approve**
You need a formal approval process in place so it's clear which version of the email is cleared for sending. This is particularly important if you have a team involved in your email campaign.

☐ 16. **Send**
Yay - it's time to SEND your email.

STAGE 4 - EMAIL REVIEW AND RESULTS

☐ 17. **Check and Review**
Check your email has sent correctly after each scheduled send date/time and watch your email stats DAILY. Tweaking and recalibrating the current or future campaigns as necessary based on your results. For example, if an email topic gets a high unsubscribe rate and you have more emails planned on that topic, you may need to go back and alter your messaging.