Email Marketing Audit Template

48 checks in six sections. Mark Pass, Warning or Fail and record the observation. Use Section 7 to turn failed checks into a dated plan.

Section 1: List health (10 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
1.1	Dormant share	Share of contacts with no click, reply or purchase in the inactivity window for your cadence (30–60 days daily; 180+ monthly)	below 25%	25–45%	above 45%		
1.2	Never-engaged share	Contacts with zero lifetime clicks or purchases who received 5+ emails	below 10%	10–25%	above 25%		
1.3	Last-mailed age	Oldest segment that has not been mailed in the last 90 days	none	90–365 days	over 365 days (treat as dormant list; see playbook)		
1.4	Hard bounce rate, last 5 sends	ESP reports	below 1%	1–2%	above 2%		
1.5	Invalid and risky addresses	Verification scan of the full list	below 3%	3–10%	above 10%		
1.6	Suppression reconciliation	Unsubscribes, complaints and bounces from every system (current ESP, old ESP, CRM, support tool) merged into one suppression list	yes, documented	partial	no		
1.7	Sunset policy	Written window, flow and disposition (suppress, not delete)	exists and runs	exists, not enforced	none		
1.8	Billing of inactive contacts	Platform rule known and applied (Mailchimp archives unsubscribed; HubSpot non-marketing; Klaviyo suppression; beehiiv inactive)	applied	known, not applied	unknown		
1.9	Duplicate and cross-brand profiles	Same address in multiple audiences or brands with different consent states	none	some, tracked	unknown		
1.10	Role, disposable and typo-domain addresses	Scan results	removed	present, suppressed	present, mailed		

Section 2: Consent and compliance (8 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
2.1	Consent source recorded per contact	Field exists and is populated	over 95%	80–95%	below 80%		
2.2	Consent timestamp recorded	Field exists	over 95%	80–95%	below 80%		
2.3	Purchased, scraped or partner addresses	Source audit	none	identified and held	mailed		
2.4	Opt-out processing time	Test unsubscribe; check time to suppression	within 48 hours (Google and Yahoo expect two days; CAN-SPAM allows 10 business days)	2–10 business days	over 10 business days		
2.5	Physical address and accurate From/Reply-To in every marketing template	Template review	yes	missing on some	missing		
2.6	Preference center works without login	Test	yes	login required	none		
2.7	EU/UK and state-law handling	Consent basis for EU/UK contacts; GPC and opt-out handling for US state residents (20 states with comprehensive laws as of Aug 2026)	documented	partial	none		
2.8	Transactional vs marketing separation	Promotional content never sent on transactional templates without unsubscribe	yes	occasional	mixed		

Section 3: Authentication and sender requirements (9 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
3.1	SPF passes on every sending stream	Gmail "Show original" for a test from each system	all pass	one stream fails	main stream fails		
3.2	DKIM passes on every stream, key ≥1024 bits (2048 recommended)	same	all pass	one stream unsigned	main stream unsigned		
3.3	DMARC record exists, policy at least p=none, rua set	DNS lookup	p=quarantine or reject with rua	p=none with rua	missing or no policy		
3.4	From-domain alignment with SPF or DKIM	headers show dmarc=pass	yes	relaxed only on some streams	no		
3.5	PTR/reverse DNS valid for sending IPs; TLS in use	ESP confirmation or DNS	yes	unknown	no		
3.6	One-click unsubscribe headers on all marketing mail	headers show List-Unsubscribe and List-Unsubscribe-Post	yes	missing on automations	missing		
3.7	Bulk-sender status known	Do you send ~5,000+/day to personal Gmail (subdomains combined)?	known and compliant	unknown	bulk and non-compliant		
3.8	Gmail spam rate, last 30 days (Postmaster)	daily values	all days below 0.10%	any day 0.10–0.29%	any day at or above 0.30%		
3.9	Postmaster v2 Compliance status; SNDS; Yahoo CFL registered	dashboards	all green, all registered	registered, one issue	not registered		

Section 4: Sending practice (7 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
4.1	Volume pattern	Day-to-day variance over 30 days	steady	spikes over 2×	sends after gaps of 60+ days		
4.2	Segmentation by engagement	Regular sends exclude the unengaged tier	yes	partial	full-list sends		
4.3	Reactivation method for dormant segments	Daily cohorts with stop conditions	yes	batches without stop conditions	single sends		
4.4	Stop conditions written and visible	Document exists	yes	informal	none		
4.5	Complaint rate per send (ESP) and per day (Postmaster) reviewed	Routine	weekly, daily during streams	monthly	never		
4.6	Soft-bounce and deferral codes reviewed	Bounce logs	yes	sometimes	never		
4.7	Separate streams (transactional vs marketing) by subdomain or IP where volume justifies	Setup	yes	mixed, low volume	mixed, high volume		

Section 5: Automation and measurement (7 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
5.1	Welcome flow exists and sends within minutes	Test signup	yes	hours	none		
5.2	Sunset flow exists with a disposition	Automation review	yes	exists, no disposition	none		
5.3	Flows exclude suppressed and unengaged where appropriate	Logic review	yes	partial	no		
5.4	Metrics used for decisions	Clicks, CTOR, orders, revenue; opens treated as directional	yes	opens primary	opens only		
5.5	Cohort measurement for any reactivation	Frozen cohort with baseline	yes	ad hoc	none		
5.6	Attribution window and labeling	Attributed vs incremental distinguished	yes	attributed only	none		
5.7	Dormant list value estimated	Calculator or equivalent	yes	rough	never		

Section 6: Content and template hygiene (7 checks)

#	Check	How to test	Pass	Warning	Fail	Result	Note
6.1	Visible unsubscribe link in every marketing email	Template review	yes	small or hidden	missing		
6.2	Subject lines accurate; no "Re:"/"Fwd:" tricks	Review	yes	occasional	routine		
6.3	From name recognizable and consistent	Review	yes	varies	personal-name tricks		
6.4	Link domains aligned or reputable (tracking domain branded)	Headers and links	yes	shared tracking domain	shorteners		
6.5	Image-to-text balance and broken HTML	Render test	fine	heavy	broken		
6.6	Pre-send QA checklist in use (segment, links, preheader, placeholders)	Process	yes	informal	none		
6.7	Promotions-tab annotations for promotional senders	Implementation	yes or n/a	planned	n/a ignored		

Section 7: From fails to a plan

Failed check	First action	Guide
1.1–1.3, 1.5	Scan, tier, and run a reactivation stream before any full send	Dormant list reactivation playbook
1.6–1.8	Reconcile suppressions; write the sunset policy; apply the platform's billing mechanism	Email sunset policy; Klaviyo, beehiiv, Mailchimp, HubSpot guides; Cost of an inactive subscriber
2.x	Hold unconsented segments; fix opt-out processing; separate transactional from marketing	Sender requirements tracker
3.1–3.6	Fix authentication and alignment stream by stream; add one-click headers	Sender requirements tracker; Postmaster Tools v2
3.8–3.9	Register the dashboards; if a day was at or above 0.3%, follow the six-week plan	Recover domain reputation with Gmail
4.x	Exclude the unengaged tier; adopt daily cohorts and written stop conditions	Playbook, Re-engagement sequence
5.x	Build the sunset flow; switch decisions to clicks and revenue; freeze cohorts	Sunset policy; Unsubscribe, complaint and bounce benchmarks
6.x	Template fixes; pre-send checklist; annotations if promotional	Promotions tab guide

Count fails and warnings per section. Interpretation, not a grade:

Any fail in sections 1–3: the program is not ready to increase volume, change ESP, or reactivate a dormant segment. Fix these first; they are the causes behind most "going to spam all of a sudden" incidents.

Fails only in sections 4–6: the foundation is sound; the plan is operational.

Warnings only: schedule a re-audit in 90 days.