

EMAIL CHECKLIST

Campaign Objective: Why are you sending this email? Educate, Convert, Re-engage

One-off email or part of a campaign?

Frequency: Daily, Weekly, Monthly, Quarterly

Target Audience

- Who is this email for?
- Be specific: role, industry, behavior
- Align message with what they care about now
- Don't default to "everyone on the list"
- Segment list accordingly

✓ Action: Describe your audience in one line:

Message & Tone

- Be helpful, specific, and real
- Conversational > corporate
- Speak to the reader, not at them
- Show POV or insight, not just data or info
- Cut 30% of your copy. Get to the point.

✓ Action: What is the benefit this email provides?
How does it help your reader?

Success Metrics

What does "working" look like?

- Open rates are directional, not definitive
- (Bots & firewalls inflate numbers—don't trust them blindly)
- Focus on clicks, replies, and CTR
- Track post-click behavior (form fills, scroll depth, replies)

✓ Action: Choose 1–2 real success metrics for entire campaign.

Subject Line Check

- Does it spark curiosity without misleading?
- Clear > clever. Always. No clickbait.
- Feels personal or specific
- First line of email matters too (AI previews use it!)

"What CTO's need to know in Q3...", "How FinTech start-ups are adopting to X regulation..."

✓ Action: Draft one subject line that earns attention:

Call to Action (CTA)

What's the ONE thing you want your audience to do?

- Be clear, visible, and action-oriented
- Only one per email
- Don't ask for too much too soon
- Examples: "Download the guide" / "Reply with a question"

✓ Action: Write your single CTA:

Final Checks

- From a human sender (no "no-reply")
- Under 102KB (avoid Gmail clipping)
- Mobile-ready
- Strong intro line (for AI previews)

