



Email Review - Design & Creative Checklist

Introduction

This actionable checklist is a compilation of Marketo best practices around deliverability and email marketing. This comprehensive pre-flight check maximizes the probability of the email reaching the intended inbox, all before the marketer hits send. Using this checklist will ensure that all deliverability best practices are implemented before any marketing campaign launches.

Message & Creative

| | | |
|-----------------------------------------------|------------------------------|-----------------------------|
| Offer and content match subject line | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Offer explains what's in it for me (WIIFM) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Headlines are calls-to-action | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Scannable content blocks | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Bullet points | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Images support copy | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Images don't replace copy | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Image-based calls-to-action | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| All images are clickable | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Full images clickable (No image maps) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Text based calls-to-action | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Action words clickable (most verbs clickable) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Sense of urgency | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Obvious pricing (i.e. Sale) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Reader reviews / Testimonials | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Brand & Design – Conversion Optimization

Brand Recognition Elements

| | | |
|------------------------------------------------------------------------------------------------------------|------------------------------|-----------------------------|
| Recognizable brand name and message purpose | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Clear message purpose <ul style="list-style-type: none"> • Operational • Marketing | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Brand is included in

| | | |
|--------------------------------------|------------------------------|-----------------------------|
| Friendly from address (Display name) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Email alias | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Subject line | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Design Impact Elements

| | | |
|-----------------------------------|------------------------------|-----------------------------|
| Good value statement/snippet text | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Viewable online link | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Alt tags on images | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Company logo included | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Brand name in text copy | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Preview Pane Elements

Where the viewer decides to read the email:

- How does the preview pane look with images turned off/on?
- How does the key area of 2-3 inches of screen look?
- Is the snippet text compelling?

| | | |
|----------------------------------------------------|------------------------------|-----------------------------|
| Value statement or table of contents (TOC) present | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Viewable online link | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| View mobile link | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Logo (with alt text) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Clear call-to-action above the fold | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Layout

Standard screen resolution (1024 x 768):

Masthead pixels

| | | | | |
|--------------------------|------------------------------------|----------------------------------|----------------------------------|-----------------------------------|
| Width (550 - 650 ideal) | <input type="checkbox"/> Under 550 | <input type="checkbox"/> 550-600 | <input type="checkbox"/> 600-650 | <input type="checkbox"/> Over 650 |
| Height (200 - 400 ideal) | <input type="checkbox"/> Under 200 | <input type="checkbox"/> 200-300 | <input type="checkbox"/> 300-400 | <input type="checkbox"/> Over 400 |
| Color use | <input type="checkbox"/> Fonts | <input type="checkbox"/> Links | <input type="checkbox"/> Borders | <input type="checkbox"/> Cells |

| | | |
|------------------------|------------------------------|-----------------------------|
| Tables based placement | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Bulleted text | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Alt text bullet images | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Trust Center

| | | |
|----------------------------------------|------------------------------|-----------------------------|
| Unsubscribe language | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Company name | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Company address / Phone | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Company URL | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Privacy policy URL | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Copyrights / Trademarks | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| "You have received this email because" | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| "This email was sent to" | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| "Add to address book" | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Change email preferences | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Viral Growth & User Generated Content

Items to experiment with in your emails.

| | | |
|---------------------|------------------------------|-----------------------------|
| Forward-to-friend | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Subscribe | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Comments | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Membership programs | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Feedback | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Survey | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

| | | |
|-------------|------------------------------|-----------------------------|
| Blog | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Video links | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Search | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Editorials` | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Common Spam Signatures to Avoid

Avoid these to avoid content based filtering:

| | | |
|------------------------------------|------------------------------|-----------------------------|
| • Font Size (8pt < >14pt) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Repetitive use of key words | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Flash or rich media | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Misspelled words | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Invisible fonts (white on white) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Full capitalization of words | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Light grey/red fonts | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Non-ASCII characters | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Missing <title> tag | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Phishing URL | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Java script | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Attachments | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Forms | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| • Embedded images | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

For more best practices and tools on email deliverability, visit Marketo's Resource Center:

<http://www.marketo.com/b2b-marketing-resources/category/best-practices/email-deliverability>