



## Email Campaign Checklist

Use this step by step checklist together with the [Mail Designer 365 App for Mac](#) to create your email campaign from start to finish. For more information on the individual steps, check out this [blog post](#).

### Step One: Planning

TASK	TIPS/RESOURCES	DONE
Consult email marketing calendar	<a href="#">Email Marketing Calendar</a>	<input type="checkbox"/>
Look online for inspiration	<a href="#">Pinterest</a> , <a href="#">Really Good Emails</a> , and <a href="#">Milled</a> are all great sources for campaign inspiration.	<input type="checkbox"/>
Confirm details of promotion		<input type="checkbox"/>
Decide on campaign message		<input type="checkbox"/>
Define target groups	<a href="#">Email list segmentation techniques</a>	<input type="checkbox"/>

## Step Two: Newsletter Creation

TASK	TIPS/RESOURCES	DONE
Build a clear layout	<a href="#">Save layout blocks</a> and reuse them in future designs.	<input type="checkbox"/>
Write email copy	Make sure you have chosen the correct tone for your <b>target audience</b> .	<input type="checkbox"/>
Add company logo	Make sure you are conforming to <b>brand guidelines</b> .	<input type="checkbox"/>
Create feature image	Effects like <a href="#">Duotone filters</a> and <a href="#">Blend Modes</a> help add a little extra to your feature images.	<input type="checkbox"/>
Add remaining images	If you're struggling to find images, refer to the <a href="#">Unsplash library</a> for license-free photos.	<input type="checkbox"/>
Design CTA (call-to-action)	<a href="#">Tips to create effective CTA buttons</a>	<input type="checkbox"/>
Define target link for CTA	Use <b>tracking links</b> (i.e. <a href="#">Google Analytics Tracking</a> ) for better evaluation after campaign.	<input type="checkbox"/>
Set up text styles	Make sure each text style has an email safe <a href="#">fallback font</a> in place.	<input type="checkbox"/>
Write subject line and snippet text	<a href="#">Subject line inspiration</a>	<input type="checkbox"/>
Create the email footer	Save and reuse your footer block with <b>copyright text, disclaimer, contact details, and unsubscribe link</b> .	<input type="checkbox"/>

## Step Three: Mobile Optimization

TASK	TIPS/RESOURCES	DONE
Check contents of detached mobile blocks	Keep a <b>mobile preview of your design</b> open on a second screen for easy reference.	<input type="checkbox"/>
Adjust mobile text styles	<a href="#">Detach text styles</a> and edit them separately for the mobile version.	<input type="checkbox"/>
Check CTAs are legible	For the smartphone version it's usually better to use bigger buttons which are <b>easier to tap</b> .	<input type="checkbox"/>
Check target URL for CTAs makes sense	Click on the <b>arrow icon</b> in the link editor to open links in your browser.	<input type="checkbox"/>
Go over the plain text version	Configuring a plain text version of your design is good for customers who can't receive HTML emails.	<input type="checkbox"/>
Preview design for smartphone and tablet	Use the <b>device preview</b> in Mail Designer 365 to check your template looks on a range of mobile devices.	<input type="checkbox"/>

# Step Four: Feedback and Approval

TASK	TIPS/RESOURCES	DONE
Upload your design to Approval	Use <a href="#">Mail Designer 365 Approval</a> to share your design with your team and get their feedback across all platforms.	<input type="checkbox"/>
Invite team members to view the design draft	<a href="#">How to invite team members to give feedback</a>	<input type="checkbox"/>
Collect feedback and ideas from your team		<input type="checkbox"/>
Apply feedback and re-upload to Approval		<input type="checkbox"/>

## Step Five: Pre-flight checks

TASK	TIPS/RESOURCES	DONE
Check prices and promotional details / disclaimers		<input type="checkbox"/>
Check footer contents and unsubscribe link	It is a legal requirement for every email newsletter to contain an <b>unsubscribe link</b> .	<input type="checkbox"/>
Test all links	The " <a href="#">Check Document</a> " feature will show you if your email contains any broken links	<input type="checkbox"/>
Proofread your copy and run a spell check	Mail Designer 365 has a built in spell-check, which you can access under " <b>Edit</b> " > " <b>Spelling &amp; Grammar</b> "	<input type="checkbox"/>
Check all text styles have a fallback font in place		<input type="checkbox"/>
Carry out a spam check	Use free tools like <a href="#">mail-tester</a> to check your email for spam risks.	<input type="checkbox"/>

## Step Six: Export and Send

TASK	TIPS/RESOURCES	DONE
Export the final template to use with your ESP	Export templates from Mail Designer 365 directly to <b>Mailchimp, Campaign Monitor</b> or <b>Direct Mail</b> , or use our <a href="#">guides</a> to integrate with 30+ other ESPs	
Set up the campaign in your ESP		
Check your target groups are up to date		
Upload your email template to your ESP	Step-by-step <a href="#">integration guides</a> help you successfully upload your template to use with your ESP	
Send out a test of your campaign	Ensure the <b>"From" address</b> is correct	
Schedule the campaign to send	Refer to <b>international time zones</b> and your <a href="#">email marketing calendar</a> to find the optimal time to send	

## Step Seven: Performance Evaluation

TASK	TIPS/RESOURCES	DONE
Check open rates	<a href="#">How to increase your open rates</a>	<input type="checkbox"/>
Check link clicks		<input type="checkbox"/>
Analyze the Google tracking link IDs	How many units did this newsletter sell? How much revenue did this newsletter generate? How much website traffic was generated via this newsletter?	<input type="checkbox"/>
Compare results to previous campaigns		<input type="checkbox"/>
Draw conclusions and strategize for your next campaign!		<input type="checkbox"/>



Mail Designer 365 App

For Mac

**Mail Designer 365** helps you and your team create stylish, professional HTML emails on your Mac.

[maildesigner365.com](http://maildesigner365.com)