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A BEGINNER'S GUIDE TO EMAIL MARKETING

In the digital age, email is an intrinsic part of maintaining customer relationships. It boasts lower costs, faster delivery, and larger reach than any form of physical advertising. However, you may not be taking advantage of all the possibilities available within email marketing. By moving beyond manually sending one-on-one emails, you can:

- Automatically group contacts through common criteria and send them emails relevant to their specific needs
- Send emails automatically at a certain time or after a certain action occurs
- Nurture your contacts into becoming customers
- Evaluate campaign success through email performance data and see what content resonates with your audience

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HOW DO YOU **EMAIL?**

For many small businesses, email marketing is limited to using tools such as Microsoft Outlook to type and send emails as they are needed. However, you can noticeably increase your efficiency and access more advanced tools with a CRM.

A CRM, or Customer Relations Management system, is powerful software that can execute nearly every step of a marketing campaign. It is:

1. **A marketing manager.** A CRM can send emails (or other types of ads) to its database of contacts without you ever needing to open your email client. It also tracks the results of these campaign or sales activities, and can provide reports on your progress.
2. **A database.** A CRM records information about your audience, such as their contact information and any other data, or *properties*, that you may need. Contacts can be grouped into lists based upon this information.
3. **An automator.** Many campaign activities can be completed in advance and scheduled for a later date. A CRM can even respond to information in its database or other events, then send an email without you scheduling a date or time.
4. **A sales reference tool.** Finally, if set up correctly, a CRM can help your business track the customer lifecycle and streamline your processes, including sales management, customer service, and more.

Wondering where to start? There are dozens of CRM options on the market, and they each offer slightly different benefits. Four popular examples include HubSpot, Constant Contact, Mailchimp, and SendInBlue.*

* *These are examples. The US government does not endorse or promote any of the listed platforms.*

SELECTING A CRM

Many CRMs exist to help you build your email marketing, and each offer a variety of plans with different tiers of pricing and features. Some even offer free trials of their platforms.

The best choice for your business will differ based upon a number of factors. When researching the options, think about how you want to use the software and what your business's needs might be.

Questions to Consider Include:

- What does it cost per month to use the CRM software?
- Does the monthly price differ based upon how many features you need, or other criteria?
- Is there a maximum number of contacts the database can support?
- Is there a limit to the number of emails you can send per month?
- How many different user accounts can be created?
- When creating user accounts, does the CRM support varying their levels of permissions, or offer admin accounts?
- Can emails be built in advance and scheduled to be sent later?
- Is coding knowledge required to create new email designs or to use other features in the CRM?

THE ANATOMY OF AN EMAIL

Once you've picked a CRM, it's time to create your first email. However, you may be unfamiliar with the content marketing emails can contain; they can be much more complicated than plain text emails.

Typically, each email should have:

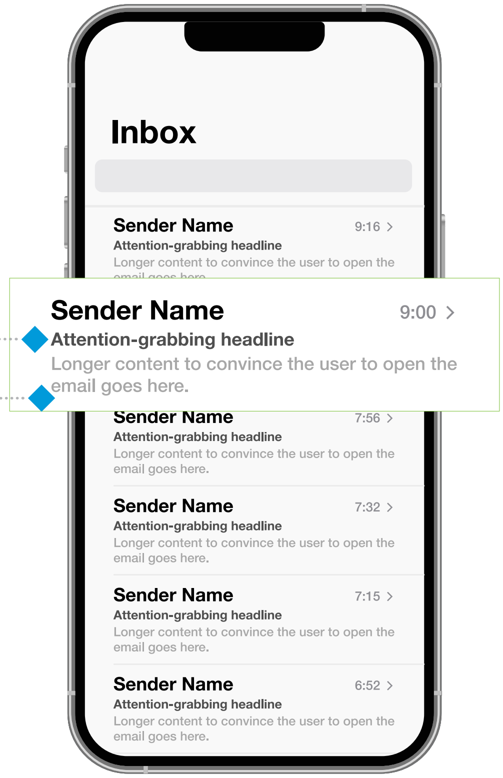
1. **A Subject Line**
   For a user to open your email, the subject line must attract their interest first. As a result, these 30–50 characters are some of the most critical content, as ineffective subject lines can drastically reduce the chances of someone reading your email.

2. **Preview Text**
   Similar to subject lines, previews show a glimpse into the content of the email. Previews should be used to provide detail or clarity to the subject text.

3. **Interesting Content**
   Once the subject line has done its job, your content should further capture the user's attention. Be sure to consider your user's needs, so you can provide them with relevant information or an answer to their problem or question.

4. **Call to Action (CTA)**
   Create a goal for each marketing email. Do you want them to visit a webpage? Fill out a form to give you information? Complete a sale? Always provide them with a clear, easy, and eye-catching way to do so.

5. **A Footer**
   Marketing emails that are sent in bulk are legally mandated to offer a way for the user to unsubscribe from future messages. Typically, this link is placed unobtrusively in the footer. If this is not offered, your emails will be marked as spam.



MASTER THE BASICS

As you begin crafting your first marketing emails, you should keep in mind the following tips to encourage a positive response from your audience:

01 Send Engaging Content

Content is king, so the information you send should be your top focus as you plan campaigns. Keep it short, focus on the user's needs or interests, and mix up the topic. Don't send repetitive content, and don't be afraid to give your brand a personality and voice in your writing.

02 Keep in Touch, Don't Overwhelm

How often you should send emails depends upon your industry and your contacts' preferences, but in general, the rule is 1 to 2 marketing emails per week. However, quality is more important than quantity, so prioritize writing compelling content first.

03 Create Clear Next Steps

Marketing emails should always include a call to action, or CTA, that offers users a link to an action they may want to complete. To increase clicks, make sure that all the CTAs you offer are eye-catching, interesting, and clearly describe what happens when clicked.

04 Focus on the Header Area

Content at the top of the email & visible without scrolling consistently receives the majority of users' attention. Take advantage of this behavior by introducing the most important topics or messaging first.

05 Design a Professional Appearance

To reinforce your branding, take advantage of your CRM's building features—add your logo to the top of the email, and use your brand colors throughout. You should also make sure font sizes are easy to read and consistent, and utilize interesting layouts.

06

Supplement with Images

Adding pictures or icons are a good way to break up the text and add interest while reinforcing your branding. However, keep in mind that some users opt not to show graphics in their email client, so your content should be a balance of text and images.

07

Personalize Your Email

While it's difficult to connect with users when sending emails in bulk, fortunately most CRMs offer *personalization tokens* or *tags*. These are commonly used to insert the user's name into your content, but they offer a variety of other opportunities too.

08

Finesse Subject & Preview Text

Creating a sense of urgency and interest while letting readers know what to expect in the email is critical. You can even try something unexpected, like asking a question or adding a joke, emoji, or deadline, then add extra details in the preview text.

09

Vary Your Sent From Address

A CRM allows you to send emails from any email address in your organization. You can use this feature to add professionalism and clarity, while protecting employee contact information. Consider addresses like *support*, *help*, *education*, *tips*, *events*, and more.

10

Don't Be Afraid to Hire Help

It's important to play to your strengths. If one aspect of marketing is difficult for your company's skill set, consider hiring a contractor to help with the workload. Even temporarily working with a copywriter, for example, can inspire your future efforts.

CONSIDER ADVANCED **TECHNIQUES**

As you master sending marketing emails and consider implementing new ideas, you should explore the other possibilities a CRM offers.

Reporting

The work may seem complete after you press send, but there is one more step: reporting. CRMs offer data on each email's performance, so it is easy to see how receptive your audience is to your content.

What You Can Do:

At minimum, your marketing team should routinely review delivery, open, click-through, and unsubscribe rates; these will gauge whether your contacts are reading your content and clicking your links, or if your audience is unengaged, uninterested, and providing email addresses that are no longer active.

Things to Keep in Mind:

Campaign performance data can be negatively skewed by uninterested users. To ensure accurate results, first decide how long a contact can reasonably ignore your emails before they can be considered disengaged. Next, routinely delete disengaged contacts who meet this criteria from your database.

Segmentation

Each customer is different, so the way you interact with them should be different too. To tailor your communications, you should create groups, or lists, of contacts that have aspects in common.

What You Can Do:

You could manually make a list of all the contacts you met at a certain trade show, then send them a follow-up email. Or, you could create a list that automatically adds all contacts located in a certain region, then send them an email with content relating to their area. The possibilities are endless!

Things to Keep in Mind:

Though it's tempting, purchasing a contact list is not recommended. New GDPR legislation protects personal information and mandates that all users must consent to receive messages from you. In addition, purchased users typically don't become customers, and their lack of interest may skew your results.

TIP: not sure what some of these terms mean? Check the glossary!

Testing

To maximize your success, it's important to try a variety of approaches, then monitor performance. By comparing the data to your benchmark average, you can see out what works best for your audience.

What You Can Do:

Consider varying your speaking points, the topics of your emails, the CTA phrase and appearance, the time you send emails, how many emails you send per week, the imagery you use in the email, and more. You may be surprised by how much small changes can improve your results, even for the same product!

Things to Keep in Mind:

Sometimes it can be difficult to tell what's working. To test one specific aspect, execute an A/B test. Split your desired audience into two groups, then send an email to each. The emails should be nearly identical, except for that ***one*** change. By comparing the results, you will see which version the audience favored.

Automation

Work smarter, not harder. By using built-in tools, the CRM can be set up to send emails for you without requiring manual input—an excellent way to free up your time to focus on more urgent matters.

What You Can Do:

Email marketing automation can become incredibly complex, but for now, consider some easier to accomplish options. Perhaps you have time to create an email now, but it won't need to be sent until next week? Use the scheduling feature to automate when that email should be distributed, and to whom.

Things to Keep in Mind:

You can also create more custom and complex sequences of actions by using workflows. First you'll set up a trigger (i.e., someone filling out a form), then assign a result (i.e., sending a confirmation email). The CRM will execute it automatically until that workflow is turned off.

Did You Know?

Although these techniques can be used independently, many of them can be combined and used in tandem to create more powerful marketing automation!

Plan for the Future

Although the majority of CRMs support reporting, segmentation, testing, and automation to some degree, it is important to understand whether there are any limitations. Even if your company does not currently use these options, it is easier to select a CRM that can accommodate your future growth than to disrupt your workflow by transitioning to a new platform a second time.

Questions to Consider Include:

- Can you create automated workflows? A/B tests? Sales landing pages? If so, are there any limits to the quantity?
- Can the CRM score users to predict how far along the sales lifecycle they are?
- Can you host your entire website on the CRM to take advantage of analytics tools and reporting? If so, does the CRM support smart content?
- Can you manage your social media accounts from the CRM? If so, are all the platforms you use supported?
- Does the CRM offer their own educational materials or other customer support to help new users?
- Are there other perks, such as third party software integrations, a theme marketplace, or other features?

GLOSSARY

Skip to: **A** *to* **C** | **C** *to* **L** | **L** *to* **S** | **U** *to* **Z**

A/B TESTING: A/B testing, or split testing, is a method of testing two variants of a single item by sending each version to a separate list of contacts. By measuring the success of each, you can see which is more successful with your audience.

ACCEPTANCE RATE: The opposite of bounce rate, this rate shows the percentage of users in your database that can successfully receive emails. This does *not* correlate with whether they choose to engage with those emails. Acceptance rate can also be called *delivery rate*.

AUTOMATION: When a CRM executes tasks without manual employee input. This can be used for a wide variety of actions, such as scheduling appointments, following up after a sale, nurturing leads into customers, offering personalized content, providing blog and post notifications, and more.

BENCHMARK: As you learn about email metrics, you may want to try different strategies to improve your performance. It is important to know your (or your industry's, or your competitor's) benchmarks, i.e., the average performance data. This will allow you to compare whether the results from your tests are improvements.

BOUNCE: An email bounces when it is undeliverable. This may be the result of an email address or domain that no longer exists, or other problems with that user's email servers. Email addresses that bounce should be routinely deleted.

BOUNCE RATE: This rate shows the percentage of users in your database that bounces and to which emails cannot be delivered. Well-performing databases that are properly maintained should have a less than 2% bounce rate.

CALL-TO-ACTION (CTA): These buttons or links guide your audience into completing a specific action, such as viewing a webpage, buying an item, registering for a free trial, or signing up for an event. Your CTAs should correspond to your marketing goals.

CAN-SPAM ACT: Passed in 2003, this law sets rules for how companies can send messages, as well as sets penalties for companies who break these rules. For example, all emails must offer the option to unsubscribe from receiving them.

CLICK-THROUGH RATE (CTR): The CTR shows the percentage of recipients that clicked on a link in your email. It is calculated by dividing the number of unique clicks by the number of emails that were sent. The higher the CTR the better, but an attainable goal is 20–30%.

CONVERSION RATE: By clicking on a link in your email, users visit a webpage that often presents a goal, such as filling out a form or buying a product. The conversion rate measures the percentage of users that complete that goal by dividing the number of conversions against the total number of users; ideally this number will be between 2–5%.

DELIVERY RATE: The opposite of bounce rate, this rate shows the percentage of users in your database that can successfully receive emails. This does not correlate with whether they choose to engage with those emails. This can also be called *acceptance rate*.

FORM: The most common way to gather a user's contact information is through a form. Forms should be prominently placed on your website, typically on the contact page or footer, allowing users to opt into your communications.

FORWARDING RATE: Forwarding rates measure the percentage of recipients who forwarded your email to another person. This is a helpful metric because it shows the number of brand advocates that you have. The forward rate is calculated by dividing the number of forwards by the number of total emails delivered.

GDPR: The General Data Protection Regulation concerns data protection and privacy for European citizens. As your database can include contacts from any country, the GDPR may nonetheless apply to American companies.

KEY PERFORMANCE INDICATOR (KPI): KPIs are metrics that are used to track progress towards your marketing goals. In email marketing this encompasses a variety of data, such as open rates, click-through rates, unsubscribe rates, and more.

LANDING PAGE: Unlike a standard webpage, landing pages are single-use and focus on one specific goal, with little other content to distract users from that goal. Most include a call-to-action that is used to measure the success of that LP, and many contain a form to collect a user's contact information.

LEAD:	Leads are potential buyers who have engaged with your brand in the past and are likely to make a deal in the future. This term can also be used more specifically to discuss only users who are in the earliest stage of the sales lifecycle.
LIST:	At its most basic, a list is a group of contacts with some criteria in common. However, despite their simplicity, lists are powerful marketing tools, as they allow email blasts to be sent in bulk, without sacrificing messaging being targeted towards that specific audience. Lists can even be created (and added to) automatically by your CRM.
NURTURING:	A user might be saved in your database long before they are ready to become a customer. To help them along the sales process, you can nurture them by sending relevant emails that pique their interest, remind them of what you offer, and invite them to learn more.
OPEN RATE:	An open rate is the percentage of users who opened your email. It is calculated by dividing the total number of subscribers who opened an email by the number sent. One of the best ways to work out if the email strategy is working. (Well performing is between 17% - 28%)
PERSONALIZATION TOKEN:	When sending bulk emails, it can be difficult to write content that feels personal while also being applicable to all recipients. A CRM can automatically insert information stored in your database about each contact, allowing you to personalize an email without sacrificing efficiency. There are many ways to do this—for example, you can add a token for the user's first name, so your email reads as if you are addressing each recipient directly.
SALES LIFECYCLE:	The time between a user being first introduced to a product and buying said product. The sales lifecycle can be further broken down into several phases depending upon the user's level of interest and familiarity with the product, as well as their engagement with your marketing.
SEGMENTATION:	Segmentation is the process of dividing your database into groups with certain commonalities, then using that data to present information in a way that is most appealing to that group. Done properly, segmentation allows your marketing to be more intentional, efficient, and relevant.
SUBSCRIBE:	For a business to legally send a marketing email to a contact, they must first agree to receive your content. This is called subscribing. Generally this process is accomplished through a form; either a user submits their email specifically for this purpose, or checks a box agreeing to subscribe while accomplishing another action.

UNSUBSCRIBE:

Unsubscribing is the email equivalent of unfollowing or blocking your content; it indicates a strong level of dissatisfaction or disinterest. This can be a good thing, if the user knows they will never purchase your products, but a high volume of unsubscribes might indicate the need to revise your approach, messaging, or frequency.

UNSUBSCRIBE RATE:

An unsubscribe rate is the percentage of users that request not to receive any further emails; it can be calculated by the number of unsubscribes divided by the number of emails delivered. You should target an unsubscribe rate lower than 0.5%, preferably around 0.2%.

USER SCORING:

This is an advanced technique in which a CRM assigns each user a score based upon how they interact with your campaign. Positive actions (opening email, clicking links, etc.) raise a user's score, while negative ones (ignoring emails, unsubscribing, etc.) lower them. The score can be used to predict how likely a user is to buy your products, and can also be correlated to the lifecycle journey.

WORKFLOWS:

Workflows are a series of steps that a CRM completes automatically. They require at minimum an event to trigger the workflow, then an action to be completed when that event occurs. Workflows can be a single step (i.e., if someone subscribes to your blog, they receive a confirmation email), or they can be a long series of more complicated steps.