EMAIL MARKETING POWER WORKBOOK - SECTION 1

EMAIL MARKETING 101:
WHY AND HOW IT WORKS
Introduction

This workbook accompanies the Email Marketing Power presentation. The questions contained in this workbook are designed to help you build upon the concepts learned in the presentation and to apply them to your current needs. This workbook can be also used as a guide for creating a successful communications strategy for your business or organization.

Why Invest in Building Relationships

How many customers do you currently have? _________

How would you rate your relationship with them?

☐ Excellent
☐ Good
☐ Fair
☐ Poor

How often do you communicate with your customers?

☐ Weekly   ☐ Monthly
☐ Quarterly ☐ Annually
☐ Other _______________________

☐ I don’t proactively communicate with my customers.

If yes, how do you communicate?

_____________________________________________
Calculating Your Cost of Acquisition

How much do you spend each year on:

- Yellow Page Ads
- Radio
- Print Advertising
- Online Marketing
- Direct Mail

**Total**

How many new customers does it generate?

**Your COA = Total Spending ÷ New Customers**

How Technology Has Made it Affordable for Smaller Businesses to Communicate

Do you currently send communications via postal mail?

☐ Yes  ☐ No

If yes, how many pieces do you send each year? ____________

How much does it cost you each year to send these communications?

$ ____________ (Including postage, printing, and design costs.)

How much would you spend if you changed over to sending email instead?

$ ____________ (To get an estimate of the cost visit www.constantcontact.com and click on pricing. Pricing starts at $15/month.)

What type of email messages do you read? ____________________________

Are there any that you save? ____________________________

Why do you save them? ____________________________
Getting Started: Building Your List

Do you currently ask your customers for their contact information?

☐ Yes  ☐ No

What percentage of your customers do you have an email address for?

______ %.

Where do you interact with prospects?

☐ Retail storefront
☐ Website
☐ Local networking events
☐ Tradeshows, conferences, industry events
☐ Phone

Getting Started: Convert Leads to Customers

Think about your business or organization. Is there something that you can offer to a prospective member or customer in return for their contact information?

☐ Yes  ☐ No

If so, what can you offer?

_____________________________________________________
_____________________________________________________
_____________________________________________________

How do prospective customers learn more about your business or offerings?

☐ Visit your office / store
☐ Visit your website
☐ Contact you by phone
Getting Started: Keep Customers Coming Back

Do you have contact information for your customers and prospects?

☐ Yes  ☐ No

How often, on average, do you interact with them on an annual basis?

_____________________

Do you get referrals from your current customers?

☐ Yes  ☐ No

How much profit do you typically generate, per sale, from your customers?

_____________________

Based on the COA you calculated, how many purchases does it take before you break even on new customers?

_____________________
Understand the Basics Before starting on your strategy

One of the most important aspects of good email marketing is that it must be permission-based, meaning you need a person’s permission to send them email communications.

There are three types of permission
1) Explicit
2) Implicit
3) None

Of these permission types, only two are legitimate to send to.

How does your list breakdown?
1) Explicit - _______ %
2) Implicit - _______ %
2) None - _______ %

Best practice tip: If your list contains over 30% implicit permission names, you should include a permission reminder at the top of your email newsletter.

Does your list include more than 30% implicit permission addresses?
☐ Yes  ☐ No

Have you been collecting email addresses from your customers for more than a year?
☐ Yes  ☐ No

If yes, then be sure to create a couple of groups of email addresses (current, 1 to 2 years, more than 2 years).
Creating a “Winning Strategy”

Congratulations!
You have now pulled together what you will use in creating your communications strategy. In the next section, you will learn how to build a winning communications strategy for your business.

### Setting Objectives
Which of the following represents your primary objectives in communicating with your customers?

**Please check all that apply.**

**Type A**
- [ ] Enhance awareness
- [ ] Increase interaction
- [ ] Educate recipients

**Type B**
- [ ] Motivate Purchases
- [ ] Generate traffic to a storefront
- [ ] Generate traffic to a website

**Type C**
- [ ] Increase event attendance
- [ ] Increase donations / contributions
- [ ] Public relations
Collecting Customer Information

When creating a communications strategy, it’s important to know your audience and ensure that you’re meeting their needs. The level of customer information that you need, in order to get started, will vary according to your intended level of communication. We categorize these levels as basic, comprehensive, and targeted.

- **Basic information** represents the minimum information needed in order to send a personalized email message.

- **Comprehensive information** (in some cases just one or two fields is sufficient) is useful if you want to be able to follow up via phone or direct mail with your recipients that open or click-through links in your communications.

- **Targeted information** is needed if you’d like to send communications to a sub-set of your customer base. This also enables customers to select the type of information they would like to receive from you.

Once you determine the information you’d like to collect, you will need to determine how to collect the information.

Below you will find a checklist that indicates several forms of communication opportunities. Check the boxes below that pertain to how you interact with your important audiences. Make sure to include the associated action item in your strategy.

**If you...**
- have a retail storefront
- have a website
- attend local networking events
- exhibit at tradeshows, conferences, industry events
- connect with your customers via phone
- advertise in the yellow pages

**then you should**
- Provide a signup form at checkout
- Add a signup form to your website
- Ask to send newsletter when collecting card
- Ask to send newsletter when collecting card
- Ask to add them to your list when on the call
- Direct prospects to your website
**Frequency**

Check the boxes below that pertain to how you interact with your important audiences. Make sure to include the associated action item in your strategy.

<table>
<thead>
<tr>
<th>Email Type</th>
<th>Suggested Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newsletter (educational content only)</td>
<td>Monthly / Quarterly</td>
</tr>
<tr>
<td>Newsletter (educational and promotional content)</td>
<td>Monthly / Quarterly</td>
</tr>
<tr>
<td>Promotional messages</td>
<td>Bi-weekly / Monthly</td>
</tr>
<tr>
<td>Event invitations</td>
<td>Event based (multiple communications)</td>
</tr>
<tr>
<td>Announcements (press releases, new products, etc)</td>
<td>Event based (single communication)</td>
</tr>
</tbody>
</table>

The day of the week and time of day that you send your messages can significantly impact the response you get from your communications. Select your audience below to determine a starting point for when you should send.

**Reader**

- Business people
- Consumers (day)
- Consumers (night)

**Days & Times to Send**

- Tues to Thurs 10am – 3pm
- Mon to Thurs 2pm - 8pm

**Format**

The format depends largely on the type of information you wish to communicate. Refer back to the “Setting Objectives” section.

Type A communications typically use a newsletter format, Type B a promotional format, and Type C an announcement format.
Create a Calendar
Creating a communications calendar is also a great way to map out your communications strategy. It provides you with an overview of the communications you will be sending throughout the year. Below is an example of a communications calendar. At the end of this workbook, there is a blank form that you can use to do the same.

**Example 2006 Calendar**

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

**Events**
- Save the Date
- Signup
- Reminder
- Announcements
- Product Launch
- Newsletter

---

Creating Great Content

**Subject Line**
Write five potential subject lines for your business' email campaigns.

1) ____________________________________________________
2) ____________________________________________________
3) ____________________________________________________
4) ____________________________________________________
5) ____________________________________________________

---

**From Line Checklist**
- Avoid generic (sales@ or info@ addresses)
- Use a consistent recognizable name
- Use a real email address

**Reply Address Checklist**
- Make sure the email address exists
- Be ready to handle replies
Body Content Checklist.

Your content:

- Provides valuable information, is interesting and/or helpful information
- Adds to your brand & reputation

Use of Images

- Do the images support / enhance your offer?
- Are they the appropriate size?
- Will the reader be overwhelmed by the number of images?
- Is there enough white space between images?

Calls to Action

- Do they create a sense of urgency?
- Do they add impact to your message?
- Do you have a “forward to a friend” call to action?

Body Content Ideas

The next page includes a variety of questions that you can answer. The answers to each question will provide you with ideas for content that you can write about.
Content Ideas

What are the top five questions that your customers ask?
1. 
2. 
3. 
4. 
5. 

What articles have you read recently that you found very interesting?
1. 
2. 
3. 
4. 
5. 

Who were the most interesting customers that you helped in the last six months?
1. 
2. 
3. 
4. 
5. 

What made them interesting?
1. 
2. 
3. 
4. 
5. 

What problems will your customers be encountering in the next year?
1. 
2. 
3. 
4. 
5. 

What will you be doing to solve these problems?
1. 
2. 
3. 
4. 
5.
Refine Your Strategy Checklist

- Bounced email messages
- Open rates, dates, & times
- Forward-to-a-Friend counts
- Click-through rates to identify popular topics
- Customer feedback

Getting Started Checklist

Here are a couple of things that you can do to start executing your strategy today:

Getting Started

- If you haven’t already, go to www.constantcontact.com and create a free 60-day trial account
- Once inside your account click on “Email Campaigns” and “Create” to see the 100+ templates you can use
- Create a test campaign and send it to your friends and family
- Review your strategy with our campaign consultants, available at no cost. Call 866-876-8464
- Visit the Constant Contact Learning Center for additional live and on-demand marketing courses

Communications Calendar

Use this form to plan your communications strategy.