EMAIL CAMPAIGN CREATION GUIDE

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Target, Connect, Convert

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Creating a successful email campaign can be an overwhelming challenge, especially when you're learning a new tool or targeting new audiences.

At SalesNexus, we've helped thousands of businesses succeed with email marketing over the past 16 years and we've learned a lot about what works and what doesn't. This guide is intended to help business owners, marketers, and sales managers who are planning email marketing strategies for the first time get it right and keep it as simple as possible.

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Mistakes to Avoid

There are a few things that most newbies to email marketing tend to get wrong initially. Let's make sure you don't have to learn these things the hard way...

Test early and often, then adjust

One of the great strengths of email marketing is that it's very easy and affordable to try and provides instantaneous feedback about results. So, you can send out an email today, see what happens, then make adjustments and do it again tomorrow.

Don't let perfection be the enemy of performance. Too many first time email marketers spend WAY too much time trying to create the perfect email before they ever send anything.

In this guide, we'll give you specific and simple approaches to quickly creating emails that are effective, without spending weeks with designers, copy writers, etc.

Let Data be the Guide to Success

Use measurements of opens and clicks to tell you how to improve your email results.

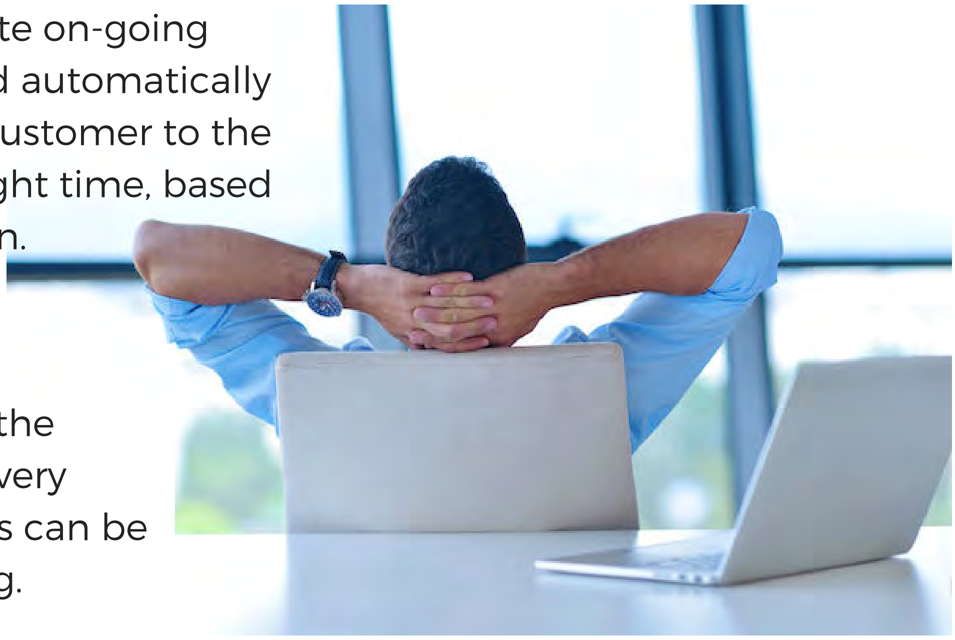
What customers will respond to is often very counterintuitive.

Plan to use the open and click rates as a part of your strategy.

More on how later in this guide!

Keep it Simple

SalesNexus can automate on-going sequences of emails and automatically switch each individual customer to the right sequence at the right time, based on their specific situation.



That's very cool!

But, trying to figure out the specific sequences for every scenario in your business can be extremely overwhelming.

Start small and build over time..

As discussed above, the data should guide you to success. Start by creating the emails intended for the broadest audiences and start using them and using the results and data to tell you what to do next.

Understand the Reader's Process

The most common mistake made by newbies to email marketing is making the emails too long. Understanding the environment of the reader helps to focus our emails on leading the reader forward step by step.

As you check your email today, think about your own thought process.
Do you love checking email?
Do you allocate lots of time in your day for reading long emails and spending time responding or taking next steps?

Probably not.

Here's a more typical process:

1. Busy executive has **5 minutes** between meetings to look through the inbox which has 20+ new emails in it that have arrived since the last time they looked at their inbox earlier in the day.
2. Their goal is to quickly identify the **important emails** from customers, team members, and friends/family and then get rid of the rest.

3. They just don't have time available to digest all the emails they get. They look at the **From Address** to find important people they recognize and start with those emails (that's probably NOT your email!).

4. For the emails whose From Address they don't recognize, they glance quickly at the **Subject Line** to see if it seems important or interesting.

5. Emails for which the From Address is not familiar and the Subject Line is not interesting are **DELETED**. That means they never look at your email. (not opened)

6. The emails that have an interesting Subject Line get opened, but are only glanced at for 1 or 2 seconds. A **quick decision** is made... Is the email engaging, clear and related to the Subject Line?

- If so, the reader will invest a few more seconds reading the email.
- If not, the email is deleted within 3 or 4 seconds of opening it.

7. Now you have their attention, it's important to **get to the point** before they run out of time or interest.

The reader at this point is saying
"OK, I'm interested, how can you help me?"

- If they see something to click on that seems like it can help, they will.
- If they have to read 4 paragraphs to figure out what's in it for them, they'll either delete the email or leave it in their inbox, thinking they'll return to it later but, never will because they'll be 100 other emails on top of it.

The point here is that we've got to **keep it short and be clear** about how we can help the reader or we'll lose their attention before we ever get our point across. This guide will walk you through a step by step process to create emails that get results in this high pressure, low attention span environment.

What's the Goal?

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It’s easy to get overwhelmed by all of the great ideas you’ll have along this journey, so it's vital to **start with the end in mind**.
Write down your **objective** and use it to keep your efforts **focused**.

Identify the target audience

Who are you sending the campaign to?

Who will we be making this offer to?

Even if you’re not able to narrow your list down too much, getting **focused** and **specific** is the secret to success here as well.

Try to imagine your ideal customer or participant

What are their common traits?

Be specific about demographic categories like:
age,
family status,
income,
number of employees,
revenue,
industry,
location... etc.

But also consider less typical criteria:

What do they watch on TV?

Where did they go to college?

What hobbies do they have?

This will help you create messages and content that **speak** to your ideal customer.

Most importantly, are these existing or previous customers or folks that have never heard of you before?

Draw a picture or "persona" of your audience. This helps to think about common traits that you can use to connect with the audience that may not be strictly related to your products and services.

Here's a helpful article on **[creating customer personas from Inc. Magazine.](#)**

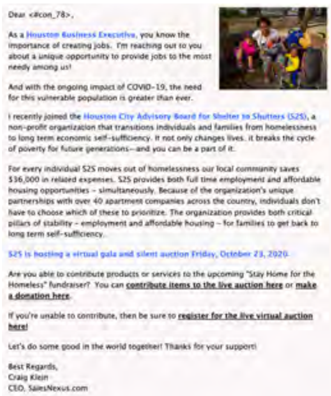
Identify Your Objective: the Call to Action

What's the objective of the campaign?

The most essential element of marketing success is deciding what you're **trying to accomplish** with your campaign.

Is it a purchase?

A donation?



Attending an event?

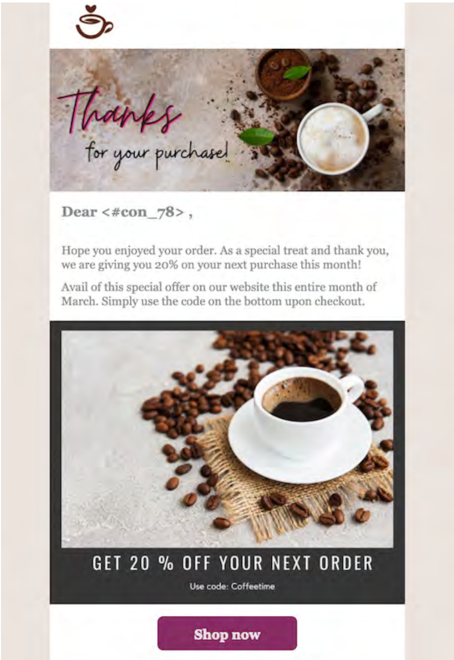
An appointment?

Regardless of the answer, the success of your campaign will depend on how well you can clarify your objective and your "call to action".

Be Specific - don't sell all your products, pick one as narrowly as you can. Pair very specific customer personas with very specific calls to action. This will lead to the greatest success.

If your target audience is very familiar with you and has engaged with you many times before (previous purchases, previous registrations, etc.) then you can be pretty direct and aggressive in your call to action.

For example:

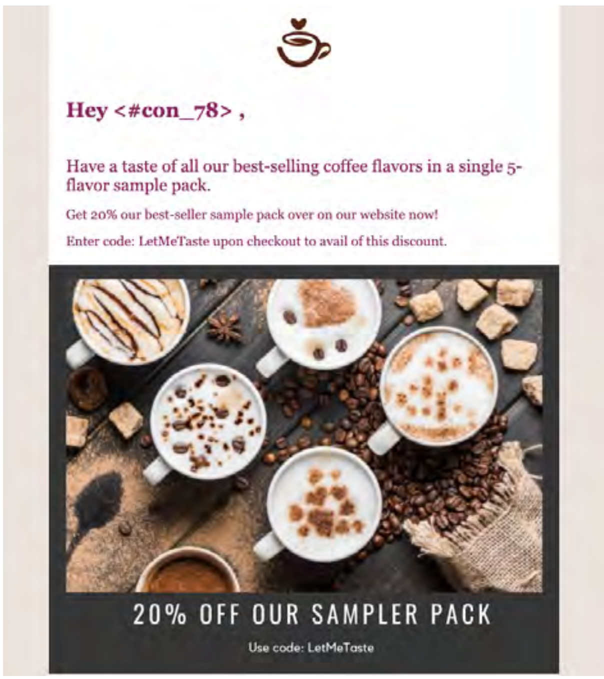


If I've purchased 5 one pound bags of coffee from you in the past year, then sending me an email offering 20% off on my next order is completely appropriate.

However, if you have no or limited prior relationship with the audience, then it's you may want to try and be a bit more subtle. So, if you're emailing a list of coffee enthusiasts that don't know your brand, you'll get a lower response rate to a discount offer. But, if you first send them something introducing your brand and it's strengths, and a follow up offer of the discount, that can be far more effective.

First email

Follow up email



This is known as "**content marketing**" and essentially is about earning the audience's trust by offering them things that they see value in, without asking for anything in return.

Then once you've earned their **trust**, you ask for the sale. More on this later. 🙂

Identify the Customer Pains

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Your email has to get the attention of your audience and stand out in the crowd instantly.

To do that, you have to speak to the **needs** and **desires** of your target audience. Remember, people make decisions emotionally and use data and facts to justify their decisions.

Success depends on appealing to their emotions.

Here are some questions to ask yourself:

- What are the **challenges** your target audience faces that you can help with?
- What problems does the chosen product/ service/ opportunity **solve** for your target audience?
- Why do they **need** what you're offering?

Even if you're selling a B2B product or service, the pain is better if it's skipping another vacation or saving for college even if the "benefit" you offer is saving their business money or time.

"Customer Pain" doesn't have to be a negative. It can also be an opportunity.

But, keep in mind that you want to appeal to the change the customer wants to see in their personal life. So, identify what is not ideal about their world today that you can help them improve.

To stand out, stay away from appealing to saving money and time.

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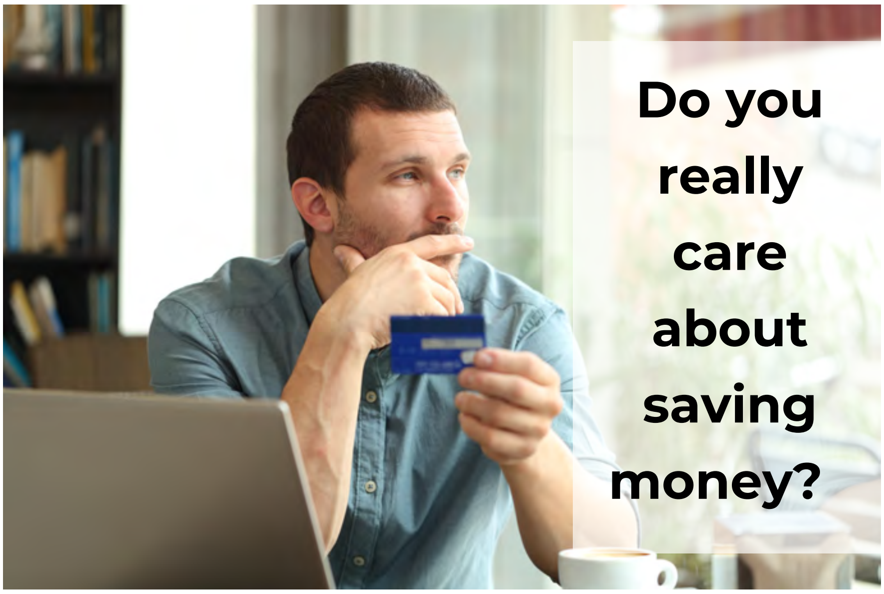
Ask yourself:



or

Do you care about having more money, or having a **quality product** that you feel good about, regardless of the cost?

For example:

Product	Money/Time Pain	Better Pain	Best Pain
Immunity Supplement	Too expensive	Cutting entertainment budget	Afraid to go out for dinner
Chain Saws	Too expensive	Too heavy/breaks down	Working late again
Mortgage	High rates/slow closing	Worrying about rate changes	Spending another year in that apartment

Identify Solutions to the Pain

If your best friend told you they suffered from the challenge you identified in the previous step, what would you do for them?

Be sure to identify all the possible solutions that your audience will be aware of including do it yourself approaches, competing solutions, etc.

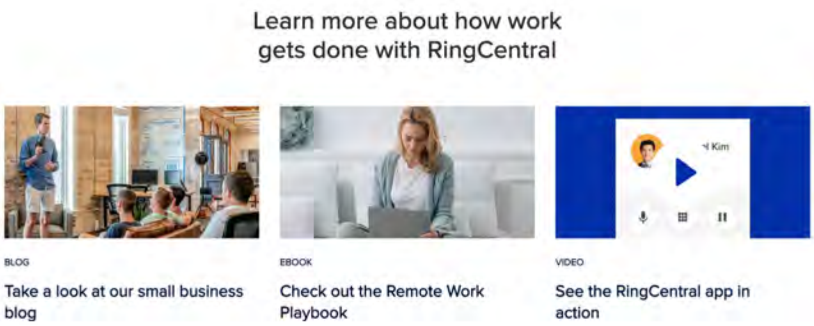
As discussed previously, regardless of the specific objective of your campaign, we want to **build a lasting relationship of trust** with the audience so that you'll be able to reach out to them with other campaigns successfully.

Give to Get

The more you can offer free advice, helpful tips and other useful information, the more they learn to trust you as an expert in your field and the less likely they are to start ignoring your emails or unsubscribe.

So, the ideal email campaign offers 2 or 3 helpful and informative items for every 1 "ask". Detailing out a broad list of helpful things you can do for a friend gives you a lot of helpful offers to work with.

For example:



Keep it Simple

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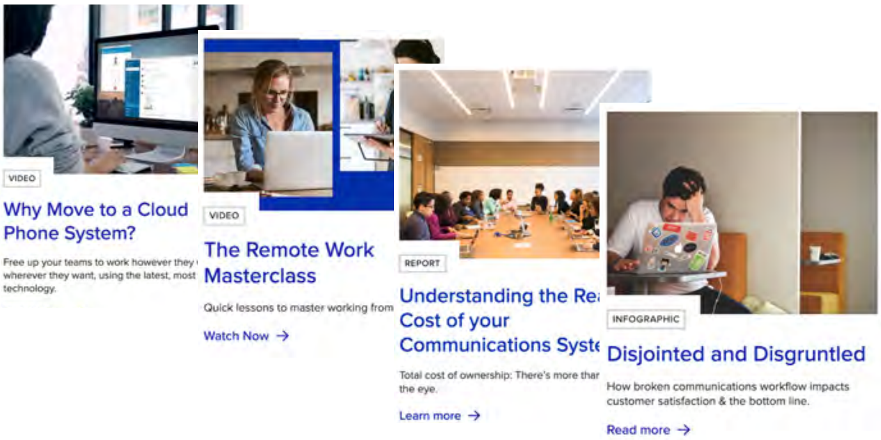
Don't try to get too sophisticated.

You're an expert in your field and you have a LOT to share with your audience so, once you get started thinking about this approach, your campaign could get very complex. Remember that our objective is to get our first email or two out into the wild so we can measure the response.

Make your list of **solutions** and rank them by what percentage of your target audience would find them most helpful. Then start with the one on the top of the list.



Identify the Related Content

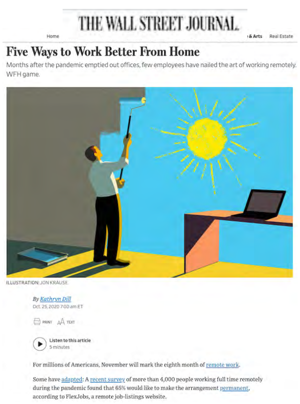
Remember, this is NOT your product or service.

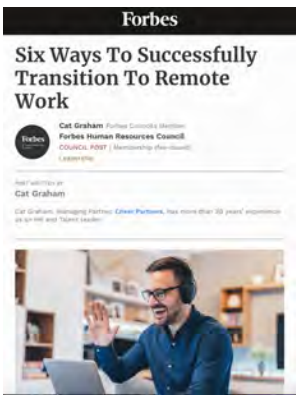
This is something your audience will benefit from even if they don't do business with you or sign up for your event.

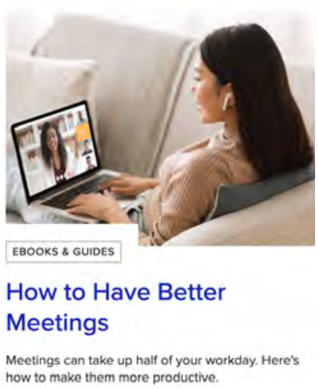
The most effective options depend on where you are in the relationship with your customer.

- If the customer has never heard of you, use resources from recognized experts that HAVE heard of.
- If it's a long time customer that has already purchased a product from you, then a free instruction manual could work.

For example:







Keep in mind that in general, video gets 2x the response that written material gets.

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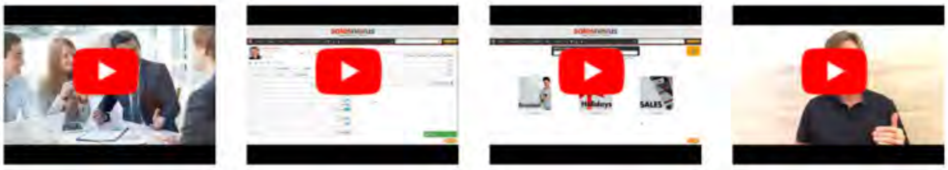


STEP 1 – Team Buy-In | STEP 2 – Organize Customers | STEP 3 – Start Automating the Process | STEP 4 – Train the Team

This step is where new email marketers often get stuck because it can seem so overwhelming. You've identified some compelling "pains" and you have LOTS of great advice about how to address those pains but, you may not have great looking videos or PDFs or web pages that communicate those solutions.

And you're probably not a copywriter or graphic designer.

Warning!

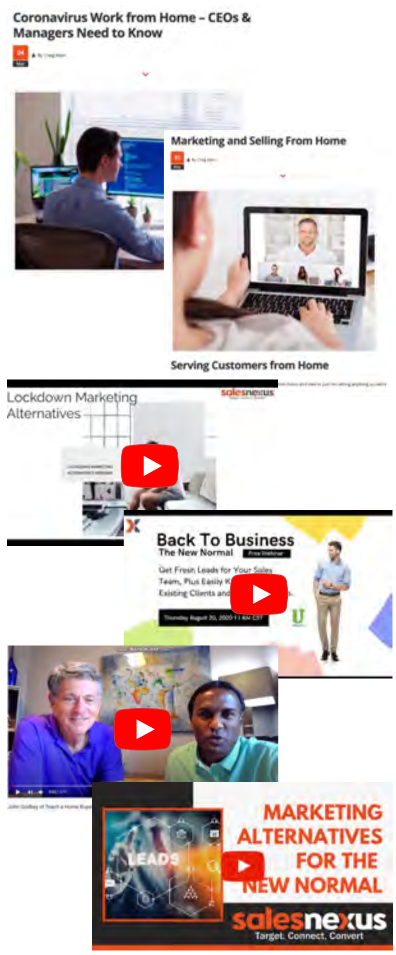
Slowing or stopping the process in order to create some beautiful content that you're going to love for the next 3 years is completely counterproductive.

Sure, it would be great to have that beautiful content, but what you THINK customers want and what they ACTUALLY want are usually two different things.

Remember that our initial goal is to send our first email or two and let the results tell us where to invest our time and resources.

Easy Content Ideas

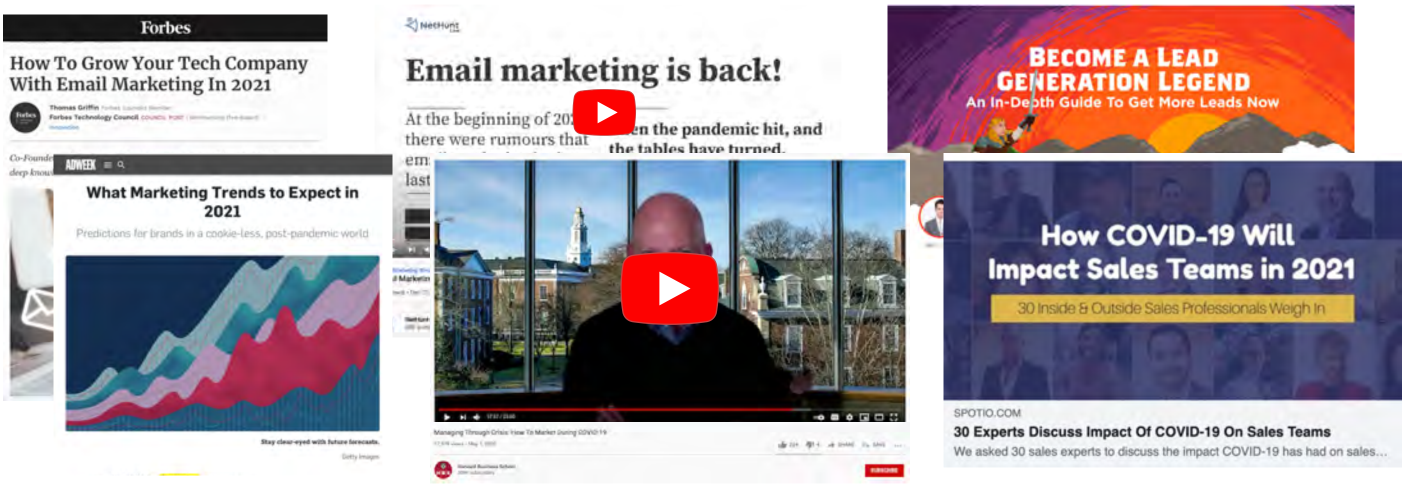
Make a chart of Customer Pains, Solutions to each Pain, Content Related to the Solution.

Customer Pains	Solutions to Each Pain	Content Related to the Solutions
• Generating leads in the midst of the pandemic	• Consider online marketing alternatives such as email marketing	
	• Find out what the business experts have to say about sales and marketing trends in 2021	

Start with content you already have. Don't worry about whether it's perfect. Just inventory what you've got available. Include pages on your website, blog posts, PDFs, videos, surveys, reports, statistics, case studies, customer stories, etc.

Now do some research to find high quality content available from other sources.

Youtube is a great place to look. Industry associations, technical journals, major media websites, even recommended books can all be great.
You can use other people's content in your email marketing!

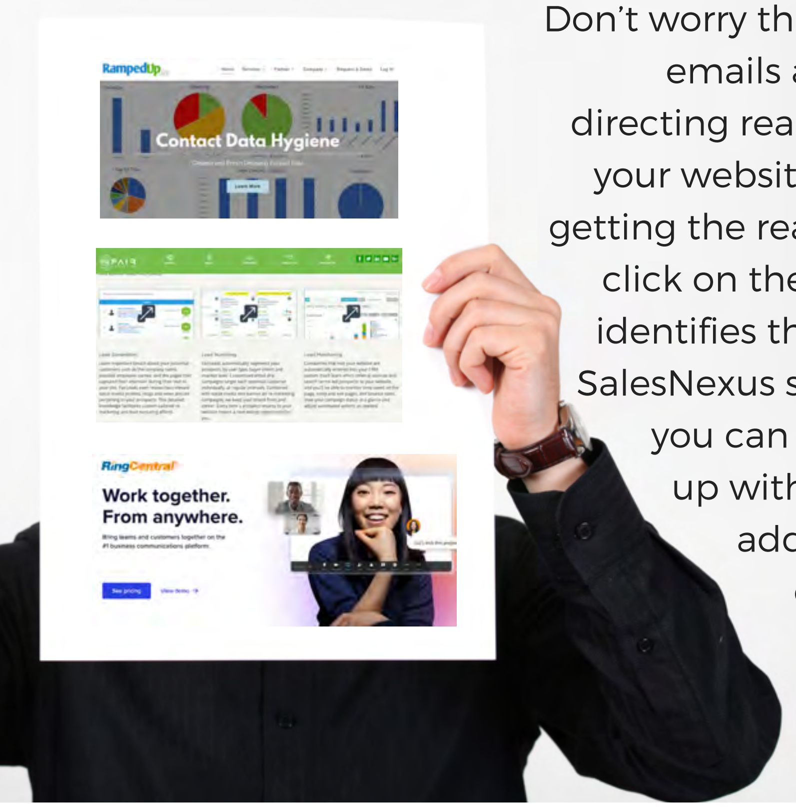


Don't Let "Perfect" be the Enemy of "Good"

Our goal is to offer helpful content to your audience and build trust and to start testing and measuring ASAP. Creating awesome content takes a lot of time and money. Plus, often connecting yourself with industry experts only adds to the credibility of your brand and your messages.

Remember, you're not violating any copyrights, etc.

Your email is going to point to this material wherever it is already published. Just try to avoid content offered by your competitors.



Don't worry that your emails are not directing readers to your website. Just getting the reader to click on the email identifies them in SalesNexus so that you can follow up with calls/ additional emails.

Write the Emails

Avoid trying to create the perfect email on your first attempt.

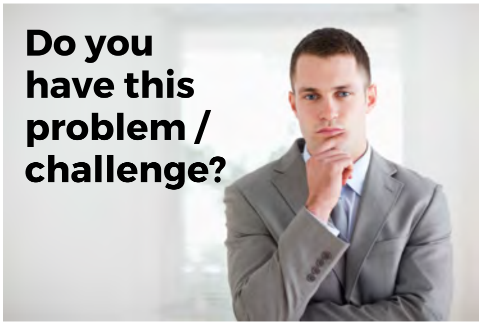
As discussed earlier, the idea is to get your first email sent so the results can tell you what to do next. The biggest killer of email marketing success is spending days and weeks creating a beautiful email that everyone on your team just loves but, no customers respond to when you finally send it out.

Remember the "email reading" process we described earlier. You've got to **get their attention** and **get to the point.**

Once you have your audience clearly defined and their pains identified, writing emails that grab attention and get results can be very easy.

The formula is essentially:

1



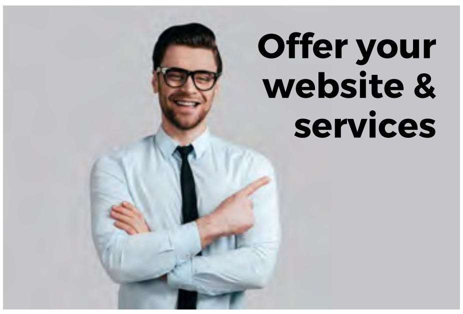
Are you looking for answers to this problem or challenge?

2

Here you highlight the helpful content that you've identified.

3

4



If you want, it's okay to add something like: if you're interested in other solutions to ('the pain you're focusing on'), then a link to your site or service, etc. But, this has to be secondary in terms of the organization and design of the message.

Here's the template to write a successful email:

- **Salutation** - (use a mail merge field here to personalize it).

- **Pain Question -**

-Do you have this pain?
-Are you suffering from this pain?
-Are you struggling with this pain?
-Is this pain costing you money?
-Is this pain keeping you up at night?
(Replace "this pain" with the specific pain your content piece addresses for your customers)

- **Offered Content** -

-You might enjoy this article.
-Download our step by step guide.
-Watch this short video.
-See how (company) fixed the pain (here you link to your website, video, pdf or other content).

- **Post Sell** - add a sentence or two (no more!) that describes how the reader will benefit from your content.

- **Signature** - mail merge in your name, phone and other contact details.

For example:

Hi <#con_78>,

RampedUp.io

Is your database a mess? Too many missing emails?
Phone numbers not working now that everyone's at home?
Are you calling campaigns unsuccessful because you don't have accurate phone numbers?

Now there's an easy and affordable way to **update** your database with **accurate** emails, phone numbers, and more.

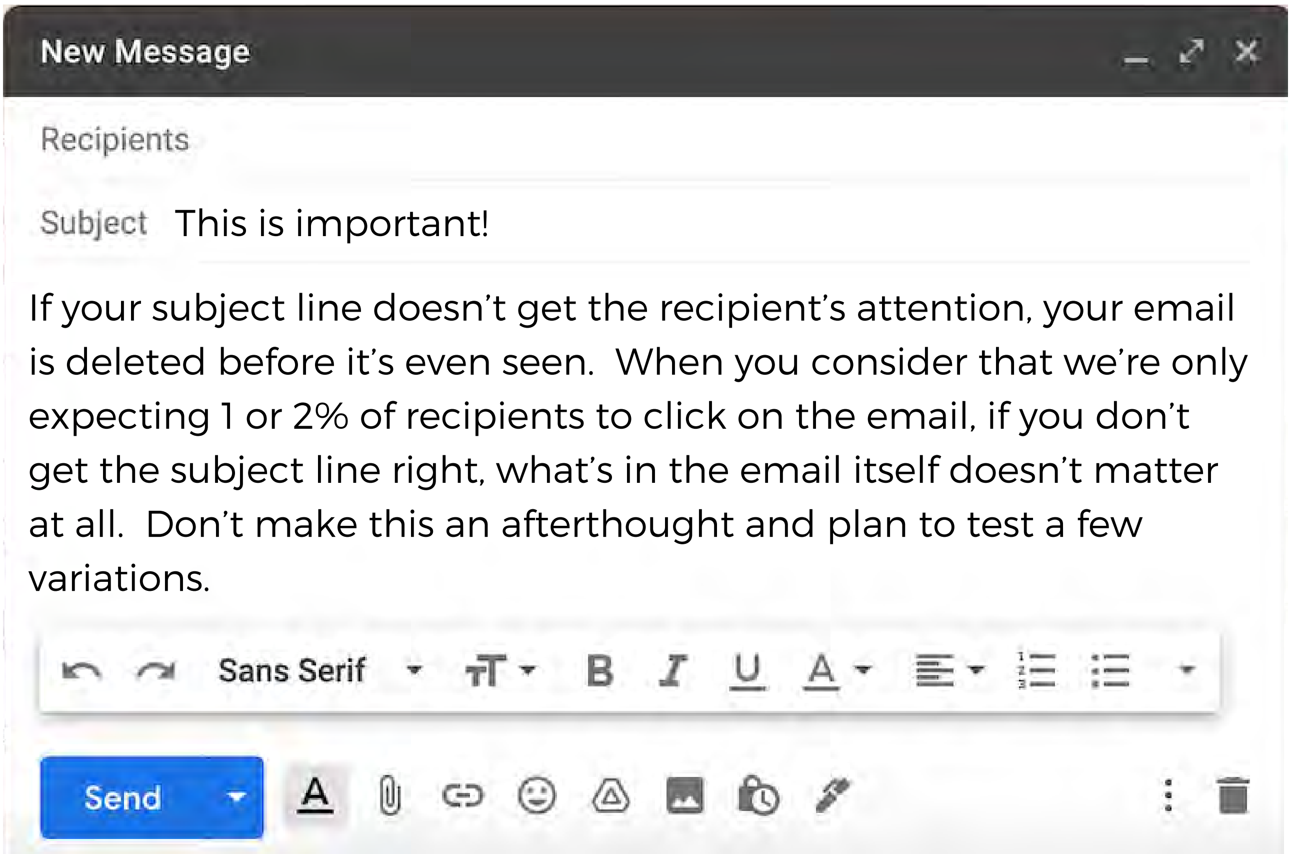
See how in this short video!

Are you ready to turn your customer database into sales?
Choose a convenient time for a short 15-minute review and start turning your "mess" into an organized actionable database!

Schedule Your FREE Database Health Review

Thanks,
<#my_26>

The All Important SUBJECT LINE



If your subject line doesn't get the recipient's attention, your email is deleted before it's even seen. When you consider that we're only expecting 1 or 2% of recipients to click on the email, if you don't get the subject line right, what's in the email itself doesn't matter at all. Don't make this an afterthought and plan to test a few variations.

- **Keep it short** - on a mobile device, you've got about 25 characters to work with. Less is more.
- **Don't waste space** with your company name or product name.
- Make sure the subject line **appeals to the customer's pain**.
- **Avoid words** like Free, Discount, Special, Offer, etc.
- **Use words** like Help, Fix, Stop, Upgrade, etc.

  How will the reader's life improve by opening your email?
- **Mail merge** - mail merge the recipient's first name or company name into the subject. This makes sure it stands out.

Avoid these Mistakes

- Talking about yourself.
- Talking about your company.
- Talking about your product.

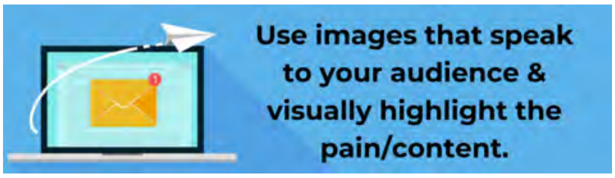
- Too much text.
- Not mobile friendly. 50% of your emails will be read on a mobile phone. You have even less room for being verbose.
- Keep it SUPER short and to the point. Make sure graphics don't push the actual message off the screen.

Create Email Templates

You've gotten the email written and you do not have to worry about the design too much. **Often simple text can work even better than a beautifully designed email.**

The golden rules of email design are:

- **Keep it simple and clean** - don't distract from the main message and Call to Action.
- **Use images**



This is not your logo or a picture of your office building or your CEO!

- To **feature a video**, put a "thumbnail image" from the video in your

message but, be sure to put a play button on the image so it's obvious they can click it and watch a video. **Videos get 2x the clicks that text links do.**

- **Keep the text to a minimum** but don't rely entirely on images. Some email software doesn't show images at first, so there has to be enough text to get the message across without the images, etc. However, you can't expect your audience to read more than a couple of sentences before they decide whether or not to delete your message.
- Be sure to **include "Alt Text"** for all the images - this also appears when images don't.
- **Link** every image to your desired content.
- Use **buttons** for the Call to Action so it stands out.

Download the Email Template Guide

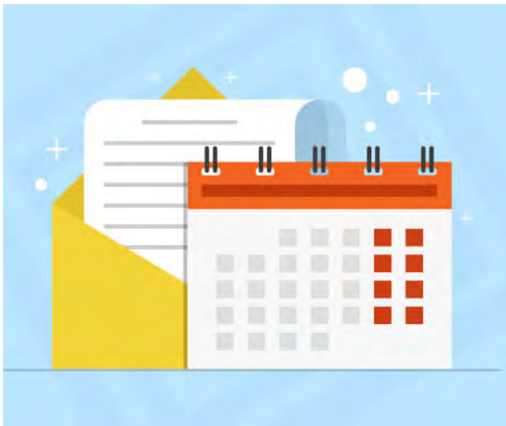
Download our Email Template Guide for an in depth overview of all the little things that go into creating the perfect email template, including examples and screenshots of how to do it in SalesNexus.

Sequence the Steps in the Campaign

Especially when targeting an audience that's unfamiliar with you, each email they see in their inbox is a branding impression and can increase the chances of a response to the next one.

It's simple math. If you have 1,000 on your list and send them one email to get 20 or 30 responses, then sending 2 emails should get you 40 or 60.

Space out the sequence depending on your relationship.



If they don't know you, once a week is a good place to start. If they have already purchased something or just requested info, then a few times a week is fine.

Plan out the Follow Up Steps

How will you handle the positive responses? Do you call the people that watch your video or send them another email asking for an appointment?

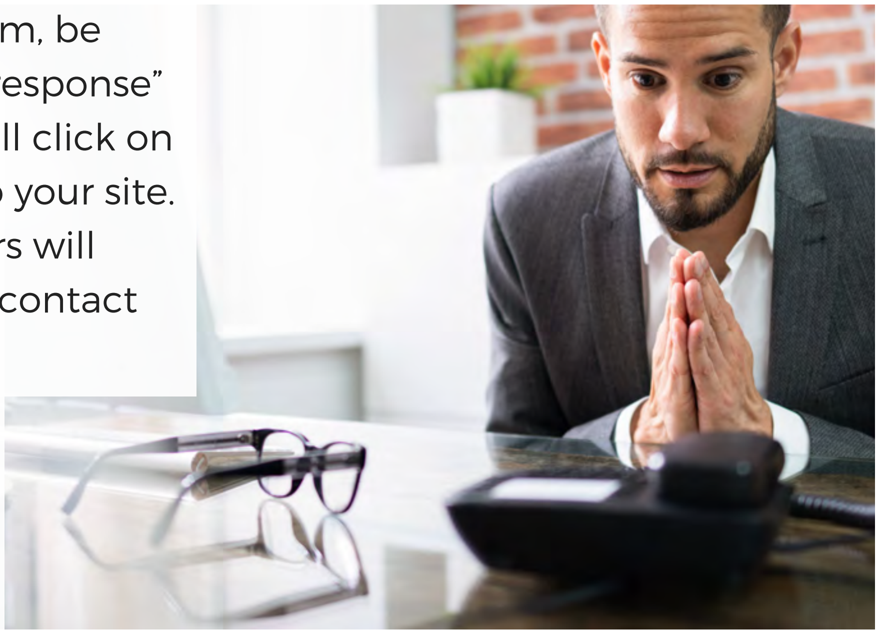
If you're expecting readers to fill out a form on your site, how will you ensure they all get the response you want? Create a separate campaign to ensure consistent and automated outreach to these responses to your first campaign.

In SalesNexus you can automate all of the above. We'll show you how in the next section.

Plan out the Follow Up Steps

Calling

If you're sending readers to a landing page to complete a form or just sending them to your site to read a blog and hoping they'll then call you or fill out your contact us form, be ready for a very low overall "response" rate. 1 to 2% of recipients will click on the link in the email to go to your site. Only 5 or 10% of those visitors will actually fill out your form or contact you.



So, unless you have a really big list, you'll only have a couple of leads to follow up on.

That's why calling "clickers" can be a very effective strategy. In other words, you call everyone that clicks on the link in the email, regardless of whether they take further action on your website. This strategy works great when you follow the 'Do you have this pain - content offer' process we've discussed. It can transform the drudgery of cold calling hundreds of contacts into a far more productive "warm calling" program.

This is because you already know what's on their mind. They read your email, responded to the pain and took the further action of clicking to read/watch/download your content. Especially for a business audience, this is a very strong indication of need or interest.

So, when you call, you don't have to bother with the normal cold calling script that we've all heard too many times. You just get to the point...

"Sally, this is Bob with YourCo, I noticed you took a look at our article on ....."

This approach works consistently but, only if you call quickly.

When you consider the email reading environment that you're competing in, your readers are processing through hundreds of emails a day. If you wait even a day or two to call, they may not even remember your email.

However, if you call that same day, they almost always will remember and respond with some feedback. If you call within an hour or two, it will be an extremely "warm" call. **They may still be on your website!** They're certainly still processing what they've read or learned.

With SalesNexus, you can make it very easy for sales people to know instantly when a reader clicks and call them quickly!

Create the Campaign

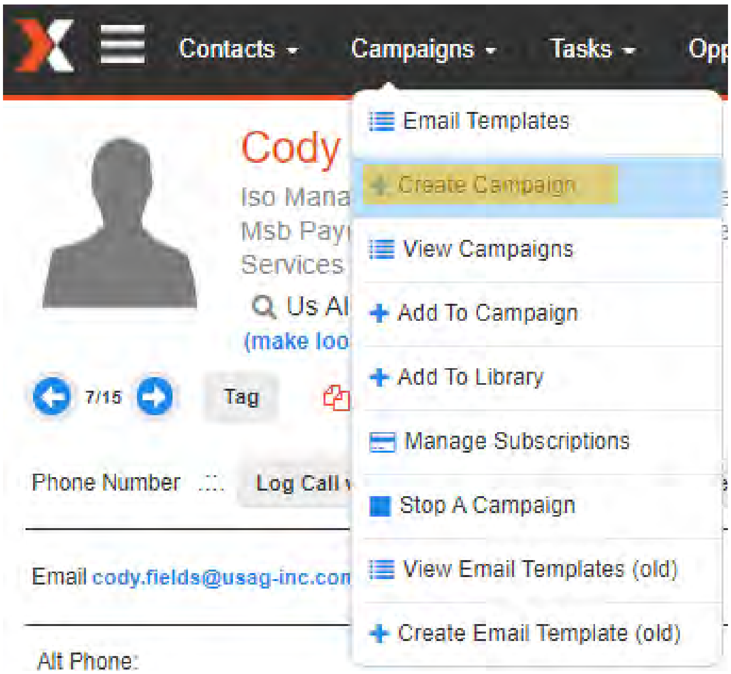
Now you'll create the campaign in SalesNexus.

This can be a single email or a series of emails and other tasks like calls and todos. It's important to understand that in SalesNexus, there are 3 essential parts of an email marketing campaign:

-The email template

-The email campaign

-The lookup (the list of contacts you'll send the campaign to)



These are all independent in SalesNexus so that you can use the same email template in multiple campaigns and you can add several different lookups (groups or lists of contacts) to a campaign over time.

To get started, go to Campaigns > Create Campaign.

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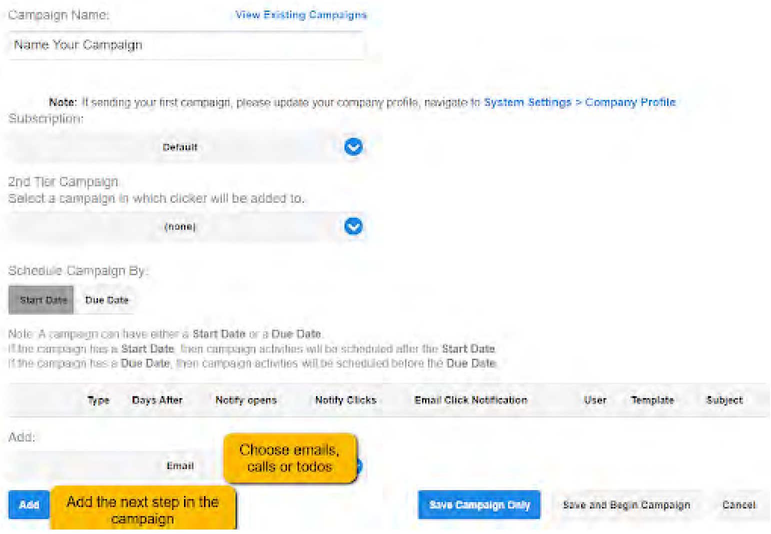
There are a lot of options and features when creating a campaign but, we're going to focus on the essential pieces, starting from top to bottom:

1. **Enter a name for your campaign** - this is how you'll find the analytics in the future.

2. **Add steps to your campaign** - under ADD leave EMAIL as the selection unless you want to add a call or todo. Then click ADD.

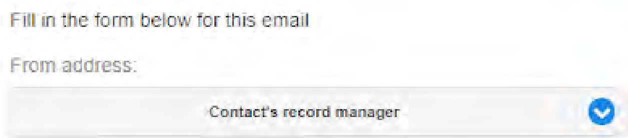


3. **Choose the From Address:**

   a. Designate Any User in SalesNexus. All emails will come from the email address in that user's My Record.

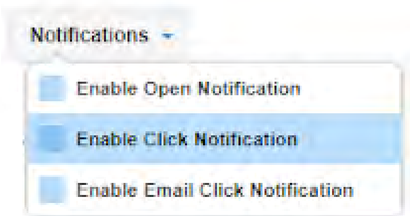
   b. Current User will use the email in the My Record of the user that schedules the campaign, when adding a lookup to the campaign.

   c. Contacts Record Manager will ensure that each recipient gets the email From the Record Manager (usually the sales person) for that contact.

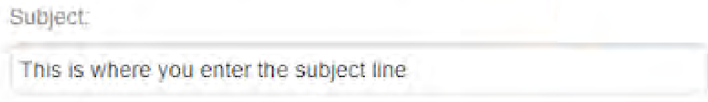


4. **Choose the # of days after the start date.** Usually 0 for a single email campaign. If your campaign will have multiple steps, this is how you define when each step happens in the overall sequence.

5. **Turn on notifications** - SalesNexus will track opens and clicks even if these options are turned off. Open Notifications and Click Notifications will place a Click Notification task on the Task List of the user who the email was sent From, for any contact that has either an open or click on this email. Email Click Notifications will send that user an email notification of the click for each contact that clicks on that email.



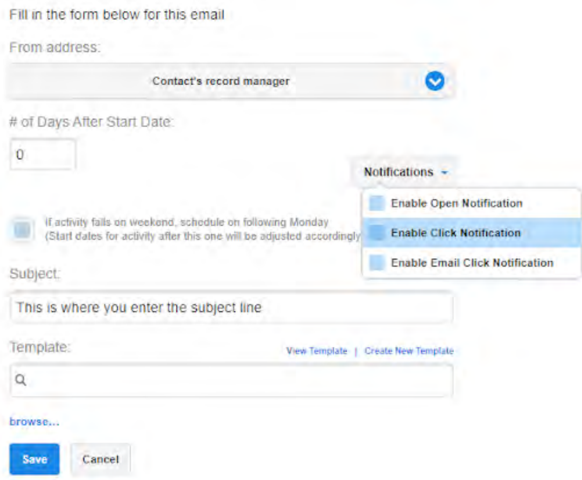
6. **Enter your subject line**. As we've discussed above, this is important so, make sure it will get your audience's attention.



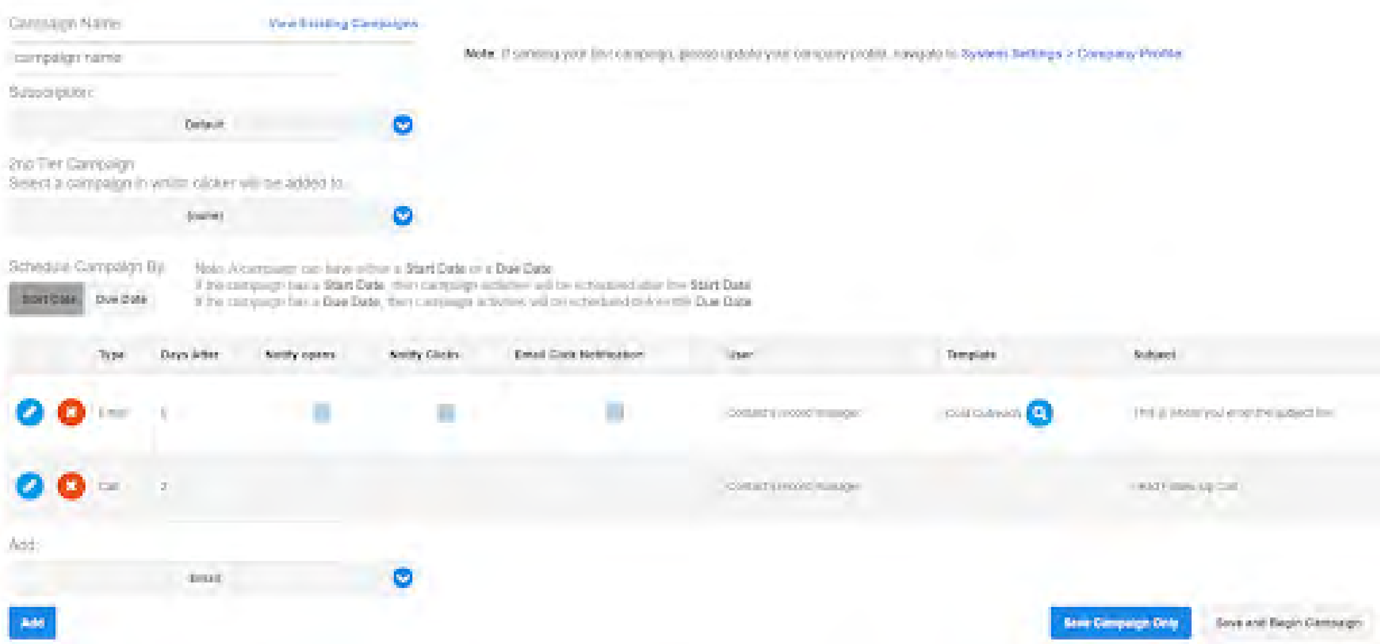
7. **Choose the template**. Just start typing in the name of the email template you created and select the correct one from the search results that appear.

8. **Click Save**.

9. **Repeat** this process for as many different steps as you need in the campaign.
A campaign can contain any sequence of emails, calls and todos.



Here's an example of a simple campaign that will send an email and then give the sales rep a task to call 2 days later.



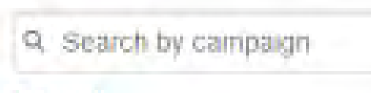
Schedule the Campaign

This is where you set the day and time for the campaign to begin and which contacts the campaign will be applied to.

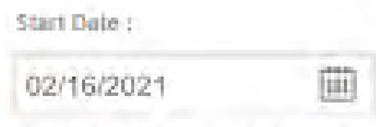
You can first perform a lookup by going to Contacts > Create Lookup. Once you have the list you want, click the Make this My Lookup button on the search results page. Now that list is your working list in the system and can be added to your campaign.

Now go to Campaigns > Add to Campaign. Then follow these steps:

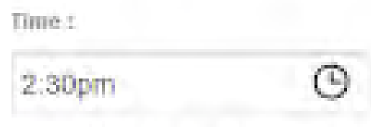
1. **Select the campaign** by typing its name in the search bar at top.



2. **Select the Start Date.** This is the date that the step in your campaign that starts 0 days after the start date will be scheduled. All other steps will be scheduled as Start Date + # of days after the start date. Note: Tuesday, Wednesday and Thursday are generally best for B2B email marketing.

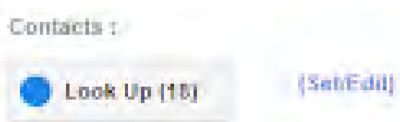


3. **Select the time.** Mornings are generally best for B2B.

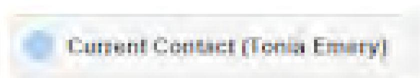


4. **Choose which contacts** will be added to this campaign.

5. **Lookup (#)** - if you've performed a lookup previously, this will select that list to add to the campaign.



6. **Current Contact** - this will add only the contact you were viewing prior to selecting Add to Campaign.

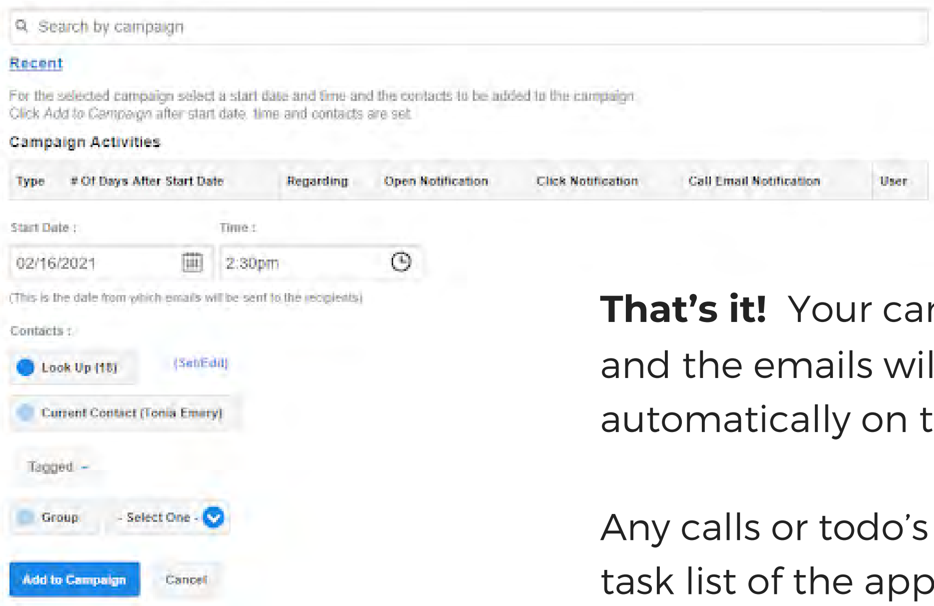


7. **Group** - you can choose a previously created group of contacts.

8. **Double check everything!** Notice that once you selected the campaign, you can click the view button next to the email template names in each step to view that template to be sure it's perfect.

9. Click **Add to Campaign**.

10. **Click Yes** - the system gives you a confirmation notice and one last chance to abort the process.



That's it! Your campaign is scheduled and the emails will be sent automatically on the schedule date(s).

Any calls or todo's will appear on the task list of the appropriate user.

Measure and Optimize

Set goals for your campaign so you have a measuring stick to compare to.

First, be sure your expectations are realistic. In general, across all sorts of industries, products, and audiences, here are the benchmarks to expect:

- Open Rate: 10 to 20% of the original list sent to.
- Click Rate: 1 to 2% of the original list sent to.
- Conversions: (meaning form submissions on your site) 5 to 20% of the clicks.

How Many Conversations?

"Connection" rates will be similar to those you see in your general calling efforts to your audience or customers. If you're calling clickers AND you're calling them quickly, you should expect connection rates to improve by 25 to 50%.

Make sure you've planned out exactly how your team will designate that a call was made and what the results were.

How Many Qualified Opportunities?

Of course, this will depend entirely on your audience and your offer but, for starters assume you'll achieve a similar rate to your other most common marketing tactics.

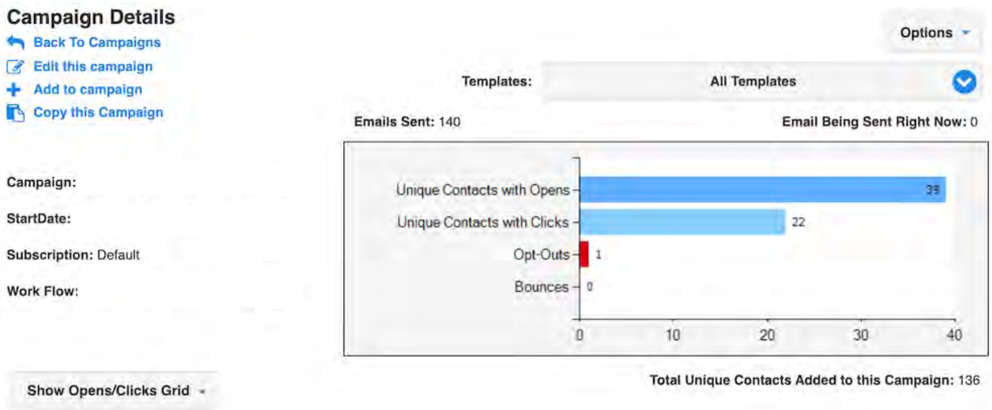
Be sure you've planned out HOW you'll identify the qualified leads or opportunities that came from your email campaign.

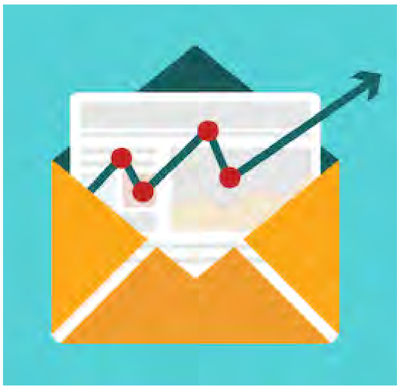
Measuring in SalesNexus

It's easy to measure Opens and Clicks in SalesNexus by going to View Campaigns.

View	Edit	Name	Start Date/Due Date	Last Added To	Emails Sent	Opens	Clicks	Subscription	Retire	Delete
		Test	Start Date: 9/17/2020	1/13/2021 3:43:36 PM	4	19	4	Default		

Once you've drilled into the analytics for a specific campaign, you can then easily view lists of recipients that Opened or Clicked or Opted-Out and then take those lists and perform additional analysis.





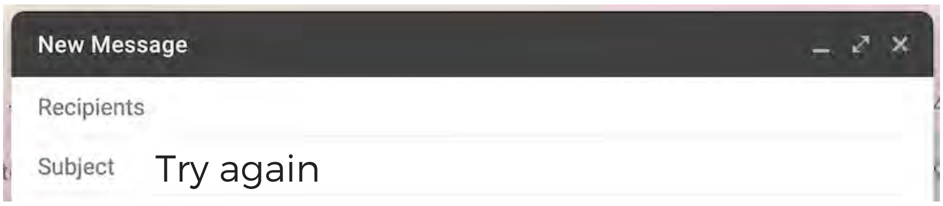
So, a simple way to track all of the metrics above is to designate one field in SalesNexus where your team will designate the disposition of the lead once they've talked to them. That way you can easily grab the list of clickers and then sort it by the disposition field, sales rep, etc.

If you're goal is to get readers to fill out a form on your site, connect the form to SalesNexus using the Lead Capture feature and when the form is submitted, SalesNexus will update the existing contact already in SalesNexus (matching by email address) and you'll be able to track clicks, form submissions and disposition.

Optimizing

If you're measuring the process as above, making adjustments to improve results is simple.

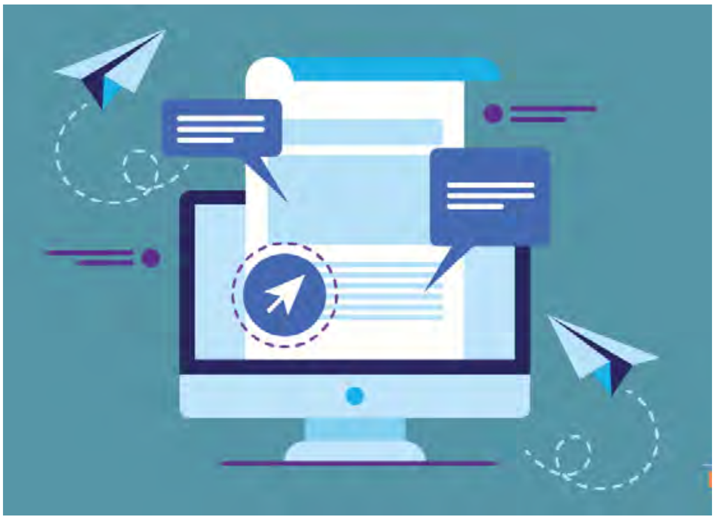
Open Rate - Benchmark is 10 to 20%



If it's lower, then try a different subject line.

Click Rate - Benchmark is 1 to 2% (of the entire list sent to, or 10% of the opens) - if it's lower, then your email did not resonate with the audience.

Some things to consider:



- If your **open rate was low**, then the click rate can be statistically insignificant.
  Don't get too worried about the email itself yet.
- Most often, a **low click rate** means you failed to get the message across to the audience quickly enough.

In the 2 or 3 seconds they took to glance at your email, they couldn't see a reason to click. Try to **make it shorter** and **emphasize** how the reader will benefit from the content.

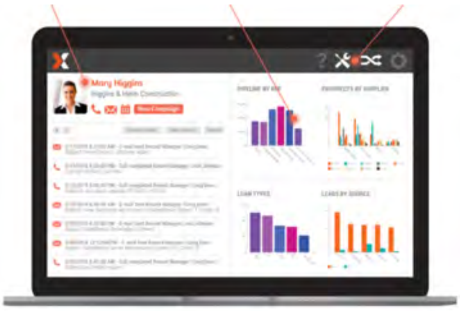
- Your **subject line** may be attracting people for reasons that don't align with the message in your email. In other words, when they open the email, they don't see what the subject line led them to expect. It's hard to know how readers will interpret your subject line so, sometimes it's best to just **rephrase** things using different words.

- **The problem may be with your list, not the emails.** Depending on how you built your list, they just may not be in your sweet spot. If you're able to **subdivide your list** into very specific groups based on industry, title, application of the product, etc. you can create campaigns that are more specific to each specific audience.

Thanks for checking out our Email Campaign Guide!

We hope you've found it helpful!

We're committed to your success. We believe that your success in business helps make your community a better place for everyone in it.



If you find all of this overwhelming, check out our Email Marketing Services **here**.

Start a Free 30 Day Trial!

If you haven't already, start your free trial of SalesNexus **here.**

If building a list of potential clients is of interest, check out our valued partner **RampedUp**.

Here's a short **video** that gives an overview of the entire process of starting a lead generation campaign.

We're here to help, just reach out **here**!

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