Email Template Quality Check Guidelines

Before scheduling an email, it's important to complete a quick but thorough quality check to ensure accuracy, consistency, and a smooth recipient experience. This checklist outlines the essential steps to confirm your content, design, links, settings, and sending details are all correct. Use it as a reliable final review to catch errors early and send every message with confidence.

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Email Details

Item	Description
Campaign Name	Is the email using the correct naming convention?
Subject Line	Is the email using the appropriate subject line?
Preview Header	Is the email using the needed preview header?
Contact Source	Have you chosen the correct audience for this email? Are you contacting the correct guests with this audience?
From Name	Is the correct From Name listed?
From Email Address	Is the correct From Email Address listed?
Reply To Email Address	Is the correct Reply To Email Address listed?

Header Icons

Item	Description
Header Icons	Confirm that email is using the correct Header Icons.
URLs	Verify that all Header Icons are using the correct links.
Alternative Text	Make sure that all Header Icons are using appropriate Alternative Text.

Hero Image

Item	Description
Image	Confirm that the email is using the correct Hero Image.
URLs	Verify that the Hero Image has the correct link applied.
Size/Dimensions	Confirm that the Hero Image is using the correct size and fits the email template.
Alternative Text	Verify that the Hero Image is using appropriate Alternative Text.

Body Text

Item	Description
Copy	Is the email using the correct copy?
Merge Tags	Does the Body Text include Merge Tags? Are they displaying correctly?
Formatting	Is the Body Text using the correct formatting indicated by the client? Or is it using the same formatting as previous emails? This includes font-size, font-family, text-decoration, etc.
Hyperlinks	Are hyperlinks using the correct URLs?

CTAs

Item	Description
Copy	Is the CTA using the correct copy?
URLs	Verify that the CTA is using the correct link.
Formatting	Is the CTA using the correct formatting indicated by the client? Or is it using the same formatting as previous emails? This includes font-size, font-family, text-decoration, etc.

Display Conditions

Item	Description
Display Conditions	Are Display Conditions being applied?
Rules	Are the rules set up correctly and identifying the right information?
Images	Confirm that the image(s) you're using are correct. Are they using the right dimensions? Are they using the correct link(s)? Do they have appropriate Alternative Text?
Copy	Confirm that the Display Conditions are utilizing the correct copy.
CTAs	Check that the Display Conditions are using the correct copy and styling.
Final QC	Test the Display Conditions by entering Preview Mode and by sending yourself a Test Send Email.

Hyperlinks

Item	Description
Unsubscribe	Ensure that the email includes an unsubscribe link.
Link Tracking	Link tracking behavior varies by ESP.

Create Fallback Text Version

Item	Description
Convert to Text	After completing the above, convert your email to text if the ESP you're using has the option to do so.

Test Sends

Item	Description
Mobile	View the email in Mobile Preview Mode. Also, send a test version of the email to yourself and verify that it's displaying correctly on Mobile.
Desktop	View the email in Desktop Preview Mode. Also, send a test version of the email to yourself and verify that it's displaying correctly on Desktop.

Download Email Template Checklist

Click on the link below to download this same guide and go down the list to make sure that you've checked off everything before scheduling your email.

Email QC Template.xlsx 📎