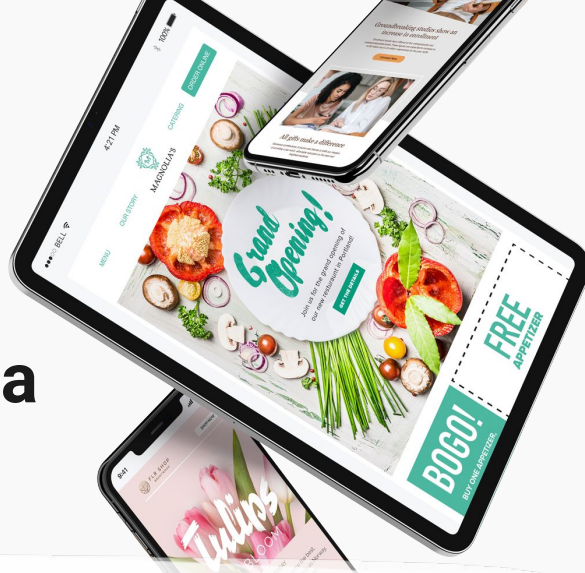




Your Guide to Getting Started With Emma



We know that a new email platform can be a lot to take on. This checklist will guide you through the most important steps and best practices in your first few months with us.

Unfamiliar with the terminology, features, or have a question to ask? [Visit the Support Hub.](#)

Looking for training videos, guides, and marketing resources? [Learn from thousands of articles.](#)

Before your first campaign



Migrate existing email addresses and data.



Add people to your account and set user permissions.

Emma Plus & HQ customers only.



Exclude previous unsubscribes and bounces by importing them to Emma and setting their Status to "Opt-out" or "Error".



Create contact fields to capture contact data.



Understand how to organize and import your contacts.



Update / replace active signup forms, to push new contacts to your contact list.



Understand how the number of contacts in your account impacts your billing plan.



Before your first campaign



Prepare your sending domain.



Review what counts as permission to send.



Setup a custom domain and improve delivery rates by setting up DKIM authentication.

It is not recommended to send from webmail account email addresses (eg. @gmail.com).



Warm up your domain to improve deliverability with small sends to engaged contacts.

Send your first campaigns to people who recently signed up and/or opened and clicked previous emails.



Send your first campaign.



Create an email using the drag and drop email editor, or import your own HTML custom templates.

Custom templates are available for Emma HQ customers, or via Professional Services.



If you're coding your own mailing, use Litmus inbox preview to see how your email displays on popular devices and platforms.

Emma Plus & HQ customers only.



Use integrations to connect and sync your other apps and CRM platform to power segmentation and personalization.

First Month



Grow and engage your contact list.



Grow your contact list using signup forms.



Compare emails to explore email trends and improve your results.

Trends: Emma Plus & HQ customers only.



Set up an email automation workflow (e.g. welcome email series).

Month 3-6



Optimize email engagement.



Personalize your subject lines and email content using contact fields and personalization tags.



Determine the best subject lines and content using A/B testing.



Send targeted campaigns using audience groups and segments.



Improve content relevance using dynamic content.



Update contact information and improve relevance using the Subscriptions Center.

6+ Months



Maintain high open and click rates



Segment inactive contacts and send a re-engagement campaign.



Clean your lists by periodically removing inactive contacts.