Evaluate Email Marketing Software

There are a number of email marketing software options. Use this checklist to evaluate which option is right for you. There is no one perfect email marketing software; they each are built for varying levels of use. Decide what is most important, efficient, and cost effective for your business.

Pre-made templates – Does the software provide user-friendly email templates?

Coding required? – Does the software require you to understand HTML code to design the emails?

Integration – What other programs, apps or platforms do you need your email software to integrate with? If you're using Wordpress or Shopify, for example, certain programs integrate more seamlessly than others.

Segmentation and personalization – Will you segment and personalize your emails? If so, does the software provide options that support how you plan to segment and personalize your emails?

A/B testing – How does the software allow you to A/B test? Is it easy to setup and are the options available that you need? Some software programs have really advanced A/B testing options while others are very basic and limited.

Reporting + Analytics – It's critical that you measure your results, so you can make smart marketing decisions. But the level of reporting and analytics that you need might vary depending on what you are measuring and how deep you need to dive into the analytics.

Marketing Automation – Do you plan to automate campaigns? If so, look for a program that makes automation a breeze to setup and execute.

Price / List size – Make sure you understand how each software prices their services. Some are free to a certain list size, some charge per email send, and others charge per list size. Do the math so you know what is best for the size of audience you plan to build.

Scalable – While you may be starting out small, your list will grow. Set realistic expectations for how big your list might grow, and how often you might send emails, as well as features you may want in the future. Choose a program that will scale with you as you grow.

Opt-In Forms Best Practices

Follow these best practices to ensure that your opt-in forms make it easy to join your list.

State a clear benefit to the user for signing up.

Keep it simple. Only ask for the information that you absolutely need. You can always follow up via email/phone to learn more about them if it's a solid lead.

Make the form easy to find on your website.

Building A Great Email

When creating your email content, use this checklist to make sure you include these important elements and best practices in your email.

- From: An actual person
- Clear attention-grabbing subject line
- Personalization when appropriate
- Clear value proposition
- Keep it short
- Clear message without images
- Clear call to action
- Proper grammar and spelling
- Include social links
- Include unsubscribe link