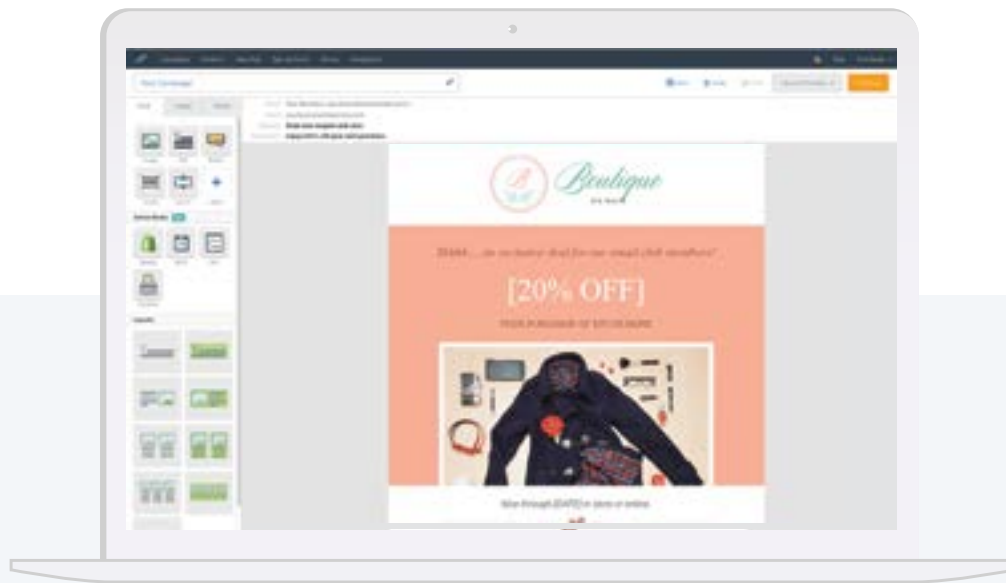# The 5-Step Approach to Successful Email Marketing

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Your customers wake up every morning and check their email.

Through the course of their day, they'll spend an average of 6.3 hours reading around 88 emails. [Source: HuffPost & Text Request]

Shouldn't your business be among them?

Sending out a marketing email might seem overwhelming, but by breaking it up into quick tasks you'll have more success reaching your goals.

We'll show you how to **plan** your email marketing strategy, **design** an email that drives action, **create** better email content, **measure** your email marketing's impact, and **grow** your email list from scratch.

If you follow this step-by-step plan, you will be sending out business-generating emails in no time that your audience actually looks forward to.

Let's get started!

The 5-step approach to successful email marketing

Businesses that do the following five things have great success with email marketing and use their time most efficiently.

4	Plan for success
9	Design for today's audience
14	Create emails to drive action
17	Measure the business impact
24	Grow your list to grow your business

Let's take a closer look.

Plan for success

Most people start email marketing with the right goals in mind.

They want to increase revenue, attract new customers, and strengthen relationships with their existing audience. But then they struggle. They feel lost, not knowing what to send or when to send it.

In the end, they send out an underperforming email or just give up without sending at all. Either way, they're leaving money on the table.

People fail at email marketing because they don't have a plan.

An email marketing plan helps you stay focused, motivated, and accountable. This means you never have to wonder what and when you're going to send.

If you need a little help getting started, we're here with the tools you need to plan your email marketing strategy in 15-minute increments.

Ready to begin?

Learn the three simple steps to planning your email marketing strategy and fill out the worksheet on the pages that follow.

3 simple steps to planning your email marketing strategy for the year

You can use your own calendar or [download and print the email marketing calendar worksheets](#) we created for you.

1. Start with the important dates
For this step, use the Email Marketing Opportunities worksheet on page 8. This worksheet lists all 12 months of the year, along with some blank spaces next to each.

Take a few minutes to jot down the important dates for your business to give yourself a big-picture view of the year ahead. Do you hold an annual summer sale? What about special events to promote your business? Fill in those important dates now.

2. Fill in the gaps with holidays
Do you have any months without much going on? Use the Holidays worksheet, from the download link above, to give you ideas for open months.
Are there any holidays on this list that would be a good fit for your business? Fill in any empty months on your Email Marketing Opportunities worksheet with major or little-known holidays — like World Chocolate Day or Book Lovers Day.

3. Plot your emails into your calendar
For this step, you'll add a mailing schedule to your calendar. This step may sound simple, but it's essential to achieving your email marketing goals.
Use your completed Email Marketing Opportunities worksheet to mark the important events and holidays from each month onto your calendar. Then, decide if the event is a time-based promotion or a non-promotional email. **Hint: A good email marketing calendar should include both.**

Time-based promotions contain time-sensitive information and encourage your subscribers to take a specific action, such as buying a discounted item, registering for a new class, or buying tickets to an upcoming show.

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For time-based promotions, plan on sending a short three-part email series to get the word out. You can include:

- **An Announcement** (of the event/ desired action, at least 2 weeks before)
- **A Reminder** (to attend event/do action, 1 week before)
- **The Last Chance** (to take part in the event/do action, 1-2 days before)

Non-promotional emails, on the other hand, will be less sales-driven and timely, and more focused on building relationships and providing value to your customers.

Tip

Even if the holiday doesn't directly relate to your business, you can still use it as a promotion. For example, on World Chocolate Day you could offer free chocolate to everyone who visits your retail store.

Tip

Want to increase engagement? Try including a poll in your email. Ask readers what information they'd be interested in receiving from you.

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Email Marketing Opportunities

Write down the key moments throughout the year for your business. Use these entries to plan out your email marketing for the year.

January	July

February	August

March	September

April	October

May	November

June	December

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Design for today's audiences

When it comes to design, you'll want to create emails that match your brand, communicate your message effectively, and look great on any device.

Professionally designed email templates from Constant Contact are easily customizable and mobile-responsive, which means your email adapts to the device it's being read on.

With the majority of emails being opened on a mobile device, we've found emails that focus on a singular purpose often have the best results.

Ready to create a marketing email that looks great on any device? Let's look at seven essential elements of successful email design.

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To create a marketing email that successfully drives action, include these seven essential elements.

1. Header
The first thing to include in your email is a well-crafted header. Your header contains the From name, the Reply name, and the Subject line.

> **For the From name**, use a recognizable name so those receiving your email instantly know who it's coming from. Just like a piece of postal mail, the sender plays an important role in persuading your readers to open your email.

> **For the Reply name**, use an official email address from your company that will be monitored so you'll see any responses come through.

> **For the Subject line**, ideally, keep it between four to seven words that explain what your email is all about in a quick, eye-catching, and entertaining way.

2. Preheader
The preheader acts like the second subject line when read on a mobile device, enticing people to open your email. The first five to eight words of your preheader give readers a better idea of what the email is about.

3. Logo and Colors
After the header and preheader, reinforce your brand by placing your logo at the top and incorporating your brand colors.

> If your logo and colors stay consistent with your website, your subscribers will begin to instantly recognize your brand and email style.

4. Image
Next, include an attention-grabbing image that pulls the reader down into the next section.

> The image should relate to the content of the email, and be at least 600 pixels wide. When clicked, the reader should be linked to the same destination that your call-to-action directs to.

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5. Text

Below your image, you should write your email content. Start with a strong headline to draw attention to your message.

Use dark text on a light background for maximum readability, and make your headline larger than the body text (around 22 pt)

In the message body, we recommend using 14 pt text that is either aligned left or centered. If you use more than three sentences, you should left align.

6. Call to Action

The Call-to-Action (CTA) button highlights the action you want the reader to take.

You may want your reader to visit a specific page on your website, make a donation, or redeem a coupon.

Make the CTA stand out by using large button text to stop the reader, clearly stating where they will be directed when they click it.
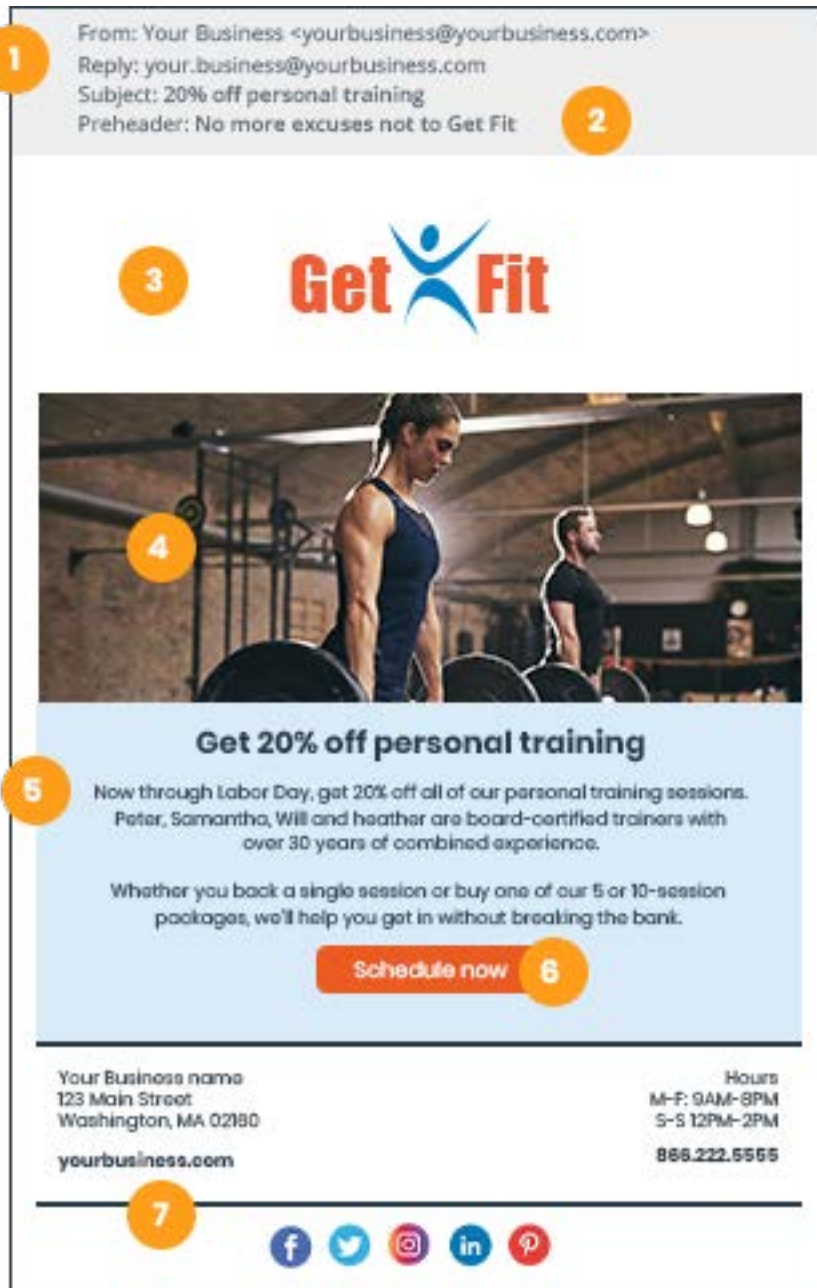
7. Footer

The final element of your email design, the footer, shows readers how to connect with you.

Your footer is the stamp of useful information at the bottom of your email that contains contact information, including your email, location, phone number, and links to your social media pages.

Stay on track using the checklist on the next page.

Email Design Checklist

1. Header

☐ Did you use a recognizable "From" name?

☐ Is your reply address correct?

☐ Is your subject line 4-7 words?

2. Preheader

☐ Does your preheader further entice the reader to open your email?

☐ Is your preheader 5-8 words?

3. Logos & colors

☐ Does the logo link to your website?

☐ Do the colors of your background, headline, buttons, and dividers match your brand?

4. Image

☐ Does your image support the message of your email?

5. Text

☐ Have you used at least 22pt text for your headline and at least 14pt text for your message body?

6. Call-to-action

☐ Do you have a call-to-action button with a compelling command?

7. Footer

☐ Does your footer include the correct company information?

☐ Did you add your social buttons (and double check the links)?

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Create emails to drive action

Before someone reads your email, they'll need to open it.

Once readers recognize who the email is from, they'll look to the subject line to help them make that decision. As a rule of thumb, the best subject lines are clear on what's in the email.

Here are some other tips for standout subject lines:

- **Stay short and sweet.** Use four to seven words.
- **Avoid anything spammy.** Avoid ALL CAPS and excessive punctuation.
- **Ask a question.** Questions can pique your reader's interest.
- **Include a deadline.** Create a sense of urgency by showing your message is timely.

What should you say in your emails?

Just answer three simple questions for your reader. Use this persuasive formula to make your writing process fast and effective at driving action. Then consult the creative writing prompts for when you need some extra inspiration.

1

What are you offering? (Headline)

State clearly what your business has to offer right in the headline.

2

How will it help the reader? (Message body)

Below your headline, write a few sentences to elaborate on your offer. Provide the important details and explain why they matter to your reader. Keep your message clear and concise.

3

What should they do next? (Call to action)

What action are you driving people towards? Your call to action should tell readers what they need to do to take the next step.

20 writing prompts for quick and creative emails

Writing an email is easy. Just answer these questions:

- What are you offering?
- How will it help the reader?
- What should they do next?

1. Share a memory of your first sale.

2. Highlight your most popular items.

3. What inspires you?

4. Look back on an early learning experience.

5. Provide a "how-to" tutorial.

6. Celebrate a milestone.

7. Introduce one of your staff members.

8. Send a thank-you note.

9. Ask for feedback/advice.

10. Preview something you look forward to all year.

11. Let customers know how you get involved in your community.

12. Share a video.

13. Respond to industry trends or news.

14. Share an interesting article.

15. Feature a happy customer.

16. Provide a gift guide.

17. Highlight your social media profiles.

18. Share local news/events.

19. Take advantage of an obscure or fun holiday.

20. Answer the question: Why do you do what you do?

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Measure the business impact

Email marketing without studying your email reports is like throwing a message-in-a-bottle into the ocean.

It doesn't matter how well planned, designed, or written your message is because you'll never know what happened to it.

How can you see the impact of your email marketing and make sure that it's worth your time?

We're going to show you how to use your email reports to see the impact email marketing is having on your business, using a simple but effective system.

Ready to get started? Let's look at the Triple-A Approach to email measurement.

A triple-a approach to email measurement

If you want to accurately understand the impact of your emails, you'll need the do three things: Analyze, Assess, and Adjust. While email reports are important, you may need to look beyond them to get to the business impact.

1. Analyze your email reports
This is where you look at your numbers to see what they're saying about your marketing efforts.

Click on the Reporting tab in your Constant Contact account to view your campaign reports.

You should see five columns that contain numbers:
- **Total sent** indicates the total number of people you sent this message to.
- **Open rate** shows what percentage of the total number of people who were sent the message actually opened to read the message.
- **Click through rate** tells the percentage of clicks an email receives based on the number of contacts who opened the email.

- **Bounce rate** is the percentage of subscribers who were unable to receive the message. If you click on the blue numbers, the bounce report will give you a reason for why the system interpreted they didn't receive the email.
- **Unsubscribe Rate** will show you how many opted out of receiving your emails.

2. Assess how your emails are supporting your business goals

Are people doing what you wanted them to do after they read your emails? Did you want people to make a purchase? Did you want people to call you? Visit your website or store? This is where you may need to look at other business systems to see the true impact of your email campaign.

Measurement strategies will also differ based on the type of email you're sending. See the worksheets on the next page to help measure your time-based and non-promotional emails.

3. Adjust your strategy accordingly

Use the information in the first two steps to help you make adjustments to get better results in the future. Over time you'll also start to see the types of campaigns that have been most beneficial to your business.

Use the worksheets on the next page to tie your metrics to business results.

Tip

Update your business profile to get industry comparison stats, tips, and tools.

Tip

Did you know you can compare the results of multiple email campaigns?
Use the Campaign Comparison Report to select up to five campaigns.

Click here to download the non-promotional worksheet and the time-based promotional worksheet.

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Measure the impact of your time-based promotions

Promotion Name _____

1. Announcement

Total Sent: _____

Send Date: ____ / ____ / ____

Open Rate: _____ %

Click-through Rate: _____ %

Bounce Rate: _____ %   **Unsubscribes:** _____ % (_____)

Business Result: _____

_____

2. Reminder

Total Sent: _____

Send Date: ____ / ____ / ____

Open Rate: _____ %

Click-through Rate: _____ %

Bounce Rate: _____ %   **Unsubscribes:** _____ % (_____)

Business Result: _____

_____

3. Last chance

Total Sent: _____

Send Date: ____ / ____ / ____

Open Rate: _____ %

Click-through Rate: _____ %

Bounce Rate: _____ %   **Unsubscribes:** _____ % (_____)

Business Result: _____

_____

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What is the goal of your promotion?

_____

_____

_____

_____

How will you measure your success?

_____

_____

_____

_____

What were your total business results?

_____

Did you meet your goal?

_____

_____

_____

_____

What will you do differently next time?

_____

_____

_____

_____

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Measure the impact of your informational emails

Email Name _____

Total Sent: _____

Send Date: _____ / _____ / _____

Open Rate: _____ %

Click-through Rate: _____ %

Bounce Rate: _____ %   Unsubscribes: _____ % (_____)

Business Result: _____
_____

Notes:
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What is the goal of your email?

_____

_____

_____

_____

How will you measure your success?

_____

_____

_____

_____

What were your total business results?

_____

Did you meet your goal?

_____

_____

_____

_____

What will you do differently next time?

_____

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_____

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Grow your list to grow your business

It's simple. The more people you have in your contact list, the more people you can encourage to do business with you. But few people wake up each morning hoping to receive more emails. Focus on the value a potential subscriber will receive from your emails, and more people will join your list.

Here are three questions to answer to grow your email list:

1. Why would someone subscribe to your email list?
We asked consumers why they subscribe to email lists, here's what they said:

- To receive promotions and discounts

- Access to exclusive content

- To show continued support

Plan on delivering this value to your subscribers based on what they're looking for above.

2. Where should you ask for email addresses?
There are three ways to collect email addresses: **in person, in print, and online.** Use all of the tools available to you in your Constant Contact account to collect email addresses with each of these methods.

If collecting in person, feature a sign-up sheet at checkout that invites customers to subscribe for VIP benefits. Or you can use the ListBuilder app to automatically add new contacts to your Constant Contact account.

To collect via print materials, use the Text-to-Join feature on signage around your store. Choose a keyword that people can text to a set number, resulting in contacts easily adding themselves to your email list via mobile.

When asking for addresses online, link to your sign-up form in your social media posts/profiles. Be sure to use embeddable forms and pop-up forms on your website.

3. How should you ask people to sign up?

The key to a good list building script is answering four key questions most potential subscribers will have.
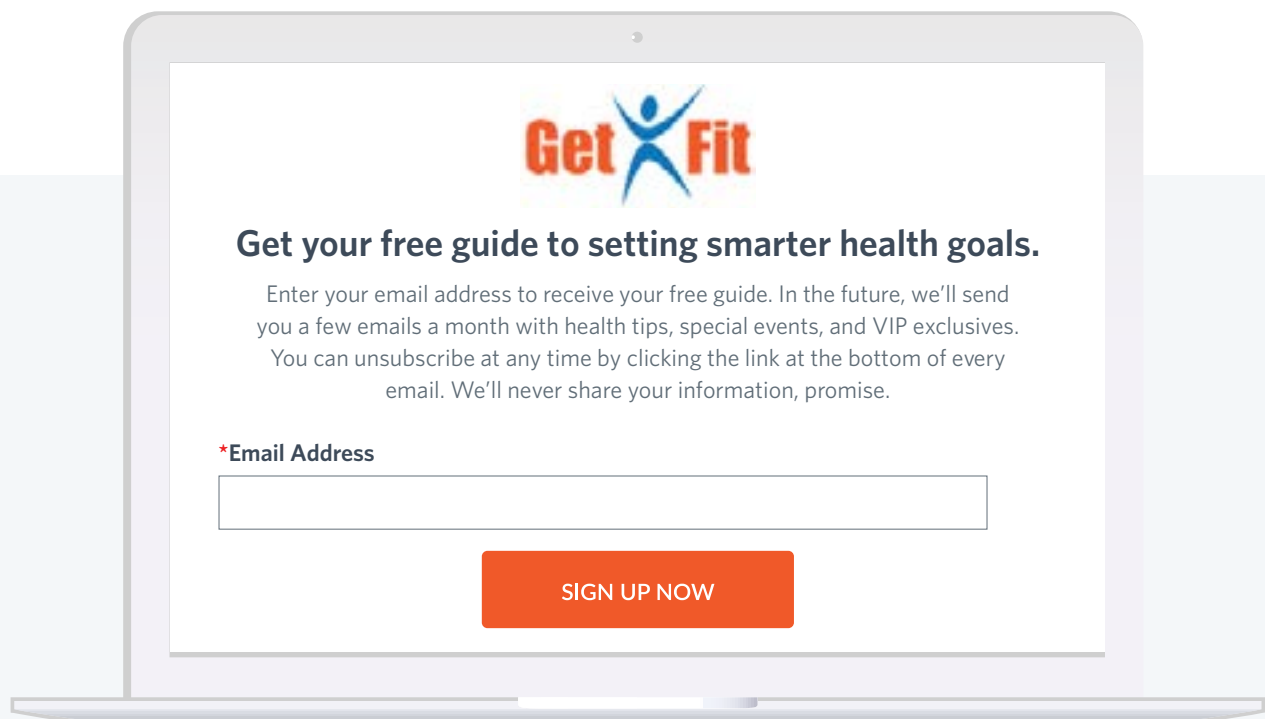
First, what's in it for them? Explain the value they'll receive in exchange for their email address.

Second, what objections do they have? Address any potential concerns including the frequency you'll be sending emails and how easy they can unsubscribe.

Third, how can they sign up? Make it painless and foolproof. Guide them through the signup process, doing it for them if possible.

Finally, what should they expect next? Explain what happens next and what types of emails they should expect to receive in the future.

Here's an example sign-up form you can use for inspiration:

Get Fit

Get your free guide to setting smarter health goals.

Enter your email address to receive your free guide. In the future, we'll send you a few emails a month with health tips, special events, and VIP exclusives. You can unsubscribe at any time by clicking the link at the bottom of every email. We'll never share your information, promise.

*Email Address

SIGN UP NOW

Make your next email campaign shine.

Ready to get started?

Now that you know the five steps of successful email marketing, are you ready to see what email marketing can do for your business?

Constant Contact makes it easy to send emails to your audience, ensuring maximum deliverability and professional design.

[Sign up for a free 60-day trial of Constant Contact's easy-to-use email marketing tools.](#)

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Do more for your business with email marketing

With Constant Contact email marketing, you'll do more than just send great email. You'll drive results for your business, create better content, expand your reach, and more.

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