



Email Quality Control Checklist

The Steps You Need to Take
Before Hitting Send



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We've all been there. You worked hard developing your email campaign. You spent hours creating excellent content, testing all of the links, and scouring the database to find a perfect image. Feeling confident in your work, you pressed send only to have your stomach drop five minutes later when your inbox started filling up with messages saying, "Did you mean to send this?", "The link you sent doesn't work," or, "I can't see the image on my phone." Yeah, it's not a good feeling. To prevent future email blunders, we've created an email quality control checklist we believe will improve the efficiency of your email campaigns.

Why a checklist? The use of checklists has been proven beneficial by saving valuable time and preventing unnecessary mistakes. Not convinced? Just ask Dr. Peter Pronovost. Dr. Pronovost implemented an intensive care unit procedure checklist and saved the state of Michigan \$100 million and 1,500 lives in just 18 months.¹ After all, email quality control is more than just running spell check and sending a test email to your supervisor. There are many variables which need to be considered and it can all get a little confusing. Use our checklist and see improvement in your email campaigns.

¹ NPR, [Doctor Saved Michigan \\$100 Million](http://www.npr.org/templates/story/story.php?storyId=17060374), Dec. 09 2007. <http://www.npr.org/templates/story/story.php?storyId=17060374>

Still need convincing? Here are some reasons why you should use an email quality control checklist:

- 1 There are no take-backs. Once you press send, your email immediately begins zooming around cyberspace and filling inboxes. Recalling a message is a thing of the past.
- 2 Your reputation is on the line. Nothing diminishes a company's credibility faster than a poorly designed or non-functioning email.
- 3 Time equals money. The more time you spend checking, changing, rechecking, and editing, the less time you have for other important projects. Without a formal plan, you're inherently less efficient.
- 4 Checklists improve consistency. You might have a large team with different members contributing to various email campaigns. A company-wide checklist will ensure everyone is on the same page and checking for the same things.

Our checklist covers the five main development stages of an email campaign: creative, initial testing, pre-client testing, client testing, and the send itself. Although these are the steps we take at Alcott Whitney, there are certainly variations and additional steps you can add to your company's checklist. After all, an email quality control checklist is just one tool your team can use to improve the efficiency and effectiveness of your email campaign.

Step One: Developing the Creative

Developing a successful email campaign includes creating an eye-catching and engaging design. Depending on your email campaign, you could use a simple, standard text email, or craft a flashier email by using HTML (Hypertext Markup Language), or email design software which creates it for you. Regardless of your choice, there are many variables which need to be considered to ensure a successful email send.

First and foremost, make sure your email fulfills CAN-SPAM requirements. This seems odd to mention during the design phase, but including the required text and obvious opt-out links at this phase can save you hassle later.

CAN-SPAM law sets the rules for all commercial emails and gives email recipients the right to unsubscribe. Make sure you don't get slapped with a \$16,000 fine by fulfilling these requirements:

- Don't use false or misleading header information or subject lines.
- Disclose that your email is an advertisement.
- Provide recipients with a physical postal address.
- Give your recipients the option to opt-out of future emails.
- Honor recipients request to opt-out.
- Monitor emails made on your behalf by another company.

One important feature to include in your email is an opt-out option. Although your goal is to always gain leads, if someone is no longer interested in your product or content, you need to honor CAN-SPAM by providing a clearly labeled opt-out link and honoring the request quickly.

Emails saturated with images will likely be marked as spam. The same goes for emails with documents sent as attachments (the .vcf in the welcome email isn't a good idea). You can avoid the spam trap by creating a good image to text ratio and embedding the images into the body of the email instead of attaching them.

The goal of this step is to create an eye-catching design that will avoid the spam folder. The ultimate goal of your email campaign should be converting contacts into leads, leads into customers, and customers into longer-term customers/fans. Be sure to provide the right CTA or contact button in your email to invite the reader to engage.

Step One Checklist:

Use the following checklist suggestions during the creative process and start your journey towards a successful email campaign. Be sure to add your own.

- ☐ Proofread for content
- ☐ Spelling
- ☐ Grammar
- ☐ Correct dates
- ☐ Correct phone numbers and contact info
- ☐ Fulfills CAN-SPAM requirements
- ☐ Good ratio of text to images
- ☐ Consider how email reads without images loading
- ☐ Subject line testing considered
- ☐ Personalization/segmentation options considered
- ☐ No image gap possibilities or other potential rendering issues
- ☐ Repeats call to actions in both graphics and text
- ☐ Provide clear CTA (call-to-action) and consider how the user will experience the next steps if they do respond
- ☐ Disclosure language clearly stated

Step Two: Initial Testing

Now that you've crafted a well-designed email and you've fallen in love with it, it's important to run it through the ringer with a variety of tests devised to catch any breaks in the HTML code, expose any lost links, and display image mistakes.

Begin by opening the email in two or three different web browsers and email clients to ensure format consistency. If one web browser displays boxes instead of images or drops the banner, you know there's a code break that needs to be fixed. Continue to test the email by confirming all of the links and CTAs are not only working, but lead to the appropriate landing pages and sites. For complex programs, you might consider wire-framing the planned experience and testing against the wireframe as well.

Then take a look at the email from the perspective of a potential lead. Does the design flow? Are the links and CTAs in a logical place? Does the subject line and image make it interesting to the reader? (It's better to make design changes in this step than further down the road.)

Step Two Checklist:

Use the following sample checklist to ensure your email passes the initial test:

- ☐ Open in two to three different email programs (we suggest at least one mobile, one web, and one desktop)
- ☐ Alt text provided
- ☐ Check for code breaks and image issues
- ☐ Check that links work and lead to the correct landing pages and sites (we suggest a PDF or wireframe plan to check against)
- ☐ Images are displayed and load quickly
- ☐ No major content nor continuity mistakes
- ☐ No image/design gaps
- ☐ Subject line is appropriate and matches content expectations

To review, the purpose of this stage of email development and quality control is to catch any major mistakes and to make any design and copy changes before stepping out the versions and sending them on to pre-client testing, which involves rendering testing.

Step Three: Pre-Client Testing

While we understand this may not be a common phase for everyone, it has saved us many times. In this step of your email development, you'll run far more detailed testing to ensure you're producing the best possible email no matter your user's preference. Begin by printing a PDF or wireframe and comparing the markups to the live email. Are the images and copy pulled and in the right places? Is the alt text appropriate? If using HTML, check that the email is properly spaced. And, yes, once more, with a broader audience, we check to see if the links are all working and go to the appropriate content.

At Alcott Whitney, we rely on Litmus to render our emails and preview them in a variety of platforms. Not only does Litmus, in minutes, show how your email will look on over 30+ devices, but it also provides spam filter testing and email analytics post-send. This program is a wonderful tool to ensure your email is rendering well on any device from Outlook 2003 (old school) to iOS 7.1.2 (current release). Litmus adds new browser/OS combinations all the time and has a nifty newsletter all e-marketers should read. Remember, this is the final step before sending the email to your client (internal or external), so make sure everything is in order and ready to impress.

Step Three Checklist:

- ☐ Check against creative PDF or wireframe
- ☐ Run Litmus test
- ☐ Be sure all copy from planned creative is represented in HTML (opt-out, etc.)
- ☐ Make sure all personalization / segmentation variables are loading with good data*
- ☐ All offers, text in HTML images, and links restated

*The best ESPs (Email Service Providers) provide test-as capabilities and/or on-screen personalization look-ups and verifications. Take advantage of these – the sure way to ensure you never call someone “Dear FirstName” again.

Step Four: Client Testing

Once you feel confident your email has been properly formatted, checked, and tested, go ahead and send it off to your client for final approval. While we understand not everyone has clients that are external, paying, or contracted, everyone has clients that are banking on every corporate communication being great. Hopefully there won't be any major changes at this stage. However, there is always the possibility an image will be changed or content added and updated.

If you need to make any client changes, remember to go back and repeat your pre-client testing in step three with the new email. You won't know how the changes affected the email unless you run it through the testing program again. Better to be safe than sorry, we always say!

Step Four Checklist:

- ☐ Send to client
- ☐ If there are changes, go back and repeat Step Three

Pro-Tip: provide your client with a checklist as well.

Step Five: The Send

There's the challenge of avoiding the dreaded spam folder, which can be tricky if you have a large recipients list. Most companies filter emails sent to high volumes of people, so consider sending the email in waves instead of all at once.

Your job's not finished once you press "send" on the email. You can learn a lot by monitoring the email's analytics, click and open rates, and number of responses. Did any of the recipients turn into leads? How many readers clicked on the CTA? Make sure at least two different people keep an eye on the email and watch for any issues or trends that may arise.

Step Five Checklist:

- ☐ Monitor for analytics and trends
- ☐ Repeat

Conclusion

So now you have the tools to successfully launch your next email campaign! We know you're human (we are too) and that mistakes are inevitable (we could tell some stories), but hopefully our checklist will provide you with some tips and the guidance you need to prevent major mistakes. From the first steps of design to the post email research, our checklist suggestions will take you through the whole process.

Looking for more? Here are a few additional resources you might find helpful when developing your next email campaign:

- ☐ Litmus – this subscription-based service renders your emails on 30+ clients and devices so you can ensure all of your recipients can read your email. Try it out for yourself at litmus.com
- ☐ “The Checklist Manifesto: How to Get Things Right” by Atul Gawande – this fascinating read explains the history and science behind the use of checklists and how implementing checklists can prove beneficial for your business.
- ☐ Download our free email optimization guide to gain additional insight into developing the perfect email content for your readers. Get it here: <http://pages.alcottwhitney.com/a-guide-to-optimizing-email-for-conversions>
- ☐ Interested in a checklist without the commentary? Download our checklist worksheet to use on your next email campaign. Get it here: (URL to landing page)

About Alcott Whitney, LLC: *Alcott Whitney is a direct marketing and CRM agency based in Franklin, TN. Founded in 2009, Alcott Whitney serves clients across the United States with data-driven, measurable marketing campaigns to drive marketing initiatives such as new customer acquisition, cross-selling, lead nurture, and on-boarding.*