

EMAIL AUDIT

How To Perform & Questions to Ask

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PLATFORM/SERVICE PROVIDER

- **Ultimate Question: Is there a better alternative for sending emails than what is used presently?**
- **Objective Appropriate**
 - Are email program objectives aligned with functionality?
 - Based on your existing business goals, is the current email service provider (e.g. ConstantContact, Lyris, Campaigner, etc.) a feasible match?
 - What important tasks cannot be accomplished with the chosen service provider today?
- **Right-Sized**
 - Is the existing platform big enough or too small?
 - Do business requirements call for more sophistication (automation, CRM integration, lead scoring capabilities) from the service provider? Or is the current email tool-to-task match the equivalent of killing a bumblebee with a bazooka?

PLATFORM/SERVICE PROVIDER

- **Ultimate Question: Is there a better alternative for sending emails than what is used presently?**
- **Future Focused**
 - At what point will there be a need to upgrade to a more advanced email service provider?
 - What specific functions and operations will be necessary in the near future as the program evolves?
- **Sender Reputation**
 - What is the current SenderScore for the program?
 - Based on this score, should the platform in use today be abandoned, and should the program be migrated to a different email service provider?

AUDIENCE

- **Ultimate Question: Are there opportunities for improvement with customer records management?**
- **Acquisition**
 - How are new customer records acquired?
 - Is the practice of list rental or purchase avoided? Just say “hell no” to buying or renting lists.
 - Are contacts informed properly about how their information will be used?
- **On-Boarding**
 - What messages are delivered to new contacts upon sign-up? Are expectations for message delivery and frequency set properly?
 - Are there opportunities to improve the content that is delivered to new contacts?
 - Are other content assets and methods to connect with the brand (e.g. customer service, social media, mobile applications, etc.) introduced?

AUDIENCE

- **Segmentation**

- Are customer records segmented in a meaningful way?
- What methods can be used to divide customer records to improve message efficacy and avoid irrelevant email delivery?
- How can the segmentation process be improved by relying upon self-selected parameters (via survey) or behavior monitoring (based on previous activity/engagement)?

- **Unsubscribe/Preference Process**

- Is the unsubscribe option clear and easy to identify within each message?
- Are requests to unsubscribe handled responsibly?
- Does the program offer a way for email recipients to choose their preferences?

DESIGN

- **Ultimate Question: how should design be modified to represent the brand and appeal to all audiences?**
- **Channel Appropriate**
 - Is the current email design right for the email channel?
 - Is the design comprised of of one single image? Does it strongly resemble a direct mail piece, a flyer, or an outdoor board?
 - Does every email message include a physical mailing address and a subject line that does not deceive (re: CAN SPAM compliance)?
- **On Brand**
 - Is the email design consistent with other brand assets?
 - Does the email design conform to existing brand standards and guidelines?

DESIGN

- **Optimized for Mobile**

- Does the email render well on smaller mobile device screens?
- Does the email utilize the @media query for responsive design?
- How should the mobile version of the email design be modified to appeal to recipients on the go?

- **Client Compatible**

- How does the email render in all email clients? (Hint: use Litmus or Email on Acid)
- Are there email clients that are more important than others based on their popularity among recipients?
- How does the email look in clients that are traditionally troublesome like the dreaded Outlook 2010, Outlook 2013, and Yahoo Mail?

PROCESS

- **Ultimate Question: How are various aspects of the email program managed and in what ways can they be improved?**
- **Frequency**
 - How often do contacts receive messages?
 - Based on response rates and engagement levels, how should frequency be modified?
 - Should frequency for certain audience segments be different from others? Read more on finding the optimal email frequency [here](#).

PROCESS

- **Message**

- Does the overall message align with the motivations of the audience to request email communication in the first place?
- How are brand assets (content marketing productions, events, video, graphics, etc.) utilized to encourage a response from the audience?
- How should the message differ based on audience segments? Is there a need to modify the message for certain recipient groups?
- Are there opportunities to develop a nurture program (or drip campaign) for contacts and prospects?

PROCESS

- **List Hygiene**

- What methods are used to maintain list integrity?
- Are some recipients removed or sequestered after long periods of inactivity?
- Does the program include email verification either at sign-up or after extended time frames?

- **Testing**

- What email tests have been run with recent messages? What elements have been tested (e.g. subject line, from name, content, call to action, etc.)?
- Does the program entail an A/B split or multivariate approach to testing? What improvements can be made to the testing process?
- How are results from previous tests interpreted and put into play for subsequent messages and campaigns?

PROCESS

- **Ultimate Question: How is the email program measured today and what methods can be introduced to gauge success more accurately?**
- **High Level Performance**
 - At what rate are email messages successfully delivered to their intended recipients?
 - What are the current open and click rates for the campaign/program?
 - What has the trend for delivery, open and click metrics?
 - What is the monthly/quarterly/annual rate of list growth? List churn?
- **Traffic Generation**
 - What is the click response to key content placed within the email?
 - How does email compare to other channels with regard to website visits? Time on site? Pages per visit?
 - What kind of messages have a high rate of success when it comes to delivering website visits?

PROCESS

- **Ultimate Question: How is the email program measured today and what methods can be introduced to gauge success more accurately?**
- **Sales and Activity**
 - How does email perform with respect to generating sales?
 - Does email have a recognizable impact on the bottom line? Does the email channel make it rain?
 - What other key performance indicators (downloads, event registrations, product demo views, etc.) have been impacted by the email channel?
- **The Correct Gauges**
 - Are the metrics used to evaluate the ongoing performance of the email appropriate?
 - What other performance metrics should be considered given the nature of the program?
 - What goals or benchmarks should be set for the email campaign(s) in the coming year?