



Your complete email marketing guide



Email marketing offers one of the highest returns on investment, at a staggering £35.41 for every £ spent. Plus, active email accounts are set to grow to 4.48 billion users by 2024, it's no wonder marketers are embracing email marketing with open arms. But, getting great results isn't as easy as clicking send.

As email marketing and automation experts with many years' experience, we love nothing more than to share insight into the topic. Within this guide we've collated easily digestible sections to help marketers grasp the nitty-gritty of email marketing.

Campaign strategy

LESSON 1



Simply put, an email marketing strategy is a set of procedures that a marketer follows to achieve a desired goal through email communications. A well planned strategy with defined objectives is an easy way to improve your communications outputs.

An email marketing strategy should never sit in a silo, it should always be connected to your overall business plan, allowing you to have prepared and synchronised content. Sending time-based promotions and prompting your audience to take action works best when planned in tandem with your unique business projections. Having a clear strategy also allows you to focus on how (and when) to build relationships with your prospects and recipients.

Like anything else in the marketers toolbox, any type of email communication requires planning and thought before hitting send. Spend time considering your strategy now, to be able to better meet your marketing goals in the future.

How to develop a strategy

A strategy at its core is a good plan. What do you want to achieve from your email communications? What type of emails will you be sending? Different types of emails need to be considered differently in this process, a promotional or sales email will need entirely different treatment than a e-newsletter. When planning your strategy, it's helpful to consider these key questions:

- Who am I sending these emails to and why?
- What types of emails will work best for me?
- How will they look?
- How often should I send these?

We've put together an example case study to help you see a strategy in action.

A detailed example of a email marketing campaign strategy

Today's industrious gnome has little time to master new skills, making the Modern Gnome magazine the ideal forum for continual improvement in the professional gnoming community. Fairytale International knew that their key audience is too busy keeping their beards immaculate to have time to buy and read their monthly magazine. Fairytale International had suffered from a dated look and feel of the magazine, and ultimately lost market share and brand awareness due to not having a digital offering.

After we visited them in their subterranean office, we suggested taking the Modern Gnome magazine online. Firstly, some basics need to be covered, these will be the same, no matter if you're working in an agency, in-house, or at your own start-up.

Who are you sending these to?

- Current subscribers of the print magazine.
- People who sign up on the website.
- Customers who make a purchase from the website.

What is the main reason for sending these emails?

- To increase brand awareness of Fairytale International generally, and to promote the Modern Gnome specifically.
- Fairytale International needs to move its perception and image into the modern-age.
- To generate sales on the website, and to encourage brand loyalty.

What types of emails are you planning to send?

- Newsletters
- Welcome emails
- Purchase and thank you confirmations

What type of content do you want to send?

- Special offers and time limited discounts.
- Informative content that is directly of interest to the target audience.

What frequency will you use?

- Newsletters – once a month, depending on content availability (this is something you can check in your planning phase).
- Informative content – ad hoc basis, depending on latest news/blogs/articles of relevance.

How will it look?

- It will be branded to build on the look and feel of the current brand, moving it into a more modern style, whilst still maintaining brand awareness.

You can move subscribers or audiences who have previously bought from the website into this e-newsletter recipient list, as a cost effective way of staying in touch, and keeping the brand at the forefront of their minds when it's time for their next beard-trimming purchase.

You can also segment your data list of potential recipients to ensure everyone is getting highly personalised content that resonates with their unique needs. For example, Fairytale International wouldn't send a promotional email selling discounted witch's cauldrons to their audience of gnomes.

If you aren't sure who your audience is yet, you can try creating personas — examples of your audience based on what you already know, to see what kind of content would best suit them.

Still struggling with what type of emails to send?

There is no one-size-fits-all answer to what type of content your business should be sending, but knowing your overall business objectives and resourcing abilities should help inform your choice. Don't overstretch and try to send 6 different campaigns a week if you are a start-up with limited time and know-how. Try one type, continuously monitor, adapt, tweak and improve. Discover more about email campaign types [here](#).

So now we've got a plan in place, let's define what success looks like.



Defining your goals

These should be as specific as possible — increasing sales sounds like a good outcome, but how will you measure this? Some products and services can earn back the cost of running an email marketing campaign and more. Specifics help you measure your ROI and overall success, so you can continue to hone and improve your communications in the future.

Not all goals may be financial, you want to maintain relationships with your recipients, or build relationships with new potential customers. Having goals in place helps you think carefully about why we are sending emails in the first place, if you can't pin down the goal, there is a good chance the recipient won't be able to figure this out either.

Some example goals might be:

- Increase engagement
- Raise loyalty
- Maximise ROI
- 40% subscribers open the email, with 20% clicking at least one link
- 30% of recipients visit the website through an email link



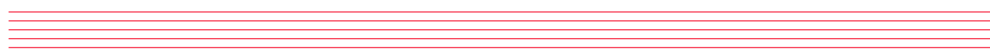
Measuring success

Now you've got your goals, how can you tell if you've met them? Your tools may include external sources, such as sales figures, analytics from the website, or internal metrics from your Email Service Provider (ESP).

If you're looking at your ESP measurements, you should be tracking:

- Open rates
- Click rates
- Forwards
- Unsubscribes
- Conversion rates

The most important measurement isn't the numbers themselves, but the change in these from one campaign to the next. After sending each campaign, you can make a series of small tweaks, such as time of day of the send, or day of the week, or subject line, or swapping out imagery (called A/B testing). Adjust your email strategy based on these reports, and feedback you have received from your audience to ensure you are maximising your chances of success.



Quick wins

How to improve your email strategy

If you have your list, you know what emails you're sending and why, consider the following points to improve your campaigns by driving engagement and creating compelling content:

1. Use personalisation – write for your audience.
2. Create subject lines that convert – subject lines with names have a 26% higher open rate.
3. Try segmentation-triggered automation – behaviour segments is a good place to start.
4. Personalise with dynamic content – save time and boost sales without making individual campaigns.

5. Crowd-source your content – this can be done easily through social media.
6. Use social media – allow your recipients to share your content via social media.
7. Use A/B testing – keep track of what works and doesn't.
8. Research timings – there is no one-size-fits-all best time to send, find yours.
9. Be consistent – make sure you keep to your schedule.
10. Spell check! All the basics of grammar and spelling still apply, make your content top class.

The next section covers how to put your strategy into action, and how to reflect your brand in your email marketing.

Branding

LESSON 2



Branding is so much more than a logo, it's reflected everytime someone interacts with your business. From colours to typeface, print to web design and even how you answer the phone. Each piece is key to defining a strong brand identity which, in turn, impacts public perception. Whether it's reimagining an existing brand, or creating one from scratch, emotive branding unlocks business potential and builds market awareness.

Your brand should be underpinned by a set of core values, shaping your personality and guiding your business. It's crucial to invest in a good and consistent brand to stand out in any marketplace. Brand management and branding is an innovative way to build the image of your company, adding values such as trust or purpose. Branding is a great way to create a conversation and to align yourself closely to your audience, and is essential to reflect it across all your marketing communications and channels.

How to reflect your brand in your email marketing

Email marketing is an opportunity to create a direct dialogue with your clients and recipients. Your company's email communications should be a reference point for your potential customers, showcasing who you are, and how you will act in future. Any misrepresentation of your brand here will be jarring when your audience converts, and lead to unsubscribes, or a negative brand image.

Here's an example for how to reflect your branding in your email marketing.

A detailed example of a well branded email marketing campaign

Grimms Apples Incorporated had been suffering from a slump in sales in their national chain of greengrocers. After a negative story hit the news - blaming their fruit products for the untimely death of a local witch and links to the occult - their internal PR team had been working overtime to try and change the narrative around their produce. Customers were no longer coming through the doors, and their marketing channels and metrics were all on the decline.

We visited them at Grimms HQ, and suggested that Grimms Apple Incorporated needed to change their image, using well considered branding and messaging to do so.

Personality and voice

After researching the market, we confirmed that there has been a cultural shift away from mega-stores, with high spenders moving back to a more traditional way of shopping, i.e. local, personal and small. 'Grimms Apple Incorporated' signified to a potential audience that the company was a large scale industrial operation. A name and attitude change was needed to bring them inline with where they wanted to position themselves in the market, and to stay relevant to a growing change in buyer behaviour.

All aspects of the voice of the company needed to be changed to reflect this, becoming more informal, and communicating their high level of care and attention to personal service. This tone shift was incorporated within all email communications, as well as across all assets. For Grimms Apple, they needed to be the hero of the story, not the villain. This involved reeducating their audience and changing their perception.

A consistent journey

In an attempt to stay at the forefront of their potential customers' minds, Grimms Apple Incorporated had been sending multiple emails a day, never using an agreed template, or with any consistency in messaging or design. When the users did convert from email marketing communications, they experienced a sloppy and badly defined user journey to their e-commerce site.

Email marketing is the perfect way to reinforce who you are as a brand, and to build trust. With this in mind, we created several branded templates for email marketing tracks, referring to the new standards and values of the company forged in the personality and voice exploration. All recipients of the emails could now easily visually recognise not only who this email was from, but could clearly understand why they were receiving it, and what the next steps of their journey should be.

Imagery

Grimms Apple had been using stock imagery of products, with no unity to what images were being used, or where, across their email marketing. For some campaigns, there was no imagery used at all, and in others the photography felt cold and seemed to be used to fill space, more than add to the emotive feel of the email and company brand.

Images say more about your brand personality than your words can, and getting this right was important in redefining Grimms Apple's traits and attributes to their audience. By creating a mood-board of suggested images and styles, we created consistency and told a story of real stores, real employees and real shoppers.

Engaging through storytelling

Your brand story is essentially storytelling - it helps you stand out from the competition, and when done right, it engages customers long-term. Make it easy for your recipients to relate to your personality and mission by becoming emotionally invested. Grimms Apple's crowdsourced engaging content, telling stories of the real lived experience of its stores, and shoppers. When done with the 80/20 rule - 80% interesting content and 20% selling - it was easy to reposition the brand in a new light. Being less focused on selling, and more focused on creating a unique, personalised and interactive experience, Grimms Apple's could now entice emotionally invested potential customers back to its bricks and mortar stores.

However, building a strong brand is not limited to the inbox, these same principles should be used for effective, well branded, multi-channel marketing campaigns.

Quick wins

How to improve your email branding

Once you have correctly positioned your brand in your market, here are some additional suggestions that can help your email marketing strategy going forward:

1. Refer to your company's passion – what do you stand for? Against?
2. Humanize your email marketing – be different and make a difference.
3. Use email as part of a multi channel campaign – ensure all your platforms work as a whole with one brand identity.
4. Take your audience through a journey, beginning with a welcome email to build both expectations and emotional connectivity.
5. Celebrate success – look to milestones, showcase stories, case studies or testimonials.
6. Use your preheader text – give a succinct overview of what's ahead and always be truthful.
7. Be consistent – whether it's a signup or unsubscribe button, ensure the customer experience is consistent across all emails and templates.
8. Be a brand advocate – make sure your team knows your brand and uses the guidelines religiously, all communications should feel as though they've come from one voice.
9. Align your email and landing pages – make sure they visually match and feel aesthetically similar.

Next we cover how you put your brand into action, and how to create engaging content for your email marketing strategy.

Content

LESSON 3



Overloaded inboxes and disingenuous marketing techniques have made it harder than ever to create an engaging and useful dialogue with your audience. Luckily, there is an answer – content first marketing. Working content first enables you to strategically distribute valuable, relevant and consistent content, designed to attract and retain a defined audience – ultimately driving profitable customer action.

Instead of pushing your products or services, content marketing provides truly relevant information to your client base, knowing their pain-points, and clearly addressing these with thoughtful assets. It's easy to see why content marketing is the future of marketing – good marketing is impossible without great content across all your platforms.

So, how can you utilise this approach? Before you start putting pen to paper, consider who your content is for, what problems it solves for them, and if it is of genuine interest. Without being able to answer these key questions, content marketing will not be successful.

Email marketing has risen to become one of the most popular forms of marketing used by brands and companies, and in addition to being incredibly effective at converting, it provides the perfect opportunity to display targeted content directly to your audience. When used in tandem, email marketing and content marketing can fuel each other, expanding your shares, and increasing your reach with little additional action from the marketer.

How to define and find your audience

First things first — know your audience. Know their challenges, their pressures, and what information they value.

But knowing your audience won't lead to an increase in engagement alone, break up your customer types into key segments. A good place to start is location, age, gender, buying behaviour or interests. You can also try using more advanced techniques with more data, such as the type of content you know they engage with, or build this by creating a customer preference center. Segment your lists to send relevant blogs, products, or news most likely to resonate with them. Starting from scratch? Unsure on what your subscribers actually want in their inbox? Just ask. Send a welcome email asking what type of content they'd like to receive.

If you are confident that you are sending relevant and intriguing content already, encourage your subscribers to share this on their social media feeds. Having a button that easily shares your content lets your audience do the hard work for you, and gets your company in front of far more people than your email list.

A detailed example of good email content in action

Content

All emails need to have a purpose, and this was something that was lacking in the communications being sent by the popular shoe seller Elves and the Shoemaker.

Whilst they had good strategic direction of their business overall, their email marketing had suffered from neglect, with little to no thought being put into the content of their sends. We recommended a series of changes to their email marketing strategy, enabling them as a brand to stand out in their audiences inboxes, to have clear purpose, and ultimately to improve sales and engagement.

Direction

Instead of firing out emails as-and-when they could, we encouraged our client to think strategically about what content they had to offer. We worked together to create a content calendar, highlighting and marking all of the send opportunities throughout the year. This included big promotional sales periods, and smaller outreach campaigns focused on single measurable outcomes. By narrowing focus, we were able to create great email content that was delivering a simple message, every time.

Subject line

Subject lines are gatekeepers. When you get it right and you see a satisfying open rate, get it wrong and your audience will not open your email. For Elves and the Shoemaker, we A/B tested different subject lines across their sends to optimise what works best for their audience. We considered how each subject line should reflect the different content marketing efforts.

Preheaders

These are often overlooked yet it can be a valuable tool to encourage your customer to open your email. For our clients, we used it as an extension to their subject line to offer more insight into the content of the email to prompt their audience to open. By keeping it short (between 40–70 characters) and to the point, the preheader works as a succinct call to action.

Body copy

On average we receive 120 emails a day, which means unless your email stands out in a crowded inbox, it's unlikely to get read.

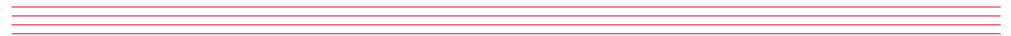
We assessed Elves and the Shoemaker's tone of voice documents, ensuring all email communications reflected their ideal brand narrative, and stayed consistent across all campaigns. As they wanted their brand and emails to feel fun and reflective of their youthful market, we created content that spoke directly to the audience in the first person, and that kept a cheeky sense of humour. We paid careful attention to appeal to their audience, not to pander. After careful market research, we knew exactly how to talk to their audience about what matters most to them.

To help our clients' emails make an impact, we focused on adding a customer name to the copy. This allows their customers to immediately feel connected to the send. We also based it on location, using the details of their local store. We also incorporated previous shopping habits, adding product suggestions based on previously bought items.



Signing off after sending

Merging your efforts between content and emails is a great starting point, enabling you to create niche content before moving out to other platforms. But don't push all your energy into just your email marketing, your audience will have an integrated browsing strategy, and your marketing approach should reflect this.



Quick wins

How to improve your content in email marketing

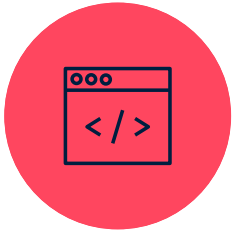
1. Keep it relevant — ask yourself, if I was in this particular group of recipients, would I find this interesting?
2. Make your message clear — focus on a clear message in each email, don't confuse your audience with too many ideas or types of content.
3. Write in the first person — talk directly to your audience, keep it personal to make your content easier to relate to.
4. Showcase your benefit — present a realistic picture and what it can mean to them, focus on the end results.
5. Keep it concise — you have a limited timeframe to grab the recipients attention, make sure your content is easy to digest.
6. Write well — stay inline with your tone of voice document, and always proof-read for errors.
7. Mobile or desktop? Where is your audience most likely to read your email? Make sure your content works best on the platform it's being read on.
8. Let your personality shine through — write with your company values and brand in mind.

9. Personalise your email – use first names, your recipients location, or purchase history to start a dialogue.
10. Use A/B testing – tweak and assess your content as you move through your content strategy to ensure you maximise your results.

The next section covers how you can put your engaging content into an eye-catching design, and how to best build it.

Design and build

LESSON 4



Great information and great design should work hand-in-hand in your email marketing – good design enhances and organises your message, creating a visual story to engage your audience, allowing them to move seamlessly through your content. Building your email from informed design, removes the opportunity for any coding or structural errors.

Email design is the process of strategically structuring your email in a way that most resonates with your target audience. Great email design gives the recipient a quick understanding of your brand, who you are, and what you are going to say. Design should always be appropriate and on-brand, being easily recognisable as your company.

But why is it important, and how much attention should you pay to design within your strategy?

Why email design is important

Design and build

The average recipient spends about 2–8 seconds scanning your send, before deciding to read it. That's why email design is so important to the success of your marketing efforts. Design makes your email sensibly organised, valuable and attention-grabbing in a cluttered inbox. At its core, good design keeps your recipients engaged and interacting with your send.

Design must always be considered within the constraints of build. Although not every marketer is a qualified and experienced developer, there are some key rules that will make the build – and design – process easier. We will explore these below.

Some businesses are lucky enough to have in-house designers, or even design teams who are well versed in the basics of email marketing. But for those who don't have this luxury, or the budget to out-source design work, we've put together the best practices you should always keep in mind when designing your emails.

Email design best practices

Subject lines and pre-headers

The line between design and content marketing is blurred, so the subject line, pre-header and hero area of your email should all work together without being repetitive. The pre-header is the second thing your audience may or may not see before deciding to engage with your send. Working with your design, the pre-header should compliment and inform the recipient of what comes next.

Use of hero images

Typical “full-width” hero images are 600 px wide but to keep that image crisp on high-resolution displays you can use images @2x. This means creating your image twice as big as it will be displayed (1200 px in this example) then your email developer can code it to display at 600 px with a higher resolution.

An impactful heading image will visually convey the main message of the email, and subconsciously display quick information to the recipient about what they can expect to find in the content below.

Stay on brand

It’s easy to get sidetracked with adding additional design elements that may not be necessary. Try to use your brand colours and palettes, and know imagery that best suits your company. Use your logo, links to the website, social media accounts, and relevant CTAs, as well as the same typography and tone of voice.

Layouts

Having a lack of clear hierarchy and structured content will make your email appear overwhelming at a first glance, and will increase your chances of abandonment. Consider the user experience in your design, leaving white space and strategically placed content in a simple and easy to follow way.

Guiding a subscribers eye down the page to your call to action will encourage more click-throughs whilst also making them more aware of your brand and what exactly is on offer.

Incorporate unique visuals

Email marketing relies on standing out, and sending a plain text message means your content is likely to remain unread. Keep your recipients engaged with unique images, GIFs or animations to break up the content into easily digestible chunks. Even video is possible in email under specific conditions.

Also, if it's correct for your brand, you can also consider emojis – once seen as unprofessional, emojis are now common-place in the inbox, and have been proven to increase clickthrough rates when used appropriately.

Use a responsive design

Your audience will not be viewing your email in the same way – some will be on mobile, others on tablets, and some on desktops of different sizes. Whilst your analytics can inform you about what percentage of your audience are using which platforms, its best to use responsive designs to enhance user experience across the board.

CTAs

Calls-to-action and your other links embedded in the email should be highly visual and clear, even on a first glance. Ensure they are not lost within your content by using good design to highlight these.

Make sure your CTAs look clickable, and if you have more than one then try to decide which has the highest priority. The perfect CTA button has four main elements that work together to create effective conversions:

- Copy – what is the focus of this CTA? Does the text drive action?
- Design – does it stand out? Is it appropriately sized? Does it have whitespace around it?

- Placement – does the placement of the button make sense within the design and the offer?
- Frequency – each action should have a separate CTA, for a focused message, there should be only one

Design and build

Fonts

In email marketing, its best practice is to use web fonts wherever possible to maintain brand consistency. But not all email clients offer universal support for web fonts. If your web font is not supported, use a fallback option with a web-safe font.

Test, test, test!

Like other forms of marketing, email design is an ongoing process. You may find you need to make changes to get the most from your sends. This could be changing your CTAs, colours, or even tone of voice. A/B testing will inform you of what types of design and content isn't working, yielding better results in future. This can be as simple as changing the font, or trying a picture of a dog instead of a cat.

To see how each email client displays your email in the recipients inbox, you can use a software service like Litmus, Email on acid, or HTML Email Check – depending on your budget.

Fallback options

Not every email design will display perfectly, and a good design will incorporate a fallback option for any blocked images or embedded videos. Avoid embedding copy directly in images, and back up with meaningful attributes on image tags – these are often read by screen readers and increase accessibility.

Consider the background colour of your image container, and for those who can't display your images, this will add visual interest and prevent your design from looking 'broken' at a quick glance.

Email clients use different engines to render HTML, so not everyone will share the same experience. Research how your most popular clients will render your email, this will help you create more engaging campaigns. You can also segment your audience by email client to avoid build and design problems in the inbox - meaning those who can, will receive and see your animations and GIFs, and those who can't will receive a more standard version.

Don't forget the footer

This necessary part of your design does not have to be an afterthought. Your footer houses all of your important information, including legal address, support, terms and conditions and social links. Your referral links should also be in the footer, allowing your email to extend its reach far beyond your send list.



Quick wins

How to improve your email design and build

When using images in your email design, it's important to keep these key elements in mind:

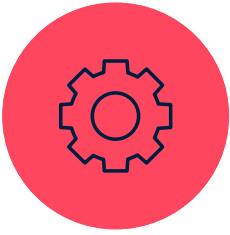
- 1.** Dimensions — use icons and images at 2x to keep them sharp, then use CSS to display them at the size you want.
- 2.** File size — more than 50% of all emails are opened on mobile. The bigger the email, the longer the load time, resulting in a less positive user experience.

3. Always compress your images' file size (with free online services like tinypng.com) and use the right file format for the right type of image. Clean logo or icon in a flat colour? Use a PNG. Photographic image or gradient? Use a JPG. Simple short animation? Use a GIF.
4. Complement the email – the images should add the message, not be the message. A simple way to test this is to turn the images off – is the message still clear?
5. Stock images – keep images on-brand and genuine, stock images are cost effective, but is there a way you can customise them to your brand?
6. Mobile first – if your audience is primarily viewing your emails on mobile devices, design mobile first. Keep it short, clear, with one CTA per send.

From here we take a look at how you can optimise your schedule and save time and resources with email marketing automation.

Automation

LESSON 5



Marketing automation is a process that lets technology take over the time and resource intensive marketing tasks from internal teams, freeing up people to look closer at elements like strategy. Email service providers can now automate scheduled email sends, as well as social media posting. Moving towards marketing automation enables you to determine better ways to deploy content, and to optimise content (as well as timing), for the best results.

Marketing automation is software that eliminates repetitive tasks, and can intelligently target your audience based on their preferences, or purchase history. This allows you to send the right message to the right people, at the right time.

Most marketers are time poor, and lack the ability to create each email campaign and monitor and manually press send – especially as business grows. Marketing automation allows you to grow your relationships, customers, and brand engagement with little day-to-day effort.

Implement complex strategies

Automation

We all know that email marketing can create meaningful conversations and interactions with potential and current customers, with most companies sending a series of pre-built and written content at regular intervals – such as newsletters. Automation enables you to add elements of complexity to these messages, that you otherwise wouldn't have time to do. Personalisation drives customer loyalty, and sales, and treating your recipients as unique people with unique needs is always a smart marketing move. Automation allows you to send custom messages to different segments, timing these sends based on the recipient's past actions. But how does it work?

How does marketing automation work?

Automation is only possible with the correct data on your audience and send lists. Each digital interaction with your business creates and provides you with valuable information. These can range from subscribes, purchases, clicks on online adverts and engagement with social media posts.

Use your ESP or website analytics to gather a complete picture of your contact data lists, see where your audience is located geographically, their gender, their engagement levels, and turn these insights into actionable automation.

Consider what messages you want to send, and to which segment. Then you simply need to analyse your data to see what circumstances are best for a triggered event or send. With a little research, your audience should now receive valuable content when it's most relevant to make them convert, or to encourage them to take whatever action is inline with your overall marketing and business objectives.

Ask yourself the following questions to get started:

- Can you identify, track and engage individual buyers online?
- Can you look at a list of customers and prioritize them based on fit and likelihood to buy?
- Are you filtering leads based on level of engagement and interest?
- Can you measure the revenue contribution of every single one of your marketing campaigns?
- Can you do all of these things without wanting to tear your hair out?

Marketing automation will enable you to do all this.

Detailed look at marketing automation in action

When Hansel and Gretel Sweet Co. approached us, their business had exploded. They had gone from a small sole-proprietorship business, to a multi-national organisation in just a few short years.

They had too few staff to perform all the elements necessary for highly effective email marketing. They knew they needed to automate and optimise their sends to free up the team, and knew their customer journey was not streamlined, and didn't know how best to react to this to improve sales and digital experience.

We recognised that whilst revenue and sales were good, Hansel and Gretel Sweet Co. had not fully focused on building relationships with their customers, and as such, their retention was poor. We suggested that Hansel and Gretel Sweet Co. use automation to build long lasting relationships with current and potential clients by building out the user journey.

Stage 1: The user journey

Using their existing metrics, we identified that Hansel and Gretel Sweet Co. was losing potential converts on their website through a low dwell time, and high bounce rate. Along with writing and creating more enticing copy and visuals, we incorporated a subscriber pop-up form on their site on key pages, and built an email welcome track from this first action. The email series was automated, scheduled to send at regular intervals to keep Hansel and Gretel Sweet Co. at the forefront of these users' minds when it came time for them to make their candy-house purchases.

Stage 2: Checking out

We knew that Hansel and Gretel Sweet Co. had high value actions occurring regularly on their website, including many users putting products in their online shopping cart. We created a series of automated emails triggered by this action, sending a reminder email to the user, adding urgency to drive conversions into sales. As a final step in this triggered series, we sent engaging bread-crumbs themed vouchers and promotional codes to the recipients that met certain criteria for loyalty or high value past spend.

Stage 3: Re-warming contacts

H&C Co. had a large email list, and many unengaged past purchasers. Some of these contacts had not engaged with the brand for a long time, but we felt they were still valuable to Hansel and Gretel Sweet Co.. Using automation, we sent occasional reminder emails to these targets, reminding them about what great value H&C Co. offer, and sending them engaging and informative content to refresh their brand perception.



How do I implement email marketing automation?

Automation

Marketing automation software can vary from simple online tools, to large applications built to manage workflows and integrated campaigns. Whilst you can adopt some of the strategies involved with automation, you will require a platform of some description to best utilise these in order to free up your resources.

The best software or tool for automation will depend on your business needs, size and internal skills. Here are some of the main considerations for your marketing automation platform:

- Ease of use – Whatever platform you pick, it should match your ability and time resources available.
- Features – What solutions offer the features you need? Don't spend more on additional features if you think you won't need them immediately.
- Integration – It should easily integrate with your existing software.
- Customisation – Discuss any requirements with the seller before agreeing to a price.
- Price – Consider upfront costs, training, additional features, as well as time estimates and see which platform best suits your needs and budget. Also consider the contract – does monthly or annually suit your cash flow better?
- Support – You will be glad to have support when things go wrong, be sure to take this into account across the different platform offerings.



Quick wins

How to improve your email automation

Automation

These examples of best practices should inform your marketing strategy, and enable you to make informed decisions about how to best utilise email automation.

- 1.** Be specific – Although the world of automated marketing can seem daunting, it's essential that you start with clear objectives and goals. Set achievable goals based on your existing data.
- 2.** Look at examples of automation done well – It's likely you have already engaged with an automated email send, look at your inbox and see what you could easily replicate with automated and triggered emails.
- 3.** Segment your audience – Automation works well when it's used against highly targeted data. But how you segment and target will depend entirely on your goals, and your audience.
- 4.** Create steps – Although a holistic approach works well in the earlier stages of automation, you need to drill down into the detail as your strategy progresses. Identify your triggers for how you want to move your recipients forward and towards your overall goal. Create if/then statements – if someone interactions, then they receive?
- 5.** Test, test, test! – Nothing is more off-putting than receiving an incorrect or irrelevant email from a company, before you hit go on your automated campaign, make sure your lists and information are completely robust.

In our final section we cover what kind of analytics and metrics you should be using to measure the success of your campaigns.

Analytics

LESSON 6



Emails are one the most measurable forms of marketing out there, and whilst there is a wealth of information online, taught in courses and available in ebooks on how to build the best send possible — how do you know when you’ve hit your unique formula for success?

How exactly you have optimised your sends, or designs, or worked on your campaign strategy is irrelevant if you can’t see or measure the result of your efforts. Metrics help you justify your spend and time, and help focus your efforts on the best performing emails in your campaign calendar.

Before hitting send on your next email, ask yourself, have you fully defined your aims and objectives from these sends? Is it to generate more sales and income revenue? To convert leads into customers? Build brand awareness with engaging content?

Whatever your goal, there will be a metric/tool you can use to record and track your stats to determine how you’re progressing towards your goal.

Key email metrics and why they're important

But let's look at the analytics we should all be using religiously across any campaign or send:

Open rate

Analytics

Quite simply, this means how many of the recipients of the email opened it. This provides value as you can use it as a comparison measure, not only against your personal sends across the year, but against industry benchmarks and averages.

Why is it important? — Track your open rate across all your sends, paying attention to the factors that might influence this statistic, like time of day, day of the week, subject line, preheader. You can test all these elements to get the best open rate possible.

How do I calculate it? — Your open rate should be easy to find within your ESP reporting tool. But do your research - what is a good open rate for one sector, might not be for another. There is a lot of conflicting information out there on benchmarks for different industries, make sure your targets are realistic and reflect an average of the benchmarks you can find online. Trusted sources like Campaign Monitor, MailChimp and similar ESP's publish scientific and robust stats for you to compare against.

Clickthrough rate

Of the recipients that opened your email (reflected in the metric above), this number or average is the measure of engagement - who clicked a link within the email.

Why is it important? – Clickthrough rate, sometimes shortened to CTR is the most important metric most marketers track regularly. It's the day-to-day metric that lets you clearly define performance of each send. A general rule of thumb is, the more CTR an email has received, the better. Tracking this over time should show some level of improvement of engagement as you learn what your audience likes and doesn't like, and therefore what they click on.

How do I calculate it? – CTR is regularly used to monitor results of A/B testing, as these tests are often used to evaluate how to get the most clicks from a send. If your ESP of choice doesn't show you your CTR within its internal reporting systems, you can use this equation to keep track of your results:

*(Total clicks ÷ Number of delivered emails) * 100.*

There is a difference between click-through rate and unique clicks – the amount of individual people who have clicked. Be sure which you want to measure and which is more important for you. You can also benchmark your CTR rates using the same method as above.

Conversion rate

Your conversion rate might not be applicable to every email you send, but is important when it is needed in specific emails. Conversion rate is the percentage of recipients who clicked a link within the email, and completed the goal action – e.g. purchasing a product.

Why is it important? – All emails should have a goal of some sort, and some are more measurable than others, like lead generation through filling in a form. If you're asking your list to fill in a form to get a call back from your sales team, you should be tracking how well your call-to-action works. Conversion rate is therefore the most important tool in working out if you're achieving your more tangible business goals.

How do I calculate it? – Most ESPs will not have a simple inbuilt tool for you to use to figure this out, as it's so unique to each business and their objectives. You should be recording how many emails you are sending with a conversion goal internally, as well as tracking the number of people who have completed the action in each send campaign. Plot this in a graph for an easy way to see improvements over time, or to identify any messaging or CTA prompts that need adjusting.

Any easy way to do this is to integrate your ESP with your web analytics (like Google Analytics, or WordPress). Create unique links for your emails to identify the source of your referral traffic from each send.

Bounce rate

Bounce rate is the percentage of emails sent that were not delivered to an inbox – for a variety of reasons. There are 2 main types of bounce rates, soft and hard. Soft bounces are caused by problems such a full inbox, or server errors. The recipient's server may attempt to redeliver these at a later time. Hard bounces are a result of an incorrect email address and will never be opened by your recipient.

Why is it important? – Some Internet service providers use hard bounce rates to determine the email sender's reputation – a large hard bounce rate will cause problems for you down the line, and it's important to ensure your data and email addresses are correct, and routinely cleansed.

How do I calculate it? – This should be one of the key features your ESP tracks. Keep up to date with what is a good and bad bounce rate, and know the difference between a hard and soft bounce.

List growth

The rate at which you gain new subscribers is a good indicator of how well your messaging and tactics are performing. Keeping track of your growth and loss will enable you to correctly position your brand to your target audience.

Why is it important? – Lists expire by about 22.5% every year, so it's important to continually attract new data and subscribers to maintain a healthy list and to expand your reach.

How do I calculate it? – Use the number of new subscribers minus the unsubscribe rate and/or spam and email complaints to find your growth average.

Also keep track of your opt-out rate, as this will negatively affect your list growth, as well as being a good indication that your subscribers are not engaged or enjoying your content.

Sharing and forwarding

The rate at which your subscribers and recipients share your content with others is a great way to reach beyond your lists, and should be tracked carefully in each send. Conversions don't help you attract new leads, but shares and forwarding does.

Why is it important? – Seeing what articles and emails are shared beyond your list will enable you to discover what types of content works well, and what gets shared the most. Knowing this valuable information will help you plan your future campaigns based on analytics and data, rather than guesstimations.

How do I calculate it? – If your ESP does not track this for you, you can track clicks through your forward button within the send itself. Tracking these over time, and comparing with the original email content, should give you a good picture of the scope of your potential external reach.

Understanding return-on-investment

The return on your investment for your email campaigns is simply — how much money/time/resources they cost your business, versus how much revenue they created. Ideally, you should always be creating more income than you spend on each send, but this isn't always the case — for example if you are looking to build brand awareness or are actively looking to grow your reach through building a dialogue between your company and your audience. Knowing your goals here is key.

If you are looking to determine the ROI of your email marketing, you can assign different values to each type of lead generated, based on their likelihood to convert. Being able to adequately track your actual ROI will help you make a business case for email marketing in the future, and justify the use of email marketing as a channel that drives income.

Quick wins

How to improve your email analytics

With such a variety of metrics to measure and analyse, how can you best allocate your time to the correct ones for you and your business?

- 1.** Have a clear defined goal — know what you're aiming for and choose the best analytics for you.
- 2.** Attract more visitors to your site — getting signups by offering content of value is a great way to increase your subscriber list.
- 3.** Remove the unengaged — sending emails to people who will never be engaged will bias your results, especially if the sends themselves are just sitting in 'junk'.

4. Focus on leads, not subscribers if relevant — send emails that offer lead generation content.
5. Track the results of your CTAs — especially if you're looking to drive conversion rates.

We hope you have found this guide useful and informative. If you have any questions please do contact us. We're here to help!

Analytics



We know email can be tricky
so let us help you with your
next campaign.

Get in touch to see what
we can do for you.

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