Email Strategy Planning Template

Use the following steps to start an email marketing strategy from scratch. If you have already created an email marketing plan, use this document as a checklist to review your progress and go back to any steps you may have missed.

STEP 1: PREPLANNING

Start by answering the following question.

Which email service provider will I use?
The needs of email marketers simply can't be met by consumer-level email services like Gmail or Outlook. Read the rest of this document and think about what your needs as a marketer will be, then research popular email service providers (ESPs). Carefully compare their features and pricing. You can always change ESPs in the future, but the larger your list becomes and the more sophisticated your strategy becomes, the more complex and difficult the process of changing ESPs will become.

Look for automation, deliverability, dynamic pricing that grows with your list and needs, and easy-to-use drag-and-drop email design functionality.

Once you have settled on an email service provider, complete the following basic tasks.

Create an email style guide and upload/configure brand assets
A style guide is a set of parameters for the ways in which colors, logos, fonts, and other design elements will be used to create a cohesive, branded look for the emails that you send. If you're just starting out or flying solo, this could be as simple as an email you create as a template for use with all your messages. If you're working with a team, your style guide should be enshrined in a document accessible by everyone.

Most ESPs have a library of templates you can choose from for inspiration.

Upload your existing contact list
Most ESPs provide an option to import your existing list of contacts, and they provide formatting guidance for the best way to do so. It's important to import only contacts who have already expressed consent, or a desire to contacted by your brand; this will keep spam complaints low and your sender reputation high. For this step, you will need to supply brand assets such as a logo and color palette.

STEP 2: IMPLEMENTING A LIST GROWTH STRATEGY

While it is true that "the money is in the list," a small list won't produce the results marketers are looking for. To get the most out of your email marketing efforts, you should create and implement a list growth strategy. Start by answering the following questions.

Which customer avatar(s) will I be targeting?

The most effective way to grow your list is to offer free value in exchange for the contact information of visitors to your site or an audience you advertise to. This free value takes the form of a lead magnet, something of value that solves an immediate and pressing problem faced by your audience. Common lead magnets include e-books, worksheets, checklists, and other actionable tools. The document you are reading right now is a lead magnet.

To be an effective lead magnet, the tool must solve a problem that your audience is facing. This is where your customer avatar comes in. A customer avatar is a representation of your ideal customer that acts as a stand-in during exercises like this. You can learn more about customer avatars here.

Select or create the customer avatar you will be targeting with your list growth efforts.

What lead magnet(s) will I be using to attract subscribers who are similar to my customer avatar?

With your customer avatar selected, determine which lead magnet will entice traffic similar to your avatar to part with their contact information and opt in to your list. In the case of this document you are reading right now, new digital marketers, freelancers, or entrepreneurs will gain a lot of value out of having a robust, repeatable, step-by-step template in plain English.

If you already have a library of digital assets or content at hand, this process will be much easier. If not, that's not a problem, but you will have to create a compelling lead magnet from scratch (or hire a freelancer to do it for you).

How will I drive traffic to opt-in landing pages?

The form that traffic will use to opt in to your list has to "live" somewhere. A landing page for the express purpose of driving list subscriptions is often referred to as a squeeze page. Creating an awesome squeeze page is a good first step, but you will also need to drive traffic to this page to grow your list quickly. Paid media (as opposed to earned or owned media) is a good solution to this problem. Running social or PPC ads that point to your squeeze page, which promises to deliver your valuable lead magnet in exchange for an opt-in, is the industry-standard method that marketers use to grow their lists.

Where are other opt-in points?

Driving traffic to your squeeze page(s) is a great way to grow your list quickly. The contact information of your audience is so crucial to your marketing efforts—and paying to drive traffic

to your squeeze pages incurs cost—that you should be finding ways to get everyone who comes into contact with your digital footprint to opt in. What other ways can you encourage sign-ups? Pop-ins on your website, content marketing in the form of search-engine-optimized blog posts or articles, and more should be leveraged as much as possible to drive opt-ins at low or no cost.

You'll need the following resources for this step:
- Customer avatar
- Landing page(s)
- Lead magnet(s)

STEP 3: WELCOMING NEW SUBSCRIBERS

You've gotten your traffic this far; they have demonstrated interest in your lead magnet and entered their contact info in the opt-in form. It's time to welcome them to your list, introduce them to your brand, and deliver the value you have promised them. Start by completing the following tasks.

Create a welcome sequence

A welcome sequence is a series of emails that are set on autopilot and delivered via your ESP's automation functionality. This sequence is triggered when someone enters their contact information into your opt-in form. Good lead magnets are digital, because digital products can be delivered right away and, after the cost and effort to create, can be given to a limitless number of contacts at negligible cost.

Your welcome sequence should consist of two or three emails sent over several days. The first email should deliver the promised lead magnet and introduce the recipient to your brand while reiterating the value you provide. The next one or two messages should nurture your new lead by sharing content, customer success stories, or whatever marketing messaging you have selected to raise the temperature of your audience.

Audience temperature is a measure of a person's familiarity with your brand and the solutions you provide. A cold audience member doesn't know who you are or what solution you provide. A cold audience member may not even realize that there is a solution on the market for the problem they are facing. Conversely, a hot audience member is someone who knows and trusts your brand, with the "hottest" audience being your loyal customers.

Be sure to adhere to your brand style guide with every message in your welcome sequence, and use compelling copy and subject lines that are consistent with the attributes of the customer avatar you selected in the previous step.

Determine your welcome offer

After the expenditure of time, money, and effort you have already put into your email marketing apparatus, it wouldn't make sense to just give your new subscribers the lead magnet you

promised them and then cease all communications. Determine an offer you will present to new subscribers after they have completed your welcome sequence.

Common welcome offers include extended free trials, exclusive new-customer discounts, free additional products with their order, free consultations, and more. This offer can be presented as part of the final message of the welcome sequence or can dovetail into the welcome sequence as another sequence of one or two messages.

Experiment with sequences of different lengths, and track open rates, click rates, and conversions to determine an appropriate length for your welcome and offer sequences.

You'll need the following resources for this step:
- A lead magnet to deliver as part of your welcome sequence
- Two or three brand-consistent emails for your welcome sequence
- One to three brand-consistent emails for your welcome offer or offer sequence

STEP 4: RECOVERING LOST CONVERSIONS

At this point you have already set up email automation for the beginning of the customer journey with your brand in the form of the welcome and offer sequences. Now take time to set up automation for those customers who make it through the entire sales process but don't convert. Complete the following task.

Create your abandoned cart sequence

An abandoned cart sequence is an automated series of emails that attempts to recover lost conversions by reengaging with customers who leave items in their cart without purchasing or who abandon the checkout process without completing their purchase. This sequence is triggered by a failure to complete the checkout process, a condition that many ESPs can recognize via integration with your e-commerce store.

Abandoned cart messages don't have to be only for e-commerce brands, however. Sometimes people abandon an appointment-setting process, fail to complete a request for a quote, or have just one step left to complete their membership application. In these cases, a version of the abandoned cart sequence works perfectly to recover members of your audience who need a reminder to follow through.

An abandoned cart sequence should consist of two to three messages sent over a period of several days. These messages should be succinct and to the point, first reminding your shoppers, browsers, or appointment-setters that they have yet to complete their transaction. Subsequent messages should remind them of what they stand to lose by not moving forward, and the final message should include an enticement to convert, such as a discount, bonus, or some other accommodation like free shipping.

Track the performance of your abandoned cart sequence and experiment with new subject lines, message content, message send cadence, and offers to ensure that you are capturing as many abandoned-cart customers as possible.

For this step, you'll need two or three brand-consistent emails for your abandoned cart sequence.

STEP 5: FILLING YOUR BROADCAST CALENDAR

Email messages that are sent to your list outside the bounds of automation sequences are generally referred to as broadcasts or email blasts. Broadcasts are the workhorse of your email marketing strategy. Use them to communicate sales, events, new content, or other developments to your subscribers. Start by completing the following task.

Create a marketing calendar
Whether you create your calendar in Excel or use software like Google Calendar, you want to create a resource you can use to see at a glace what you have completed, what you have coming up, and the frequency of your promotions.

Ideally, everything goes on your calendar: sales promotions, new content publishing, important dates, social posts, media blackout dates, and anything else that would be relevant to your marketing schedule for the year and beyond.

Create and schedule messages in advance of relevant sales, promotions, or other events, and look for gaps to fill in your calendar.

You'll need the following resources to complete this step:
• A marketing calendar
• Brand-consistent broadcast messages as needed

STEP 6: TESTING AND RESULTS TRACKING

Every broadcast you send is an opportunity to glean valuable insights into what works and what doesn't when communicating with your subscriber list. Did including a personalization element, such as the subscriber's first name in the subject line, improve or worsen open rates? Which offer resulted in more clicks, a $5 discount or a 10% discount? Continually asking these questions and tracking your performance will help you refine your approach, discard tactics that don't work, and find new ways of connecting with your subscribers that will help grow your business.

Just about every aspect of your email marketing efforts can be tracked, measured, and improved, but design and copy elements that relate to concrete metrics should be the focus of your monitoring efforts. These metrics include open rate, click rate, and conversion rate.

Experiment with various subject lines to test their impact on your open rate. Try different layouts, body copy, and calls to action to test their impact on click rate and conversion.