The Email Experience Maturity Model

BLANK WORKSHEET **Brand:** _____ **Date:** _____ **By:** _____

Find out which of five stages your email marketing system is in, dimension by dimension, and pick the next move for each.

WHAT IT IS
A five-stage self-assessment across eight dimensions. It shows where you are strong, where you are behind and which small move comes next.

HOW TO USE IT
1. Read each row from left to right. 2. Mark the stage that is fully true today. 3. If you are between stages, pick the lower one. 4. Choose the three lowest. 5. Plan one move for each.

BE HONEST
A stage counts only when it is true every month, not when it was true once. Most brands are at stage 2 in several rows. That is normal and fixable.

The five stages

1 AD HOC	2 MANAGED	3 DESIGNED	4 MEASURED	5 LEARNING
Things happen. Nothing is planned.	The basics work. Little is reviewed.	Journeys and messages are planned on purpose.	Results are tracked and fed back.	The system keeps improving from what customers tell you.

Aim to move your lowest dimensions up one stage at a time. Do not try to jump to stage 5.

The maturity grid

Mark the stage that is fully true today for each dimension, and write the number in the last column.

DIMENSION	1 AD HOC	2 MANAGED	3 DESIGNED	4 MEASURED	5 LEARNING	YOUR STAGE
Trust and deliverability	Nobody has checked authentication.	Basics pass. Nobody watches reports.	Rungs 1 and 2 are solid and reviewed.	Reports are watched monthly. Issues are fixed fast.	Reputation is protected as a standing routine.	
Journeys and flows	A few flows from setup.	Core flows live but not reviewed.	Each journey is blueprinted and owned.	Fail points are tracked and fixed.	Journeys change as customers change.	
Segments	One list for everyone.	A few basic segments.	A small set with clear rules.	Segments tied to results.	Segments adapt from replies and data.	
Message quality	Written on the day.	A template and a habit.	A check before every send.	Scores tracked over time.	Quality improves from tests.	
Customer feelings	Never discussed.	Noticed in complaints.	A Mood Line exists.	Feelings are scored with evidence.	Moments are redesigned from findings.	
Replies and feedback	Reply-to is unmonitored.	Someone answers when they see it.	A reply loop with an owner.	Themes counted monthly.	Replies change products and messages.	
Testing	None.	A test now and then.	A backlog and a log.	Tests run on a set rhythm.	Learning shapes the plan.	
Ownership and rhythm	Nobody owns it.	One person, no routine.	Owners and a calendar.	Reviews on a schedule.	The system runs without heroics.	

Your next moves

Pick your three lowest dimensions. For each, name the single move that would take you up one stage.

DIMENSION	STAGE NOW	STAGE NEXT	THE MOVE	OWNER	DATE

Action plan and review rhythm

Turn what you found into a short list. Fix the highest impact items first, and give every item an owner and a date.

#	ACTION	LINKED FINDING	EFFORT	IMPACT	OWNER	DUE
1						
2						
3						
4						
5						

Review rhythm

TWICE A YEAR
Re-run the grid. Compare with last time.

AFTER A BIG CHANGE
Platform, team or strategy change: re-run it.

IN PLANNING
Use the grid to choose the next quarter's priorities.

Next: the EE Index turns your results from all the models into one score.