BEST PRACTICES

EMAIL SUCCESS CHECKLIST

This checklist identifies key email components and provides best practices for each one. Use it as a baseline, then test and iterate to determine what works best for your industry and audience.

COMPONENT	CHECK FOR...
"From" name	64% of people choose to open an email based on the sender name, yet many companies still use "no-reply," which is impersonal, reduces deliverability, and suggests that you don't want to hear from prospects and customers. ☑ Is your company included in the "from" name, along with the most appropriate department or function where applicable (XYZ Company Product Team)? ☑ Where appropriate, does the "from" name include a specific person ("Jane from XYZ Company")? This tactic can boost the open rate.
Subject line	Subject lines are one of the top three email elements that impact open rates. ☑ Is the subject line around 50–65 characters or fewer (about 5–7 words)? ☑ Where appropriate, does it create a sense of urgency? ☑ Where appropriate, does it include a question format? ☑ Where possible, does it identify the ideal recipient ("Networking Tips for CFOs")? ☑ Does it include personalization ("Chen, you qualify for lower rates")? ☑ Does it describe what recipients get ("Your 2019 Growth Guide is here")? ☑ Do the most important words come first ("Last chance to attend XYZ event")?

COMPONENT	CHECK FOR...

Preheader text	Preheader (the short line of text that appears in the recipient's inbox immediately after the subject line) is often overlooked, but it's one of the top three email elements that impact open rates.
	
	☑ Has preheader copy been inserted so that the preheader space doesn't display default content or code?
	
	☑ Has the preheader display been tested to ensure that the text makes sense and doesn't break awkwardly at the top cut-off points (35, 40, 45, 55, 60, 75, and 90 characters)?
	
	☑ Does the preheader text:
	  • briefly summarize the email contents,
	  • explain the importance of the contents, or
	  • identify who the information is relevant to?

Banner/ headline	☑ Does the banner or headline sum up the email contents or create intrigue? ☑ Does the banner or headline connect to the subject line thematically? If the email has no banner/headline, does the opening sentence connect? ☑ If using a banner image, is the text live so that it scales for readability?
Body content	☑ Is the body copy approximately 125 words? (Note: a newsletter or formal announcement can be longer—up to 250 words.) ☑ Is the copy chunked into new paragraphs every 250 characters or 40 words? ☑ Can the text be broken into 3 or 5 bullet points? (Odd numbers are more appealing to readers than even numbers, and more than 5 bullets reduces comprehension.) ☑ Are bullets kept to a relatively uniform length? ☑ Are bullets parallel in construction? Do they all start with the same part of speech and the same verb tense? ☑ Is the copy written for a 10th grade language level or lower? Use the readability checker at **Readability Formulas** to confirm. ☑ Is HTML content set up to be semantic (<strong> / <em> / <h1>) instead of display-focused (<b> / <i> / <span>) ? ☑ Do elements using color have high contrast and are they easy to see? ☑ Does the text version of the email match the HTML version of the email and is it formatted for readability (bullets, line breaks, etc.)?
Footer	☑ Does the footer include social sharing buttons? ☑ Does it include an unsubscribe option? ☑ Does it include a one-line company description to remind recipients who you are and what you do? ☑ Does it remind the recipient why they're receiving this email ("You're receiving this email because you opted in to our email list")?

COMPONENT	CHECK FOR...
Call to action (CTA)	☑ Does the email include a CTA? ☑ Does it use action verbs ("Download the ebook," "Save your seat")? ☑ Does it clearly describe what the recipient will get or where they will go when they click? ☑ Is more than one prompt included (a text link embedded in the body copy plus a CTA button, for example)? ☑ Is the CTA button in a high-contrast color, and is the button text legible (dark text against a light button or light text against a dark button)?
Alt text	☑ Has alt text been assigned to every image included in the email? (This provides context for recipients whose email clients block images and those with visual impairments.) ☑ Has alt text been assigned to all CTA buttons and social sharing buttons?
Layout	☑ Does the email follow a single-column format? (Multi-column content can render poorly on mobile screens.)
Images	☑ Do images account for no more than 25–50% of the total email content? (This helps to avoid spam filters.) ☑ Are images uploaded at twice the size of the intended display to ensure they remain crisp on High DPI or "Retina" devices? (See **instructions.**)
A/B testing	☑ Has an A/B test been selected for this email send? (This step is optional, but recommended if the size of the send list supports it. This **SurveyMonkey tool** can help you calculate your sample size.)
Review	☑ Have all the links been checked? ☑ Has the text been proofed by someone other than the writer? ☑ Was the email tested on multiple devices and clients using a tool such as **Litmus** or **Email on Acid**?