act-on

Intro to
Email Marketing

The Act-On Center of Excellence

Helping you be a better marketer

Course Syllabus

Course Introduction

Email is one of the most powerful and effective tools in marketing. That's because email is the preferred mode of communication for today's buyer. According to Waldow Social, 77% of buyers prefer to receive marketing communications via email.

But many marketers find email marketing to be challenging. Buyers are inundated with emails, so emails need to be truly engaging. Deliverability issues associated with ever-changing spam filters and inbox restrictions require vigilence. Furthermore, making the most of email marketing also requires knowledge of metrics and technology.

When marketers are able to manage these issues, email becomes a tool that's capable of generating a lot of leads at a low cost, and managing buyer relationships to maximize lifetime customer value. That's why we create this course – so you can learn everything you need to know to start using email as one of your "go-to" marketing tools.

What's inside the course

This course is designed to help marketers create great email marketing campaigns to support their lead generation efforts; note that the basic principles also apply to reselling and upselling. It consists of ten sections. If you are interested in a specific topic, you can focus on each section on a standalone basis. Each section contains: essential best practices; an illustration of those best practices; and a step-by-step how-to.

Who should take this course

Marketers who are responsible for creating and managing email marketing campaigns should take this course. It's particularly useful to marketers who use email to support their business' lead generation efforts.

How to use the course

Introduction to Email Marketing focuses on how to create and manage email marketing campaigns. The course serves as a blueprint for marketers who want to know the specific steps required to do this. As such, you should take the course once and then refer back to it when creating your email campaigns.

This course was jointly created by Act-On and TOPO. Learn more at www.topohq.com

Part 2
Email Marketing Fundamentals

Part 2 Email Marketing Fundamentals

The Essentials

Email is a powerful way to get prospects to take actions that move them closer to a purchase. Most marketers regard email as an essential tool for getting buyers to do things such as download white papers or sign up for events. It's these sign-ups that power most companies' lead generation efforts.

Email marketing elements

Marketing emails consist of some fairly common elements, including: the target recipient list, the email offer, copy and design, and the calendar that governs when you'll send the email. Think of these elements as your building blocks when creating and managing your email campaigns.

Email and the lead generation process

The emails you send must fit into an overall lead generation process. This process starts with acquiring a prospect's email address. With an email address in hand, you can now send emails that promote various offers to the prospect. The objective of email marketing is to get prospects to open your email, click through to your landing page, and fill out the form on that page. When this happens marketing can continue to engage the lead, or sales can follow up.

How to run a great marketing email campaign

There are a number of best practices to keep in mind when running an email marketing campaign. First, make sure that you target a specific type of buyer with the email. Ideally, your buyers will be segmented by some factor you can appeal to directly. Second, offer them something compelling so that they want to take the action you offer. Third, send the email at a time when prospects are more likely to respond. Best practices like these will improve the performance of your email marketing efforts.

The Big Picture

Throughout the Introduction to Email Marketing course, we'll use a sample Act-On email to highlight key best practices associated with effective email marketing.
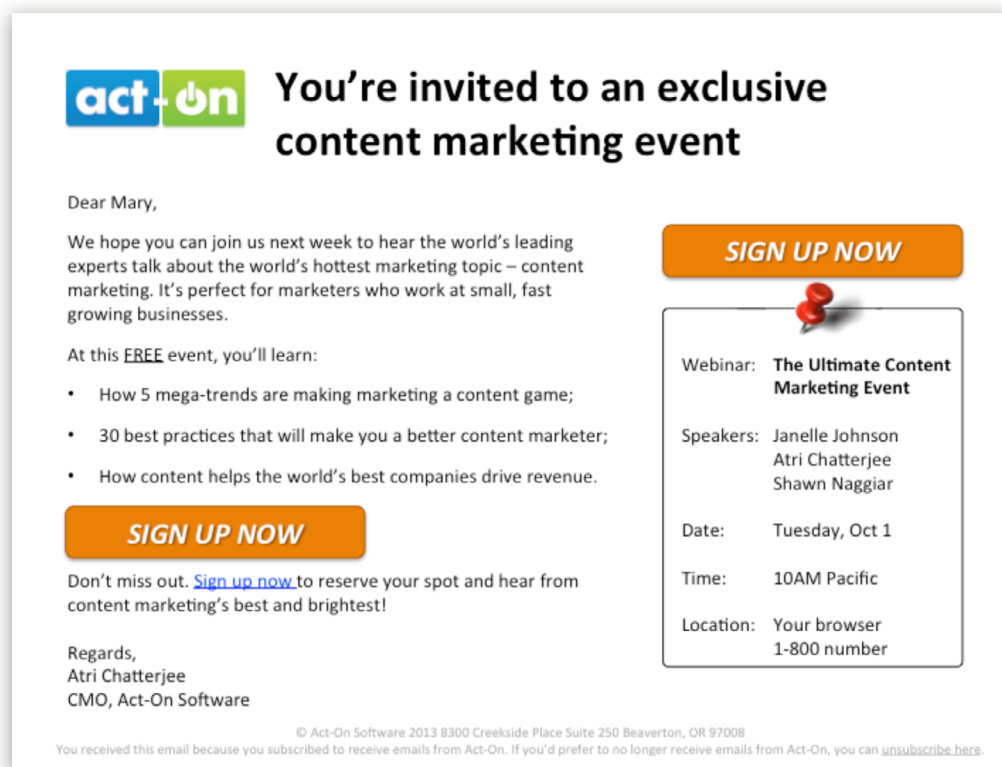
This landing page highlights a handful of best practices worth noting:

1. It targets a specific type of prospect or buyer. In this case, the email targets marketers at small businesses with something that is relevant and valuable to them.

2. The email offers these small business marketers something that they want – free access to an upcoming event on content marketing. This offer is the foundation of the page, and is sufficiently valuable to get visitors to click through to the landing page to register for the event.

3. The email uses copywriting best practices to describe the offer and its associated benefits. Particular attention is paid to the email subject line. The copy is simple and easy to understand thanks to the use of whitespace and bullet points.

4. It highlights the call-to-action buttons above all else. The call-to-action asks recipients of the email to click through to the landing page where they can download the offer by filling out a form.

The Big Picture–Continued

5. The email is well-designed. Ilt's easy to consume and understand.

6. Although you can't see it in the above example, the email was sent at a particular date and time designed to increase open rates. For example, many marketers believe that sending emails first thing in the morning increases email marketing conversion rates.

Part 2 Email Marketing Fundamentals

How to:
9 Steps to Great Email Marketing

1. **Plan your email marketing campaigns**

   For each email campaign that you create, you should create a simple plan that specifies: the target buyer, what your email will offer recipients, the delivery date(s), and key objectives.

2. **Develop your email list**

   Before you can create and send a marketing email, you need to have a list of people who have signed up to receive email from you. There are a number of list-building techniques you can use such as asking people to subscribe to your newsletter, or offering content they want enough to fill out a form to get it. Be wary of buying lists; if they're not scrupulously maintained, they may contain spam traps or other types of bad addresses that can jeopardize your email sending reputation. '

3. **Identify a target buyer and segment your database**

   The most successful marketing emails target a specific type of buyer with a specific offer that is highly relevant. Identify the target buyer, then segment your database accordingly. This will allow you to develop an appropriate recipient list for the email.

4. **Create a compelling offer for the email**

   The offer is the most important part of your email. It's what you offer your prospects so that they'll open your email and visit your landing page. Offers that are really valuable to prospects convert at a high rate. Offers that are not valuable waste the recipient's time and could cause them to unsubscribe.

5. **Write your copy and design your email**

   Email copy should describe your offer and its benefits. Keep your copy simple and specific. Your subject line should create an expectation that your copy and call-to-action fulfill. The design of your email should make it easy for recipients to digest its contents and should highlight the call-to-action to click through to your landing page. Make sure someone with fresh eyes reviews your copy so typos don't slip through.

6. **Send your email**

   After you've created your email, you can send it to the target list. There are a number of best practices on the best times to send emails detailed later in the course. It's also important to adhere to deliverability best practices so that your email is delivered to people's inboxes and not relegated to the spam folder.

How to:
9 Steps to Great Email Marketing–Continued

7. Manage your subscribers

While the goal of your email is to get recipients to take an action that moves them closer to a purchase, some subscribers will want to unsubscribe completely, or control how much email they receive from you. Make sure you provide subscribers with an opportunity to do this.

8. Measure and optimize your email's performance

You can measure your campaign's performance by tracking four primary metrics. You should track the number of people who receive your email, open your email, click through to your landing page, and complete the form on that landing page.

9. Understand the technology that will support your email campaign

If you're acquiring a system, detail your email marketing requirements and then identify the technology you'll need to meet those requirements. If you're using a technology already in place, make sure to familiarize yourself with it thoroughly.

Part 3
Building Your Email List

The Essentials

You can't begin email marketing unless you have a list of people to send emails to. Fortunately, there are a number of proven techniques for collecting emails from your target prospects. Most of these techniques involve presenting visitors to your website with an offer, such as a free newsletter, that persuades them to share their email address with you.

Plan your list-building efforts

Set monthly targets for the number of email addresses you'd like to add to your database. Focus on adding addresses for prospects in your target market. Before beginning your list-building efforts, develop a plan that specifies the types of people you want in your database and monthly targets.

Driving lots of sign ups

There are three primary factors that determine how fast your list will grow. First, make sure that a sufficient number of people visit your website. Second, the offer that you present to these visitors needs to be valuable enough so that they share their email address in order to get it. Third, the form that asks people to sign up needs to be designed to convert at a high rate.

How to build your list

First, determine the data that you'll need to collect for your email marketing efforts. Some marketers start with a name and email address, but others capture additional information that allows them to segment their database and target specific types of prospects. Keep in mind that the fewer the fields in your form, the higher your completion rates will be. Make sure that what you offer prospects is compelling enough for them to choose to share their email information with you.

The Big Picture
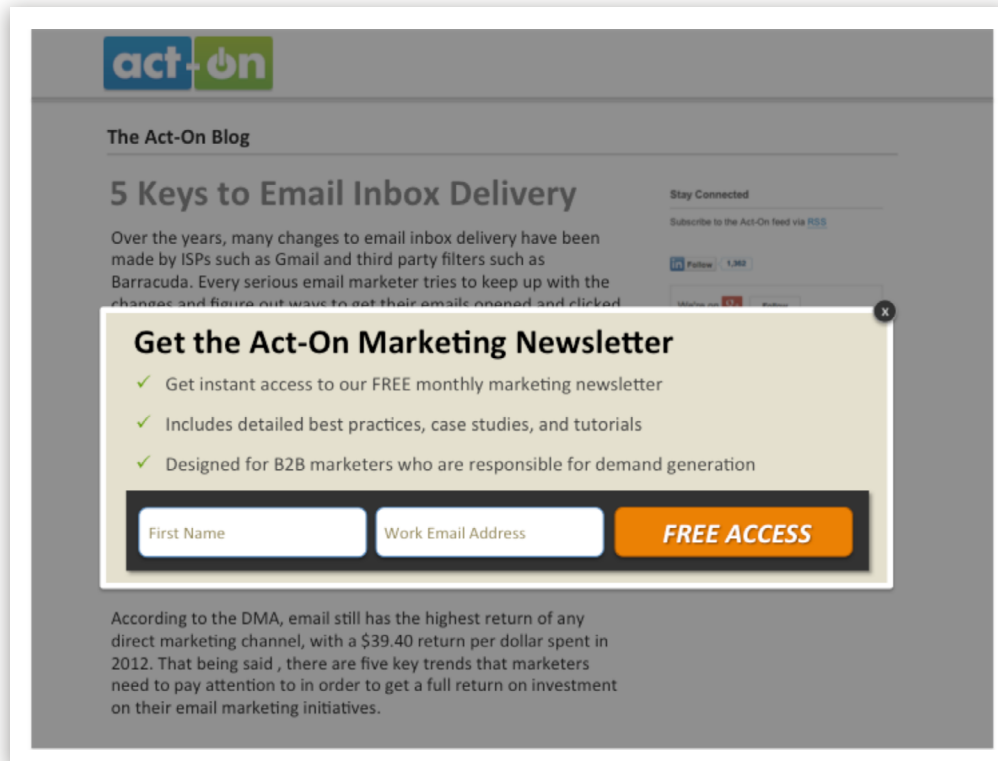
1. This marketer is focused on capturing prospects' names and email addresses, so there are just those two fields.

2. The best place to capture email addresses to add to your list is on your company website.

3. The offer consists of a free subscription to the company's newsletter. This is a common offer used to gather email addresses.

4. The offer is presented to prospects using a pop-up form that runs on the company's blog.

5. When someone subscribes to the newsletter, they are added to the database. They will now receive marketing emails from the company.

Part 3 Building Your Email List

How to:
10 Steps to Building Your Email List

1. **Establish a list-building target**

   Building an email list is a numbers game. Establish a monthly target for the number of emails you'd like to collect each month, and increase this number each month.

2. **Identify your target prospect**

   As a marketer, you have a target buyer in mind. It's important to focus your list-building efforts on this target so that when you run email marketing campaigns, you see conversion rates that allow you to hit your lead generation and revenue targets.

3. **Specify the data you need to collect**

   When building your email list, one of the most important things you can do is specify the data that you need to collect. The data you collect depends on your business and target market. Some marketers collect only a small amount of information like the person's name and email address. Others collect additional information such as company name and title. Whatever data you choose to collect, remember that the email address is most important and that any additional information you collect will likely reduce the sign-up conversion rate.

4. **Decide where you'll store your data**

   You'll need to determine where to store your data. There are many good options; you don't need to be a database expert to manage your email list. Just make sure that the technology you use is capable of storing the data you collect and will allow you to view the data by different factors, and segment it into smaller lists according to some factor, without changing the master list.

5. **Leverage existing email addresses**

   If you're an established business, you likely already have some prospect and customer email addresses. These may exist in your email account, a CRM system, or a CSV file somewhere. In many cases, you can use these email addresses to seed your email database.

6. **Create offers that will incent people to give you their email**

   Most people won't just give you their email address without a reason. You'll need to offer them something in return. The most commonly used offer when building a list is to give people access to your newsletter. Other common offer types include white papers and online events. If you're selling a product, you can offer follow-up support or warranty information.

How to:
10 Steps to Building Your Email List—Continued

7. Establish your opt-in policy

The opt-in is a critical part of email marketing. While it's important to get prospects to opt-in to receive emails to avoid running afoul of spam laws, the opt-in is also an essential part of making prospects feel like you are creating a relationship with them. You'll need to decide whether you'll use a single or double opt-in. A single opt-in simply requires a prospect to provide their email address. The prospect will then start receiving email from you. A double opt-in requires the prospect to enter their email address, causing a confirmation email to be sent. The prospect must then click on a link in the confirmation email to confirm that they signed up.

8. Create and publish your sign-up forms

There are a variety of different forms you can use to gather email addresses. One common type is a sign-up form that runs in the right rail of your website asking people to sign up for something, such as your newsletter. Another common type is a lightbox form that pops up when someone is visiting a page on your website.

9. Thank and welcome your new subscribers

A simple best practice when building your list is to send a thank you or welcome email to prospects after they sign up. Create a trigger email so this happens quickly and automatically. This allows you to start building a relationship with the prospect right away and sets the tone for future emails that they will receive from you.

10. Measure and optimize the sign-up process

Building an email list is a never-ending process that can always be improved. Make sure you track conversion rates for the sign-up forms you use. Test different offers, copy, and form designs to see if you can improve the number of email addresses you're able to collect in a given week or month.

Part 4
Targeting and Segmenting the Database

The Essentials

The first step to successful email marketing campaigns is to target specific types of prospects. If you're like most marketers, your email database likely contains various types of prospects that vary according to factors like size, industry, geography, and interests. While you can sometimes send the same email to all of the prospects in your database, it's usually more effective to create specific email campaigns for a list of recipients who fit a certain profile.

The power of targeting

Targeting specific recipients with contextually relevant emails offers a lot of benefits. For example, a prospect in the retail industry would much rather receive an email with retail-specific messaging than generic messaging. This email will have higher open rates, recipients will find it more relevant, more prospects will click through to the landing page and complete the form, and the email will see lower unsubscribe rates.

Different types of prospects

The first step to targeting and segmenting your database is to understand the types of customers you do business with. While you may believe that you have dozens of different types of customers, try to start with three to four key types or segments (some marketers call these personas). Once you have a handle on these core segments or personas, you can create additional segments from there.

How to segment your database

It's important to walk before you run when segmenting your database. To start, try segmenting using some simple criteria like geography or industry. Later on, you can tackle more advanced techniques, like behavioral segmentation that will allow you to send emails to specific types of prospects based on their previous behavior.

Part 4 Targeting and Segmenting the Database

The Big Picture
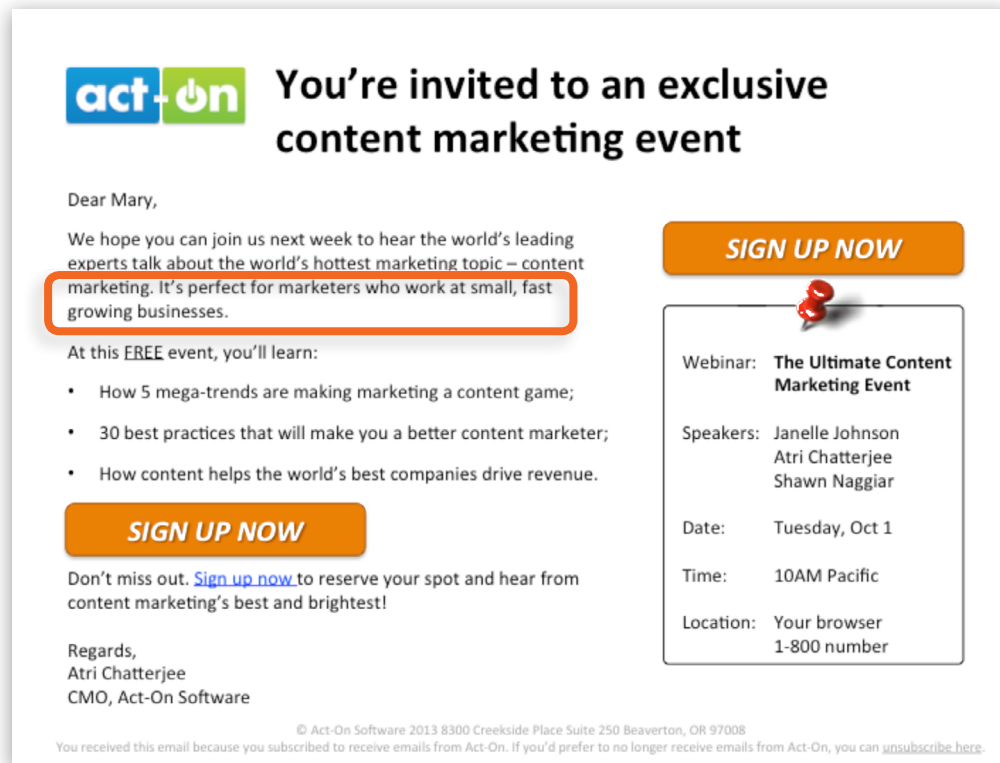
1. The email clearly targets a specific type of prospect – marketers who work for small businesses.

2. Before creating and sending the email, segment your database to create a targeted recipient list.

3. The email highlights an offer that is valuable to this particular prospect type – in this case an event on content marketing.

4. The copy is written in a way that's attractive to marketers. It speaks the target buyer's language.

How to:
8 Steps to Target and Segment the Database

1. **Review the key targets in your email marketing plan**

   To target and segment your database, you'll need to review the target prospect for your campaign. Remember that email marketing campaigns almost always perform better when they target a specific type of prospect or buyer.

2. **Access your database**

   You'll need access to the database that contains information about your prospects. In some cases, this is simply a spreadsheet or CSV file. In other cases, this data may reside in your CRM system. Some companies have standalone databases that contain prospect data. Whatever the case, make sure you get access to this data.

3. **Understand what's in your database**

   Before you being your segmentation efforts, determine what fields are in the database. Examples of common fields include: first name, last name, company name, email address, phone number, role, and number of employees.

4. **Map your data to your buyer personas**

   You should also determine whether you have the data you need to segment the database around the personas that you think are important to the business. Most marketers have enough data to get started with some simple segmentation or can start with no segmentation at all. But in some cases, you will want to add some additional data to your prospect database.

5. **Choose how you will segment your database**

   With an understanding of the data that's available to you, there are a number of different segmentation techniques you can use. Some are demographic in nature and involve segmenting around attributes lsuch as industry, role, or geography. Others are behavioral and segment around past behavior such as whether the prospect filled out a particular form, visited a specific web page, or attended a webinar.

6. **Start with simple segmentation**

   Start with a single target that's based on one simple piece of data. For example, you might choose to only send this email to prospects in a certain geographical area. You might also send the email to prospects in a certain industry. You can move on to more advanced segmentation techniques later, but for now, stick to one target based on one piece of data.

How to:
8 Steps to Target and Segment the Database

7. Move on to more advanced segmentation

Once you have the hang of some of the simple techniques available, you can move on to more advanced forms. You can segment based on a prospect's previous behavior. For example, if the person hasn't opened an email in more than 12 months, you might send them an email that contains a valuable offer. You can also combine variables such as demographic and behavioral characteristics. For example, you might send a welcome email to prospects from the retail industry that have recently signed up on your site. The email would include retail-specific messaging and reference existing customers of yours from the retail industry.

8. Start thinking about an offer related to the target segment

Now that you have a target segment created, it's time to start thinking about what you can offer them to drive the highest conversion rates possible. Remember that you want the recipients of your email to open the message, read it, click through to your landing page, and fill out the form on that page. Having an offer that's relevant to the target segment is critical to achieving high conversion rates across all these areas..

Part 5
The Email Offer

The Essentials

The offer is critically important to your email marketing efforts. It's what you offer recipients of your marketing emails in hopes they will take the action you want them to. Examples of offers include signing up for an upcoming event or downloading a white paper. As such, the offer must be sufficiently valuable to the prospect to open the email, click through to your landing page, and complete the form on that page.

Different types of offers

There are many types of offers that you can create for your email marketing campaigns. These days, newsletters and other content-related offers such as white papers, and online events are quite prevalent. Pricing-related offers that provide prospects with things like discounts are also common. Free consultations by subject matter experts are another commonly used offer. Finally, free trial versions of products have become a proven offer for email campaigns.

Creating email offers that convert

Email offers that convert recipients into leads share some common characteristics. First, a good offer is something that the prospect wants. Second, offers need to be easy to understand – given that prospects usually only spend a few seconds reading the subject line to determine whether they should open the email. Third, the offer needs to be sufficiently valuable to get the prospect to click through to your landing page and share information about themselves.

Integrating emails with landing pages

Recipients of your email will click through the email to a landing page where they'll respond to the offer. You should make sure that your email and landing page are tightly integrated as a result. For example, your email offer and copy should match your landing page offer and copy. For more information on landing pages see our course Introduction to Landing Pages.

The Big Picture
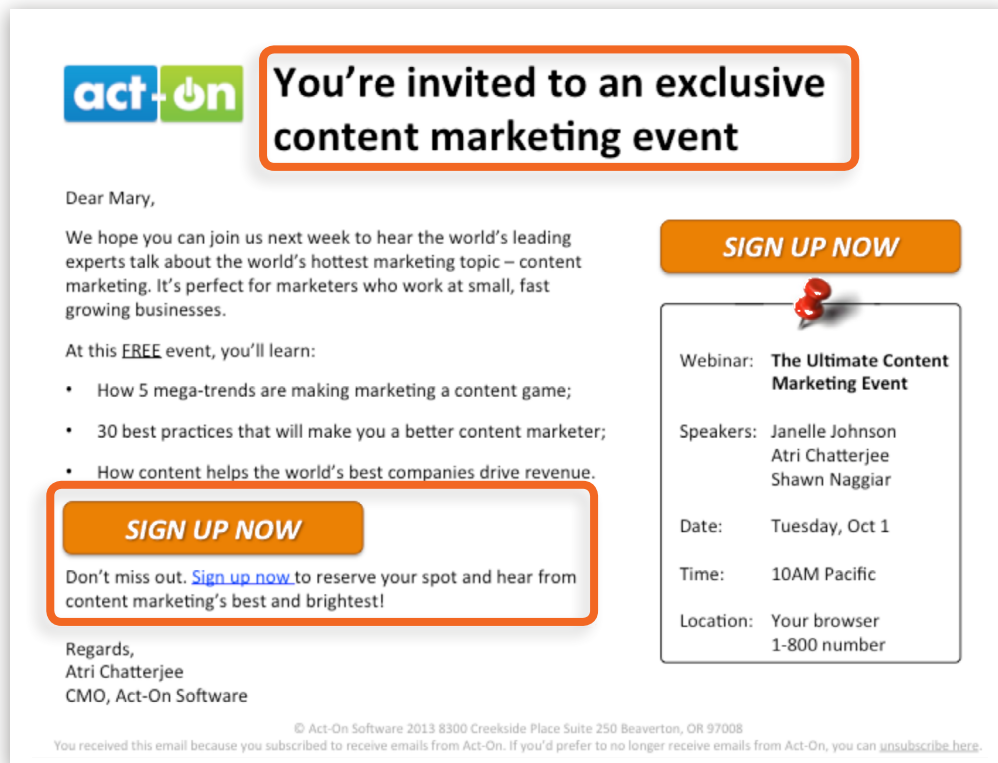
1. The offer contained in the email provides the prospect with something they value.

2. The email clearly describes the offer and the benefits it will deliver to recipients.

3. The offer is sufficiently valuable to get recipients to open the email, click through to the landing page, and complete the form.

4. The email offer helps the company create a deeper relationship or bond with the prospect.

5. The offer may also move prospects further down the sales and marketing funnel, closer to the point of purchase.

How to:
8 Steps to a Great Email Offer

1. **Conduct a brainstorming session on the offer**
   What will you offer recipients of your email? Remember that your offer isn't necessarily your product. Common email offers include newsletters, white papers, online events, pricing discounts, and free trials of your product.

2. **Remember your target audience**
   When you're creating your offer, refer back to the target list of recipients who will receive the email. Who are they? What do they want? What are their priorities right now? Answering these questions will help you develop an offer that converts at a high rate.

3. **Determine how valuable the offer is to the prospect**
   Make sure that the offer delivers sufficient value to entice the prospect to click through to the landing page and provide you with the information you're asking for on that page. Your offer is usually the key determinant of whether your email campaign will drive enough opens, click-throughs, and landing page form submissions. Each of these conversions is critical to the success of your campaign.

4. **Map the offer to where the prospect is in the purchasing process**
   Some offers target buyers when they are just starting their buying cycle. Other offers sit deeper in the funnel and are designed to push the buyer to a final purchasing decision.

5. **Make sure the offer moves prospects closer to the point of purchase**
   Strong offers not only convert at a high rate; they also move prospects further down the funnel and closer to purchasing your product. Offers that move a prospect from awareness to consideration to purchase are the most powerful of all.

6. **Make sure that prospects will understand the offer**
   The offer should be understandable in three seconds or less. In the world of email marketing, you have limited real estate to work with and little time to capture interest, which means you need to make sure that your email subject line and headline capture the essence of the offer and associated benefits. You want prospects to be able to understand the offer just by reading the email subject line.

Part 5 The Email Offer

How to:
8 Steps to a Great Email Offer–Continued

7. **If the offer doesn't already exist, you'll need to create it**

    When first starting out, you should use an offer that doesn't require a lot of work. Offers in the form of content such as a newsletter, white paper, or online event are usually the easiest to create. Other offers like trial versions of the product often require product development work and may take longer to create.

8. **Make sure that you can deliver the offer to the prospect**

    Make sure that you can deliver the offer to the prospect once they've filled out the landing page form. For example, if the offer is a newsletter, you'll need a mechanism to add the prospect's email address to your newsletter database and email the prospect the newsletter whenever it's published.

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Part 6

Copywriting and Designing Great Emails

The Essentials

Good copywriting is essential to effective email marketing. Your emails provide a limited amount of space for you to convince the recipient to open the email, click through to a landing page, and fill out the form on that page. To accomplish this, you need to write copy that succinctly describes your offer and why a prospect should sign up to access it.

Email copy requirements

Marketing emails require a few common copy elements, including: the email subject line, the first sentence of the email, the body or details of the email, and the main call-to-action. Make sure that you really nail the copy for each of these elements. It's critical to driving high conversion rates.

Copy that converts

For an email marketing campaign to be successful, you'll need prospects to take three actions. First, they need to open the email. Second, they need to click on the call to action that takes them to the landing page. Third, they need to fill out the form on that page. Good copy that effectively describes the offer is critical to driving high conversion rates for each of these steps.

Good copywriters use a number of best practices to achieve high conversion rates including: writing engaging, easy-to-understand subject lines, using simple language whenever possible, reiterating the benefits of the offer, supporting claims with proof, and writing clear calls-to-action.

How to write great copy

The first step in writing great copy is to remember that you are trying to describe the offer in a really engaging, succinct way. One way to do this is to let your customers write your copy for you – in other words, use the language your customers use. Finally, all email copy is important, but pay really close attention to the email subject line, first sentence, and call-to-action.

The Big Picture
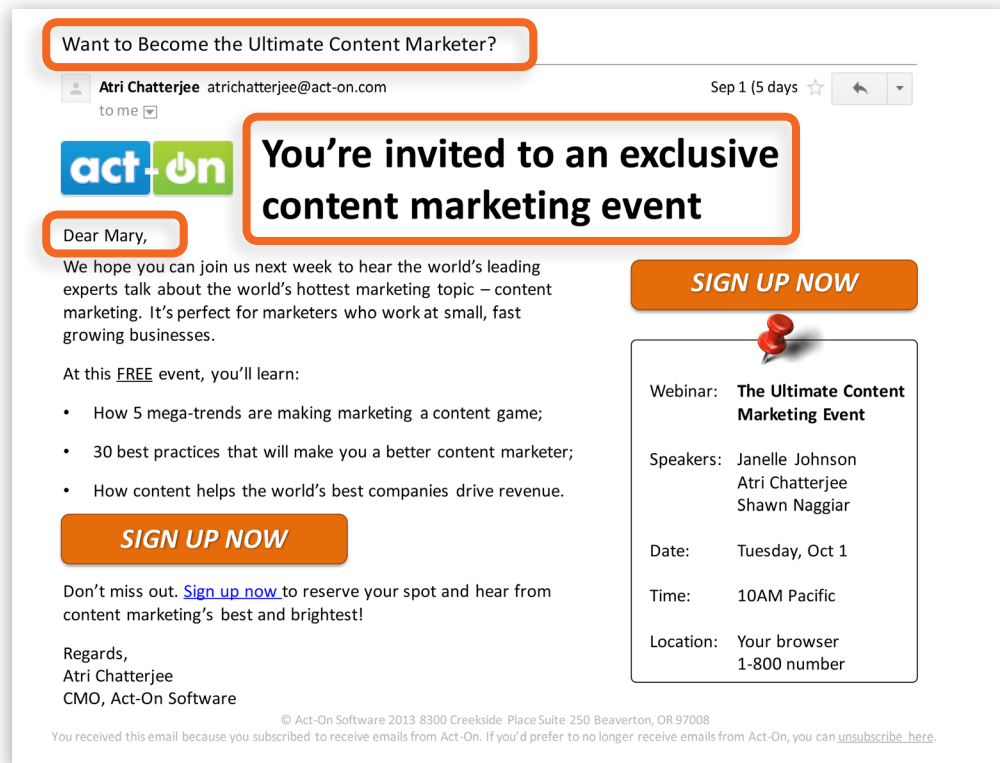
1. The email subject line is written in a clear and compelling way so that it causes recipients to open the message.

2. The first sentence is another important copy element that clearly describes the offer so that it's understood in three seconds or less.

3. The email is short and sweet. It uses things like white space and bullet points to make copy easy to consume.

4. The copy adds personal touches such as addressing the recipients by their first names.

5. The button's call-to-action copy uses strong words that ask recipients to take a specific action.

How to:
15 Steps to Effective Email Copy and Design

1. **Review the offer, its benefits, and key messages**

   Remember that your primary objective when writing copy is to describe the benefits of the offer in such a way that recipients of your email will open it, visit your landing page, and complete the landing page form. As such, your copy needs to describe the offer and the benefits it will deliver.

2. **Identify the elements of your email that will require copy**

   Some common elements that require copy include: your email's subject line, the first sentence, a description of the offer, specific bullet points, the call-to-action, and social proof points such as customer testimonials.

3. **Whenever possible, use your customers to help you with copywriting**

   Creating copy that uses the voice of the customer is one of the most powerful copywriting techniques available. Ask yourself, how would my customers describe this offer? You can find lots of great copy in existing customer testimonials or by running a quick survey to collect customer quotes.

4. **Create a consistent voice for your emails**

   You will likely send multiple emails to your prospect list so it's important to develop a consistent voice and tone for your email copy. When developing this voice, try to find the intersection between your brand and what your prospects want. It could be fun, but it could also be authoritative. It's really up to you. Use this voice when writing your email copy so that your subscribers become familiar with your emails.

5. **When writing your email copy, use power words**

   Power words include words such as "you," "free," "new," and "instant." Use these words to describe the value your offer will deliver to the prospect.

6. **Use plain language to describe the offer**

   When copywriting your email, you should use plain language. Remember that a recipient needs to understand what you're offering by glancing at the email (and the subject line before they even open the email) in three seconds or less. Keep sentences short, and active.

7. **Keep email copy short and sweet**

   People want to be able to read emails quickly so keep your email copy short. A great trick to keep email copy short is to create a first draft and then set a goal of reducing the number of words by 50% for the final draft.

8. **Pay close attention to the email subject line**

   Create an email subject line that details the compelling benefits the recipient will receive if they open the email. Your email subject line is the key determinant of your campaign's performance (if no one opens your email,

How to:
15 Steps to Effective Email Copy and Design—Continued

conversions such as click-through and form submission rates will be irrelevant). Make sure you draft at least three subject lines for each email you create and ask co-workers which one they find most compelling.

9. **Write the first sentence of your email**

   Once a prospect has opened your email, the opening sentence becomes critically important. It determines whether a recipient will spend more time reading the email or simply discard it.

10. **Write one to three short paragraphs**

    Try to keep your email copy to three short paragraphs or less. A good starting point is to describe the offer at a high level in the first paragraph, provide offer details in the second paragraph (preferably via bullet points), and ask the reader to take an action in the third paragraph. These paragraphs need to be short and easy to understand. Keep the reading level low, sentences short, and use active sentences and verbs as opposed to passive ones.

11. **Use bullets to list specific benefits of the offer**

    People like to consume content in list form, so develop three bullets that provide prospects with an understanding of three benefits they will receive via your offer. Incorporate these bullet points into the main body of the email.

12. **Write the copy for your email call-to-action button**

    Your email call-to-action asks the recipient of the email to click a button that will take them to your landing page. Button copy can have a significant impact on conversion rates, so pay close attention to it. Avoid using the word "submit" in the button and instead use copy like "Download Your Content Now."

13. **Write copy for other email elements**

    There are a number of other elements that will require copy including the greeting (personalize this using the first name of the recipient), the sender address (send your emails from a personal address if possible), and the signature (again, the email should be signed by a real person).

14. **Develop a copy-centric mockup of the email**

    Develop a simple, copy-centric mockup of the landing page so that you can see how the copy will look when laid out on the page. Don't worry too much about visual design, but do pay attention to relative placement on the page and font treatments.

15. **Conduct a quick review of the copy**

    Have a handful of your co-workers review the copy to make sure that it articulates a clear benefit, uses plain language, provides specifics, and contains no mistakes. Pay close attention to how easy the content is to read.

Part 7
Sending Your Email

The Essentials

Sending marketing emails isn't as easy as hitting the send button. There are a number of factors, from timing your sends to deliverability, which you need to carefully manage.

The email calendar

The email calendar is an important tool in creating an email marketing program that truly engages prospects. In a nutshell, the calendar governs when you send emails. Make sure that you create one in your calendaring tool of choice, and that you schedule every email that you will send for at least the next 30 days. The calendar will help you manage the work required to plan and execute your program

Timing and frequency guidelines

The time that you send your emails has a material impact on the performance of your email marketing campaigns. For example, some marketers believe that sending email first thing in the morning is most effective. The frequency with which you send emails also has an impact. Many marketers believe that sending one email per week is a good standard placeholder. If you schedule too many emails in a short period of time, you risk alienating your subscribers and generating complaints of spam.

The importance of deliverability

The success of your email efforts depends on your ability to deliver your emails to their intended recipients. It sounds simple, but if your email isn't delivered to the prospect's inbox, not much else can happen. There are some basic rules you can follow, but you should also make sure you use an email service provider (ESP)who can ensure high deliverability rates.A few basic principles will help ensure that your emails are delivered and opened. Create your calendar, choose a proven ESP, and adhere to a few simple timing and deliverability best practices.

How to:
10 Steps to Sending Your Email

1. **Create and manage an email marketing calendar**

    The first step to sending emails is to create a calendar that governs when you send emails. It should include every email that you plan to send to your list, including emails about newsletters, white papers, events, and special promotions. Try to schedule at least the next 30 days of email sends mapped out in your calendar.

2. **Use an experienced email service provider (ESP)**

    Sending emails is a technology-intensive endeavor, so make sure you use a proven ESP. While you need technology to manage many different elements of email marketing, one of the most important areas of functionality is the actual sending of emails. A good technology provider can help manage key metrics like deliverability.

3. **Target a specific type of prospect with each email you send**

    Most of the emails you send should target a specific type of prospect in your database. Look to target prospects based on demographic traits such as industry or title. You can also target based on past behaviors such as whether they've attended a recent event or not. For more information on targeting, see the section on targeting and segmenting your database.

4. **Send emails at a consistent frequency**

    You should establish a frequency that sets expectations with prospects around how frequently they will receive email from you. A good starting frequency is to send prospects and email once per week. For example, over a month-long period, you might send your monthly newsletter in week one, a webinar announcement in week two, a white paper announcement in week three, and a special promotion at the end of the month.

5. **Send emails at a consistent time**

    You should also send emails at a consistent time. While there's no right or wrong answer here, research suggests that sending emails when people are arriving at work or returning from lunch increases open rates. Regardless of the exact time you pick, sending email at a consistent time will help set an expectation with prospects around when they can expect your emails. This consistency helps increase conversion rates. Test once in a while to make sure the timing is still right.

6. **Avoid email overload**

    One of the biggest complaints among email recipients is that they receive too many emails. There are two factors that contribute to the email overload problem: First, you need to make sure that you don't send too frequently. A weekly frequency is a good middle ground for marketers and email recipients. Second, make sure that you don't send same email over and over. If you do need to promote the same offer more than once via email, invest a little bit of time to change copy and creative.

How to:
10 Steps to Sending Your Email–Continued

7. Use lead nurturing

Thanks to marketing automation and lead nurturing, you can now specify the sequence of emails that a prospect will receive over a period of time. For example, after someone downloads a white paper on your site, you might define a lead nurturing flow that sends them a follow up email asking if they'd like to connect 7, 14, and 21 days after the download. Some marketers find lead nurturing to be complicated, but there are some simple nurturing flows you can start with and it's a very powerful marketing technique.

8. Remember that deliverability is critical

Email deliverability is critical to the success of your email marketing efforts. That's because if your email isn't delivered to the prospect's inbox, not much else can happen. Make sure that you use a technology provider who can ensure high deliverability rates for you.

9. Practice good deliverability housekeeping

There are two important best practices you can use to make sure your emails are delivered to recipients' inboxes. First, make sure you are sending emails to people who signed up to receive emails from you. Second, make sure that your emails and offers are engaging. There are other, more technical considerations to be aware of when it comes to deliverability. Your technology provider should help you manage the more technical factors like spam traps and blacklists.

10. Track performance carefully

Always track the performance of your email sends. There are numerous metrics that will tell you whether your most recent send was a success or now. For more information on this, see the section on metrics and optimization.

Part 8
Managing Your Subscribers

The Essentials

An essential part of email marketing is to carefully manage the people who sign up to receive emails from you. The ultimate goal, of course, is to get these subscribers to buy something from you, but along the way, you need to make sure that you are engaging them in an effective manner.

The subscriber lifecycle

Subscriber management starts with understanding the basic steps that a person who receives your marketing emails goes through. A person must first subscribe to your emails before they can start receiving them. You will then send a series of emails according to a certain frequency. It's important to understand what these emails are (e.g. will you send a newsletter, white papers, or webinar invitations?) and the frequency with which they are sent. Finally, many prospects will unsubscribe from your emails at some point in time. It's going to happen, so don't stress too much when it does. If you're losing subscribers at an alarming rate, take a step back and examine your content or timing to see what needs to be changed.

There are certainly many more steps than the aforementioned ones, but these are a good starting point for most marketers.

Measuring the lifecycle

When it comes to subscriber management, there are a number of metrics that can tell you whether you are effectively engaging your prospects with email. Metrics such as the number of new subscribers and open rates will tell you a lot about how engaged your subscribers are. There are also a number of red flags to watch out for. For example, if you have an unsubscribe rate that exceeds 30% annually, you need to optimize your email marketing program.

How to manage your subscribers

A few simple best practices can help you manage your subscribers. First, make sure you have a decent understanding of the subscriber lifecycle. Second, optimize each step in the lifecycle to drive the highest engagement and conversion rates possible. Third, make sure you track the performance of key metrics in this area. This is addressed in greater detail in the next section.

How to:
11 Steps to Managing Subscribers

1. **Map the subscriber lifecycle**

   The first step in managing your subscribers is to understand the complete subscriber lifecycle. The best way to do this is to list the specific steps that a subscriber experiences when they opt-in to your email list. You should map common steps like: initial sign up, welcome/thank you email, marketing emails that the subscriber will receive, and the unsubscribe step. Some marketers like to create visual representations of the lifecycle, but a simple list will suffice in most cases.

2. **Optimize how someone becomes a subscriber**

   The subscriber lifecycle starts when someone opts in to receiving emails from you. It's important that you create a sign-up experience that converts lots of visitors to your website to subscribers. You should use compelling offers, well-designed forms, and a solid opt-in policy to drive a large number of new subscribers each month. These practices are discussed in more detail in the section on building your email list.

3. **Identify who the subscriber is**

   It's also important to understand the types of people that are subscribing to your emails. There's little value in signing up a bunch of people who don't fit one of your target buyer personas. Spend some time doing a qualitative analysis of new subscribers to determine whether your products and services will be of value to them.

4. **Send subscribers valuable offers**

   One of the most important factors in managing your subscribers is to make sure that the emails you send are valuable to them. Before you send an email, ask yourself if your subscribers will find this valuable. Value-add content that helps a prospect do their job better is an example of providing real value to your subscribers via email.

5. **Determine the frequency with which you'll send emails**

   You'll need to decide how often you will send emails as part of your subscriber management efforts. Remember that blasting your prospects with too many emails is a surefire way to have a lot of people unsubscribe from your list. Sending one email per week is often a good place to start.

6. **Tailor upcoming emails based on past behavior**

   You should track your subscribers' activities and tailor upcoming emails based on them. For example, some of your prospects might find a white paper on a certain topic particularly interesting. In an effort to improve engagement, you could them an email that invites them to an upcoming webinar on the same topic.

How to:
11 Steps to Managing Subscribers–Continued

7. Manage inactive subscribers proactively

Many of your subscribers won't do anything in response to the emails you send to them. These are called inactive subscribers and you need to manage them proactively. For example, if after a year, a subscriber hasn't even opened one of your emails, you should try to reactivate them by sending a compelling offer. If they still don't take action, send them one final email notifying them that you are unsubscribing them from your emails unless they tell you not to.

8. Let prospects manage their subscription

Prospects should be able to manage their subscription with you through what's often called the subscription center. There are usually two parts to this. First, they need to be able to decide what kinds of content they want to receive from you. For example, some subscribers may only want to receive your newsletter and not special promotions. Second, they need to be able to manage the frequency with which they receive emails from you. Many prospects don't want to receive an email from you every day, but would like to receive an email once a week.

9. Allow prospects to unsubscribe

People will unsubscribe from your email list. In fact, it's not uncommon for 30% of subscribers to opt out of a list in any given year. You should make it easy for people to unsubscribe through a link in the footer of the emails that you send to them, as well as one in the subscription center.

10. Pay attention to legal issues

Every country has laws and regulations affecting email. In the United States, the CAN-SPAM Act sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations. Read the CAN-SPAM Compliance Guide.

Other countries' laws vary. Make sure you know what they are and abide by them. Consult your legal counsel for specifics or questions.

11. Track metrics to identify performance issues.

There are a number of metrics to track to determine how well you're managing your subscribers. First, track the number of new sign-ups you receive to make sure you're actually growing your list.. Second, track your deliverability rate. Third, measure both open rates and click-through rates to evaluate how your subscribers value the emails you send them.. Finally, track the unsubscribe rate to see the pace at which you're losing subscribers.

Part 9

Metrics and Optimization

The Essentials

Success in email marketing is measured by hitting specific marketing and sales performance targets. There are a variety of metrics you can track to gauge the performance of your emails. These range from operational metrics, such as email open rates, to more strategic metrics, like the number of leads an email generates. It's also critical to optimize your emails so that performance improves over time.

Essential email metrics

Email marketing metrics fall into two categories. First, operational metrics help you track things like the number of emails sent, open rates, and clickthrough rates. These are critical to understanding performance. Second, strategic metrics help you understand the impact that your emails are having on the business. Common strategic metrics include the number of leads generated, pipeline opportunities created, and revenue.

Improving the performance of your emails

The best way to improve email metrics is to conduct an A/B test. An A/B test allows you to compare the performance of one email (email "A") against another (email "B"). The two emails are usually similar, but email B will contain slight changes such as a new subject line. You want to see which email performs the best across the metrics you track.

How to track and optimize marketing emails

Some marketers find email metrics and optimization to be challenging, but a simple framework can make it much more straightforward. Start by identifying just a few important metrics.The basics are open rates, click-through rates, and the number of leads generated. After you start collecting data, you can begin thinking about making small improvements to your email. Develop new offers, subject lines, and calls to action as a starting point.

The Big Picture
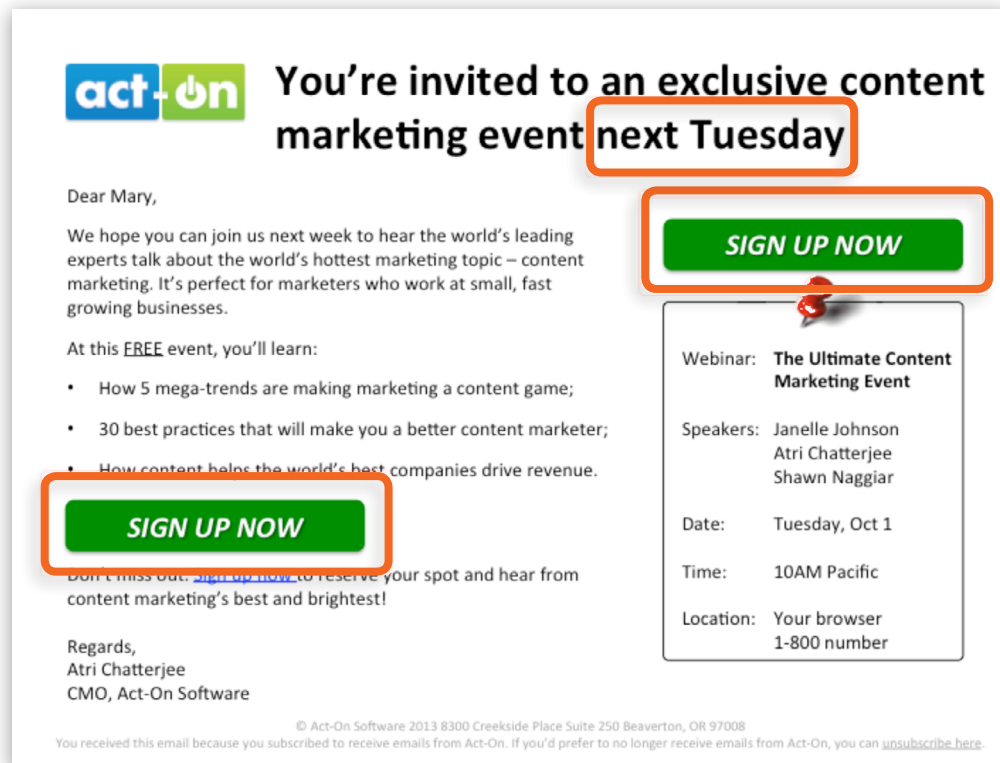
1. A new version of the email includes changes designed to increase conversion rates. Note: We've made two changes to this email to illustrate the point. However, as a best practice, make only one change at a time so you can clearly identify which change gets results.

2. The headline has been changed to include the date that the event will occur.

3. The color of the call-to-action button is now green, as opposed to orange.

4. Test the revised email with a small sample that's representative of the larger group you will mail the final email to, to see if conversion rates are affected.

How to:
9 Steps to Metrics and Optimization

1. **Identify the campaign your email will support**

   Your marketing emails can support different marketing and sales campaigns. These might be getting prospects to download a white paper, sign up for an event, or contact sales. Regardless of the specific campaign, the objective is almost always to turn the recipient of your email into a lead.

2. **Specify your operational metrics**

   Operational metrics gaugeemail marketing campaign performance. Commonly tracked metrics include: the number of emails sent, the number of emails actually delivered, the bounce rate, the open rate, the click-through rate, and the unsubscribe rate. Each of these metrics is important for its own reason, but you should pay particular attention to the number of emails delivered, open rates, and click-through rates. It's important to set targets for these metrics and try to meet them.

3. **Specify your strategic metrics**

   Strategic metrics tell you how your emails are impacting business factors such as pipeline size and revenue. Start by tracking the number of leads generated by each marketing email you send; later move on to more advanced metrics like the total pipeline opportunity created. Again, set targets for these metrics and optimize your emails until you're meeting them.

4. **Collect and analyze data for a "control" email**

   With a set of operational and strategic metrics defined, you can start collecting data that tells you how your email is performing. When it comes to tracking performance, the first version of your email is called your "control", or "A", page. As you create new, optimized versions of the email, the control is the baseline that you'll use for comparisons. Refer back to your original targets and make sure that you are in the right ballpark. If not, it may be time to revisit some email fundamentals such as the subject line and offer.

5. **Develop a second version of the email**

   With some data from your control email, you can now create a second email. This second, or "B", email is critical to understanding which of your emails best meets your target metrics. Your B email should change one specific element that you think will improve the performance of your email. High-impact changes you can make include modifying the subject line, the first sentence of the email, and color of the call-to-action button.

How to:
9 Steps to Metrics and Optimization

6. **Run an A/B test that compares the two emails**

    Now you can start tracking the performance of the B email. You'll want to compare its performance against the performance of the A email. Make sure you can understand the relative performance of each email across open rates and click-through rates in particular.

7. **Choose an A/B test winner**

    Testing an A and B version of an email is designed to allow you to identify the highest performing email. Once you've identified the best performing one, make that your new control email.

8. **Continue optimizing your email with new A/B tests**

    Now that you have a new control email, you should develop a new, B email that you can use to run another A/B test. It's essentially the same exercise – you're going to test new subject lines, calls-to-action, and offers. You can also test colors, placement, images, copy length, etc.

9. **Never stop optimizing your marketing emails**

    You should never stop optimizing the performance of your emails. Email marketing is a metrics-driven field that requires you to constantly collect metrics and test new optimizations.

Part 10
Email Marketing Technology

The Essentials

The integrated solution

The key to email campaign success is finding an integrated marketing solution which supports list building and segmentation, flexible email design, A/B testing, subscription management, email automation, and robust reporting. These fundamental features should be minimum requirements to help create, track, and appropriately identify and follow-up on the email recipient's behavior. Additionally, make sure the chosen technology allows you to extend your email marketing reach through social media applications.

Creating, sending and tracking email campaigns using Act-On

Act-On's integrated marketing platform allows marketers to quickly and easily create, launch and track email campaigns.

Begin by setting up a list. Act-On's flexible platform allows marketers numerous ways to accomplish this task: upload an Excel or CSV file, synchronize with your CRM, import via an FTP server, or use API integrations for unique databases. To ensure that relevant email is sent to targeted individuals, the uploaded list can be segmented based on profile or behavior attributes to map to the email content.

Create an email. Marketers have six different options for creating a new email, includinguploading a predesigned HTML email. Smart Content Blocks to make email creation fast and easy. Creating an template email that can be used over and over is the best way to save time.

Launch a campaign. When launching an email campaign, marketers can choose to send to multiple groups, determine a subscription management category, select suppression lists, select the launch date and time, test email content through A/B testing, or have the email launch based on a specific action the recipient has taken within an automated program (also referred to as a "drip" program). Once the email campaign has been sent, marketers should review the metrics to determine the success of the campaign based on predefined targets, such as opens, click-throughs, leads generated, etc.

Part 10 Email Marketing Technology

How to:
9 Steps to Email Marketing Using Act-On

1. ### Create marketing assets for your offer
    Before you create your email, think about the offer and make sure that the relevant content is either uploaded to Act-On (such as a datasheet, whitepaper, or case study) or has been created (such a landing page and form for webinar registration). This will allow you to incorporate that marketing asset into your email campaign. Learn more about creating forms or landing pages.

2. ### Segmentation for higher email success
    Once you have decided on your email topic, determine your target audience and use segmentation to group individuals with those attributes . In some cases, the email will be sent to multiple lists and/or segments.

3. ### Select how you want to compose your email message
    Decide if you want to create the contents of your email message from scratch, use a copy from a draft, a template, or a previously sent message, or upload your own HTML code.

4. ### Determine the overall outline for the email
    Decide on the From and Reply To addresses. Names of people are more personal and more effective than a company name. Select the stationery, logo, font and font size and any padding for your email content. Make sure to include an appropriate subject line for your email message. To automatically suppress the appropriate group based on subscription management, select your Subscription Category, if applicable. Finally, determine which header and footer to use.

5. ### Composing the email
    In Step 1, use the Smart Content Blocks to create your offer, keeping in mind the copywriting essentials. Make sure to link to your marketing assets for tracking purposes. For details about creating emails in Act-On, click here.

6. ### Testing the email
    Send out a test message and review it thoroughly to make sure images are being rendered, links are working correctly, and if applicable, form submissions are being collected in the right areas (either within Act-On only or inside your CRM also). Consider sending iyour test email to multiple people and to multiple email clients. Sending a test email can be done in either Step 1 or Step 4 of the Act-On Message Builder.

How to:
9 Steps to Email Marketing Using Act-On–Continued

7. **Addressing the email**

    In Step 2, select the lists/segments/individuals you want to send the email to. In the same step, you can also select suppression lists.

8. **Reviewing the email**

    Take advantage of all the options available in Step 3 of the message builder. Run a validation check to make sure all key elements are included in your email. The validation process also helps to make sure your email is CAN-SPAM compliant. Check for any personalization errors. Use the Preview feature to see the email the way the recipient will see it. Check your email against Spam Assassin's spam filter validations. Consider making edits if any infractions are listed. Lastly, make sure to check your account limits.

9. **Sending the email**

    Step 4 of the message builder allows you to determine when you want to send out the email.

    Note: **A/B testing:** If you want to test the effectiveness of your copy, consider using the A/B Testing feature.
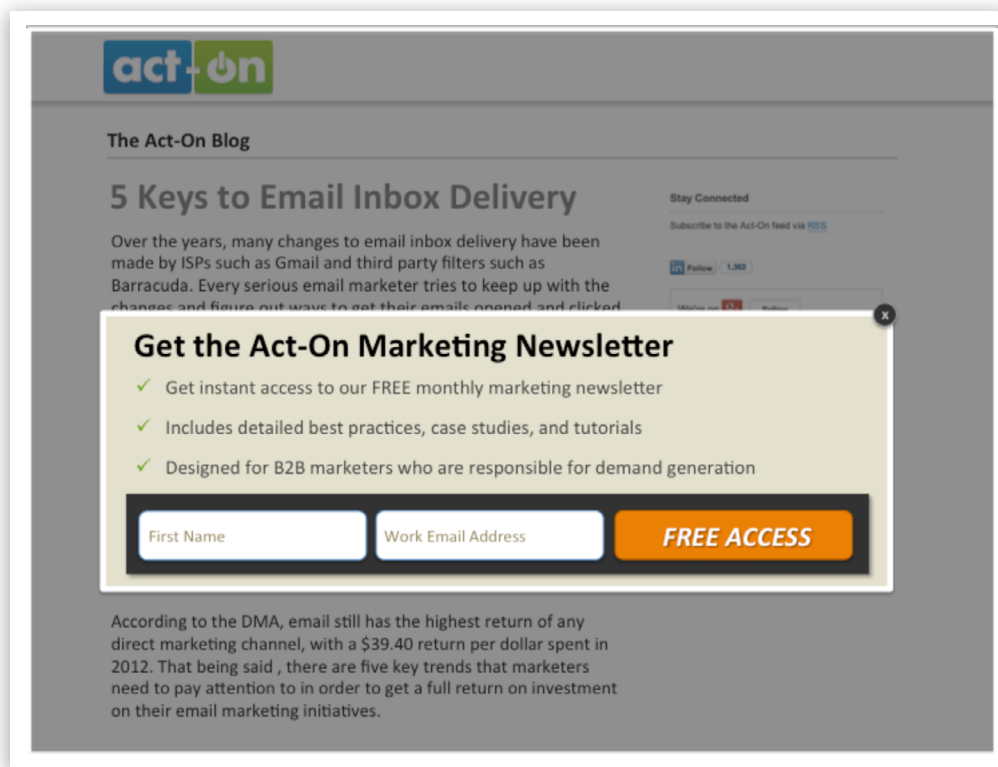
    After your email has been sent, make sure to review the message reports, analyze the data, and determine a course of action for a subsequent follow-up email.

Appendix
Email Marketing Templates

Appendix Email Marketing Templates

The Sign Up Form

Appendix Email Marketing Templates

The Marketing Email

Learn more

Other courses in this series:

- Landing Pages
- Sales & Marketing Cooperation
- Social Media Lead Generation
- Webinar Planning & Management

Learn more about email

Browse white papers, blog posts, videos, and more.

Read customer case studies

Learn more about how real people use marketing automation for lead generation and customer lifecycle management.

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About Act-On Software

Act-On Software's integrated marketing automation suite is the foundation of successful marketing programs, from simple and direct, to sophisticated and globally executed campaigns. Act-On is a cloud-based marketing platform that enables marketers to tie inbound, outbound, and nurturing programs together in a single dashboard. Scalable and intuitive, Act-On supports sales as well as marketing and is fast to implement, easy to use, and powerful.

About TOPO

This course was created by Act-On and TOPO, a research, advisory, and consulting firm that believes in a really simple, but powerful idea – that the most important thing in business is to deliver a great buying experience.