

Getting Started with Email Marketing Checklist

Lay a solid foundation for email marketing success – one step at a time!

1. Choose the Right Email Marketing Platform

- Research beginner-friendly platforms like MailerLite, ConvertKit, GetResponse, or Mailchimp
 - Compare features, pricing, and ease of use
 - Sign up for a free trial (if available) to test the dashboard
 - Pick a platform that fits your business needs and tech comfort level
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2. Set Up Your Account Properly

- Fill out your profile information (name, business name, website, etc.)
 - Upload your logo and brand colors if the platform allows
 - Add your business mailing address for compliance
 - Verify your email address with the provider
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3. Verify Your Sending Domain

- Purchase a custom domain (if you don't have one already)
 - Follow your platform's instructions to authenticate your domain (usually involves DNS settings like SPF, DKIM, and DMARC)
 - Double-check to ensure verification is successful – this boosts deliverability!
 - Set a custom "from" name and email address (e.g., hello@yourbrand.com)
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4. Understand Basic Legal Compliance (CAN-SPAM/GDPR)

- Add a clear unsubscribe link in all emails
- Include your physical business address in the footer

- Avoid using misleading subject lines or “clickbait”
 - Only email people who have given you permission (no purchased lists!)
 - Familiarize yourself with GDPR rules if you have EU subscribers (like offering a checkbox for consent)
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5. Create a Branded Email Signature

- Add your name, role/title, and company name
 - Include a headshot or logo (optional but personal!)
 - Add contact details (email, website, or social media links)
 - Keep it short, clean, and mobile-friendly
 - Save it inside your email platform so it’s automatically added
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6. Explore the Dashboard and Features

- Get comfortable navigating the dashboard – don’t skip the tour!
 - Find where to create lists, forms, campaigns, and automation
 - Check out the email template library and customization options
 - Look into analytics or reporting sections
 - Bookmark or write down key features you want to try later
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7. Set Up Your First Audience List

- Create a new list or audience segment (you can name it “Main List” or “Newsletter Subscribers”)
 - Add yourself to the list so you can preview how emails look
 - Import any existing subscribers (if you have them)
 - Tag or segment them if possible for easier targeting later
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8. Create a Simple Signup Form

- Use your platform's form builder to create a signup form
- Add fields for first name and email (keep it simple!)
- Customize the design to match your branding

- Set up a thank-you page or confirmation message
 - Embed it on your website or landing page
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9. Send a Test Email to Yourself

- Draft a simple email with a subject line and body content
 - Use personalization (like inserting your name)
 - Add your signature and verify unsubscribe links are working
 - Send a test to yourself – check how it looks on desktop and mobile
 - Make edits if needed and save it as a template
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10. Plan Your Next Steps

- Set a simple goal (e.g., “send my first email next week”)
- Make a content calendar or list of email ideas
- Block time weekly to practice and explore features
- Consider creating a welcome email or simple email series
- Celebrate – you’ve taken the first big step into email marketing!