



Email Marketing Checklist

A Practical Guide to Creating Emails That Convert

Every successful email starts with careful planning and a methodical approach to creation and delivery. This checklist covers the key elements of effective email marketing, from initial strategy to final content review. Use it to ensure your emails are purposeful, well-crafted, and designed to convert.

Conversion Foundation

The science of email conversion involves two key formulas working together: one for the email itself and one for where that email leads. Use these formulas to evaluate and optimize both your emails and their corresponding landing pages.

Email Formula

$$(eme = rv (of + i) - (f + a))$$

- ☐ Relevance clear and specific
- ☐ Offer value defined
- ☐ Incentive to act identified
- ☐ Friction points minimized
- ☐ Anxiety elements addressed

Landing Page Formula

$$(C = 4m + 3v + 2(i-f) - 2a)$$

- ☐ Motivation carried through from email
- ☐ Value proposition aligned
- ☐ Incentives maintained
- ☐ Friction reduced
- ☐ Anxiety addressed



9 STEPS OF EMAIL

Content Strategy

Your email's content needs to balance purpose, structure, and voice while delivering clear value to the recipient. Use these checkpoints to ensure your message is focused and effective.

Purpose & Focus

- ☐ Primary purpose clearly defined
- ☐ Supporting elements reinforce main purpose
- ☐ Additional content adds value without distraction
- ☐ Clear next action identified
- ☐ Purpose describable in one sentence without "and"

Message Structure

- ☐ Primary message (70% of content)
- ☐ Supporting elements (20% of content)
- ☐ Additional value (10% of content)

Voice & Tone

- ☐ Voice matches message type
- ☐ Tone appropriate for audience
- ☐ Language consistent throughout
- ☐ Personalization meaningful
- ☐ Brand guidelines followed

Call to Action

- ☐ Clear and action-oriented
- ☐ Naturally follows content
- ☐ Works without images
- ☐ Mobile-friendly size
- ☐ Creates urgency without hype



9 STEPS OF EMAIL

Design Elements

Email design must work within strict technical limitations while remaining clear and effective. These guidelines ensure your emails are readable, accessible, and display correctly across all devices.

Layout

- ☐ 650px maximum width
- ☐ Clear visual hierarchy
- ☐ Adequate whitespace
- ☐ Scannable structure
- ☐ Mobile-first approach

Content Presentation

- ☐ Important info above the fold
- ☐ Clear content sections
- ☐ Consistent spacing
- ☐ Readable font sizes (14-16px)
- ☐ High contrast for readability