Template: Checklist for Integrating Email Marketing and Social Media

Generated: 12/13/2025

Based on Article: "Integrating Email Marketing and Social Media for a Unified Strategy"
Website: https://scaleblogger.com

A practical checklist to unify your email marketing and social media strategies for improved audience engagement and conversion.

Checklist Items:

☐ **1. Confirm Admin Access for Social Media Accounts**
Ensure that all team members have the required administrative access to social media profiles to facilitate scheduling and analytics integration.
Reference Section: What You'll Need (Prerequisites)

☐ **2. Set Up Email Service Provider (ESP)**
Choose an ESP that supports robust segmentation and automation. Verify functionalities such as APIs and transactional send capabilities.
Reference Section: What You'll Need (Prerequisites)

☐ **3. Create Shared Content Calendar**
Establish a centralized content calendar that integrates with your email and social media platforms for better coordination of content timing.
Reference Section: What You'll Need (Prerequisites)

☐ **4. Define Clear Goals and Metrics**
Identify business-specific goals and choose leading and lagging indicators to measure the effectiveness of your marketing efforts.
Reference Section: Define Goals and Metrics (Time Estimate: 2-4 hours)

☐ **5. Standardize UTM Parameters**
Implement a consistent UTM strategy across all marketing channels to ensure accurate tracking and attribution of traffic sources.
Reference Section: What You'll Need (Prerequisites)

☐ **6. Pull Baseline Measurement Data**
Collect data for the last 90 days from Google Analytics and other platforms to assess current performance levels.
Reference Section: Define Goals and Metrics (Time Estimate: 2-4 hours)

☐ **7. Create Reporting Dashboard**
Design a dashboard that showcases primary KPIs and tracks progress against your set goals on a daily, weekly, and monthly basis.

☐ **8. Establish Testing and QA Procedures**
Set up a checklist for testing email and social content before launch to ensure accuracy, consistency, and compliance.
Reference Section: Testing, QA, and Launch Checklist (Time Estimate: 1-2 days)

☐ **9. Iterate and Scale Based on Results**
Regularly analyze performance metrics, make necessary adjustments to strategies, and scale initiatives that yield successful outcomes.
Reference Section: Measure, Iterate, and Scale

☐ **10. Review and Troubleshoot Regularly**
Establish a routine to review performance data, identify common issues, and apply troubleshooting techniques to enhance strategy effectiveness.
Reference Section: Troubleshooting Common Issues