Email Marketing Content & Copywriting Checklist



A best practices cheat sheet for winning email campaigns



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Welcome to More Motivating Email Marketing Messages

Congratulations! You've just taken the first step to planning and writing purposeful, cohesive email marketing campaigns that motivate customers to BUY and subscribers to RESPOND.

If you've struggled with email marketing campaign content and copywriting, you're far from alone.

Coming up with campaign ideas is the easy part; executing on your concepts is a whole other matter. Translating your ideas into engaging messages that motivate subscribers to action while effectively conveying your content, value and offer in a visually engaging manner is easier said than done!

This **checklist will guide you, step-by-step, through a process for setting campaign objectives, identifying your unique value proposition (UVP), and organizing your proof points**. It's also your go-to index of email copywriting essentials your messages need to suceed.

Here's to better email. Let's get to it!

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Content, Clarity & Organization

Your ideas and campaign concepts may be stellar, but once it comes time to translate them into message briefs for your designer, agency or coder if your content isn't clear and properly organized it can fail to launch or worse yet - crash on arrival! Follow these steps to ensure your campaigns and messages stay on track and on-brand:

1. Message Objective

- ☐ What is the **reason** for the message? In other words - ***why*** are you sending it and to ***whom***?

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- ☐ What do you **hope to accomplish** by sending this email? (List any qualitative or quantitative goals – the more measurable, the better):

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- ☐ What are the KPIs (key performance indicators) and metrics you'll use to measure whether or not you accomplished your objective(s)?

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Content, Clarity & Organization

Your **Unique Value Proposition (UVP) is the beating heart of your message**. If it doesn't pass the litmus test below, it's not ready for prime time - or inboxes. After you've defined the purpose and topic of your message, run it through the following checklist and if you still can't tick every box, it's back to the drawing board.

2. Purpose, Topic and UVP

- ☐ What is the **purpose and topic of the message?**

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- ☐ **Why** should your audience care about the topic? **What's in it for them?** *(this is usually your UVP)*

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- ☐ **UVP checklist.** Is your UVP:
  - ☐ Relevant to your audience's problems or circumstances?
  - ☐ Clear and easy to understand?
  - ☐ Brief enough to be read in five seconds or less?
  - ☐ Demonstrating value and/or portraying transformational outcomes for the recipient?
  - ☐ A statement you can support with specifics?
  - ☐ Differentiating your brand from the competition?
  - ☐ NOT your company slogan or mission statement?

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Once you've crafted and honed your UVP you still need to effectively articulate it, if not also **prove it**. That's where the content you curate and include, plus how you organize it hierarchically, can be critical to campaign success.

Scan the list below and again, if you can't check every box there's still work to be done:

3. Content Hierarchy & Organization

- ☐ UVP expressed in the headline?
- ☐ UVP visible within the first viewable screen/window of message content?
- ☐ Benefits articulated before features?
- ☐ Are benefits supported by features, details, specs or other specific facts?
- ☐ Have you identified which features reduce or eliminate audience pain points? If so, what are they? (list here)

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- ☐ Have you identified the features that address desired audience gains (what audience members want?) What are they? (list here)

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Your final step is to determine your **approach**, meaning **how you'll psychologically resonate with your intended audience**. Will you appeal to the heart (emotions) or head (intellect)? While you might do a little of both, you should decide which will be primary and which secondary.

You can also **leverage motivators** to support and strengthen your primary approach. Identify which you'll employ below.

4. Resonance & Motivators

What is your *primary approach* for psychologically connecting?

- ☐ Emotional : We'll evoke feelings to provoke respone
- ☐ Intellectual : We'll convey facts and information to invoke curiosity and interest

Which of the following motivational tactics will you employ?

- ☐ Time scarcity (deadlines, flash sales, etc.)
- ☐ Price scarcity
- ☐ Quantity scarcity
- ☐ Worry or alarm
- ☐ Anger or disgust
- ☐ Interruption
- ☐ Social Credibility / Testimonials
- ☐ Story (real-life customer successes, wins, etc.)
- ☐ Curiosity or mystery
- ☐ Exclusivity (advance notice, private access, etc.)
- ☐ Surprise and delight

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Email Copywriting

If you've come this far, it's time to start carefully crafting the language of your message beginning with the subject line. Your email's **subject line is calling card, sneak peek, and teaser all in one**. Use this handy checklist to ensure it pulls its weight.

1. Winning Subject Line Checklist

- ☐ Written with the UVP in mind?
- ☐ Relates to purpose and main body of message ? *(a legal requirement of commercial email in the US)*
- ☐ First two words optimized for response?
- ☐ Action oriented - written in active vs. passive voice?
- ☐ Less than 50 characters?
- ☐ Brief yet specific?
- ☐ Unnecessary words (conjunctions, articles, etc.) eliminated?
- ☐ Numbers expressed as numeric values vs. written words?
- ☐ Unnecessary or excessive punctuation removed?
- ☐ Personalized?
  - ☐ Yes
    - ☐ How? _____
  - ☐ No
- ☐ Using emojis?
  - ☐ Yes
    - ☐ Which? _____
  - ☐ No
- ☐ Testing multiple versions?
  - ☐ Yes
  - ☐ No

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Email Copywriting

Subject lines, pre-header text (aka "snippets"), and message headlines should ideally be written together and tell a cohesive story. While subject lines and pre-header text are visible in preview mode, the headline is the first pithy content a subscriber will absorb once a message is fully opened. Don't miss this powerful opportunity to invite deep engagement with your email!

2. Pre-Headers and Headlines

Pre-Header Text

- ▢ Reiterates main idea in subject line or headline
- ▢ Bridges between the subject line and message headline
- ▢ Fewer than 100 characters
- ▢ Could stand alone or even be a subject line
- ▢ Contains link to primary CTA landing page

Headline

- ▢ Expresses or encapsulates the UVP
- ▢ Pays-off the promise of the subject line and/or pre-header text
- ▢ Short (3 to 7 words max!)
- ▢ Clear
- ▢ Focused on the recipient more than sender (it's about them, not you)
- ▢ Benefits-forward

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Email Copywriting

The body of your email message provides the context for your offer and call to action. Yet many non-editorial emails are unnecessarily wordy, so **keep in mind you're writing for the digital vs. printed page**. Readers skim emails and visually focus on graphics vs. text, so trim body copy to the bone. Use digest-form snippets if article/editorial copy begins in your email but continues on a web site or landing page.

3. Body Copy Checklist

- ☐ Illustrates the transformational outcome achieved by responding to the offer or primary call-to-action (CTA)
- ☐ Expresses or teases at least one benefit
- ☐ Written in short sentences and paragraphs
- ☐ Complex ideas or features are broken down into easily-viewed bullets, lists or a series of checkboxes
- ☐ Sections visually separated by graphics or white space into scannable content blocks
- ☐ Subheadlines break up longer copy
- ☐ Key points supported by images
- ☐ Written in active vs, passive voice
- ☐ Written in layman's terms, free of jargon or language the audience would not be familiar with
- ☐ Write directly to the reader as if having a one-on-one conversation, not speaking to a group
- ☐ Written in a style and tone appropriate to the audience
- ☐ Hyperlinked or bolded text makes sense if read alone
- ☐ Denser content moved downstream; saved for landing page

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Email Copywriting

At last it's time for final copy elements - the call-to-action text on buttons or in links, and the ALT-text behind images as well as text overlaid on them. In the event your message is scanned, images are suppressed, or both, these seemingly minute pieces of text can carry a heavy load and make the difference between conversion and abandonment.

A last recommendation is to **always conduct your final proof and copy edit in full graphic layout**. Seeing copy integrated with design is key to visibility and response optimization.

4. CTA and Image Copy Tips

Call-To-Action Text

- ☐ Is clear enough that the reader knows exactly what to do!
- ☐ Is compelling and motivating
- ☐ Is specific but not wordy
- ☐ Isn't boring or cliche - instead of "click here" strive for writing with the transformational outcome in mind, such as "save 25%" or "get free report"
- ☐ Keep button text to 4 words or less

Image Text

- ☐ Make sure each image has an ALT-tag with populated text describing the image
- ☐ ALT-tag text should convey UVP or include active CTA link
- ☐ ALT-tag text should be very short sentences or just a few words
- ☐ If overlaid on images, short caption-style copy only
- ☐ Do not embed all body copy into an image!

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