

Email Campaign Plan

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Note – This is one from a sequence of exercises from the Email Marketing subject outlined in the Strategic Marketing Process eBook. Download the free e-book www.growthpanel.com/marketing-tools/index.html and subscribe to this subject at www.growthpanel.com/versions/get-started.html to download from Growth Panel’s Intelligent Marketing Platform.

Some of the graphics in this PDF might not display properly.

VOLUME & FREQUENCY

Based on your quantitative goals in **537-A**, how many emails will you send?

Number of emails to send	
Frequency	

FORMAT: HTML OR TEXT?

Should you send a graphical HTML email or a plain-text email? It depends on your objectives.

FORMAT	USE WHEN...
HTML	<input type="checkbox"/> You need graphics to convey your message or brand strategy <input type="checkbox"/> You need to include images – for example, a product image for a sale email <input type="checkbox"/> Your target audience responds best to short snippets, color and imagery
TEXT	<input type="checkbox"/> The message needs to feel like a one-on-one communication – for example, it’s a personal invitation from your CEO <input type="checkbox"/> Your target audience responds best to traditional communications – for example, executives tend to respond at much higher rates to text emails than to HTML

Decision: HTML Text

TECHNOLOGY

How will you launch and manage your campaign? If it's a very small, text-only, completely personalized one-on-one communication, you could potentially send it out with Microsoft Outlook – all other campaigns are best managed with a solid software package or outsourced Email Service Provider. (ESP). If you do decide to create an email campaign in-house, be very careful about spam. Any more than 150 email addresses not designated as a distribution list has the potential to label you a spammer.

When sending out the email, you can put the addresses in the BCC: field to protect the privacy of your database. Weigh this protection against the possibility of being labeled a “spammer”.

If you choose to use an ESP or software package to run your email campaign, **463-A** can help you compare the cost of different options and to see how variables like the delivery rate, response and conversion rates will impact your campaign success. Exercise 453 will help you explore this in greater detail.

OPTIONS TO CONSIDER	NOTES
<input type="checkbox"/> Vendor	
<input type="checkbox"/> Software	
<input type="checkbox"/> Manual	

THE LIST

In the strategy section you indicated whether you'd need to buy a list or use your own. Now think specifically about the “selection criteria” you'll use to select recipients for your campaign.

EX: You may be targeting the general partner in small law firms in a particular area of the country. Your “selection criteria” may be contact title, number of employees and/or annual revenue, SIC code, and metropolitan area.

Really target your audience. Additional selections will cost more, but with a more targeted list, you can do a much better job of speaking to your audience's exact needs. Sending emails to generic mailboxes or the wrong recipient is a waste of time and can easily label you as a “spammer.”

Use **463-B** to help you compare the cost-effectiveness and potential results of different lists with different selections.

AUDIENCE CHARACTERISTIC	What data will help you identify this characteristic (“selection criteria”)?
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AUDIENCE CHARACTERISTIC	What data will help you identify this characteristic ("selection criteria")?

THE OFFER

You outlined your offer in the strategy section --- now provide as much detail as possible about the offer. What is included?

What are the benefits of the offer to the particular audience?

When does the offer expire?

How can you create a sense of urgency around the offer?

CONTENT

In the strategy section you outlined the content you'll include and the approximate length. If you need to provide more detail about the material, document it here.

Your content needs to focus on your offer and call to action. However, depending on the type of campaign, you should carefully balance your objectives with the needs of your audience. For example, the purpose of an email newsletter is to provide valuable information that keeps a prospect engaged and interested; if you use hard-sell tactics, you'll lose your audience. Businesspeople don't want to read ads in their inbox unless they're incredibly valuable.

In order to keep your email CAN-SPAM compliant (the 2004 regulation that outlines email spam regulations), it will need:

- Clear and conspicuous opt-out link kept live for 30 days
- Your name & physical address
- Link to website
- Functioning return email address
- Opt-outs handled within 10 business days
- Clear identification that the email is a solicitation
- "From" line to directly identify you

LINKS & LANDING PAGES

What information can they access online? List the pages that the message will link to:

PAGE	PURPOSE OF THE PAGE	STATUS
		<input type="checkbox"/> Existing page <input type="checkbox"/> New page for this campaign
		<input type="checkbox"/> Existing page <input type="checkbox"/> New page for this campaign
		<input type="checkbox"/> Existing page <input type="checkbox"/> New page for this campaign
		<input type="checkbox"/> Existing page <input type="checkbox"/> New page for this campaign

RETURN ADDRESS

What email address should appear in the "From" field?

RETURN ADDRESS	USE IF...	BUT BE PREPARED FOR...
A specific person	<input type="checkbox"/> The message needs to feel like a one-on-one communication – for example, it's a personal invitation from your CEO	<input type="checkbox"/> You're sending to a very large group <input type="checkbox"/> It's a regular communication such as a

RETURN ADDRESS	USE IF...	BUT BE PREPARED FOR...
		newsletter <input type="checkbox"/> Personalization is not important
Generic address	<input type="checkbox"/> If you use the sender's actual email address, they may be bombarded by various responses. Instead, you can set up an alternate email address that isn't the sender's normal address and have someone else monitor the responses and reply on the sender's behalf	<input type="checkbox"/> It's still best to make sure the address is a working address that can be monitored. A "do not respond to this email" message is offensive to business prospects and customers – it says you're not savvy enough to figure out how to respond when you launch a campaign.

Decision:

TIMING

When will you launch the campaign?

Month	
Day of week	
Date	
Time of day	

OFFER FULFILLMENT

When recipients want to take advantage of your offer, what do they need to do?

What programming and/or materials will you need to fulfill the offer? For example, if they're going to download a free trial of your software, you'll need to incorporate it into your website.

TRACKING/MEASUREMENT

Look back at the strategy section where you outlined your qualitative goals – you noted how you will measure your success on each goal (for example, the number of click-throughs). Now document any measurement tools or processes you'll need. (Your technology will need to be able to track these items as well.)

MEASUREMENT	TRACKING METHOD

TESTING PLAN

To evaluate the strength of your content and your delivery, response and conversion rates, you can set up a test. Send out your campaign to a small group from your list, measure your results, and then revise the campaign and send it to another group to compare the results.

Better yet, set up an even split so that you can launch the two comparison campaigns at the same time.

Variable to test. Choose only one at a time -- for example, you can test heavy graphics email vs. heavy copy email.

Who will receive the test campaign?

How will you measure the results?

What will you do after measuring the results?

TIMING

Establish key dates for the campaign. Here's a basic list to get you started. If you're going to test the campaign first, you'll need to incorporate those dates in the list below.

STEP	DATE	PERSON RESPONSIBLE	NOTES
List completed			
Technology selected			
Email design (if HTML)			
Email copy completed			
Email programming completed			
Landing pages designed			
Landing pages written			
Landing pages programmed			
Campaign launched			
Hard bounces quarantined for further research/updating			
Resend to soft bounces #2			
Resend to soft bounces #3			
Soft bounces quarantined for further research/updating			

STEP	DATE	PERSON RESPONSIBLE	NOTES

Once you've finished your plan, move on to the technology provider section to evaluate the best technology for the campaign.