**Steps for planning and checklisting**

**EMAIL checklist:**

1) Agree on email concept and core content

* Final sign off from x people within the organization

2) Decide on who will draft and who will load via email marketing system

3) Drafter uses template to draft

* <Include template link>

4) Drafter sends copy in body of email and link for group review and feedback is added in the Google document.

5) After review and edits the email is loaded to email marketing system and checklisting happens:

* Confirm “audiences”
* Confirm “Reply To: email”
* Confirm “Preview Text:”
* Confirm subject lines
* Test all links
* Test how images, text, and buttons work in mobile and desktop.

6) Email sent from email marketing system, and forwarded including new subject line “Email test #1 + subject line”

* CC needed people on all tests
* Include the name of the person the email is being sent from
* Include other staff as needed working on project

7) Edits or updates needed sent back via email where simple or updated in the doc where larger section updates.

8) Edits made in email marketing system and new test for approval sent.

* “Email test #2 + subject line”
* Repeat steps 6 - 7 - 8 until final approval to send tests to lists

9) Test sent to list including at least x people per subject line <this should be decided in your organization.

* Ideally 3 subject lines tested and not more than 5.

10) After 2-3 hours select the winning subject line

* Minimum wait time 1 hour
* Winning subject line should look at open rate, action rate, and unsubscribes and pick the best balance of those factors.