

Changing Email Service Provider Best Practice Checklist

Ensure you have all of the areas covered when researching and switching to a new Email Service Provider.



Your Requirements

- Volume and Frequency of email sends
- Your preferred pricing model
- Have you set a budget?
- Which types of emails will you be sending?
- Which features do you require?
- Who will be using the new ESP?
- Do you need a dedicated IP or server?
- How many users do you need?
- Do you need multiple sending domains or entities?
- Do you need API access?
- Do you require access to a customer success and/or an account management team to help with your strategy?
- Do you require creative and professional services?

About the Email Service Provider

- Have you checked the ESPs GDPR policy?
- Do they have a Data Protection Officer?
- Does the ESP have a good reputation?
- Have you read the ESPs Reviews and Case Studies?
- Does the ESP have use cases for your industry?
- Do they have good email delivery rates?
- Have you invited your recipients to reply? Avoid using noreply@yourcompanyname.com

Be part of the journey

We are committed to improving our customers' results by taking them on a journey of email maturity. Get in touch to find out how we can grow your marketing sophistication.

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- Have you researched their support services i.e. phone, ticketing system, support site, collateral etc?
- How will you be notified of any down time or maintenance?
- Have you had a demonstration of their solution?
- Have you researched the ESP's brand values and roadmap?
- Have you checked the onboarding process?
- Does the ESP offer an email data health check?
- Have you checked the location of the ESP and their servers?

Things to do when switching to your new Email Service Provider

- Transfer your email unsubscribe list
- Get a list of bounces
- Clean your list
- Use engagement history
- Bring across your sending domain
- IP certification
- Follow their ramp up plan if you have a dedicated IP
- Check bounce and blocked rates after each send
- Update sign-up forms

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