

# 7 Easy Steps

To Create an Effective  
Email Marketing Plan



# Email Marketing

Email marketing still tops as the most effective marketing channel to engage with the B2B audience. In a recent study by Marketing Sherpa, “email marketing continues as the leading channel in the overall marketing mix (71%)”. Another research report says email continues to top the ROI charts with \$40 return for every dollar spent on email marketing.

Despite the wide usage of email marketing, many B2B marketers are still confused about 'where' and 'how' to start email marketing. The problem with most marketers is the lack of a systematic “plan of action”. And therefore, creating a “plan of action” would be the right place to start an email marketing plan.

This whitepaper titled, “7 Easy Steps to Create an Effective Email Marketing Plan”, pens down the seven cardinal rules for creating an effective marketing plan. The points given in this whitepaper is suitable for SMB and also for large organizations.

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## Map and Track - Introduction

In business, there're all kinds of marketing plans to accomplish different business goals. An email-marketing plan is not much different from those marketing plans. It contains a detailed step-by-step process required to accomplish the marketing objective.

This tried and tested email marketing plan is the best for newbie marketers and experienced players. By following this plan, you'll be on the right track towards creating your marketing wealth appropriately.

So, without wasting any more time, let's discover the seven ways to create an effective email marketing plan for your business.

## Define Your Audience

As Seth Godin, marketing guru puts it, “the key to failure is trying to please everyone.”

Many marketers make the mistake of creating a marketing plan without understanding the audience. Understanding your target audience helps to refine your communication, create compelling offers and enables you to personalize your marketing activities.

To understand your audience, first you need to look at your customer base. So, it's recommended to spend some time analyzing, researching your best customers.

Here're the common steps to define the target audience –

- › Find common traits about your best customer.
- › Segment customers based on customer demographics, purchase history, title, industry or any other key element.
- › Refine these segments by filtering them through a psychographic profiling process (profiling based on values, attitudes, interest, etc).
- › Find the preferred mode of communication used by your customers or prospects.
- › Check out what your competitors are doing with their clients, and who they are.

- › Find your audience online by listening to what people are saying in online channels. Use social listening tools to find the latest buzz from potential customers and pick clues from posts by competitors.
- › Create personas based on all common attributes of the audience. This will help you to send relevant communication or offers to these segments.

Lesson: Not everyone is your customer. Developing a clear picture about your customer will help you to plan, strategize and personalize your email-marketing program.

## Determine the Objective

After profiling your audience, you are now ready to move to the next stage, i.e. setting an objective for your email marketing. By setting the objective, you can get a concrete reason as to why you're sending email messages to your audience.

The following set of questions will help discover the objective of your marketing –

- › What is the objective of running email marketing? Is it increase in the customer base, enhance brand loyalty or develop new markets? If you've multiple objectives then list it out on a timeline. Use measurable points as well.
- › What's in for me (audience)? Step inside your customers' shoes to answer this question. Find out what they want to hear from you?
- › How can I engage with the audience? What kind of messages will be relevant to the audience? How can you help them improve their business outcomes? What will they love to receive from you? How about a newsletter, an e-book or a case study?

Setting the objective will give you a broad outline of your entire email-marketing plan. It also helps you to keep track of your activities and keep them aligned to your overall business objective.

## Gather Content for Engagement

Your customers are inundated with all kinds of marketing, sales and educational content. And to gain their attention, you need unique, relevant or attractive content.

So, it's recommended to create a repository of unique content. Here's how you can build this content repository and use it create engagement.

- › Reach your subscribers with the latest in business information. Let them be the first to know about new product releases, interesting business news, or special insights of the company, Give them special treatment so that they feel you're communicating with them on a personal level.
- › Provide useful information that will help alleviate any business problem or increase the efficiency of the system. Content through whitepapers, process charts, checklists, case studies, etc. as they will be relevant to your offer messages.
- › Keep the content short and succinct. Always know that people have very limited attention span. Remove all the fluff and make it easy for recipients to pick the key points at a glance, and highlight key points hidden inside.
- › Speak to your audience in an increasingly personal and unique way. Avoid the typical corporate talk. Instead, inject some personality in your messages and campaigns.

## Prepare an outline of your Goals

The next step in the marketing plan is to create short-term goals. Goals will guide your efforts and ensure that they are in-sync with your overall business objective. At this stage, it is advisable to spend some time brainstorming with your team. While deciding on your goal, ensure that you cover these four things:

- › Note down all the goals
- › Find out how you're going to achieve them
- › Set the timeline for all the goals
- › Learn to measure the outcome

## Sample goal sheet for email marketing

Goal	Proposed Action	How to engage?	Timeline	Expected Outcome
Goal	To find new markets	Send geographic based email campaigns	First half of the coming year	7% increase in sales from new territories
Goal	Establish new vendors	Reach out to new vendor	During first quarter	Add 10 new vendor
Goal	Increase repeat business from existing customer	Send special offers to existing customers	First half of the coming year	Increase repeat business from 12% to 26%
Goal	Increase visibility in social channels	Drive more visitors to social profiles	Third quarter of the year	Increase fans, followers in leading social networking sites

## Determine the frequency of Emails

After creating the goal sheet calendar, it's time to set up the frequency of mailing. Interval between email communications should be neither too short nor too long. Strike the right balance by understanding the expectation of your customer.

Various studies show that the best time to send email campaigns is Tuesday. But this should not be taken at face value, as many businesses often respond to mails on weekends.

Apart from figuring out the frequency of the email program, you should finalize the best time to send email messages. As a general practice, most campaigns are sent after the office rush hours.

Best way to figure out the best day and timing of message is through careful testing. Also, be aware of the different geographic zones of your subscribers. It makes sense to segment users by location while sending campaigns.

Create a detailed email Marketing Calendar with timeline

Now that you have a broad plan, it's time to go granular with it. You can start finalizing your entire process by preparing an activity chart with a deadline.

A broad set of points to prepare your email-marketing calendar.

Point 1: Gather relevant topics to send in your email newsletter. Search for interesting graphics or images you can use in your newsletter.

Point 2: Create an idea repository to store the latest news, interesting articles, snippets of the topic and other stories.

Point 3: Design an email template for the newsletter.

Point 4: Prepare a creative copy for the newsletter. Do a spam check to filter out any spam words in your copy. Also check for any typos or grammatical errors in your copy. If necessary, hire an experienced writer to create attention-worthy content.

Point 5: Test your campaign for email rendering and delivery issues. Create free accounts for popular email clients to test your campaign.

Point 6: Select a suitable campaign-sending platform to roll out the campaigns. Monitor the results of all campaigns to improve the response.

Point 7: Roll out your newsletter/email campaign to the audience

## Review and revise.

As always, there's room for improvement. You can go back to the plan to add new elements or modify the plan by removing things that are not working. Moreover, business environments change and so do the preferences of the audience. Gather insights after each campaign and find out what has worked and what failed to work. Lesson learned: Learn as you go with your email-marketing program.

## Conclusion:

The simple yet relevant seven steps mentioned in this whitepaper are written for new entrants into email marketing and for those looking to improve value from their existing marketing plans. Finally, as with every plan, you should tailor everything as per your audience.



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