



EMAIL MARKETING STRATEGY WORKBOOK



**SOCIAL
BRANDING**





Understanding the purpose of your email marketing and finding the who, what, where, when and why behind it is vital. Otherwise you are shooting darts in the dark. Take a moment to fill out this strategy sheet to help you find the true purpose to your email marketing and then plan accordingly.

Why are you using email marketing for your business?

Is to build thought leadership, stay in touch with your audience, provide value to VIPs, push special promotions, generate leads or sales? **Really drill down to why you are using email marketing for your business and write it below.** The only wrong answer is “someone told me to do it”.

What are your email marketing goals?

By setting goals, you set a destination that you are working towards for your email marketing. Now you have a purpose and direction to move into. For instance,
“I want to use email marketing to generate additional sales for my business.”
“I would like to get more volunteers to sign up for my nonprofit.”

Create 1 – 2 goals you hope to accomplish with your email marketing (Be specific).





How will you measure success?

You need a benchmark so you can measure your goals. To do this you need to **quantify** your goal and give yourself a **timeline** to work towards.

*"I would like to see my sales grow by **20%** in the next **6 months**."*

*"I hope to gain **50 new volunteers** in the **next quarter**."*

Look at the goals you wrote above. Now update them with a quantity and timeline.

Who is your target audience?

Understanding who we are talking to is vital. It helps us decide our tone, our voice, the content we will include and the actions we want the audience to take. Think about your customers. The ones that you *hope to attract* AND the ones that *you do attract*. **Write a description of who they are, what they like and similarities that exist between them.**





Are there groups that you can segment your audience into? Define those audiences.

Sometimes our audience is vast or we appeal to more than one target. For instance, a Realtor would have: Active Buyers, Active Sellers, Past Buyers, Past Sellers, Prospective Clients, Other Real Estate Agents, Professionals They Work With, and Home-Related Businesses. They have many different audience whom they would speak and market differently to.

Take a moment to segment your audience.

What is a problem that your audience has that you can resolve?

This is how you are going to attract the audience you wish to work with. Take each of those segments and think of a problem that they have. How can you solve it for them? Let's use the Realtor example: Buyers are looking to buy a home, Sellers are looking to sell a home. But what about Past Buyers? They are probably looking for resources to update their home. There is no reason the Realtor should stop communicating with them once the sale happens. They may buy another home in the future or refer other Home Buyers to them. The Realtor can share their knowledge and expertise in connecting these Buyers to other Home-based businesses or share information to help them get settled and stay connected at the same time.

Write out each segment and one problem they have and a solution you can offer.





How will you solve their problem with email marketing?

Now go through the list below. How can you package your solution to their problems with email marketing?

- Discount / Special Offer or Promotion on Your Product or Service?
- Newsletter
- Information Sharing
- Downloadable Content / eBook
- Event Sign Up
- Donate / Fundraise / Volunteer
- Other _____

What kind of results are you looking for?

The key to email marketing is get the click through. You want contacts interacting with your content so you can see what they are doing. This way you will learn more about your audience, what appeals to them and be a better resource in the long run.

Select the call to action you want your audience to take.

- Clicks & Downloads
- Visit to Your Location
- Set Up an Appointment
- Make a Phone Call
- Make a Donation
- Sign Up to Volunteer
- Register for an Event
- Visit Your Website
- Other _____





How will you communicate with your audience through email marketing?

Content is essential with your marketing campaign. You need to inform your audience as to why you are taking time out of their day to open this email. You need to show them value and make it worth it for your audience.

How will you do this?

- Create your own content
- Repurpose older content
- Curate content (Share others' content). If you plan to curate content, who are your sources?

- All of the above

Taking it back to the Realtors, they may curate other content from home-based magazines and share with those Past Buyers. If they properly cite the source, they are okay in sharing content with their readership.

How much information will you send?

It is important to not overwhelm your audience. Less is More in many instances with email marketing. Choose only three pieces of content you will share and put them in order with the call to action you want the audience to take. It is okay if you have less than 3 pieces to share. But if you have more than 3 things to say, then perhaps you should be sending more emails with less content.





Fill out the content you will share below:

1. _____
2. _____
3. _____

When are you going to send the email(s)?

Ask yourself when your audience is most likely to take you up on your offer. That is when you are going to send the email. For instance, a pizza delivery service is going to send their emails mid-afternoon, when people are thinking about what they are going to do for dinner. Also think about your marketing. When do you want people calling, visiting, scheduling time with you?

Day(s) of the week: _____

Time of Day: _____

How often do you plan to stay in touch with them? (Minimum of one time /month)

Finally, how often do you want to stay in touch with your audience? Weekly, Bi-weekly, Monthly? Set a delivery goal and write it on your calendar based on the timing you wrote above. If it helps, schedule time in your calendar a few days before to allow yourself time to create content and pull your email marketing together.

Now that you have taken the time to go through this exercise it will be easier to replicate for future campaigns. Don't forget to get familiar with your email marketing reports and analytics too. That will tell you who is opening your emails, where they are clicking and what content is resonating with them. This is all valuable data to help you with your future email marketing campaigns.

