



Email Checklist

Email can be a power tool for your campaign but if you're not careful, you can get hurt. This email checklist will help you make sure that you're using it effectively and not making mistakes that are easily avoidable.

Note: This checklist assumes that you're using a tool like Mailchimp or ActiveCampaign to send your emails. We highly recommend that you do not use a personal account to send mass emails.

- ☐ Right list for the message.
- ☐ Check the "From" name and email.
- ☐ No default content.
- ☐ Subject line creates curiosity.
- ☐ Message is concise.
- ☐ Contains a "call to action."
- ☐ Hyperlinks work.
- ☐ Spell and grammar check.
- ☐ Mobile compatibility.
- ☐ Send a test email.

Right List for the Message

If you're using multiple lists or segments (e.g. constituents, donors, volunteers, etc.), be sure you've selected the right ones for the message you're sending. You don't want to accidentally send campaign team emails to your constituents!

Check the "From" Name and Email

Make sure you're using your name and the correct email address so that when people see your message in their inbox, they know who it's from. Also, make sure that the reply-to email works.



No Default Content

When you use an email template it frequently contains default content like, “Put your company logo here.” Double-check your messages to make sure that you’ve updated all this default content.

Subject Line Creates Curiosity

Most of your email messages will never be read. That’s simply a fact of life. But whether they will be read is highly dependent on their subject line. For that reason, it’s important to put a lot of thought into them. Try to create curiosity and connect with something that’s important to the recipient.

For example, if you’re promoting a fundraising event, instead of asking people to come out and support you, offer them a fun night of networking and socializing.

Message Is Concise

People are busy and reading takes a lot of time and energy (relatively speaking). The shorter and more concise your message, the more likely people will be to read it. Use short words, in short sentences, in short paragraphs with lots of white space. It reduces anxiety and allows readers to expend less energy. Make it easy for them.

Contains a Call to Action

The first rule of salesmanship is to ask for the sale. Every communication is an opportunity for your campaign but people rarely take initiative on their own. They need to be asked to donate, volunteer, attend an event, etc. Always include a call to action with your emails: But don’t offer too many. The options a person has, the less likely they are to choose any of them.

Hyperlinks Work

If you include any hyperlinks in your email, double and triple-check them to ensure that they work.



Spell and Grammar Check

Spelling and grammar errors are credibility-killers that are completely preventable. We highly recommend that you use Grammarly's free tool. They have browser extensions that will work in almost every circumstance (including social media posts) that can be reputation-saving!

Mobile Compatibility

It's likely that most your recipients will be reading your email on a mobile device. While most email providers can send responsive formats that work on all devices, make sure that your content is also mobile-compatible. That means that any images you include are legible in small formats, your fonts are large enough, etc.

Send a Test Email

Many times, we're in a rush to get out a message but sending test emails have saved me from many embarrassing mistakes. Whenever possible, send a test to yourself and one or two other volunteers. You'll be surprised how many mistakes get prevented.