

Email Campaign Launch Checklist

By Checklister

- ☐ **Define the campaign and audience**
 - ☐ **Define this campaign and its release owner**

Record campaign/reference and version, goal, audience/segment reference, main recipient action and release owner. Name the approver, authorized sender and post-send monitor. Record planned timing in the scheduling check below.
 - ☐ **Confirm audience eligibility and permission evidence**

Have the responsible owner verify the selected segment against the applicable permission rules and subscription choices. Record where eligibility evidence is held and any restrictions on the audience or message. Hold uncertain records out of the send while the owner resolves them; do not paste subscriber details here.
 - ☐ **Test suppression, exclusions, and duplicate handling**

Use controlled records or safe platform references and the actual campaign recipient-selection rules. A delivered test does not prove suppression. Add notes with the safe case, expected/actual inclusion and evidence. Keep recipient details in the platform.
 - ☐ **Include an eligible test record**

Use an approved controlled record that meets this campaign's segment and permission requirements. Verify it is included in the recipient preview.
 - ☐ **Exclude an unsubscribed or suppressed test record**

Use a controlled test record with the expected exclusion. Verify the actual selection rules exclude it; do not modify a real subscriber to create a test.
 - ☐ **Exclude a duplicate recipient**

Check an approved duplicate test case and verify the expected deduplicated outcome for this platform and campaign.
 - ☐ **Optional example: exclude a campaign-specific segment**

Rename for an actual restriction, such as already-completed recipients or an excluded region, or remove when no additional exclusion applies. Verify it through the platform selection rules.
- ☐ **Check content and delivered test cases**
 - ☐ **Match the email offer to the destination**

Review the subject, preheader, message, call to action, and landing page together. Confirm that the offer, availability, price if shown, deadlines, timezone, and important conditions agree. Check that offer and linked-asset expiry dates remain valid for the scheduled send and advertised redemption period. Remove placeholder content and flag claims or terms that still need owner approval.
 - ☐ **Verify sender identity and reply handling**

Confirm the displayed sender, sending address, and reply-to address are approved and recognizable. Send a controlled reply to confirm the monitored inbox works. Obtain the email administrator's confirmation that the sending domain and platform meet the relevant authentication and provider requirements; route configuration issues to that owner.
 - ☐ **Test personalization and variant fallbacks**

Use supported recipient preview or a separately approved seed-only campaign. Ordinary test sends may not populate real recipient-specific fields. Add the case reference and expected/actual text to each task's notes, without private recipient details.

 - ☐ **Test a complete personalization profile**

Verify the expected name or other approved merge values render correctly for a controlled seed case, with no unresolved tags.
 - ☐ **Test missing-value fallback**

Use a controlled case missing the relevant field. Confirm readable fallback content and that no other recipient's details appear.
 - ☐ **Optional example: test language or audience variant**

Rename or remove. Verify the correct subject, body, offer and destination for each actual content variant. Duplicate this test when variants require separate evidence.
 - ☐ **Follow every destination and verify tracking**

Open every user-facing link, including buttons, text links, images, and the browser-view link where present. Verify tracking through a supported preview or separately approved seed-only campaign if ordinary test sends do not exercise it. Confirm the intended destination, working page, and agreed campaign tracking parameters. Test the conversion path only with authorized test data and approved non-purchasing methods; log broken links or mismatched offers.

- ☐ **Test unsubscribe and required footer content**
Use a controlled subscribed seed account and a provider-supported test path to verify unsubscribe and resulting suppression. If ordinary test messages cannot exercise this, use a separately approved campaign restricted to controlled seed accounts. Confirm the approved sender details, preference links, and other required footer content. Have the owner check any provider-specific unsubscribe requirements; do not test by altering a real subscriber's preferences.
- ☐ **Check delivered messages across the test matrix**
Rename these starter client/device cases for the audience's agreed matrix. Add actual device/client/version, expected result and evidence to each task's notes. Use delivered controlled messages rather than only the editor preview.
- ☐ **Starter example: mobile email client**
Replace with an actual priority mobile client. Check readable text, subject/preheader, usable buttons, spacing and the destination path.
- ☐ **Starter example: desktop or web email client**
Replace with the selected client and duplicate for additional materially different clients. Check layout, text, links and the rendered subject/preheader.
- ☐ **Check the message with images blocked**
Use the supported client mode. Verify meaningful alternative text and that the main information and action are understandable without images.
- ☐ **Resolve release-blocking defects and verify retests**
Keep one issue list with the failed case, fix owner, and next date. After changes, send fresh controlled tests and repeat the affected checks, including links or personalization that may have changed. Save evidence against the revised campaign version and keep separate unresolved corrective actions open.
- ☐ **Approve and release the exact version**
 - ☐ **Coordinate send timing and post-send coverage**
Confirm the send date, timezone, platform scheduling behavior, and any audience frequency limits or overlapping campaigns. Name the post-send monitor, monitoring window, escalation contact, and the issues that require escalation. Confirm someone is available when the campaign goes out.
 - ☐ **Obtain approval for the final campaign version**
Give the reviewer the final delivered proof, segment and exclusion references, planned timing, test results, and any exceptions. Record the decision, reviewer, time, and exact campaign version. Do not treat a draft review, a checked box, or silence as release approval. Recording a decision completes this record; the final release-settings action stays unchecked unless the campaign is approved and all release conditions are met.
 - ☐ **Recheck the final audience and release settings**
Immediately before release, confirm the approved version, recipient count, exclusions, current suppression state, send time and timezone, and any platform warnings. Check for changes since approval. Hold the release for review if the audience, content, or timing differs materially from what was approved. Leave this release gate unchecked while approval is missing, a blocker remains, or the final configuration is uncertain. The recorded QA answers alone do not authorize sending.
 - ☐ **Record the authorized send or scheduled release**
Have the authorized operator send or schedule the approved campaign in the email platform. Record the campaign or job reference, operator, actual or scheduled time, timezone, and platform status. If scheduling fails or the status is unclear, verify it in the platform before retrying so the audience does not receive a duplicate.
- ☐ **Monitor and review**
 - ☐ **Monitor the send and route problems**
During the agreed window, review platform delivery status, failed deliveries, complaint and unsubscribe signals, replies, and the main destination. Record incidents and contact the responsible owner using the agreed escalation route. Do not assume a sent status proves that every recipient received the message or authorize an unreviewed resend.
 - ☐ **Record results and close remaining actions**
At the agreed review time, record the campaign's chosen outcome measures, date range, source, and any measurement limits. Compare results with the goal, summarize defects or useful lessons, and assign unresolved replies or technical issues. Link the final version and evidence so the next campaign can reuse the improved checks.