

The Email Data and List Hygiene Checklist

Use this as a starting point for your own audit. We'd recommend going through it quarterly, or at minimum twice a year.



Prospect Data

- Identify every place prospect data currently lives (CRM, spreadsheets, email platform, individual inboxes)
- Consolidate into one central system
- Enrich missing fields: company, industry, title, location
- Flag contacts with only a name and email as low-confidence records
- Confirm a process exists for logging new prospects within 48 hours of contact
- Review what happens to trade show leads, website form submissions, and referrals today
- Assign ownership: who is responsible for keeping prospect data clean and current?

Data Quality

- Remove all hard bounces from previous campaigns
- Remove or suppress known unsubscribes
- Identify and merge duplicate contacts
- Remove or flag role-based email addresses like info@ and sales@
- Standardize data fields for state, industry, and company name formatting
- Identify contacts with missing critical fields

Engagement

- Pull a report of contacts with zero opens in the last 12 months
- Run a re-engagement campaign before removing cold contacts
- Move non-responders to a suppression list after re-engagement attempt
- Check your bounce rate after each send, aiming for under 2%
- Review unsubscribe rates by segment to identify messaging problems

Segmentation

- Confirm you have a clear customer vs. prospect split
- Review your industry or vertical segments for accuracy
- Add or update lifecycle stage tagging: new lead, nurturing, active, etc.
- Check that your automation triggers point to the right segments
- Review which contacts have no segment assigned and clean them up

Source and Compliance

- Know where every contact on your list came from
- Confirm you have opt-in or a legitimate business relationship for all contacts
- Check that your email footer includes a working unsubscribe link and physical address
- Review your domain authentication setup (SPF, DKIM, DMARC) with your tech

The Bottom Line

Email marketing works best when your data is clean and your audience actually wants to hear from you. A well-organized, segmented list will consistently outperform a large, messy one. When paired with a growing prospect database and consistent outreach, it builds a reliable pipeline.

This doesn't have to happen all at once. **Start simple:** organize your data, build a single clean segment, or set up a basic way to capture new prospects. **Small steps compound quickly.**

And if you're not sure where to begin or want help shaping a smarter prospect strategy, that's exactly where we come in.

Let's talk about your email strategy.

