The Small Business Email Automation Checklist

Everything a small business needs to set up email automation properly — from domain authentication to the welcome sequence to staying out of spam. Work through it in order; tick each box as you go.

1. Lay the foundation

- [ ] Pick one email tool and commit to it for 90 days (switching tools kills momentum).
- [ ] Send from your own domain (e.g. mail@yourdomain.com), never a free Gmail address.
- [ ] Authenticate your domain: add the SPF, DKIM and DMARC records your tool gives you.
- [ ] Add a real reply-to address you actually monitor.
- [ ] Put your business name and postal address in the account settings (required by law).

2. Build your list the right way

- [ ] Put one opt-in form on every key page: homepage, blog sidebar, checkout, contact page.
- [ ] Offer one clear lead magnet (checklist, template, or short guide) — one promise, one form.
- [ ] Turn ON double opt-in: subscribers confirm by email before they join your list.
- [ ] Store proof of consent (what they signed up for, when, and where).
- [ ] Never buy, rent, or scrape email lists. Ever.

3. Set up your welcome sequence

- [ ] Email 1 (immediately): deliver the lead magnet + say what to expect next.
- [ ] Email 2 (day 2): your story — why you do what you do, in plain language.
- [ ] Email 3 (day 4): your best free help — the one tip that makes readers think.
- [ ] Email 4 (day 7): soft offer — how you can help further, no hard sell.
- [ ] Every email has one job and one call to action.

4. Automate the essentials

- [ ] Abandoned cart / enquiry follow-up (if you sell online): 1h, 24h, 72h reminders.
- [ ] Post-purchase thank-you + how to get the most from what they bought.
- [ ] Review / testimonial request 7–14 days after delivery.

- [ ] Re-engagement: win back subscribers who haven't opened in 90 days — then remove them if they stay silent.
- [ ] Birthday or anniversary note if you collect the date (small touch, big loyalty).

5. Protect your deliverability

- [ ] Clean your list monthly: remove hard bounces immediately, sunset chronic non-openers.
- [ ] Keep complaint rates under 0.1% — one spam complaint per 1,000 emails, max.
- [ ] Make unsubscribing one click and instant. A hard-to-leave list becomes a spam-flagged list.
- [ ] Send on a consistent schedule so inbox providers learn your rhythm.
- [ ] Test every campaign: send to yourself first, check links, images, and mobile layout.

6. Stay compliant

- [ ] Every marketing email has a working unsubscribe link and your postal address.
- [ ] You can prove consent for every subscriber if ever asked.
- [ ] Honor opt-outs within 48 hours (most tools do this automatically — verify yours).
- [ ] If you email EU/UK subscribers, know the GDPR basics: consent, purpose, and the right to be forgotten.

7. Measure and improve

- [ ] Track three numbers weekly: open rate, click rate, and unsubscribes per send.
- [ ] Fix the weakest link first: low opens = subject lines; low clicks = offer/copy; high unsubscribes = wrong audience or too frequent.
- [ ] A/B test one thing at a time (subject line first — it's the highest leverage).
- [ ] Review your automations quarterly: update old offers, broken links, and stale copy.