# Email Strategy Exercise

## Before Emailing

Start with your marketing strategy and ask yourself “how can we delight our customers and prospects using email?” and “is there a better way to engage them?”

You might not want to use email at all for your target audience, and that’s okay! There are a lot of tools in our communications toolbox and email isn’t always the right option.

# Exercise

Fill in the sections below. This becomes your email strategy. You can use this for your overall email strategy or use it for individual email campaigns to make sure the campaign is aligned with your vision.

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| --- | --- |
| **Target Market***Detail who you are sending this email or campaign to.* | Who are you sending this email or campaign to? Be specific and include segmentation if needed. |
| **Vision Check***How will this email or campaign get you closer to your vision?* | Copy your vision statement here: How will this initiative support your vision? |
| **Goals & Objectives***What are you hoping to accomplish through your email?* | [Brainstorm here]*Examples:** *Introduce existing customers to the benefits of a new program.*
* *Follow up with webinar attendees to book a demo.*
* *Invite customers to a conference or event.*
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| **How is it Measured?***What are you going to measure? Open rates? CTR? How will we know we need to try something else?* | [Brainstorm here]*Examples:** *If CTR drops below 2% we will revisit the campaign.*
* *If unsubscribes hit 0.4% we will revisit the campaign.*
* *Webinar subscribers should hit at least 45.*
 |
| **Value Proposition***How will the content of the email or campaign reinforce your value proposition to this target audience?* | [Brainstorm here]*Example:** *Our target market struggles with XYZ and this email educates them on how to improve their ABC because we are experts at solving that problem.*
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| **Target Market Reality Check***Answer each question to make sure you are sending this email (or campaign) to serve your target audience and not just for the sake of “staying top of mind.”* | Thinking about your target market, do they REALLY want to get emails from you?Is the content compelling enough or adds enough value to warrant an email?How often would the ideal customer want to hear about it? Is this communication triggered on an action like downloading a guide? Or is it seasonal based on times of year or monthly?How does this ideal customer like consume information? Do they like short and sweet tips? Do they like longer story-driven articles? Do they want plain English or cat memes or technical jargon? |

# Next Steps

When you have prepared the email or campaign, double check it against this document before you send it.