

SALESFORCE MARKETING CLOUD (SFMC) Email Checklist.





We know the true test of an email marketer: that heart-stopping moment before hitting send, wondering if you really checked every link, the subject line, every dynamic block permutation, the list, the legal disclaimers—because you know the one thing you missed will be in the first reply.

We've worked with marketers at different stages in their own journey of using Salesforce Marketing Cloud. Some are struggling to get their first email out, while others are trying to use more complicated AMPscript to deliver ultra-personalized campaigns.

No matter where you are in your journey, this checklist is what we run through for every single deployment, because there are so many details, from messaging to data to configuration, that you want to double (maybe even triple!) check before you hit activate.

And if you ever need a hand, we're an email away.

The Sensible Marketer team
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STRATEGY

Measure twice, cut once

- ☐ How does this email fit into your business goals and objectives?
- ☐ How will you determine if this email was successful?
 - ☐ Revenue/purchases/orders
 - ☐ Replies
 - ☐ Clicks, opens
 - ☐ Traffic
 - ☐ Renewals
 - ☐ Other
- ☐ What does the customer journey look like for this campaign?
- ☐ If you need to have a series of emails deploy, based on different actions, have you mapped out the journey?
 - 💡 **Tip:** We love using [Miro](#) to map our outline!
- ☐ What decision splits will you need?
- ☐ Have Sales, Operations, Product, and other SMEs weighed in on your flow?
- ☐ Are these messages transactional or commercial messages
 - ☐ If commercial, ensure CASL/anti-spam requirements are followed
 - ☐ If transactional, ensure you still meet form requirements for CASL/anti-spam
- ☐ Who is your audience, and what data do you have to segment them?

- ☐ Who should be suppressed from this campaign?
- ☐ Will you use varying content blocks to speak to various audience segments (dynamic blocks)?
- ☐ Will you be testing anything in this email?

PRODUCTION

Building your email

Setup

- ☐ Subject Line: key message in first 16 characters, use first name variable to help inbox placement, and max 50 characters.
- ☐ Preheader Text: Complements subject line, under 100 characters.
- ☐ Sender Profile: Ensure the "From Name" and "Reply-To" Address are correct
- ☐ Header/Footer: Includes social links, website address, brand elements, unsubscribe link, CASL/anti-spam requirements and privacy policy.
- ☐ 1-click unsubscribe mechanism included and operable.

Email Content

- ☐ Is the email **clear, concise**, and does it follow your company's written **style guide**?
 - 💡 **Tip:** Ensure at least your key CTA and/or a few links are in HTML and not embedded in images, as they may not be downloaded

- ☐ Does it pass a **spam analysis** (no excessive caps, symbols, or suspicious links)?
- ☐ Is the **image-to-text ratio** optimized?
 - 💡 **Tip:** 40% images, 60% text is recommended
- ☐ Does it include a **"View in Browser"** link for accessibility?
- ☐ Are all links tracked using **UTM parameters**?
 - 💡 **Tip:** set these parameters in your child account so they're automatically applied to reduce manual work
- ☐ Are dynamic content rules set up and tested (if applicable)?
 - 💡 **Tip:** in the content builder, find your email, and preview and test it with data from your data source and ensure you review each dynamic block and variable data live
 - 💡 **Tip:** use a test list to send a test deployment and validate with others what they received, and what data/message showed
- ☐ If you're using **AMPscript or personalization**, has it been tested against your data source?
 - 💡 **Tip:** review permutations in the content preview and test function, using your data extension or list source



PRODUCTION

Building your email *continued*

Design best practices

- ☐ Is your email mobile-friendly and responsive across different email clients? (Gmail, Outlook, Apple Mail)
- ☐ Are your header and full-width images exported at 660px?
- ☐ Are your images optimized for high-retina devices?
 - ☐ **Design Size:** 1320px wide (to account for retina displays)
 - ☐ **Displayed Size:** 660px wide
 - ☐ **Format:** PNG (preferred) or JPG
 - ☐ **Resolution:** 300dpi
- ☐ Are font sizes legible? Do buttons adhere to minimum accessibility standards (contrast & sizing)?
- ☐ Do colours, logos, and styling match brand guidelines?
- ☐ Have you reviewed your email design in dark mode for any issues?
 - ☐ Check out important considerations in [our blog](#) if this is new for you

COMPLIANCE & DELIVERABILITY

Stay onside with privacy & legal to make it in the inbox

- ☐ Is the email using the correct **Send Classification** (commercial vs. transactional)?
- ☐ Does the email include a **1-click unsubscribe** and/or preference center link?

- ☐ Is the **physical business address** included?
- ☐ Have you run a **Spam Check** and renderings in a third-party tool (e.g., Litmus, Email on Acid)?
- ☐ Are you following **IP warming and sending reputation best practices** (if relevant)?
- ☐ Is all of your **legal** properly noted and in a min. 9px font?

JOURNEY BUILDER & AUTOMATION SETUP

Building the journey for your audience

- ☐ Is the **entry criteria** correctly set up (Data Extension, API Trigger, Audience List)?
- ☐ Have you added **filters and exclusions** to prevent incorrect contacts from entering?
- ☐ Are decision splits based on **email engagement, attributes, or custom criteria**?
- ☐ Have you included **exit conditions** to prevent unnecessary sends?
- ☐ Are you using **wait times and frequency capping** to avoid over-sending?
- ☐ If using **Path Optimizer**, are variations set up correctly for testing?
- ☐ Have you tested journey logic using **Test Mode** in Journey Builder?

PRE-SEND TESTING & QA

Make sure your email is delivered correctly

- ☐ Have you sent test emails to yourself and key stakeholders?
- ☐ Have you tested the email in **multiple inboxes and devices** (Gmail, Outlook, iOS, Android, desktop, tablet, mobile, light & dark mode)?

- ☐ Are all **links working** and tracking properly in Google Analytics/SFMC reports?
- ☐ Is the email **assigned to the correct campaign** in SFMC?
- ☐ Have you checked for **typos, broken personalization, and missing content**?
- ☐ Have you validated the **email send time and time zone settings**?
- ☐ After activating, have you checked **individual email tracking** to ensure the emails deployed?

💡 **Tip:** a journey may show clients have moved through, but the email may not fire if there are issues with dynamics and the data available



SALESFORCE EXPERTS

Elevating your email marketing

- ☐ Contact Sensible Marketer for help with getting first campaigns out the door
- ☐ Lean on Sensible Marketer for an audit of your existing campaigns and opportunities to enhance
- ☐ Get in touch with Sensible Marketer for help with email strategy, design, copywriting, configuration, or list management—or all of the above!