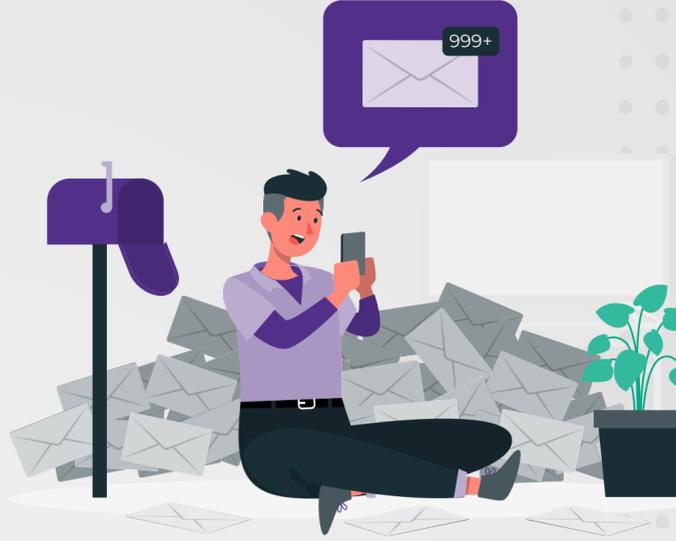


Error Free Email Checklist

How to proof a data driven email campaign



1

READABILITY

The first thing to check when proofing a marketing campaign is the big picture. Now that all the elements are together in their final format, does this campaign look great and make sense? The problem when you dive straight into the detail when reviewing a campaign is that you can sometimes miss those big mistakes. Before you go checking whether links are clicking through or spelling is correct, look at the overall messaging (including the subject lines) and layout to see if anything jumps out.

CALL TO ACTION (CTA)

What are you compelling your customer to do in your campaign? Is it clear, visible and does it function as expected?

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SPELLING & GRAMMAR

This is not an area that everyone is strong in...so, if you're not, then ask for help. Spelling and grammar issues can be embarrassing for the brand and confusing for the customer.

TERMS & CONDITIONS

T&Cs are tiny but powerful elements of a campaign. They can often be forgotten when it comes to final checks. Are they still up to date, recently approved and functioning correctly?

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SALUTATION

Does your campaign greeting format suit the messaging, follow brand rules and line up with the briefing requirements? Is the salutation set up correctly to reference variable and default data?

CREATIVE CHECKS

Along with data driven campaigns usually comes dynamic content, making it especially important to check that data and creative mapping is set up correctly. Produce proofs that represent as many possible scenarios of segment and creative mapping as realistic, to ensure nothing is missed, and all images are rendering correctly, not just the default content. This set of checks should also rely heavily on the brief.

It's also important to review multiple email providers and devices to ensure your email is rendering as expected, especially in those providers and devices your audience tends to use.

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DATE & MONETARY VALUES

This is an area that can cause problems when you're bringing in personalised data. Any ambiguities around how date and monetary values should appear in the final output should be challenged at the brief review stage to ensure proofing can reflect the requirements exactly. Common issues in this category include not allowing appropriate amounts of space in the creative for the variable and readability issues due to formatting.

URLs

There are two categories of URLs to check in every campaign. The first are the key (usually obvious) URLs that make up CTAs or exist in the main copy of the campaign. The second are the standard links that may exist in every campaign, such as social icons, but should also be regularly checked to ensure they are still live and functioning well. Exercise caution when testing URLs with live data to ensure you are not changing customer preferences or affecting campaign metrics.

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PERSONALISATION

As well as looking at different creative mapping, you also need to consider personalisation fields to ensure they populate correctly. The format of personalised data may not be possible to check until the live data is available and again this should be a stage where the brief is heavily relied upon. For example, if your brief doesn't request variable content appear in capital letters but the data appears that way in the live tests, it's likely an exporting format mistake, rather than by design.

TOTALISER

First off you may be wondering what a totaliser is! Essentially it is the output of a calculation specifically created for that campaign. Usually, a couple of values coming together to create a new value; for example, a specified discount per customer based on their recent transactions or a percent-based offer recalculating the current value of their loyalty points. These values need additional care as they are usually created specifically for that campaign rather than being a standard data field. It doesn't hurt to pull out pen and paper and run a couple of random checks before you hit send!

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At Purple Square CX, we support our clients in getting their campaigns out the door on time and error free. We do this via both our Consulting and Managed Services. Talk to us today about our Campaign Delivery service.

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