



Email Audit Worksheet

Step #1: Write down your email creation process:

Email creation from concept to completion	Who's doing it?	How long does it take?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Step #2: Run three emails through the 'Superior Email Checklist'

Successful Email	Middle-of-the-Road Email	Failed Email
<p>1. From Line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Personal, professional name <input type="checkbox"/> Company domain included (not @gmail or @yahoo) <p>2. Subject line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Length is between 60-70 characters <input type="checkbox"/> Personalization included and checked for accuracy <input type="checkbox"/> No spammy words <p>3. Preheader</p> <ul style="list-style-type: none"> <input type="checkbox"/> Preheader text exists <input type="checkbox"/> It provides additional context about email's purpose <p>4. Headline</p> <ul style="list-style-type: none"> <input type="checkbox"/> A headline exists in the email <input type="checkbox"/> The headline is in large, bold, readable font <input type="checkbox"/> The headline gives subscribers an idea of what the email is about <p>5. Body</p> <ul style="list-style-type: none"> <input type="checkbox"/> Short, clear text <input type="checkbox"/> Bulleted lists used when necessary for clarity <input type="checkbox"/> Color scheme is appealing and brand appropriate <input type="checkbox"/> Text talks to the subscriber, not at them <input type="checkbox"/> Text focuses on benefits not products 	<p>1. From Line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Personal, professional name <input type="checkbox"/> Company domain included (not @gmail or @yahoo) <p>2. Subject line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Length is between 60-70 characters <input type="checkbox"/> Personalization included and checked for accuracy <input type="checkbox"/> No spammy words <p>3. Preheader</p> <ul style="list-style-type: none"> <input type="checkbox"/> Preheader text exists <input type="checkbox"/> It provides additional context about email's purpose <p>4. Headline</p> <ul style="list-style-type: none"> <input type="checkbox"/> A headline exists in the email <input type="checkbox"/> The headline is in large, bold, readable font <input type="checkbox"/> The headline gives subscribers an idea of what the email is about <p>5. Body</p> <ul style="list-style-type: none"> <input type="checkbox"/> Short, clear text <input type="checkbox"/> Bulleted lists used when necessary for clarity <input type="checkbox"/> Color scheme is appealing and brand appropriate <input type="checkbox"/> Text talks to the subscriber, not at them <input type="checkbox"/> Text focuses on benefits not products 	<p>1. From Line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Personal, professional name <input type="checkbox"/> Company domain included (not @gmail or @yahoo) <p>2. Subject line</p> <ul style="list-style-type: none"> <input type="checkbox"/> Length is between 60-70 characters <input type="checkbox"/> Personalization included and checked for accuracy <input type="checkbox"/> No spammy words <p>3. Preheader</p> <ul style="list-style-type: none"> <input type="checkbox"/> Preheader text exists <input type="checkbox"/> It provides additional context about email's purpose <p>4. Headline</p> <ul style="list-style-type: none"> <input type="checkbox"/> A headline exists in the email <input type="checkbox"/> The headline is in large, bold, readable font <input type="checkbox"/> The headline gives subscribers an idea of what the email is about <p>5. Body</p> <ul style="list-style-type: none"> <input type="checkbox"/> Short, clear text <input type="checkbox"/> Bulleted lists used when necessary for clarity <input type="checkbox"/> Color scheme is appealing and brand appropriate <input type="checkbox"/> Text talks to the subscriber, not at them <input type="checkbox"/> Text focuses on benefits not products

<p>6. Call to action</p> <ul style="list-style-type: none"> <input type="checkbox"/> The call to action is a button <input type="checkbox"/> The email has 1 (maybe 2) calls to action <input type="checkbox"/> Text inside the call to action is urgent <p>7. Images</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clear, relevant images are used <input type="checkbox"/> Alt text included <input type="checkbox"/> Images are compressed for quick load time <p>8. Branding</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your logo and company name is included <input type="checkbox"/> Clicking on your logo takes subscribers to your home page <input type="checkbox"/> Messaging is consistent with brand and vision <p>9. Footer</p> <ul style="list-style-type: none"> <input type="checkbox"/> Unsubscribe button is obvious to find <input type="checkbox"/> Contact information is provided <input type="checkbox"/> Social icons are clickable 	<p>6. Call to action</p> <ul style="list-style-type: none"> <input type="checkbox"/> The call to action is a button <input type="checkbox"/> The email has 1 (maybe 2) calls to action <input type="checkbox"/> Text inside the call to action is urgent <p>7. Images</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clear, relevant images are used <input type="checkbox"/> Alt text included <input type="checkbox"/> Images are compressed for quick load time <p>8. Branding</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your logo and company name is included <input type="checkbox"/> Clicking on your logo takes subscribers to your home page <input type="checkbox"/> Messaging is consistent with brand and vision <p>9. Footer</p> <ul style="list-style-type: none"> <input type="checkbox"/> Unsubscribe button is obvious to find <input type="checkbox"/> Contact information is provided <input type="checkbox"/> Social icons are clickable 	<p>6. Call to action</p> <ul style="list-style-type: none"> <input type="checkbox"/> The call to action is a button <input type="checkbox"/> The email has 1 (maybe 2) calls to action <input type="checkbox"/> Text inside the call to action is urgent <p>7. Images</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clear, relevant images are used <input type="checkbox"/> Alt text included <input type="checkbox"/> Images are compressed for quick load time <p>8. Branding</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your logo and company name is included <input type="checkbox"/> Clicking on your logo takes subscribers to your home page <input type="checkbox"/> Messaging is consistent with brand and vision <p>9. Footer</p> <ul style="list-style-type: none"> <input type="checkbox"/> Unsubscribe button is obvious to find <input type="checkbox"/> Contact information is provided <input type="checkbox"/> Social icons are clickable
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Evaluation.

List the boxes that aren't checked. These are your new email marketing goals to work on this year.

Step #3: Evaluate your email service provider

You may have outgrown your current email service provider. To see if it's time to switch, answer the questions below. Add your responses to each question to the right column.

What do you like most about your current provider?	
What features do you use the most?	
What features do you lack?	
Is this an email service provider that you can grow with?	
What kind of features do you get for the subscription fee?	

If you're ready to upgrade, consider looking for an email platform that has the following features:

- Mobile-friendly templates
- A free image library
- SPAM scoring
- Email previews that show specific devices
- Personalization techniques
- Drip campaign capabilities
- Behavioral targeting
- Email preference centers
- Integrations
- Customized, comprehensive analytics

As you do research, fill in this chart so you can decide which platform is best.

Email Service Provider	Pros	Cons	Cost

Step #4: Turn analysis into action

Now, it's time to make an action plan. Turn your audit into actionable improvements you'll make this year by answering the questions.

- **Review your email creation process**

Go back to the chart you created for step one. Review the notes you've made and answer these questions. Add your responses to the right column.

What will you do to improve your workflow and create emails more efficiently?	
Who needs to be notified of these changes?	

How will you measure the success of these changes?	
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- **Review your checklist results**

When you compared three email campaigns, you learned a lot about what you do and don't include in an email. Take a look at the things you're missing and figure out what steps you have to take to make them happen.

For instance, if you're sending emails from gmail, you'll need to set up a more professional one with your domain name in it. If your personalization skills are lacking, you might need to upgrade to a better email service provider that has the tools you need to do this.

Review the notes you've made and answer these questions. Add your responses to the right column.

What has to be done to achieve all of the missing components from the Superior Email Checklist?	
Do you need to delegate any of these tasks? If so, to whom?	

- **Review email service provider research**

You took some time to compare your email service provider to others. Now's the time to decide what you want to do. To help, review the notes you've made and answer these questions. Add your responses to the right column.

Are you missing the tools necessary to take your emails to the next level?	
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Are you ready to switch to a more advanced email platform?	
Which platform resonates with your brand and needs?	
If you're switching, what steps are necessary to make a switch?	

Congratulations!

You're now equipped with all you need to improve your email marketing strategy. Keep this worksheet accessible so you can reference it throughout the year. When it's time to do another audit, you can compare your progress from year to year.