

Presend Checklist

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Use this checklist to help your team optimize PoliteMail for delivery. A PDF version of the checklist may be found [here](#).

1. Prepare your message

- ☐ Check your [sender email address](#) and make sure you're sending from the appropriate account for the communication. You may have been granted permission to send from different email addresses. Recipients are more likely to open an email from a recognized sender.
- ☐ Use [Send Options](#) under Send Options to add a line of text that will appear under the subject line for recipients.
- ☐ Use [Subject Line Tester](#) to check your subject line and ensure its optimized for the highest engagement.
- ☐ Use [Send Options](#) under Send Options to send a copy to yourself and any colleagues to preview content, formatting, and links.

2. Verify your audience

- ☐ Confirm your recipient list is correct.
 - Click on the To: field to add your addresses. This will ensure you are accessing your most up to date lists. Do not simply type the name of the list and use the cached version.
 - Under Send Options, use List Expansion options to get your recipient count and verify all list members are included.
 - Every recipient gets their own copy of the email when sending with PoliteMail so you don't need to use the Cc or Bcc fields.

3. Confirm your send settings

- ☐ Use [Send Options](#) under Send Options if you don't want undeliverables (hard bounces, out-of-office notifications, etc.) coming back to your inbox.
- ☐ Check your [GDPR compliance](#). Refer to your organization's policies on sending GDPR-compliant mail.
- ☐ Assign the message to a [campaign](#). If you are using Campaigns, verify your message is being included. If you are not using Campaigns, keep it to the default "Assign to Campaign."
- ☐ [Schedule your message](#). If not sending right away, schedule it under Send Options and set the date and time for delivery