STANDARD OPERATING PROCEDURE

Email Marketing Campaign SOP

Document no.	SOP-MKT-003
Revision	1.0
Owner	Marketing Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To send email campaigns that reach the right audience, respect their consent and preferences, and go out error-free after proper review.

2. Scope

Applies to marketing email campaigns sent through the email marketing platform, including newsletters and promotional sends. Transactional emails triggered by product usage are covered by a separate SOP.

Definitions

Segment	A defined subset of the contact list chosen to receive a specific campaign based on shared attributes or behavior.
Suppression list	The list of contacts excluded from a send because they've unsubscribed or should not be contacted.

3. Responsibilities

Email Marketing Specialist	Builds the campaign, sets up segmentation, and monitors performance after sending.
Marketing Manager	Approves the audience, content, and send time before the campaign goes out.
Content Writer	Writes the subject line and email copy for the campaign.

RACI matrix

Activity	Email Marketing Specialist	Marketing Manager	Content Writer
Define the audience segment	R/A	C	-
Write the email copy	I	C	R/A
Check consent and suppression list	R/A	I	-
Approve the campaign to send	C	R/A	C
Review post-send performance	R/A	C	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Email marketing platform
- Contact list with consent and preference data
- Suppression and unsubscribe list
- Brand and style guide
- Campaign brief template

5. Procedure

Step	Task	Owner	Done
5.1	**Define the campaign goal and audience** Define the campaign's goal and the specific segment of contacts it targets, based on attributes like interest, past behavior, or lifecycle stage.	Email Marketing Specialist	☐
5.2	**Confirm consent for the segment** Confirm every contact in the segment has given consent to receive marketing email under applicable law and the platform's own subscription status. **Checkpoint:** The selected segment excludes every contact without valid marketing consent before the list is finalized.	Email Marketing Specialist	☐
5.3	**Apply the suppression list** Apply the current suppression list to exclude unsubscribed or do-not-contact recipients before building the send list. **Warning:** Never send to a contact on the suppression list, even for what seems like an urgent or one-time message.	Email Marketing Specialist	☐
5.4	**Write the subject line and copy** Write the subject line and body copy for the campaign, following the brand voice and keeping the call to action clear and singular.	Content Writer	☐
5.5	**Build the email in the platform** Build the email using an approved template in the email marketing platform, inserting the copy, images, and links.	Email Marketing Specialist	☐
5.6	**Test links and personalization** Test every link and personalization field in the email, and check the rendering on both desktop and mobile preview before requesting approval.	Email Marketing Specialist	☐
5.7	**Send a test email internally** Send a test version of the campaign to the internal review list and confirm it renders correctly and matches the approved copy.	Email Marketing Specialist	☐
5.8	**Get approval to send** Review the final campaign, audience segment, and send time, and approve it to go out or send it back with specific changes needed. **Checkpoint:** Every campaign has a documented approval of the audience, content, and send time before it is scheduled.	Marketing Manager	☐
5.9	**Schedule or send the campaign** Schedule the approved campaign for the planned send time, confirming the correct segment and suppression list are attached to the send.	Email Marketing Specialist	☐
5.10	**Monitor delivery right after sending** Check delivery, bounce, and spam complaint rates shortly after the send completes, and investigate any unusual spike.	Email Marketing Specialist	☐

Step	Task	Owner	Done
5.11	**Review campaign performance** Review open, click, and unsubscribe rates against past campaigns and the campaign's goal, and record findings for future campaign planning.	Email Marketing Specialist	☐
5.12	**Process new unsubscribes promptly** Confirm the platform's unsubscribe processing is applying to future sends immediately, and manually verify the suppression list updates for any manual removal requests received outside the platform.	Email Marketing Specialist	☐

6. Quality checks

- Every send excludes contacts without valid consent or on the suppression list.
- Campaigns have a documented approval before sending.
- Links and personalization fields are tested before every send.
- Post-send delivery and complaint rates are reviewed for anomalies.

7. Records

- Campaign brief and approval history
- Consent and suppression list exports
- Test send confirmations
- Post-send performance reports

8. KPIs

- Delivery rate and bounce rate per campaign
- Unsubscribe rate per campaign
- Open and click-through rate against goal

9. Common mistakes

- Sending to a segment that includes contacts without valid consent.
- Skipping the internal test send and finding a broken link after sending.
- Sending before getting documented approval on content and audience.
- Not checking the suppression list is current before finalizing the send list.
- Ignoring a spike in bounce or complaint rate right after a send.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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