

Email List Migration Cleaning CHECKLIST

For: Marketing Ops · Salesforce Admins · Email Managers
Use before: Any platform migration or major list import

Clean your list before you migrate — so you don't carry bad data into your new platform.

< 2% Hard Bounce Rate	< 0.1% Complaint Rate	< 5% Soft Bounce Rate	> 15% Open Rate	< 0.5% Unsubscribe Rate	12 Months Max Inactivity
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STEP 1 — REMOVE INVALID & HARMFUL ADDRESSES

- Delete all hard bounces from previous campaigns Critical
- Remove role-based addresses — info@, admin@, support@, noreply@ Critical
- Remove addresses with obvious typos — gmail.com, yahoo.com, hotmal.com
- Remove addresses with invalid formats — missing @ or domain Critical
- Remove all known spam traps — addresses flagged by your ESP Critical
- Remove any addresses that have previously complained Critical

STEP 4 — ENGAGEMENT SEGMENTATION

- Tag contacts by last engagement date — opened or clicked Critical
- Segment: Active (0–90 days), Warm (91–180), Cold (181–365), Inactive (365+)
- Flag contacts with no engagement in 12+ months for re-permission Critical
- Do not migrate inactive contacts without a re-permission plan Critical
- Preserve open and click history for segmentation in the new platform
- Document segment sizes before and after cleaning

STEP 2 — SUPPRESSION LIST PREPARATION

- Export the full suppression list from the current platform before migration Critical
- Combine unsubscribes, bounces, and complaints into one master file Critical
- Deduplicate the suppression list — remove duplicate entries
- Import the suppression list to the new platform before any other data Critical
- Verify suppression list is active and applied to all future sends Critical
- Document suppression list size and date for post-migration audit

STEP 5 — CONSENT & COMPLIANCE REVIEW

- Confirm every contact has a documented opt-in source Critical
- Remove any contacts without verifiable consent Critical
- Flag EU/UK contacts for GDPR — verify consent basis is documented Critical
- Flag Canadian contacts for CASL — express or implied consent on file Critical
- Ensure consent timestamps are exported with the contact record
- Remove contacts where implied CASL consent has expired

STEP 3 — DEDUPLICATION & STANDARDISATION

- Deduplicate on email address — one record per unique address Critical
- Standardize email addresses to lowercase
- Remove leading and trailing whitespace from all email fields
- Merge duplicate contact records — preserve most recent engagement data
- Standardize country, state, and phone fields for consistency

STEP 6 — PRE-IMPORT FINAL CHECKS

- Final list size documented — compare before and after cleaning
- Sample of 50 records manually reviewed for data quality
- Suppression list confirmed as imported before contact list Critical
- CSV or import file validated — correct column headers and encoding
- Domain warm-up plan in place if the list exceeds 50,000 contacts Critical
- Stakeholder sign-off received before import begins Critical

RULES OF THUMB

- Expect 10–20% list shrinkage.** A clean list outperforms a large dirty one every time.
- Always clean before you import.** Never let your new platform inherit your old data problems.
- Suppression list before contacts.** Load suppressions first — if you reverse this order, you will send to people who opted out.
- Never skip inactive contacts.** Sending to 12-month inactives will immediately spike complaints and damage your new IP's reputation.

Unchecked Item

Critical Must complete before importing — skipping risks deliverability or compliance

MIGRATING TO SALESFORCE –NATIVE EMAIL? MASSMAILER MAKES IT SIMPLE.

Import your cleaned list, load your suppression file, and send your first campaign — all natively inside Salesforce with no external ESP.

[INSTALL FREE](https://massmailer.io/install) massmailer.io/install

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Arti Devaki
CEO
+1 (408) 480-7334
arti@massmailer.io
linkedin.com/in/artidevaki/



Siva Devaki
Co-CEO
+1 (650) 248-7958
siva.devaki@massmailer.io
linkedin.com/in/sivadevaki



+1 (800) 297-0991
hello@massmailer.io
www.massmailer.io