

Mailchimp DIY Account Review Checklist

A simple self-check to make sure your email list is healthy, growing, and actually working for you. Use this checklist once per quarter to spot issues early and keep your email marketing on track.

1. Account & Audience Setup

Goal: Keep things simple and avoid fragmentation.

- You have one main audience (not separate lists for each location)
- You are using tags instead of multiple lists
- Tags include:
 - Location (Location 1, Location 2, Location 3, Location 4)
 - Signup source (website, in-store, event, etc.)
 - Interest type (events, promos, content)
- You are avoiding duplicate contacts across audiences

Note: Multiple audiences for the same brand is one of the most common reasons for growth stalls.

2. List Health & Engagement

Goal: Make sure you're emailing people who actually want to hear from you.

- Open rate is between 30–45%
- Click rate is 2–5% or higher
- You've reviewed contacts who:
 - Haven't opened an email in the last 90–180 days
 - Have never opened any email
- Inactive contacts are archived (not deleted)

Smaller, engaged lists outperform large, inactive ones.

3. Signup Forms & Website Integration

Goal: Make it easy – and worth it – to subscribe.

- Signup form exists on the main website
- Signup form exists in the footer or high-traffic pages
- Satellite or location-specific sites feed into the same audience

- Signup form clearly explains:
 - What emails subscribers will receive
 - How often emails are sent

- Signup experience is:
 - Mobile-friendly
 - Fast to complete
 - Not intrusive

- New subscribers see a confirmation or thank-you message

4. Welcome Experience (Very Important)

Goal: New subscribers shouldn't be ignored.

- New subscribers receive a welcome email automatically

If YES:

- Welcome email explains who you are
- It sets expectations for future emails
- It clearly communicates the value of staying subscribed

If NO:

- At least one automated welcome email is set up

Optional but recommended:

- 2-3 total welcome emails sent over the first week introducing:

- Your best content
- Popular features or resources
- How to stay connected

5. Location-Based Content (For Multi-Location Brands)

Goal: Keep emails relevant to the subscriber.

You can send emails to:

- All subscribers
- A single location
- Multiple selected locations

Local events or announcements are only sent to the relevant audience

Brand-wide updates are sent to everyone

Relevance leads to higher opens and fewer unsubscribes.

6. Campaign Content Check

Goal: Make emails worth opening.

Subject lines are clear and human (not generic or overly salesy)

Each email has one main message

There is one clear call-to-action

Emails are:

- Easy to skim
- Not overloaded with links
- Written in a conversational tone

7. Sending Frequency & Consistency

Goal: Be predictable, not sporadic.

- Emails are sent at least 1–2 times per month
- Emails go out on a consistent schedule
- Subscribers know what to expect

Inconsistent sending is one of the fastest ways to lose momentum.

8. Re-Engagement (Quarterly Check)

Goal: Clean up quietly and protect deliverability.

- You've sent a "Still want these emails?" message in the past
- Subscribers can update preferences if they want
- Inactive contacts are archived periodically

9. Quarterly Snapshot (Make Note)

Record these **once per quarter**:

- Total audience size
- Open rate
- Click rate
- Number of emails sent
- Number of new subscribers

If these numbers are flat for 6+ months, revisit this checklist.

How to Use This Checklist

- Run through it once per quarter
- Fix only what's broken – don't overhaul everything at once
- Small improvements compound quickly

If you don't have time to review this yourself or would like a second set of eyes, you're always welcome to reach out to your friends at [GreenixMedia](#). 😊