

A Comprehensive Guide to Email Marketing



Introduction: A Tale of Two Businesses

Two businesses decided to look at their email marketing plans and determine a new approach. Both businesses were similar in size, revenue, and industry. But the marketing leaders of the businesses each had a different view of email marketing.

One business had a very tight budget and took a conservative stance about marketing in general. The decision was made to approach email marketing in a similar conservative way. Most of the work was absorbed internally with minimal tools in place to monitor and manage the campaigns. The results were not too surprising –

- The people assigned to manage the email marketing campaigns were quickly overwhelmed with complaints about “spam” or “irrelevant” emails.
- The tools were limited, so even if an email campaign was successful there was no efficient way to measure success.
- Even with a small budget set, the costs for internal resources exceeded the results.

The other business wanted to be as aggressive as possible and believed that outsourcing all email marketing was the right approach. This business quickly signed an agreement with an email marketing company and expected fast results. Their results were not as hoped, either –

- A substantial amount of money was spent up front.
- Very little information or analysis was provided to the email marketing company, so the company simply blasted massive emails to large prospect databases.
- A lot of emails were sent, but the actual leads generated were minimal.
- Even with a large budget, the return on the investment was insufficient.



Executive Summary

The tale of two businesses above can be echoed across the world. The moral of the story is a business must make the right email marketing decisions for their specific needs, and partner with an email marketing company that will properly target the right prospects to get maximum lead generation that will convert to sales.

This guide will help you develop your email marketing strategy while also making recommendations along the way. This guide will navigate through potential obstacles while also giving you a comprehensive approach to minimize your email marketing costs while maximizing your qualified leads and sales conversions. This guide will cover:

- The purpose behind email marketing
- How to start
- Target audience and personas
- Crafting emails that get attention
- Building a campaign schedule
- Measuring success
- What to do if things go wrong
- Tools and services that help

The Purpose Behind Email Marketing

Email marketing is still one of the most effective tools for any business. From a bakery to an enterprise software company, every type of business can leverage email marketing. Some of the key reasons to use email marketing include –

- **Generating qualified leads** – a good email marketing campaign can give you highly qualified leads for your sales team.
- Increase brand awareness – your business brand along with your products and services can be exposed to new audiences.
- **Foster relationships** – even with existing customers, an effective email campaign can keep them engaged and willing to participate even more in helping your business to grow.
- **Educate and inform** – you can help readers to better understand how your business solves certain problems.
- **Emphasize your differentiation** – you can communicate how your business is different from your competition in a refreshing new light.
- **Works for B2B and B2C** – whether you are marketing directly to the consumer or to other businesses, email marketing campaigns are proven to be effective at gaining interest and building qualified sales leads.

How to start – First steps



As most marketers know, email marketing is just one tool in a business marketing plan. Most business marketing plans include not only email marketing but also website, pay per click (PPC),

search engine optimization (SEO), social media marketing, and traditional marketing such as print, radio or TV advertisements. The amount of marketing budget devoted to email campaigns varies depending on several factors –

- Metrics on existing or previous email marketing efforts such as qualified leads and sales conversions
- Target audience definition
- Campaign frequency and scheduling
- Clearly defined expectations including metrics versus goals
- Regular review of status and willingness to make course corrections

Even if a business has an internal team and software, there should be serious consideration given to using a professional email marketing partner –

- Email marketing is rapidly changing and involves a lot of monitoring of trends and techniques to stay ahead
- Internal marketing teams should have an oversight role, but the day to day efforts can easily consume far too much time for professional marketers
- The costs spent to internally maintain an email marketing effort can be more costly than necessary

Before engaging with any email marketing company, the business team should prepare the following –

- **Who are the key decision makers within the business?** While the marketing department is obvious, there should be engagement with sales and executives to make sure everyone is aligned.
- **What is the overall marketing plan, and how will email fit into the plan?** The marketing plan should make sure all tools used will align with the defined marketing goals.
- **Is the business willing to do the needed prep work alongside the email marketing company?** The prep work can include reviewing target audiences, competitive analysis, sharing SEO and social media information, and more.
- **Is there any existing customer feedback relating to emails or marketing?** By sharing this information, the email marketing team can address before repeating any possible mistakes. There can also be valuable insight on what was effective.
- **Does the business have a clear understanding of the email marketing company's role?** Some companies have a one-time meeting and expect the email campaigns to run flawlessly. Actually, most successful email campaigns are a collaboration where the email marketing company does the “manual labor” while there is guidance and oversight from the business stakeholders.

Once these questions have been addressed by the business team, you can begin your email marketing work!

Knowing Your Target Audience



Who are you selling to? The answer to this question seems obvious on the surface, but there are some solid reasons to clearly define your ideal customer personas. Developing your target audience is an essential first step for any marketing initiative, especially for email marketing.

The benefits of defining your target audience for an email marketing initiative include –

- Refined number of emails to maintain and use for email campaigns
- Clearer messages built for email campaigns
- Higher response rate than just buying an email list
- More personalized – the reader feels that you understand their situation. [A key study from Epsilon](#) shows 80% of consumers respond positively to personalized marketing.
- Better sales conversions
- Overall lower cost to launch and manage

It is possible to have more than one target persona for your email marketing. For example, a bakery operation may have a target persona for retail that is around people looking for birthday cakes. But the same bakery may have a target persona for wedding and event planners for more elaborate wedding or celebration cakes. Having more than one persona is acceptable, but you should not have more than just a few. This helps to keep all marketing initiatives focused.

Steps to develop your target audience profile (marketing persona):

1. **Take a look at your existing customers** – what traits do they have in common? For new businesses, you may only have one or two customers. If that is the case, consider doing

personal interviews with people or businesses you believe would be your target. After about ten or twenty short interviews (ten minutes or less) you should start to see a trend. For more established businesses, list out specific traits of your existing customers to spot common themes.

2. **Pay attention to who is watching you** – from social media to website visitors and more, take a good look at those who are paying attention to your company. There is most likely a common theme. Do you have a larger than expected social media following? If so, which platform? That alone can speak volumes about the demographics and buying behaviors of potential customers.
3. **Examine your competition** – like it or not, every business has competition. Pick three to five of your key competitors and do some investigative work. The customers that buy from your competitors could someday buy from you!
4. **Get insight from reviews** – whether the reviews are on competitors or on your own business, there are some interesting points to use when building your target audience profile. You can quickly understand what products or services work, and which do not. You can also understand important strengths and weaknesses in your business or your competitor businesses.
5. **Optionally, do a survey** – you can send the survey to both existing customers as well as those you are currently prospecting. Keep the survey brief but ask key profile questions that are needed in the profile.
6. **Build your target audience profile from the information you have** – the profile can be a simple spreadsheet, a slide deck, or just a word document. The items to include in your profile should be –
 - a. **Target audience name** – this could be “retail customers” or “small businesses” or something more specific like “young spontaneous buyers” or “adventure seekers”.
 - b. **Geographic area** – try to be as specific as you can. An entire country is OK, but it is often better to try and focus on regions or specific locations.
 - c. **Economic status** – for businesses this could be a revenue range. For individuals it might be income level.
 - d. **Buying style** – this could fall into several categories including
 - i. Pioneer (loves to jump into anything new)
 - ii. Fast adopter (buys soon after introduction)
 - iii. Conservative adopter (does evaluation and research before buying)
 - iv. Slow adopter (waits to see if proven before buying)
 - e. **Platform preference** – this can include the marketing approach that seems to work best with the audience. It could be email, social media, print or other.
 - f. **Email style** – there can be a number of email preferences for your audience but focus on the ones that should get attention. Is video needed? Infographics? Personalization? Contests?

Now that you have your target audience profile(s), it is time to get more detailed around the emails to use in your campaigns.

Crafting Emails that Get Attention



There are several styles of emails that can be sprinkled throughout your campaigns. Some of these styles you may want to use more than others, depending on your business –

1. **Newsletter** – this is a very common email marketing technique. The email newsletter gives important information about new products or services while also presenting the latest news about your business or industry. Readers who subscribe to newsletters tend to be more committed to your particular business or brand, so give them good, useful content in your newsletter
2. **Sales or Deals** – as part of your overall marketing strategy, you should have emails that promote certain sales, specials, or deals that your business may have ready. Watch closely the email open rate for these to see how attractive the deal email is for the readers.
3. **Coupons or Discount Codes** – the discount code has become quite effective for email campaigns recently. Make sure your ecommerce software is able to apply a discount code before using in your email marketing. If a discount code option is not available, try using a coupon code and having the buyer add as a line item in the checkout process.
4. **New Product Releases** – whether you are offering a new product or a new service, an email campaign to introduce is a foundational part of your launch strategy. Include specifications about the product or service along with images. Link to your ecommerce site or product detail page (PDP) of your website if readers wish to know more.
5. **Service Message** – [during COVID-19](#) many of us saw these emails pop into our inboxes. This message explains about any changes in the level of service for your business. A service message might include change in delivery process, packaging changes, updated

policies, certain restrictions and more. Even with a service message you should encourage your readers to continue doing business with you.

6. **Follow up or abandoned cart** – if you track who has visited your site recently, an email that acknowledges the visit and solicits a follow up is always a great reminder for someone who may have neglected to complete the transaction.
7. **Thank you for your business** – while most ecommerce systems will do a default thank you response for any purchase, it could be a good strategy to follow up a few days later with another thank you, especially if the customer has not returned to purchase more. Consider segmenting your target audience email list by frequent customers, potential customers, and customers who have not purchased in some time.
8. **Surveys and polls** – this approach serves two purposes. First this entices more engagement from the reader, so a larger open rate should result. Second, a completed survey or poll can give valuable insight into your readers and what their preferences are for different offerings.
9. **Special Events** – having a special event can get an increase in attention from readers. The events can be tastings, trade shows, appearances, or even online webinars or digital discussions. Events like this can help build loyalty while also providing a forum for you to feature your products and services with a low-pressure approach. Include an add to calendar option in your email to provide a reminder for the event.
10. **Free Downloads** – many readers love the idea of getting something for free. Offering information in the form of white papers, articles, or detailed documents is a great way to entice the reader to click and get more information. As an added bonus, the downloads contribute to your search rankings for relevant data.

Pay attention to what bothers your readers. All of us get annoyed with certain types of emails. Consider what bothers you, and make sure this is NOT repeated for your email campaigns –

- Too many emails
- Irrelevant emails
- Long emails that never get to the point
- Subject lines that do not make sense
- Email and subject are not the same
- Not personalized, not meaningful

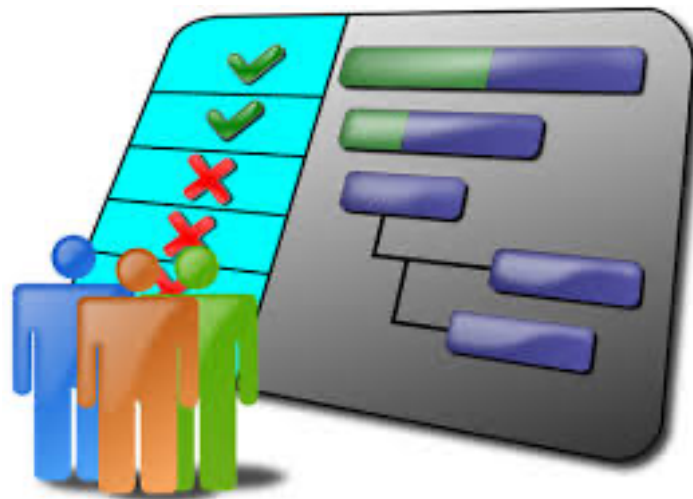
Knowing what you should not do is a large part of the work. To develop effective emails, incorporate these tips –

- **Schedule emails based on your target audience preferences** – what would they prefer? Daily? Weekly? Monthly? Something in between?

- **What time of day and what day of week?** Many people have their inbox inundated on Monday mornings. Choosing a preferable time based around your target audience is ideal. Be ready to adjust and be flexible as reader preferences may evolve.
- **Keep the content short, yet enough to prompt action** – one or two paragraphs should be enough for most emails, but your particular industry may need more or less. Most email readers only spend a few minutes reading emails at most. Generally speaking, emails should be around 200 to 250 words, but this can vary based on the business.
- **The content should be focused and relevant** – be careful not to cram too many items into the email – stay on a specific topic about your product or service and do not deviate.
- **Implement A/B Testing** – sometimes it is hard to gauge how your target audience will respond to different types or styles of emails. Using A/B testing can help you to determine what works best for your business. With A/B testing you can send a couple of types of emails to different groups within your target audience, then measure the effectiveness. Sometimes a more upbeat and light-hearted email will work, while other times a fact-based serious email would be effective.
- **Be Aware of GDPR** – the [General Data Protection Regulation](#) is now valid in most countries including the United States and Europe. It is important to adhere to these regulations and make sure your email marketing process accommodates the requirements.
- **Use Autoresponders** – these pre-built responses to email requests have become a key part of email marketing strategy. If a reader takes the time to respond to an email, they expect some form of acknowledgement. An autoresponder can help you deliver a prompt response that appears personal.
- **Leverage SEO** – emails, like any other digital tool, should leverage your search engine optimization keywords and phrases. This helps to enforce a clean and consistent message in all areas while also contributing to improved search rankings.
- **Incorporate UGC** – user generated content (UGC) is a powerful tool that not only builds loyalty with existing customers but creates interest from new prospects. Consider using quotes from social media, online review, or other areas where users have commented about your business, products, or services.
- **Use imagery wisely** – make sure the digital assets that you use are eye catching while also tying neatly into the subject of the email. Static images are always a good go-to, but you can also incorporate some animated gifs and video links. A good rule of thumb is to have 2 images for every two hundred words of text.
- **Responsive design** – the vast majority of email readers now use their mobile phones instead of desktops or laptops to catch up on emails. Make sure your emails are designed so they are easily read from a mobile phone.
- **Give subscribers power** – offer a way for subscribers to set their preferences on frequency of emails and the types of emails they would prefer to see. Giving this ability helps to build loyalty and reduces the chances of being blocked or unsubscribed.

- **Always have a CTA** – the call to action (CTA) is an essential part of email marketing. Tactfully insert your CTA at the beginning, and then have a clear message on what to do next at the end of the email. Your CTA should have a link to the desired action. For example, if the CTA is “subscribe to this service” then the link to the service subscription should be there.

Building an Email Campaign Schedule



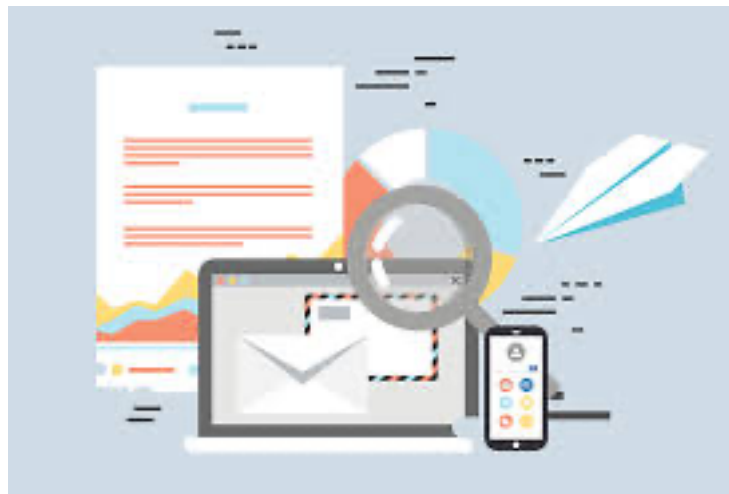
There was a time when a marketing campaign schedule would be planned and fixed for the whole year without any deviation. In today’s ever-changing digital world, a schedule is still needed, but there should be a good deal of flexibility incorporated. This will allow you to adapt your email campaigns to current events or new trends.

1. **Consider major holidays for your email campaigns** – this is a standard that some may consider too routine and cliché. You should not overdo the holiday angle, but leveraging some more unique holidays might be worthwhile, such as –
 - a. Black History Month
 - b. Diwali, India’s Festival of Lights
 - c. Summer solstice
 - d. China’s New Year
 - e. Europe’s D-day
 - f. Earth Day
2. **Evaluate the total number of campaigns for the year** – should you have 2 or more campaigns a month? Or should you have one a month with a series of emails that

support the campaign? Keep in mind to strike a balance between too many and too few, based around your target audience. Be prepared to increase or decrease based on feedback from email recipients.

3. **Be flexible based on current events** – there can be major events that surprise us throughout the year. COVID-19 is one of the more devastating examples of this. While it is good to stick to the themes for campaigns, build in flexibility so you can pivot to address major events if needed. For example, if a celebrity makes a really big announcement, should you do an email to capitalize on the publicity? If a snowstorm hits an area of the country, should you do an email on how your company is responding?
4. **Hold periodic reviews around email cadence** – every 3 to 4 months, take a look at your email frequency and the metrics around it. Should you increase for the remainder of the year? Should you back off? Is it on budget? How are conversions?
5. **Have an annual recap of your email marketing campaigns** – show the trends throughout the year and rank the campaigns based around your success metrics. Look for trends and adapt the next year schedule based around the analysis.

Tracking Success – Is It Working?



Throughout this guide, metrics have been mentioned multiple times. Having a way to quantify the success of your email campaigns is an essential part of any marketing leader's role. The following are some important measurements and how to properly track them –

1. **Sales conversions, the one true measure of success** – every email campaign should have this measurement in place. But determining the best way to get this information can be tricky. If a user clicks from an email into an ecommerce site, the metrics should

be easy enough to achieve once there is an add to cart or live purchase. But if the user walks into a store and buys as a result of the email, how can that be tracked? Using a coupon or QR code in the email to incent the user can be helpful for these situations.

2. **Open rate** – the number of emails that are actually opened can give you real insights into how effective your emails are worded and formatted. The open rate should be as high as possible and should trend upwards when new campaigns are launched. An open rate above 15% is good for most industries.
3. **Delivery failure rate** – this rate should be as low as possible, but rarely are delivery failures at zero. People and businesses change emails often, so a process should be in place to review the failed deliveries and update or remove the emails where applicable.
4. **Replies** – while most email services have a “do not reply”, in some cases you may want to accept replies. This could give you an idea of possible leads that may not know to click the links provided in the emails. While a lot of the replies may simply be “out of office” there could be some legitimate queries that you should not pass by.
5. **Click-Through rate** – how often does the reader click a link in the email? This rate should be as high as possible, so make links easy and obvious. Setting a goal of 5% or greater click-through is a good place to start.
6. **Unsubscribed** – note the number of requests to opt-out of future emails.

When Things Do Not Go As Planned



Like it or not, every marketing campaign will have some lessons to be learned. While it is difficult to account for every scenario, there are some common email marketing mistakes that you can review and take steps to prevent. The following are some of the most notable –

- **The Wrong email was sent** – this can occur when there is a miscommunication on when a campaign is starting, or the sequence of the campaign emails. Do what is possible to ensure clear communication on timing and sequence, but if something still happens, do not hesitate to send an “oops” email with some incentives for readers to still take advantage of the current campaign.
- **Typos in the subject or email body** – in this case, it depends on the severity of the typographical error. If the price on products or services was incorrect, you should quickly send a correction email explaining the error and showing the corrected prices. If there is simply a misspelling of one or two words, it might be best to just move on while improving your editing and spell correction steps.
- **Wrong name matched to email address** – this is an embarrassing mistake, and often the reader will simply ignore the email altogether. Take extra precautions if a wrong name is ever reported and go extra steps to help ensure accurate names are used.
- **Duplicate emails sent** – if the email reconciliation process is ignored, the result can be the same email sent to the same address multiple times. This can be a real problem as readers will turn negative quickly if they are bombarded with the same email. Make sure there is a monthly reconciliation process in place to reduce duplicate email addresses.

Tools and Services That Help

The evolution of email marketing tools moves at an accelerated pace. If the software that you use is more than 2 years old, there is a good chance that there are newer and better tools on the market today that will make your team even more productive and efficient while driving sales conversion rates up.

The right email marketing software can greatly improve your click-through rates as well as your sales conversion rates. With the right software you can react much faster to changes while also efficiently managing your campaign schedules.

Aside from the software itself, having an email marketing firm that understands the ever-changing climate will help tremendously. Your business marketing team can play the role of oversight and business driver, while your email marketing partner can handle the day to day work.

When looking for email marketing firms and tools, consider these key points:

- **Primary focus is your target audience** – if the firm comes prepared with some generic email lists, do not expect adequate results. The firm and tool should first work with you to develop your target audience and build a focused email list from that.
- **Collaboration model** – your email marketing firm should want to partner with your team and meet regularly to stay on track with the initiatives.
- **KPI's** – there should be clearly defined metrics to monitor how all activities are going.
- **Flexibility** – there is no “one size fits all” for email marketing, so the firm and the software used should be ready and willing to adapt quickly when your business needs to adjust.
- **Value-add** – your business should be open to suggestions and inputs on ways to improve your email marketing strategy based on the experience of the firm or software that you choose.
- **Multi-Channel** – the firm or software you choose should have the ability to help across a variety of channels including email, social media, and more.
- **Manage email subscriptions** – your firm or software must have the ability to process unsubscribe requests as noted in the [CAN-SPAM act of 2003](#).

There are many different email marketing firms and software tools available today. Choose wisely so that your business can realize benefits quickly.

