

# Engage Email Send Checklist ✓

Easily and efficiently send tracked emails to prospects throughout their journey and gain insight through Pardot engagement.

## Audience

- ☐ Navigate to a lead or contact layout to send 1:1 emails
- ☐ Use Contact Views, List Views, Campaigns, and Accounts to send 1:many emails

## Templates vs Free text

- ☐ Marketing will create and share preapproved templates. Use these templates and edit/personalize as needed.
- ☐ For a plain text email, use the free text option by typing your own message.

## Subject Lines


- ☐ Whether using a template or creating your own email, don't forget to review your subject lines.

## Merge fields

- ☐ Add personalization by dynamically pulling in data specific to the prospect that is viewing your Pardot emails.
- ☐ Double check your fields/data are complete to avoid blank spaces once sent.

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## Attachments

- ☐ Upload and attach files to Engage emails using the Attach Files button, which looks like a paper clip .
- ☐ File sizes should be no larger than 100KB.

## Links

- ☐ Check that links are going to the right destinations when clicked.
- ☐ Don't forget to include the merge field for *Unsubscribe or Email Preferences* in every email.

## Previews

- ☐ Use the preview option to review your email before sending
- ☐ Preview as prospect to ensure Merge fields are pulling through correctly.