EMAIL MARKETING QC CHECKLIST

YOUR STEP-BY-STEP GUIDE TO HIGH-PERFORMING CAMPAIGNS

LOGICAL POSITION

OPEN NEW REVENUE
FROM EVERY SEND

THE ART OF
MASTERING REGULATORY COMPLIANCE

The Knowledge to Move the Needle:

- 📈 **EMAIL HAS THE HIGHEST ROI**

- 📊 **MISSION-CRITICAL STEPS YOU CAN'T AFFORD TO MISS**

PLUS: **5 MUST-HAVE BUCKETS TO PUT OUT ANY FIRE**

EXCLUSIVE INFOGRAPHIC: ROADMAP TO CAMPAIGN CONSISTENCY

The 3 Pillars of High-Performing Email Marketing

Successful campaigns are built on these foundations you can leverage to unlock hidden revenue.

This step-by-step checklist provides an actionable framework to ensure your emails win the inbox and drive meaningful revenue.

Strong Foundations

Deliverability, compliance, and integrations keep campaigns on target.

Smarter Scaling

Segmentation and automation put your growth on autopilot.

Relentless Optimization

Testing and thorough QC ensure you continuously improve performance.

Whether you're just getting started or looking to optimize an existing program, this checklist will establish a stronger email marketing foundation that sets your business up for success.

The next pages take these pillars and expand them into 5 tactical buckets you can use to launch, refine, and scale with confidence.

BONUS DOWNLOAD: 90-Day Launch Schedule

Bucket 1: Integrations & Compliance

Setting the Stage with a Strong Technical Foundation

Before you start writing subject lines or designing templates, make sure your backend is set up for deliverability to earn trust. When your Email Service Provider (ESP) is both well-integrated and compliant, emails will stay out of the spam folder and build credibility with your audience and inbox providers.
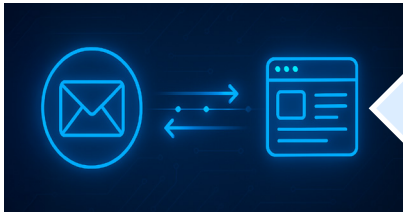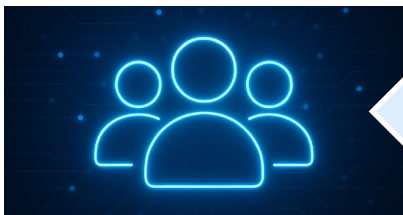
Integrate ESP with CMS (Shopify, WooCommerce) for seamless data sync, segmentation, and automation.
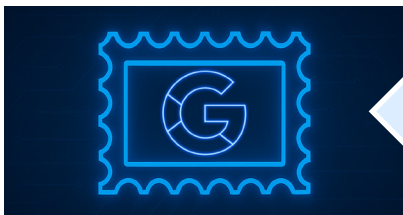
Set up Google Postmaster Tools to monitor sender reputation, spam rates, and inbox placement.

Authenticate domain with SPF & DKIM to verify sender identity, prevent spoofing, and improve deliverability.

Implement DMARC to control how unauthenticated emails are handled and block phishing attempts.

Bonus: Connect to Meta & Google Ads for enhanced remarketing and audience insights.

Why it Matters: Most deliverability problems stem from weak infrastructure, not poor content. A solid setup ensures your emails get opened, read, and acted on.

Bucket 2: Segmentation & List Acquisition

Target Smarter, Not Broader

A well-segmented list drives higher engagement and protects your sender reputation with quality over quantity.

Import engagement data during migrations to avoid sending to inactive contacts.

Map sign-up forms to the correct list or automation (e.g., Welcome Series).

Use clear opt-in checkboxes for GDPR/CAN-SPAM compliance.

Segment by behavior, purchase history, and engagement for tailored messaging.

**Test sign-up flow** to confirm list placement, confirmation email, and incentives.

Form best practices:

- ✔ Use high color contrast for readability
- ✔ Offer SMS opt-in for multi-channel
- ✔ Link to Privacy Policy
- ✔ Test in Incognito Mode
- ✔ Enable auto-opt-in at checkout (where legally allowed)
- ✔ Use exit-intent pop-ups for abandoners

Why it Matters: Segmentation boosts open/click rates and strengthens sender reputation.
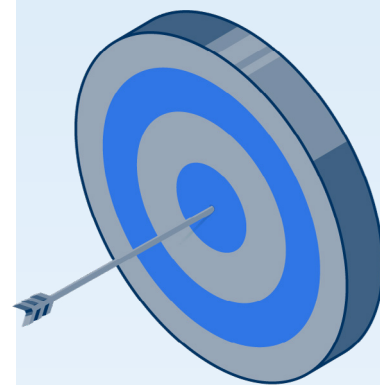
NEVERBOUNCE
EMAIL VERIFICATION

Bonus: Clean lists with tools like NeverBounce before major sends.

Bucket 3: Automations

Work Smarter with Lifecycle Flows

Automation scales your email program—nurturing leads, recovering carts, and rewarding customers without ongoing effort.

Step 1: Set up core flows

Welcome series – educate and engage new subscribers

Abandoned cart – recover missed sales

Thank-you – build loyalty and repeat business

Step 2: Disable default CMS cart emails if using custom ESP flows.

Use precise triggers.

▷ Page View

▷ Product Ad

▷ Form Submit

Step 3: Test dynamic content to ensure accuracy

Verify names & images

Ensure coupons render correctly

Verify coupon codes for validity and expiration

Step 4: Monitor performance closely

The first 30 days require routine checks to pivot quickly.

Analyze test results from dynamic content adjust in month 2
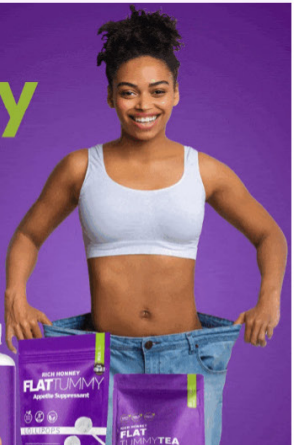
> ◁ **Why it Matters:**
> Optimized automations deliver high-converting, timely messages—keeping your brand visible and revenue steady.

Bonus: Disable smart sending for urgent flows; and enable bot filtering for cleaner data.

Bucket 4: A/B Testing Calendar
Experiment Intentionally to Optimize Results

Don't guess—test. The best email marketers continually experiment to refine what works and what doesn't. But A/B testing needs structure to be effective.

Set a testing cadence: Weekly, bi-weekly, or monthly, based on send volume.

Choose your sample size: Determine what portion of contacts receive each variation. Typical test groups are 20-50%, with the remaining recipients getting the winner.

Define success metric: Know whether you're optimizing for opens, clicks, or conversions before starting the test.

Re-test promising winners: Validate insights by retesting strong performance, before deploying across campaigns.

Log your results: Track what you tested and key takeaways. Over time, this will reveal tactics unique to your audience.

TESTING HIERARCHY:

Subject Line

Drives Opens

▼

Call to Action

Drives Clicks

▼

Content & Layout

Drives Conversions

Why it Matters: A/B testing is your pathway to continuous improvement. Without it, you're flying blind and potentially leaving conversions on the table.

Bucket 5: Sending Your First Campaign

Measure Twice, Cut Once: Send With Confidence

Before launch, run a final check to ensure your campaign is polished, accessible, and impactful.

First Campaign Send Worksheet

Send a test email to yourself and stakeholders to catch broken links, typos, and formatting issues.

Verify all links—including buttons and logos—point to the correct destination.

Check on all devices (mobile, tablet, desktop); mobile optimization is essential.

Preview in multiple inboxes (Litmus, Email on Acid) to ensure consistent rendering.

Add alt text to all images for accessibility and as fallback messaging.

Reconfirm audience segmentation to avoid sending to the wrong list.
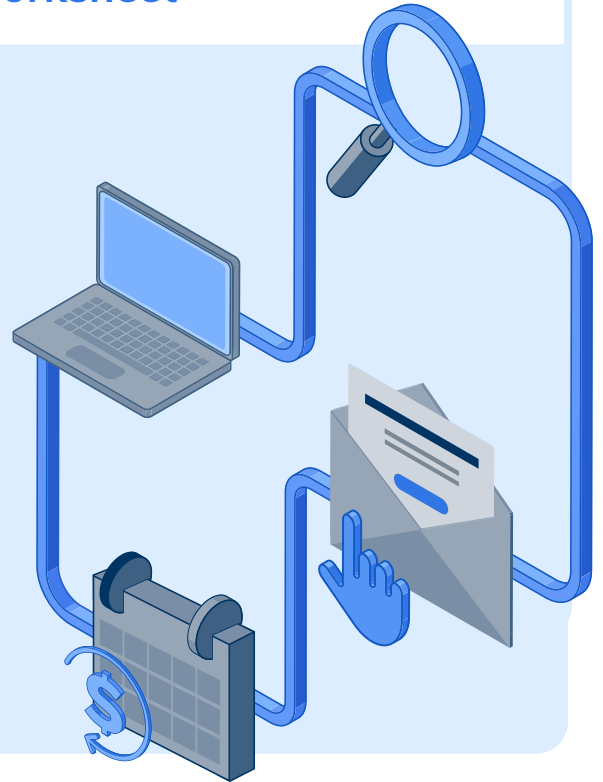
Why it Matters: Your email is your brand in a customer's inbox. A flawless send builds trust, credibility, and engagement.
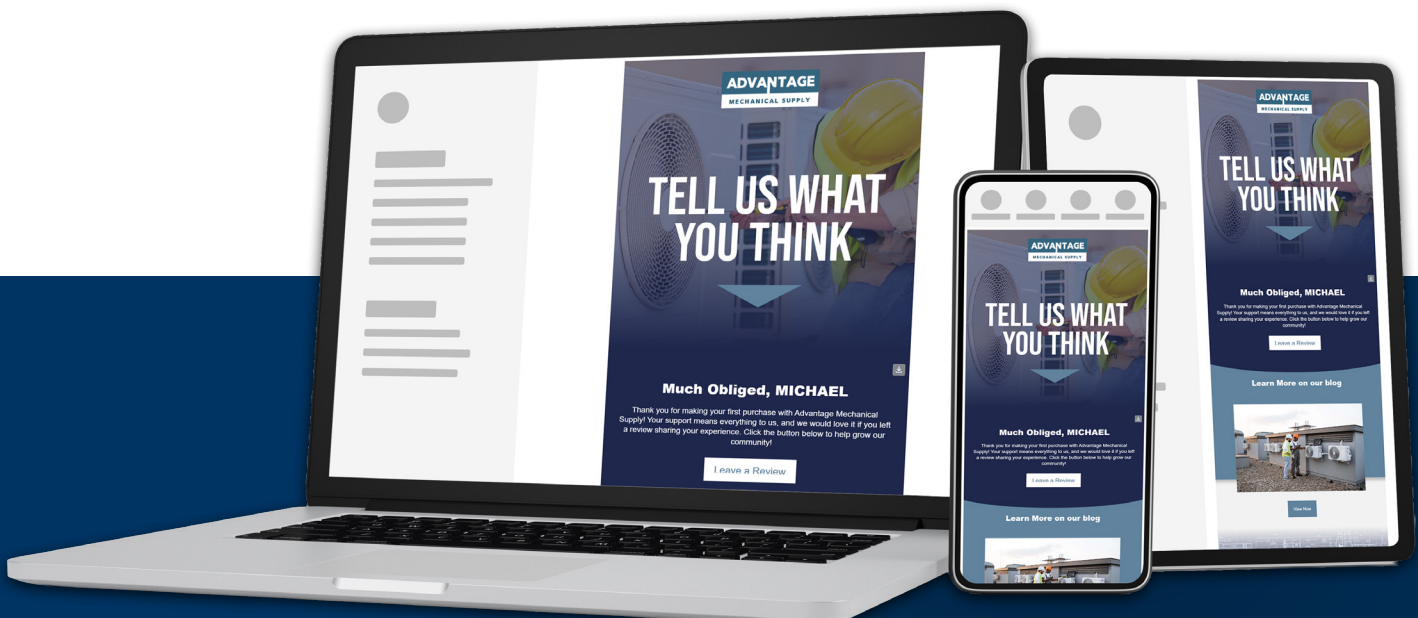
You're Ready to Send!

Congratulations! Whether this is your first campaign or your fiftieth, this QC checklist ensures you're sending polished, strategic emails that actually perform. With the right foundation, consistent testing, and smart segmentation, your email program will become one of your most reliable growth engines.

Email Marketing 3-Month Benchmarks for Success

LOGICAL POSITION

| MONTH 1 Foundation & Launch	MONTH 2 Optimization Mode	MONTH 3 Momentum & Scale
List Hygiene • Import only high-quality (opt-in) contacts • Remove bounces, duplicates, inactive users	**Campaign Intelligence** • Test send times, previews, design • Identify best-performing segments	**Automations Review** • Refine flows (Welcome, Cart Abandonment, etc.) • Add new flows: Win-Back, Browse Abandonment, VIP Loyalty
Platform Setup • Authenticate domain (SPF/DKIM) • Set up core automations: Welcome, Abandoned Cart, Post-Purchase	**Segmentation in Action** • Segment lists by engagement • Launch re-engagement campaigns	**Audience Expansion** • Promote newsletter signups (site, social, PPC) • Use lookalike audiences (Meta/Google)
Content Calendar • Send 1–2 campaigns (promos, newsletter, etc.) • Establish A/B testing (subject lines, CTAs, layouts)	**Content Refinement** • Review top campaigns (subject lines, tone, layout) • Optimize for mobile	**Data-Driven Decisions** • Apply heat maps & click data to design • Sync results with Google Analytics for attribution
List Hygiene • Import only high-quality (opt-in) contacts	**Campaign Intelligence** • Test send times, previews, design	**Automations Review** • Refine flows (Welcome, Cart Abandonment, etc.)

Remember: Consistency beats perfection. Email performance compounds with strategic refinement.
Download the full Email Marketing QC Checklist

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LOGICAL POSITION

Download the 90-Day Email Marketing Roadmap

GET THE GUIDE

Need a Hand?

At Logical Position, we specialize in helping businesses scale email campaigns that integrate into your broader marketing strategy. Whether you need assistance with technical setup, automated workflows, or creative testing, we're here to help!

Contact us today to integrate email into your full-funnel marketing mix, and watch the results roll in.

GET STARTED