



Client: _____

AE: _____

Campaign: _____

Automated Marketing Checklist

Campaign Objectives: _____

Campaign Date Range: _____

Database Name: _____

Emails			
<input type="checkbox"/>	Branded templates created/approved	<input type="checkbox"/>	Subject lines have been optimized/approved
<input type="checkbox"/>	Templates optimized for device type & touch	<input type="checkbox"/>	Emails will be addressed by contact name
<input type="checkbox"/>	One or more welcome emails exist	<input type="checkbox"/>	Each email has a clear CTA
<input type="checkbox"/>	Admin action links exist in template	<input type="checkbox"/>	Email schedule defined
<input type="checkbox"/>	Social media networks exist in template	<input type="checkbox"/>	Non-campaign emails to be intermixed
<input type="checkbox"/>	Sender name(s) clear and simple	<input type="checkbox"/>	A/B testing planned
<input type="checkbox"/>	Email content is developed & approved	<input type="checkbox"/>	Emails have been QC'd

Database			
<input type="checkbox"/>	Database has been imported/created/named	<input type="checkbox"/>	Schedule for scrubbing has been established
<input type="checkbox"/>	Fields (current and future) have been defined	<input type="checkbox"/>	Plan exists to evaluate aged/dormant records
<input type="checkbox"/>	Database access has been mapped	<input type="checkbox"/>	Progressive profiling enabled
<input type="checkbox"/>	Email addresses have been validated	<input type="checkbox"/>	Database has been QC'd

Campaign			
<input type="checkbox"/>	Preference center(s) are built	<input type="checkbox"/>	A/B testing planned
<input type="checkbox"/>	Opt-Out alternatives exist	<input type="checkbox"/>	Social media is campaign component
<input type="checkbox"/>	Workflows are mapped out/approved	<input type="checkbox"/>	SM posts/ads exist with UTM codes
<input type="checkbox"/>	Consistent brand templates/voice exist	<input type="checkbox"/>	Ad budgets have been defined
<input type="checkbox"/>	Personalized, value-added content exists	<input type="checkbox"/>	Content and workflows have been QC'd
<input type="checkbox"/>	Workflow logic has been tested	<input type="checkbox"/>	Campaign execution validated through dummy accounts

Analysis & Reporting			
<input type="checkbox"/>	Campaign goals have been articulated	<input type="checkbox"/>	Lead scoring scheme defined/approved
<input type="checkbox"/>	Report content/freq is defined/approved	<input type="checkbox"/>	Campaign debrief scheduled

= completed
 = not applicable

