

The Checklist

Define the who & why

- ☐ Identify who to send to
- ☐ Figure out the why for them
- ☐ Define success
 - ☐ Determine tactical-level metrics
 - ☐ Determine strategic-level metrics
- ☐ Get buy-in from stakeholders
 - ☐ Customer success
 - ☐ Marketing
 - ☐ Design
 - ☐ Revenue/marketing operations
 - ☐ Data analytics

Creating the email content

- ☐ Ideate on best case
- ☐ Align on the real version
- ☐ Implement best practices
 - ☐ For email
 - ☐ For data visualizations
- ☐ Determine A/B tests

Launching the email

- ☐ Determine timing
- ☐ Get data ready
 - ☐ Figure out what data you're getting & from where
 - ☐ Lock in filters for the data
 - ☐ Run spot checks
- ☐ Prep email platform
 - ☐ How are you getting the data in?
 - ☐ How are you delivering the email?
 - ☐ How are you dev'ing up the email in the platform?

- ☐ Track metrics
 - ☐ Email metric tracking
 - ☐ Product usage tracking
 - ☐ Connecting email activity to product usage
 - ☐ Renewal and expansion tracking
- ☐ Test
 - ☐ Make sure email comes through correctly
 - ☐ Get feedback from customer success managers
 - ☐ Get feedback from trusted customers or customer advisory board
- ☐ Enable/train customer success and sales teams
 - ☐ How to speak to metrics
 - ☐ How to respond to customer replies
 - ☐ Coordinate post-send outreach

After the launch

- ☐ Get learnings
 - ☐ How did email perform on a tactical level?
 - ☐ What was the impact of the campaign on a strategic level?
 - ☐ For tactical and strategic metrics that it did well on, why do you think it worked?
 - ☐ For tactical and strategic metrics that it didn't well on, why do you think it didn't work?
 - ☐ How did customers respond to the email?
 - ☐ When you ask select customers in your next meeting what they thought of it, what did they say?
- ☐ Identify which you want to pursue next in crawl / walk / run