The Marketer's Step-by-Step Guide to

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Conducting an Email Campaign

By Michael Selissen

CASE MOUNTAIN COMMUNICATIONS
Visual Storytelling for Nonprofits

Email Isn't Just About Email Anymore…

Among the champions of communication channels, there is one that keeps fighting its way back to the top: **That one is email.**

More than advertising, telemarketing, direct mail, or tradeshows, marketers continue to rely on email to generate new leads, nurture prospects, cross-sell, up-sell and keep in touch with current customers.

But to stand out in the midst of overflowing inboxes and hectic schedules, a successful email campaign needs to go beyond talking about your company and asking to "spare a few minutes" for a phone call.

It needs to persuade recipients to take a moment, open the door and invite you in.

The way to do that is to lead them through a sequence of steps that, in the end, offers vision, insight or a deal they can't get anywhere else. And if you've never sent them email before, to do it in a way that says they can trust you as an advisor and as protector of their most precious asset — contact information.

If you're thinking about executing your first email campaign, or if your existing campaigns have lost their steam, then this eBook is for you.

In seven steps, you'll learn how to set a definitive campaign goal… define your audience… build a recipient list… create a valuable offer… and attract recipients to that offer with a compelling message.

So read on and discover how to plan and execute a productive email campaign. And by all means, if you have any questions or comments, feel free to contact me at michael@casemountain.com.

Good Luck!

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Three Truths

Think about how you evaluate the importance and value of each email message you receive.

Now, step into the shoes of your own email recipients.

No matter how well you design and produce a campaign, your recipients will do exactly the same things you do — starting right from the moment they read the subject line and see an unfamiliar name in the *From* field.

In fact, all the while they read your email, they will keep a wall between them and you. Specifically, they'll:

1. Decide within two seconds whether your email is relevant enough to read

2. Continuously evaluate the potential risk/benefit of providing contact information

3. Delete all future emails if they sense any shenanigans

Your job is to scale that wall by offering trust and relevance. How nimbly you do it will influence your campaign's success.

With that in mind, let's get started.

Step 1: Set the Campaign Goal

Imagine planning a trip without knowing your destination.

How will you get there? What will you pack? And, how will you know when you've arrived?

An email campaign's ***goal*** is its destination. It defines the foundation, assumptions and constraints you'll use throughout the remaining steps. Knowing the goal of the campaign helps to answer questions like, "Who will we send the emails to?," "What action do we want the recipient to take?," and "How will we know if we're successful?"

But there's a trick to defining the goal. And it's this: the narrower and more quantifiable you make it, the better chance you have of generating the desired outcome. Having a broadly defined goal, such as "lead generation" will result in unfulfilled expectations because the target audience will be too varied, forcing you to dilute the message.

Here are some examples of goals you can set…

- Generate 50 new qualified leads in the North American medical device manufacturing sector from among companies with revenue between $50-250 million

- Recruit 30 of our top 25% revenue-generating customers to try our new *IT Risk Management* services

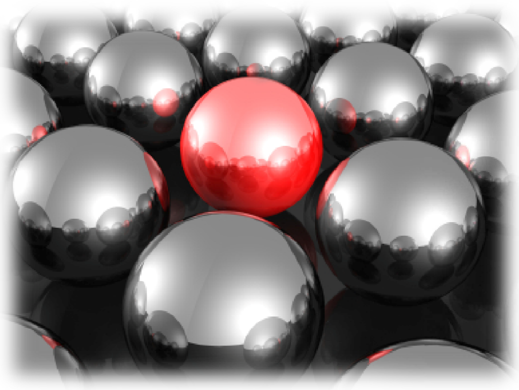
- Subscribe 150 senior researchers to our new eNewsletter covering the bioscience industry

Step 2: Define the Audience

Once you've established a proper goal, identifying your intended audience should be pretty straightforward.

Imagine your audience, though, as one person rather than a group. That way you can more accurately evaluate how "Sarah" will respond to each decision you make when building out the campaign.

Based on the example goals from the previous page, here are some possible audience identifiers:



- *VP of Development* for a medical device manufacturer
- *CIO* from your top 25% customers
- *Research Director* at a bioscience company

Note that the job titles are for convenience. What is more important is to identify a common level of responsibility, influence or decision-making authority among the audience.

Next, identify a single top-of-mind concern — relative to your goal — that Sarah has. Maybe it's how to be more innovative. If possible, talk with your current customers to help identify candidate concerns. Brainstorming this part among your internal staff may lead to incorrect conclusions.

If you cannot identify one audience, you can either narrow the campaign goal a little more or split the audience into two or more groups. Choosing the latter path may mean that you will replicate the remaining steps in this guide for each audience in order to achieve an acceptable response rate. But that's okay, too.

Step 3: Create an Offer

The job of the email message is to bridge the gap between the *top-of-mind concern* and a specific offer.

That's because it is the **perceived value of the offer** that will have the greatest impact on the campaign's success. So budget at least one-half of your campaign time to creating the offer.

Even if your main offer already exists – as in the case of the eNewsletter – you may want to offer a premium.

When considering the type of offer, you might be tempted to think first about the format, such as a webinar, calculator, white paper, checklist or video. Instead, give first priority to the information you want to convey. **In other words, decide how you can help Sarah understand or solve that top-of-mind concern.** Then, select the best format.

For example, you might choose among these approaches:

Topic	Message	Format
Medical device innovation	How to sustain market advantage in the medical device industry through government-academic-vendor collaboration	White paper
IT risk management	Five vulnerabilities that are threatening your IT system and your company's reputation	Face-to-face seminar
Bioscience research	Beyond salary: What bioscience researchers require before accepting a job	Survey report

Step 4: Design the Landing Page

A landing page serves two purposes: as a transition from the email to the offer and a place to collect contact information.

Consequently, its design is a critical factor in the recipient's decision to accept the offer. You'll want to test different elements to help improve conversion. But to start, follow these basic guidelines when creating the page:

Photo credit: eliteventure

- Select a format that flows easily from top to bottom
- Choose a headline that echoes the key message from the email
- Summarize the offer and takeaways
- Include a photo, but only if it contributes to the message

Depending on the goal of your campaign, you may decide to include a form to capture contact information. Consider the following approach to creating the form, particularly if you do not regularly email to this list:

- Restrict required information to name, email and phone number
- Include a link to your privacy policy
- Have an "About Us" paragraph
- Optionally include checkboxes for actions such as "Have a sales representative call me" or "Sign me up for your free newsletter." Make sure the default for the boxes is "unchecked."

If you are emailing an audience that is typically averse to providing contact information, consider requesting optional contact information after the recipient clicks the *Download* button.

Step 5: Make the Distribution List

Taking care to build the proper list will help your campaign success rate and protect you from the SPAM police.

Two principal objectives in producing the list are (1) to correctly match the contact names to the audience definition, and (2) to ensure the integrity and accuracy of the email addresses.

The first objective is important because you want to identify as many Sarahs as possible among your audience. And the second objective is important because you want your email to reach all of the Sarahs, but also avoid sending to those who have opted out or have received too many emails by being on your source list.

To satisfy both objectives, you need to build a list you can trust. With that in mind, here are the preferred sources:

1. Selected from your own in-house database
2. Supplied by an event or publication sponsor – for example, an analyst that coproduces your webinar
3. Rented from a provider that is recognized and trusted by your intended audience
4. Culled from public sources such as LinkedIn or an industry association membership list

Note that when you rent a list, you do not get access to the contact information. Instead, the provider sends the email message on your behalf. The benefit is that the recipients are likely to recognize the sender.

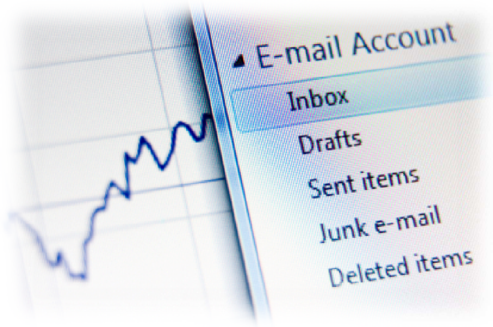
Another option is to purchase contact information from a commercial supplier. However, list suppliers vary in their ability to satisfy the two factors above. Use only providers that come highly recommended.

Step 6: Write the Email

An effective email contains a subject line that rouses curiosity and a message that inspires action.

But, while straightforward in concept, constructing this two-step sequence demands rigorous attention to detail. That's because each part needs to communicate relevance, value and trust, all in a matter of seconds.

The subject line's job is just like that of a newspaper headline: to attract the recipient's eye and generate interest in the offer. The best subject lines emphasize a core benefit rather than the offer itself. For example, *Learn how 3-way collaboration spurs innovation for device manufacturers* is likely to be more effective than, *Download free whitepaper on collaborative innovation.*



The email's message text takes it from there and introduces the recipient to the offer. Try to keep it short and follow a basic outline like this one:

Paragraph 1: Set the context. Identify the top-of-mind concern your offer addresses. Alternatively, state an ideal business goal and the barrier to achieving it.
Paragraph 2: Introduce the offer and summarize its benefits. Provide a link to the landing page
Paragraph 3: Write something like, "Reading this white paper, you'll learn:" And list three or four bullets.
Paragraph 4: Restate the call to action with a second link to the landing page,

Always close the email with an individual's name rather than your company name or, "The Marketing Department." To further build trust, consider adding a brief "About Us" paragraph.

Step 7: Execute and Follow-Up

Now that all of the pieces are in place, it's show time!

But, before raising the curtain, there are a few finishing touches to consider.

First, it's a good idea to test different variations of the email's hinge elements. Those are the elements that factor into whether a recipient will take the next step. Here are some key elements and measurements you can use to gauge and adjust your campaign:

Element to Test	Measurement
Subject line	Number of email opens
Message text	Number of click-throughs
Landing page design	Number of registrations

Second, if your offer is something the recipient will download, create an automatic response email that thanks the recipient and provides the URL.

Third, if you rent the distribution list, your list provider will send the email on your behalf. Otherwise, select an email service provider that offers proven deliverability, A/B testing, compliance to SPAM regulations, auto-responders and analytics.

Finally, if this is one of your first campaigns, **expect a total conversion rate of no more than two percent, and possibly less than one percent**. This rate will increase as you analyze what went right and apply those practices to subsequent campaigns.

Some Extra Tips

Here are additional actions you can take to help improve the campaign's overall impact

- Send the email from someone who serves an equivalent functional role as the intended audience. For example, CIO-to-CIO. Alternatively, send it from the person who will follow up with the recipient.

- Add your company name to the email's From field. For example, **Joe Smith | Xyport Software Corp.** This covers the case where the recipient recognizes the company if not the sender.

- If you include a photograph or other image in the email, use the same one as you've selected for the landing page. This will help the recipient in transitioning from the email to the landing page. Same holds true with the color scheme.

- To help build trust, include a small photograph of the email sender as part of the signature.

- If you plan to telephone those who register for the offer, make the call within 24 hours of the conversion. That way, the recipient will still remember your company and the offer. If your distribution list is large or you have limited staff, send emails in small batches to allow time to process the registrations and make the calls.

- If the offer is not for an exclusive audience, cross-promote it via social media, pay-per-click, online banner advertising and business online communities.

- Consider offering the option of social sign-in (LinkedIn, Twitter, etc.) for your registration forms.

About Michael Selissen

Michael Selissen is a marketing communications writer and consultant and the founder of Case Mountain Communications. Bringing more than 12 years of marketing experience to the job, he writes executive-level articles, papers and blogs, and designs inbound marketing processes for technology and industrial companies. He is recognized for his insight into business trends and his ability to connect technology solutions to the issues that concern senior managers.

His work has appeared in executive blogs and publications such as Baseline.com, Dell PowerSolutions, SAP Insider and Financial Times.

In addition, Michael publishes *MarCom Matters*, a monthly eNewsletter where he shares his thoughts on marketing communication strategies, tactics and tools.

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