



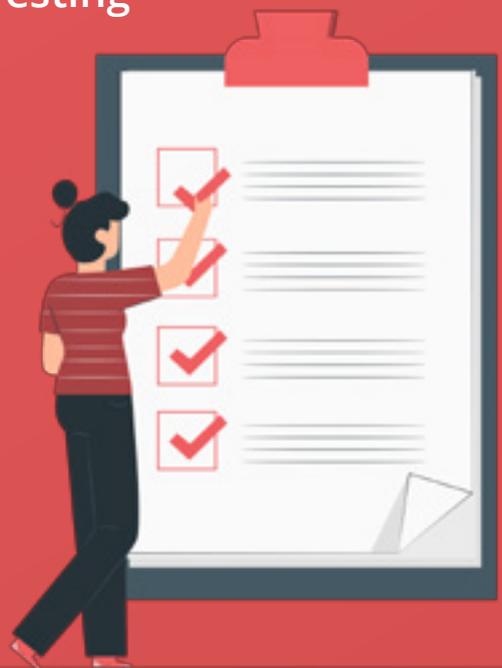
Email Marketing Fundamentals

The Ultimate Guide for Digital
Marketers and Entrepreneurs
on Leveraging Email
and Drive Growth



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Glossary

Email Service Provider (ESP) - An ESP is an online software solution that can be used to send out emails to contacts, based on lists or on a one-to-one approach. The solution can be helpful on the day-to-day activities of email marketers to sales representatives.

Email list - An email list is where you store the information you have gathered about your contacts. You can build the list online, using contact forms, subscription forms or via social media contests. You can also use a list that you have generated offline, at events, with your CRM or from your business partners.

Segment - Starting from your email list, you can create sub-lists, based on whatever criteria is appropriate for your specific need. These sub-lists are called segments and they are used to better target contacts when planning a campaign. You might use gender to segment lists, but you also have the option to use your contacts' engagement to create new segments, when you try to **increase email marketing engagement**.

Email marketing metrics - To be able to assess the success of your email marketing campaigns, you will use, at least at first, the basic email metrics that the industry operates with. There are 4 metrics that you need to pay attention to: **open rate** (what percentage of recipients open your email), **click rate** (the percentage of users who have opened your email and also clicked on a link or image), **bounce rate** (the percentage of recipients who could not be contacted) and **unsubscribe rate** (the percentage of recipients who asked to not be contacted again). The first two metrics refer to **engagement**, while the latter refers to **disengagement**. You can create KPIs based on industry or market benchmarks, but we will get to that later in the series.





What Is Email Marketing?

Before we can properly dive into the email marketing topic, we need to clarify what email marketing is and understand what you can do using email marketing platforms.

Email marketing is a marketing tactic of targeting contacts via email. It is used to send out email communication or newsletters to customers or prospects regarding company updates, benefits or offer valuable information. Additionally, you can also perform sales activities through email.



Email marketing ranks number one in terms of return on investment, at **\$44 for every \$1 spent**. Obviously, this statistic differs by industry or market, but what you need to keep in mind is that a well-defined and coherent email marketing strategy will help you keep subscribers engaged and up-to-date. That, in turn, will translate into profit for your company. So, if you arrived at this article with an important question about whether or not to start paying attention to email marketing, that answer should be crystal clear by now.

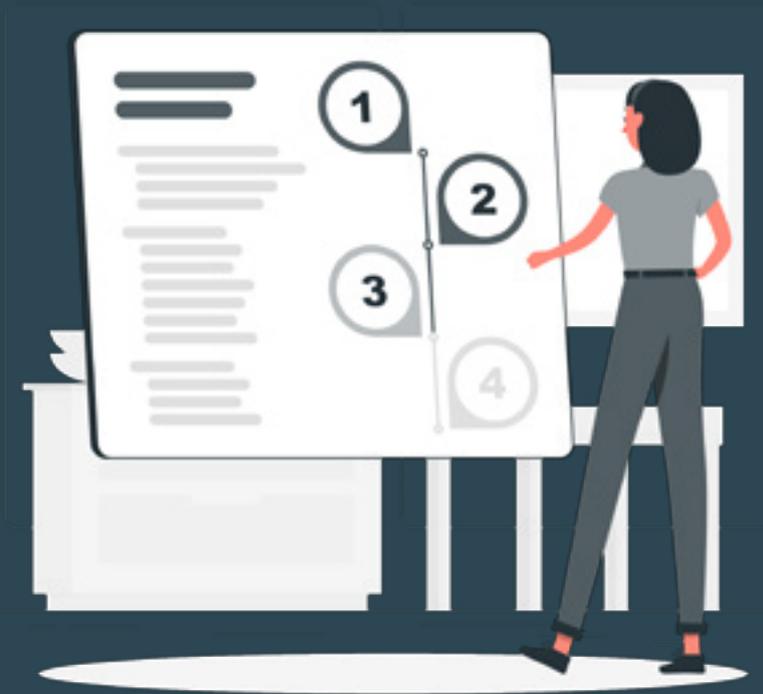


Use Cases

You can find below some relevant use cases about email marketing which could apply to you:

Brand awareness: with each American being exposed to up to 10,000 ads on a daily basis, it is really difficult to make a lasting impression. That's where email can actually help you boost brand awareness and keep your brand top-of-mind.

Inbound marketing: Help your subscribers find your content, from blog articles to white papers or e-books. By supporting them with valuable content, they will have a reason to continue reading your emails and engage with your value propositions.



Sales: Start promoting your products or services to your customers, make sure that you are upselling and that you constantly offer them something that they might be interested in. Let your customers know about promotions or discounts.

Lead generation: Reaching your prospects, but converting them is a more difficult task. Ask your prospective customers to fill out a form and move the conversation to email.

Lead nurturing: Help customers navigate the stages of your marketing funnel with content that will help them achieve their goals.

Engagement: From welcome emails to reminders, engagement emails are a good tactic for communicating with clients in a more personalized manner.

Benefits



While ROI or return on investment is one of the biggest benefits for using email marketing as a tactic to keep in touch with customers, it isn't the only benefit to take into consideration.

Website traffic: You can easily redirect your subscribers from emails to your website, therefore increasing traffic. Include relevant links inside the email, from blog articles to contact pages or from offers and promotions to important announcements. Not only will you get more people to visit your website, but you will ensure that customers are always aware of what updates you have for them and know where to find them.

Drive sales: Users that subscribe to newsletters are more likely to convert into customers, that's why emails play such an important role in generating sales. As previously mentioned, there is no contender to email when it comes to ROI.

Customer relationship: Build and maintain strong customer relationship via email. You might not have the time to personally connect with all customers on chat platforms or by phone, but email provides a great opportunity to bridge that gap.

Absolute control: Probably the most important reason to include email in your marketing strategy is the fact that, unlike social media or SEO, with email you own the channel. Of course you need to comply with regulations, but other than that you don't need to worry about restrictions that other channels come with. You decide who and when, and how often you contact your subscribers, which makes email priceless.

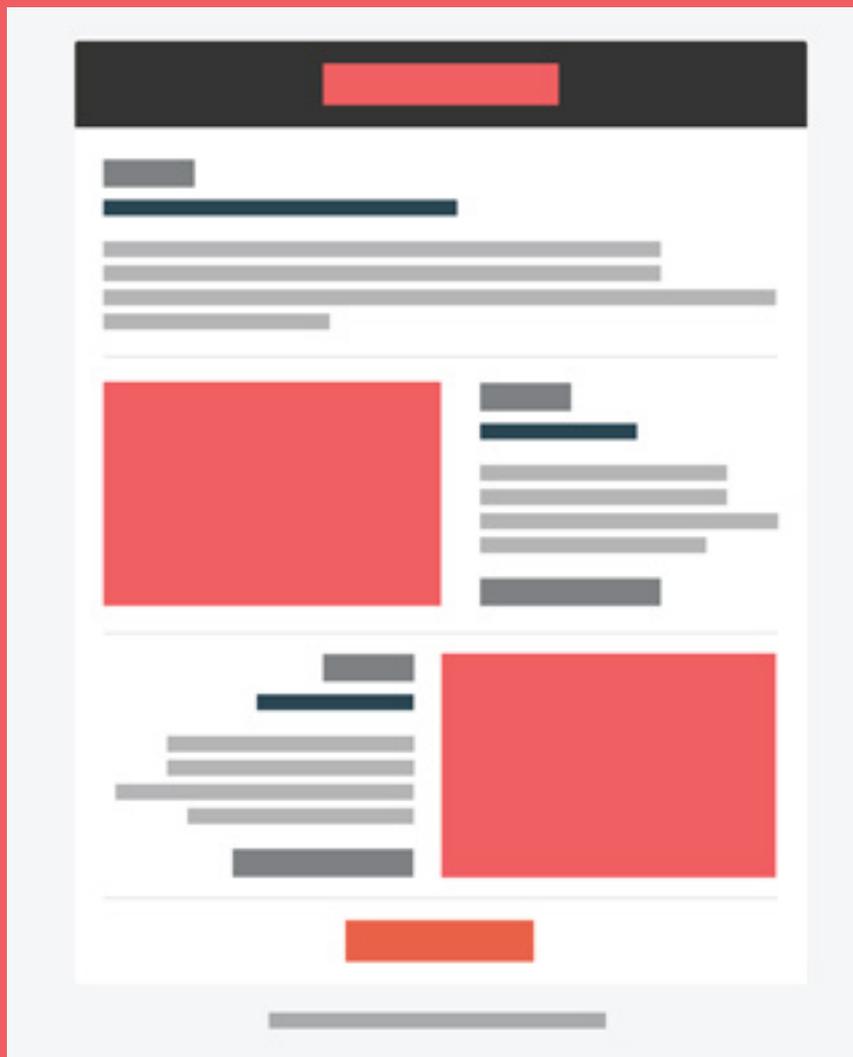


The Look and Feel

Templates play a major role in how you are going to interact with your subscribers. A clean and easy-to-understand template will help you get your message across, while also help you keep those subscribers engaged.

First of all, let's start by explaining what an email template is. Put very simply, an email template is an HTML document that dictates the sections, colors and text density of your campaigns. You can use templates to easily insert both your images and copy to create emails. The best thing about efficient templates is that you can reuse them whenever necessary.

To create an efficient template, make sure you **add very few images**, include your **brand assets** (logo, brand colors, social media links) and help **distinguish individual sections** by using different background colors. Having few or no images means that all email clients will be able to properly render your email. But colors and call to action buttons will actually transmit your brand identity.





The 8 Steps for Generating an Email Marketing Strategy

Definition

An email marketing strategy is a plan that includes **tactics, rules, procedures and goals** related to email activity. Each of these elements need to relate to a company's overall business plan and must be as detailed as possible.

1 Define your goals

There are several goals that might apply to your business:

- To grow your business
- To increase customer retention
- To develop a channel for customer relationship
- To increase ROI from digital marketing efforts
- To distribute content to subscribers

2 Choose an ESP

An ESP is an online service that you will be using for managing, creating and sending out email campaigns. Compare their features, integrations, pricing and decide which email marketing platform is most suitable for your needs.

Before making a decision, be sure to read reviews on online platforms like [Capterra](#) or [TrustPilot](#), because doing so will highlight the experience other users have had when using the service. On paper, one ESP might sound like a great choice, but they might have problems with support, for example.

3 Define your audience

You need to understand your audience and to make sure that subscribers fit the criteria that you have created. How do you do that? The most simple approach is to use buyer personas to map all the typologies of customers and/or prospects that you will be interacting with.



For B2C companies, some relevant buyer personas could be:

- Student persona
- Stay-at-home parent persona
- Non-parent persona

For B2B companies, buyer personas should focus on job titles, resulting in the following examples:

- Technical personas
- Business personas

Do your research, categorize your audience and start creating your personas.

4 Start growing your email list

Once you have set up the first steps of creating your email strategy, it is important to start thinking about growing your email list. You know what kind of people you want to attract and convert into subscribers, so now start planning. If you already have traffic to your website or application, you could consider using a form to allow visitors to subscribe to your email list. Most ESPs will offer you a simple way to do so.

Another tactic you could consider is offering some incentives for users to subscribe. Inbound marketing is extremely attractive for subscribers and you might offer a free e-book in exchange for some of their personal information. Also, don't shy away from giving your customers a discount when they subscribe to your newsletter, because this is a great way not only to grow your list but also to develop a healthy relationship with customers.

5 Define email types

Not all subscribers will be interested in all your emails. And that won't happen because what you communicate is not relevant to them. No, it can happen because of how busy all of us are. In this crowded space, it is important to grab your subscribers' attention with the information they are likely to react to.

Start thinking of the content you will be sharing with subscribers. How can you categorize that? Are you going to focus on tips and tricks and occasionally on updates regarding discounts? If so, that sounds great, because you already have two distinct categories. Allow subscribers to choose the email lists they end up in.

6 Create a communication plan

As soon as you have an answer to the following questions, you can map those answers in a long-term plan. How often do you plan on reaching out to your subscribers? What days of the week will you be using to schedule campaigns? Will you be having recurring campaigns, such as Black Friday or Valentine's Day?



Make sure to use the resulting plan, keep it updated and adhere to it, for a coherent email marketing communication and for protecting your brand identity. Furthermore, having clear schedules for sending out emails will also result in educating your audience.

7 Format your emails

This is something that we have addressed previously, but we are going to also include it here, because of how critical it is. Correctly formatting your emails will not only result in them being properly displayed in all email clients, but it will also mean that customers and subscribers will be able to recognize your email and your brand. This is vital because you want to create a sense of familiarity about your brand and having clear guidelines regarding the format of emails will contribute to that.

8 Monitor and optimize results

Whenever you send out a campaign, your ESP will automatically create a report with the most important metrics that you will need to assess the success of each newsletter. Use that data to determine what approaches work best for you and monitor the evolution of your results.

But, from time to time, you will also want to optimize those results. There are various areas that you can address when trying to optimize email marketing results:

- Test out shorter, personalized subject lines
- Test out newsletters with and without images
- Test out more appealing Call To Actions
- Test out the newsletter on multiple email devices



Building Email Lists

At the very beginning of your email marketing activities, you will need to properly **set up your ESP account**. That means adding all the necessary and required information regarding your business. Afterwards, if you're starting fresh and you don't have any customer databases ready to be uploaded, you will need to create your first email list. Most email service providers will offer you the option to create a **rule-based list** or a **dynamic list**.

Rule-based lists

Rule-based lists are something that you will want to experiment with after generating a considerable number of contacts. Think of them as potential segments of your entire email database. Rule-based lists will be generated respecting the settings you have chosen, but will not be updated with new contacts that will fit those criteria on a later date. A good example of a rule-based list setting is to create new email lists for **all customers from a specific city** or to generate a list with **customers that have not bought anything from your business in the last 30 days**.

Dynamic lists

Dynamic lists are constantly updated with contacts that meet certain criteria that you decide on. Similarly to rule-based lists, dynamic lists can include a portion of your entire contacts for specific communication. Then you can start using those lists to send out **targeted campaigns**.

But if we assume that this is the first time you interact with an ESP, you will need to build a list that, in the beginning, doesn't contain any contacts. The fact that you're just starting out shouldn't feel intimidating, because that's a normal process every entrepreneur goes through. The hard work will come when you will have to grow that list, but we will have some great suggestions for you in the next section of the article.



Growing Email Lists

Now that you are ready to grow your list, you're definitely wondering what **steps you need to follow** to achieve that. We are going to detail two incredibly efficient approaches. All you will need is **creativity** because you will have to be able to stand out in front of potential subscribers, **dedication** and **time**.

Subscription form

The first approach that we are going to discuss is the simplest. You will have to **create an attractive form** (most ESPs allow you to create the form directly in your account), with a powerful incentive for users to submit their personal information. Make sure that the copy you are using is not only **relevant**, but also **enticing**, so that the users that will interact with your website understand right away what they are subscribing to. Based on your email strategy, you will be able to tell users what type of content you are going to include in your campaigns.

Because of GDPR regulations, you will also want to allow new subscribers to **double opt-in**, by automatically sending them a **confirmation email** after joining your email list.

Lead magnet

The second approach we will go over implies that your strategy is spot on and that you already plan on using **inbound marketing** to generate new subscribers. Create a **lead magnet** to attract subscribers. Here you can use a large variety of informative and **quality content**, depending on what you feel most comfortable with.

To create a lead magnet that will actually convert your website visitors into email subscribers, you might consider creating one of the following: **templates** that you share for free, **e-books** or **whitepapers**, **online courses** or **webinars** on relevant topics for your audience, **free demos** for a solution or service your business provides, **infographics**, **case studies** or **success stories** that highlight your expertise. Whatever you end up choosing, remember that you have to offer a good experience to your new subscribers, so that they stick with you for a long time.



Maintaining Email Lists



Email lists are not something you create and never bother with again. For various reasons, **the quality of email lists depreciates over time**. Some of your subscribers might lose access to their accounts, they might delete their email addresses or simply change jobs and stop using the account they have used to subscribe to your campaigns. Even if nothing like this ever happens, they might stop engaging with your newsletters and therefore stop being valuable for you. All these situations will **negatively impact your email metrics**. It is necessary to clean email lists regularly.

How do you clean email lists? First of all, use segments to **exclude bounces**, both hard and soft ones, from your active list. Second, **filter out the subscribers that are no longer opening your emails**. You can compose distinctive campaigns for them, to try to re-engage these contacts. Offer them special discounts, for example, to see if they are still interested and can be converted. Third, use an **email list cleaner**, like the solution offered by DataValidation, to make sure that everything is in order and that you still maintain deliverability and are compliant with your ESP's terms of service.

DataValidation is an email verification solution aimed at companies large and small. Our feature-rich application detects the quality of email addresses and offers a grade of each contact in your email list. With **AutoPilot**, you can also track the changes in quality for contacts. Using one of **our native integrations**, with ESPs like **MailChimp**, **Hubspot** or **GetResponse** and native integration with third-party applications like **PieSync** and **Zapier**, you can make sure to keep your lists clean and fresh.

The Do's of Email Marketing



Main elements of an email

- **Subject line:** A short, attractive and interesting message that will be your email's first interaction with your subscribers
- **Copy:** Your email's body needs to be entirely related to the main goal and topics of your campaign
- **Images:** Try to include a few eye-catching images that are optimized for responsive emails, so that the campaign is properly rendered by all email clients
- **Call to Action:** Placed either as links, images or buttons, your CTA should take subscribers to a page where they can take the appropriate action, depending on your goals (buy, download, read more and so on)
- **Footer:** This is the home of your contact information, social media accounts and the unsubscribe link

Timing

According to Campaign Monitor, the best day of the week to schedule your email campaign is either Tuesday or Thursday, with some industries showing higher open rates on other days of the week. If this is your first newsletter, you can use these benchmarks as an indicator, but the best solution is to always test things out.

There will never be a one-fits-all solution for deciding when to communicate with your subscribers. But looking over data for your industry and market will always be a good first step in trying to understand the behavior of online users and get the most out of your email lists.



Personalization

Whenever possible, make an effort to include personalization in your email. This will ensure that you are not shouting out the same message to each of your customers, but that you are trying to engage with them on a more direct level. Personalization always comes in handy when you are using email in your conversion funnel, because users that feel a connection with your brand are more likely to develop brand loyalty.

A good place to start when including personalization in your emails is either in your subject line or in the first paragraph of the email's body. That way, whether you are inserting their name, company or some other information you have collected regarding your contacts, they will react more positively and will be more likely to engage.

Another way you can unlock the power of personalization with email is by creating **dynamic content**. Dynamic content is an HTML code that changes parts of your email, like the image, CTA or copy, based on what you know about your end-user. Some more advanced email marketing platforms allow you to dynamically change the content of your emails for buyer personas, lead score, the email lists that they belong to or any other info that you might find relevant. Find out more about dynamic content for email and discover some great use cases in this [article from Marketo](#).

Email segments

Email segments go hand in hand with personalization, because they make communication via email customizable to the needs, expectations and engagement behaviors of your customers. A segment, for those who have not used one yet, is a section of your overall email list that fits certain criteria. To better understand segments, we will try to explain them by referring to a B2B company. But, before doing so, it is important to mention that segmentation is suitable for both B2B and B2C emails.

If you have a large email list, but you are sending out a notification regarding an upcoming live event, for example, you will want to segment recipients based on their location. For this situation, you would create a segment of all your contacts that live in the city where the event is taking place. Why is this the best practice? First of all, you need to make sure that you are reaching subscribers who will actually be able to participate. Furthermore, you can segment contacts based on their job title, industry or level of experience, if you have records for all these fields.



The Don't's of Email Marketing

Don't just write and send your emails

Always check for typos and make sure you proofread the copy of your emails before deploying a campaign.

Don't overwhelm your subscribers with a lot of emails

You might have a multitude of announcements to make, but sending out too many emails will eventually backfire. Make sure to include multiple topics in a single email, to avoid your contacts unsubscribing.

Don't buy an email lists

While buying an email list might sound like an easy way to grow your database, this will create more problems than it will solve.

Don't repeat emails

Sending the same email repeatedly to subscribers is something you need to avoid, because you want your contacts to be up-to-date with the latest brand announcements, not to feel like you are just recycling content.

Don't forget to analyze your reports

As with every digital marketing effort, you should make a habit out of reviewing the results of your email campaigns as an ongoing process. This will help you make the appropriate decisions to correct negative results, as well as give you an overview on how your subscribers' behavior changes over time.

Don't send the email without testing it first

Creating a test email list or just sending out tests to stakeholders and to yourself is a must. You will be able to see if your email is displayed correctly on various email clients and devices, but you will also have the approval from decision-makers in your company to proceed with your current campaign.

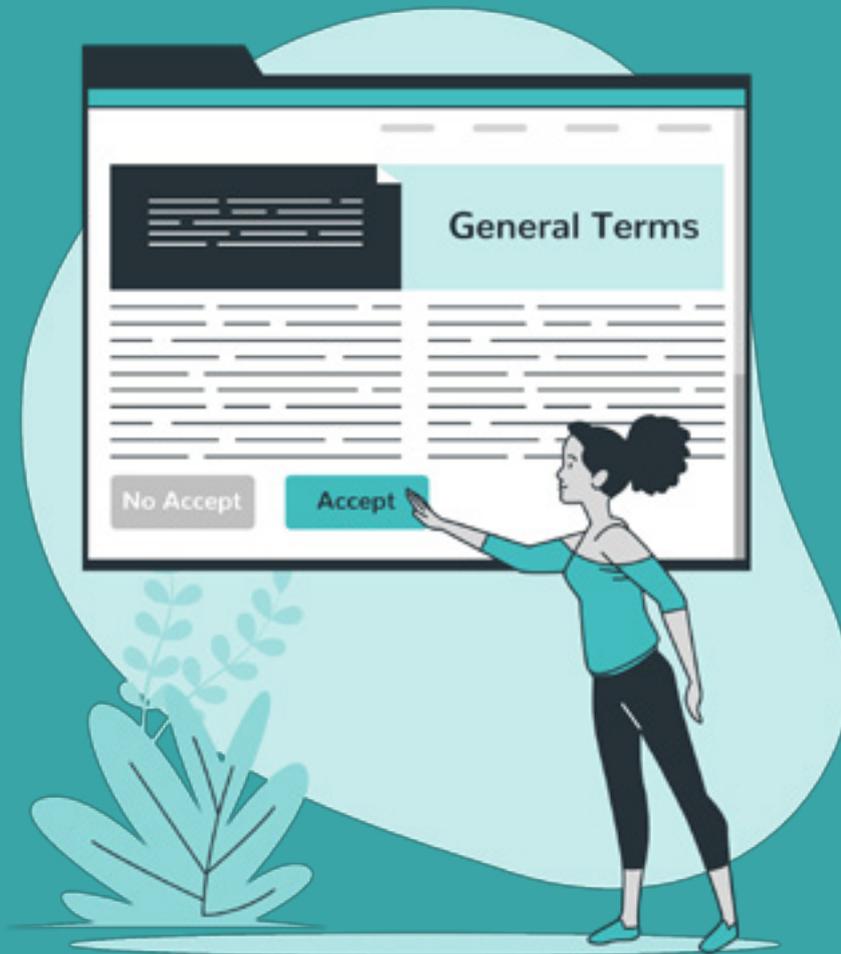
Rules and Regulations

Email Regulations

Depending on the region where your business operates, you might have to be aware of local laws around email marketing, but the main ones are the **US CAN-SPAM Act**, the **European Union General Data Protection Regulation (GDPR)**, the **Canadian CASL laws** and the **UK Privacy and Electronic Communication and Regulation (PECR)**. Things differ between them and you should always consult legal advice before sending out emails to prospects and customers, or just use trusted and reputable email service providers, but we will go over the common denominators. All these laws specify a series of conditions that have to be met to avoid fines.



The Definition of Consent



Implicit consent

Implicit consent means that your business relationship with the contact allows you to send out emails. They might be a current or previous customer, they have created an account on your website, they have placed orders, or they have contacted you in the past with questions. For political campaigns, local municipalities or charities, it might also mean that they have contributed or donated money and have left their contact info while doing so. Implicit consent is not a blank slate, you still need a legitimate reason to contact them.

Explicit consent

Explicit consent refers to situations in which users have intentionally given you permission to send them communications. This could have happened when they have subscribed to your newsletter by filling in a form, at in-person events, or by submitting their contact info at your physical store. Either way, they want to hear from you and, until the moment they unsubscribe, you have every right to contact them.



Unsubscribing

Emails need to include an unsubscribe link. Most ESPs will actually not allow you to send out any campaign without having one, so you can understand why this is something you need to pay close attention to. Inserting the unsubscribe link at the bottom of your email is a best practice that every serious email marketer understands and follows.



Afterward, make sure your email platform truly unsubscribes contacts that choose to do so. Otherwise, just having the link there, without serving any purpose will not actually protect you from fines. If possible, remove the contact from your email list immediately. If that is not the case, then you will need to take the appropriate actions in 10 business days tops.



Deliverability

Email deliverability is closely linked to email regulations, in the sense that if you comply with the advice above, you will be able to reach the inbox every time. Of course, there are cases in which email servers cannot be reached or situations where a subscribers' email address is no longer active, but those are isolated circumstances. Most often than not, deliverability is impacted by your own actions or inaction.



Email deliverability is a term that measures the successful delivery of email campaigns. If you are sending out communications from a free email address, if the subject name is filled with spammy words or bad capitalization, if you use too many images, if you include short URLs or if you don't use email authentication for custom domains, you will be exposing yourself to the risk of low deliverability.

Email Metrics

Engagement metrics

Open rates translate into the share of subscribers in your list who have opened the newsletter. While this number will differ depending on the size of your email list, as well as on when you schedule your deployment, a successful email marketing campaign depends almost entirely on this metric alone. If users never really engage with your email and they just delete it or they mark it as read, you will have all the reason to start making changes.

Click rates refer to the percentage of subscribers who have opened emails and have also clicked on at least one link. Clear call to actions, clean and easy to read emails might contribute to a higher open rate. If you want recipients to take any kind of action after reading your message, tracking clicks will help you measure how efficient your campaign has been.

Use the email marketing benchmarks from your ESP or those offered by [GetResponse](#) or [MailChimp](#) to generate action points for your improvement plan.



Disengagement metrics

Unsubscribing is a term that describes a recipient's decision to opt-out from your email list. That means you will need to remove them from future communication. Overwhelming subscribers with too many emails will eventually lead to people call it quits. You don't want to crowd their inbox, but to remain top-of-mind and help them with any email you plan to send out. Take into account any triggered emails or drip campaigns when analyzing how often you send out newsletters.

There are two major types of bounces when it comes to email. The first one, soft bounces, means that there has been a temporary deliverability issue. It might happen when the mailbox is not configured correctly or full, the email is too large or the recipient email server is offline or temporarily down. The second one, hard bounces, occurs when the email is invalid or doesn't exist or when the recipient email server has stopped allowing incoming emails.

Email Testing



A/B testing, or split testing, allows sending out two competing emails, also known as variants, so that you can choose elements that will differ between them. Eventually, email marketers will be able to see which version performs better and extrapolate those conclusions for their entire email strategy.

A/B testing in the email world has 5 ground rules. Knowing them will also clarify how and when to use A/B testing for your campaigns.

- **Only choose one element or asset for each test**

Test different subject lines, CTAs or images, but always limit yourself to just one asset. After your A/B test is final and you have picked a winner, you can start testing out a different asset.

- **Only have one variable**

You might be inclined to test out two or more variables because you want to gather as much information as possible from a test. But doing so will defeat the purpose and make drawing conclusions unnecessarily difficult or downright impossible.

- **Always have a control version**

A/B testing isn't viable without having a control version of your email. That means that you are sending out a version with a different asset and one without it. You will be testing the variant against the control so that the outcome is actionable.

- **Use randomly split audiences**

Most well-known email service providers offer complete A/B testing features, including randomizing audiences. That way, you won't have to create segments prior to deployment. Random split audiences will ensure that no bias or misconception will influence who receives the control or variable version of the email.

- **Send the A/B test at the same time**

To allow for relevant results, both versions need to be sent out at the same time. Otherwise, you risk influencing the outcome by allowing timing to affect how subscribers will engage with your campaign.



Multivariate testing

Multivariate testing is the next step in sending out different versions of the same email. You will be testing multiple variations, not just one, to see not just what performs better, but also to find out which combinations of assets deliver the best results.

You can create several copy messages, images, CTAs or even different templates, with different fonts and colors. Keep in mind that you will need to use a software solution that permits multivariate testing because doing it manually is impractical and could also affect results.

MailChimp, which is **natively integrated with our email verification service**, has multivariate testing built-in. Read [this great guide](#) from Uplers Email to learn more on the topic of A/B and multivariate testing.





The Ultimate Checklist

Timing

Decide on date and time

Schedule it on content or campaign calendar

Make sure it doesn't conflict with other emails

Optional: If there is a conflict, reschedule the email campaign

Email details

Check for typos and grammar mistakes in the subject line

Update the preheader and check it for typos

Update the footer, if necessary

Make sure the sending address is correct and appropriate for that campaign

Always include the permission text (where you have the email from and why you have their permission to contact them)

Always include an unsubscribe link

Include Social Media icons, if necessary, and make sure they are linked to correct social networks

What are people visiting our assets doing?

Content

Check the body text for readability, grammar mistakes, and typos

Make sure that any image is linked correctly and has added ALT text

If the campaign includes background images, add a fallback color

Add links to all appropriate headlines

Add links to all CTA buttons



If the campaign includes a personalization, add fallback text

If the campaign includes dynamic content, make sure to define the audiences correctly

Lists

If necessary, make sure to include a suppression list to the campaign

If necessary, make sure to exclude segments of a list from the campaign

Make sure that the subscribers from the list have all the necessary fields

Test

Send yourself a test email and preview the email in your inbox on Desktop and Mobile

Stakeholders

Notify all concerned team members with a link to the campaign

Send

Schedule the campaign or send it immediately

Analytics

Compare results against benchmarks and campaign goals

Create a stakeholders report

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