Tools EQ4C Checklist

Marketing and Sales - Email Campaign Setup and Deployment

Phase 1: Campaign Planning and Strategy

☐ Define campaign objectives and key performance indicators (KPIs) - open rates, click-through rates, conversion rates, revenue targets

☐ Identify target audience segments using customer data, demographics, purchase history, and engagement patterns

☐ Research competitor email campaigns for inspiration and differentiation opportunities

☐ Establish campaign timeline with specific dates for content creation, review cycles, testing, and deployment

☐ Allocate budget for email platform costs, design resources, copywriting, and potential paid promotions

☐ Determine email frequency and sending schedule based on audience preferences and industry benchmarks

☐ Select primary and secondary calls-to-action (CTAs) that align with campaign goals

☐ Choose email campaign type (promotional, educational, nurture sequence, re-engagement, or transactional)

☐ Verify compliance requirements for your industry and regions (GDPR, CAN-SPAM, CCPA, etc.)

Phase 2: Technical Setup and Platform Configuration

☐ Choose email service provider (ESP) platform - Mailchimp, Constant Contact, HubSpot, Klaviyo, or enterprise solutions

☐ Set up domain authentication (SPF, DKIM, DMARC records) with your IT team or hosting provider

☐ Configure sender reputation by warming up IP addresses if using dedicated IPs

☐ Create or verify email lists and segments within your ESP platform

☐ Set up tracking pixels and UTM parameters for campaign analytics

☐ Install and test integration with CRM system (Salesforce, HubSpot, etc.) for lead scoring

☐ Configure automated workflows and trigger conditions if using drip campaigns

☐ Set up A/B testing parameters for subject lines, send times, or content variations

☐ Verify email deliverability by testing with inbox placement tools (GlockApps, Mail Tester)

☐ Create unsubscribe landing pages and preference center for compliance

Phase 3: Content Creation and Design

☐ Write compelling subject lines that are 30-50 characters and avoid spam trigger words

☐ Create pre-header text that complements subject line and provides additional context

☐ Design email template with mobile-responsive layout (60%+ of emails opened on mobile)

☐ Include clear sender name and "from" address that recipients will recognize

☐ Write email copy using conversational tone, clear value proposition, and benefit-focused language

☐ Design prominent CTA buttons with action-oriented text and contrasting colors

☐ Add social proof elements like testimonials, reviews, or customer logos where relevant

☐ Include footer with company address, unsubscribe link, and social media links

☐ Optimize images for fast loading (under 100KB total) and include alt text for accessibility

☐ Create plain-text version of email for clients that don't support HTML

☐ Ensure brand consistency with company colors, fonts, and messaging guidelines

☐ Write backup copy for dynamic content blocks in case personalization fails

Phase 4: Quality Assurance and Testing

☐ Proofread all email content for grammar, spelling, and factual accuracy

☐ Test email rendering across major email clients (Gmail, Outlook, Apple Mail, Yahoo)

☐ Verify all links are working and direct to correct landing pages

☐ Test email on multiple devices (desktop, tablet, smartphone) and screen sizes

☐ Check image loading and fallback text for blocked images

☐ Verify personalization tokens display correctly and have fallback options

☐ Test unsubscribe process to ensure it works properly and updates preferences

☐ Send test emails to internal team members for final review and approval

☐ Use email testing tools like Litmus or Email on Acid for comprehensive client testing

☐ Verify CTA buttons are large enough for mobile tapping (minimum 44x44 pixels)

☐ Check email accessibility with screen readers and color contrast ratios

☐ Test automated workflows and trigger conditions in staging environment

Phase 5: List Management and Segmentation

☐ Clean email list by removing invalid addresses, hard bounces, and inactive subscribers

☐ Segment audience based on demographics, behavior, purchase history, or engagement levels

☐ Verify all subscribers have opted in and maintain double opt-in records for compliance

☐ Create suppression lists for unsubscribes, complaints, and bounced addresses

☐ Set up re-engagement campaigns for inactive subscribers before removing them

☐ Implement list hygiene practices to maintain sender reputation

☐ Create custom fields in ESP for advanced personalization and segmentation

☐ Set up dynamic content blocks for different audience segments

☐ Verify GDPR compliance with proper consent records and data processing agreements

☐ Create backup lists and export subscriber data for platform migration capabilities

Phase 6: Deployment and Monitoring

☐ Schedule email send time based on audience time zones and engagement analytics

☐ Set up real-time monitoring dashboard for delivery rates, open rates, and click rates

☐ Deploy A/B tests to small percentage of list first, then send winning version to remainder

☐ Monitor spam complaints and bounce rates immediately after deployment

☐ Track email delivery progress and troubleshoot any delivery issues

☐ Watch for technical issues like broken links or formatting problems reported by recipients

☐ Monitor social media and customer service channels for campaign-related inquiries

☐ Set up alerts for unusual activity like high bounce rates or spam complaints

☐ Track conversion rates and revenue attribution in real-time

☐ Document any issues encountered during deployment for future reference

Phase 7: Performance Analysis and Optimization

☐ Pull performance metrics 24-48 hours after deployment for initial analysis

☐ Calculate key metrics: delivery rate, open rate, click-through rate, conversion rate, ROI

☐ Analyze subscriber engagement patterns and identify high-performing segments

☐ Review heat maps and click tracking data to understand recipient behavior

☐ Compare performance against industry benchmarks and previous campaigns

☐ Identify top-performing content elements and CTAs for future campaigns

☐ Analyze unsubscribe rates and feedback to identify improvement opportunities

☐ Document lessons learned and successful strategies for team knowledge sharing

☐ Create performance report with recommendations for stakeholders

☐ Set up automated follow-up sequences based on recipient engagement levels

Post-Completion Review

☐ Archive campaign assets and templates for future reuse and brand consistency

☐ Update email marketing best practices documentation with new insights

☐ Schedule follow-up campaigns or nurture sequences based on engagement data

☐ Review and update email marketing calendar with upcoming campaigns

☐ Conduct team retrospective to discuss what worked well and areas for improvement

☐ Update subscriber personas and segmentation strategies based on campaign performance

☐ Plan next campaign iteration with performance improvements and new testing variables

☐ Ensure all compliance documentation is filed and accessible for audits

☐ Update ESP platform settings and automations based on campaign learnings