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The Essential Checklist

FOR SUCCESSFUL EMAIL MARKETING

Is your email program generating at least 23% of your total eCommerce revenue?

That's the average we've seen across industries, with certain top-performing brands generating over 50% of their revenue from a robust email marketing program. In 2019, email marketing's return on investment was 42:1 on average – an increase from 38:1 the previous year, according to [Litmus' 2019 State of Email Survey](#).

This checklist aims to guide you through the process of developing a masterful email program. If you have any additional questions, we are only an [email](#) away.

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1. EMAIL DELIVERABILITY

Email deliverability is the capacity to deliver emails to subscribers' inboxes.

Various issues can hurt your deliverability and reduce the number of emails that will land in your subscribers' inboxes, which in turn affects the success of your email program.

Here's what you can do to improve your email deliverability:

- ❏ SEEK PERMISSION WHEN CAPTURING EMAILS

- ❏ MAKE SURE YOUR CONTENT IS SPOTLESS – Avoid spam trigger words, UPPERCASE words, and too many images; keep a good word-to-image ratio, and avoid large file sizes

- ❏ SET UP AUTHENTICATION PROTOCOLS: SPF and DKIM – The email service provider will handle these processes for you

- ❏ THROTTLE YOUR EMAILS – Instead of sending to the full list at once, send your emails over a period of time

- ❏ KEEP YOUR COMPLAINT RATIO UNDER 1 IN 500 (0.02%)

- ❏ MAINTAIN A CLEAN LIST – Suppress inactive contacts, segment by frequency of your sends, and send relevant content

- ❏ SEND FROM A PRIVATE SUB-DOMAIN

- ❏ REGISTER FOR PROGRAMS THAT PROVIDE YOU WITH INBOXING ANALYTICS: Google Postmaster Tools, Microsoft Postmaster Tools (outlook.com)

- ❏ SET UP ENGAGEMENT-BASED SEGMENTATION

- ❏ MANUALLY SET UP AUTHENTICATION PROTOCOLS: DMARC and BIMI

- ❏ CHECK FOR SPAM TRAPS AND REMOVE YOUR SENDING IP AND SENDING DOMAIN FROM BLACKLISTS
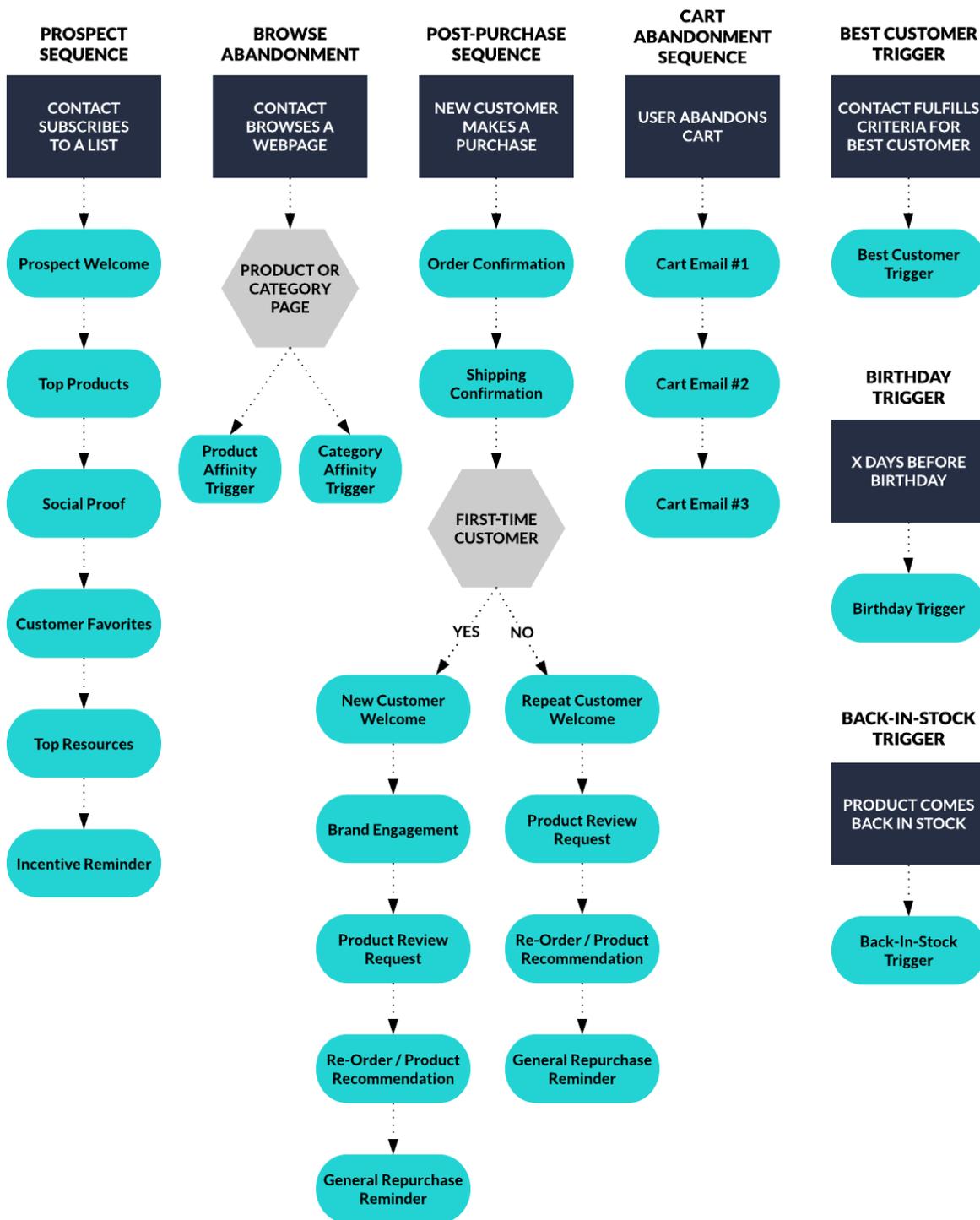
- ❏ MAINTAIN IP ADDRESS REPUTATION – Consider using a dedicated IP if your sending volume is big enough

2. EMAIL AUTOMATION

Automated emails are premade emails that are triggered by subscribers' actions. The trigger is usually behavior such as making a purchase, abandoning a cart, or signing up to a list. Triggered emails have a 70.5% higher open rate and a 152% higher click-through rate than generic email newsletters.

Key triggers and follow-up sequences:

- ❏ MAKES A PURCHASE

- ❏ ABANDONS PRODUCT BROWSE

- ❏ ABANDONS CHECKOUT

- ❏ SUBSCRIBES

- ❏ ABANDONS CART

- ❏ SUBSCRIBES TO EXIT INTENT OVERLAY

- ❏ NO ACTIVITY (DORMANT)

- ❏ NUMBER OF ORDERS

- ❏ ANNUAL EVENT OCCURS

- ❏ AI-DRIVEN EVENTS

PROSPECT SEQUENCE

CONTACT SUBSCRIBES TO A LIST

Prospect Welcome

Top Products

Social Proof

Customer Favorites

Top Resources

Incentive Reminder

BROWSE ABANDONMENT

CONTACT BROWSES A WEBPAGE

PRODUCT OR CATEGORY PAGE

Product Affinity Trigger

Category Affinity Trigger

POST-PURCHASE SEQUENCE

NEW CUSTOMER MAKES A PURCHASE

Order Confirmation

Shipping Confirmation

FIRST-TIME CUSTOMER

YES — New Customer Welcome

NO — Repeat Customer Welcome

YES branch:

New Customer Welcome

Brand Engagement

Product Review Request

Re-Order / Product Recommendation

General Repurchase Reminder

NO branch:

Repeat Customer Welcome

Product Review Request

Re-Order / Product Recommendation

General Repurchase Reminder

CART ABANDONMENT SEQUENCE

USER ABANDONS CART

Cart Email #1

Cart Email #2

Cart Email #3

BEST CUSTOMER TRIGGER

CONTACT FULFILLS CRITERIA FOR BEST CUSTOMER

Best Customer Trigger

BIRTHDAY TRIGGER

X DAYS BEFORE BIRTHDAY

Birthday Trigger

BACK-IN-STOCK TRIGGER

PRODUCT COMES BACK IN STOCK

Back-In-Stock Trigger

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3. CAMPAIGN CALENDAR

The annual campaign calendar should include:

- ❏ HOLIDAYS: gifting holidays, general holidays, high season

- ❏ EVENTS: pop-up shops, contests, news

- ❏ PROMOTIONS: discounts, shipping offers, flash sales

- ❏ CONTENT: blog posts, videos, user-generated content

- ❏ RECURRING EMAILS: featured products, seasonal category, the product of the month

Elements of a campaign calendar:

- ❏ SEND DATE

- ❏ SEND TIME

- ❏ ORIGINAL CAMPAIGN OR A RESEND

- ❏ SUBJECT LINE

- ❏ PROMOTION CONTENT (product launch, upcoming sale, new product functionality, upcoming webinar, monthly newsletter)

- ❏ CODE (for any discounts)

- ❏ FEATURED PRODUCTS (product names, descriptions and prices)

- ❏ ADDITIONAL CONTENT (such as blog posts, featured Instagram posts or videos)

- ❏ A/B TESTS

- ❏ TARGET LISTS

- ❏ TERMS AND CONDITIONS

4. SEGMENTATION

Email segmentation is at the core of effective email marketing. Segmented messaging has been proven to generate more engagement, increase sales conversions, and reduce subscriber churn.

How to Build a Subscriber Profile

Oftentimes, we have incomplete data about our subscribers. For example, if you have an email capture form on your website asking only for an email address, first name, and last name, you'll only be receiving very basic pieces of information.

You can use a variety of tactics for piecing together a complete profile of each subscriber. Here are a couple of ways to start building a subscriber profile:

- ❏ REVERSE APPENDING – using external data providers to fill in demographic and personal information based on your file of email addresses

- ❏ BEHAVIORAL CUES – utilizing a subscriber's behavior, such as which links they click, what pages they view, and what category or type of products they purchased, to build a better understanding of their profile

- ❏ PREDICTION ENGINES – product-based or subscriber-based prediction algorithms that use past history, as well as related characteristics, to show predictive content

- ❏ USER-SUBMITTED INFO – info gathered through surveys, feedback forms, preference centers, etc. This is quite reliable, but it is often harder to obtain, as it requires a very engaged contact to take additional action

Segmentation Types

❑ **LOCATION SEGMENTATION**

Location segmentation utilizes information about a subscriber's current or historical physical location for the purposes of targeting your messages. There are a couple of ways to determine your customers' location:

- Geo-IP based on metadata during email opens/clicks

- Billing or shipping addresses

- Country-level domains

How to utilize location-based segmentation:

- Send campaigns based on the recipient's time zone

- Send local event or pop-up store notifications

- Exclude locations from shipping promotions

- Add options for faster delivery times

- Use local language or local holiday campaigns

- Follow local compliance regulations, such as opt-in requirements

❑ **AFFINITY SEGMENTATION**

Affinity segmentation refers to grouping subscribers based on them gravitating towards a certain product, type of message, values (speed of delivery, customer experience, product quality, price, etc.).

Here are some sample ideas of what you can segment across:

- Purchased product A, but not product B – opportunity to cross-sell

- Viewed specific product or category

- Sensitivity to promotion types (shipping offers vs. $ discounts vs. % discounts vs. free gift with purchase, etc.). Measured by opens/clicks and browsing behavior on these promotions

- Affinity towards content type – new arrivals, blog content, social updates, contests, etc. If clicked on hairstyles video, send additional hair resources email

- Combining behaviors, i.e. purchased Men's watch or Men's cufflinks AND viewed Men's category AND selected interested in Men's accessories = Men's affinity segment

You are not really restricted to only building segments on one criterion. You can combine different criteria, like demographics, behavior patterns, or other information you have to construct relevant segments for your messaging.

❏ **ACTIVITY SEGMENTATION**

Activity segmentation measures how often a subscriber takes a positive or negative action regarding your store or communication, such as opening emails, making purchases, and visiting the website.

Sample uses:

- Active on site within the last week, but did not make a purchase – retarget them through email and Facebook

- Inactive (no opens/clicks) within the last 6 months – send a Re-Engagement Email with plain text for a higher chance of reactivating them

- Opens emails infrequently – send to them once per month

- Opens emails frequently – send to them once per week

- Purchased twice over lifetime – alert them if they purchase once more, they'll qualify for the VIP group

- Purchased thrice over lifetime – qualifies for the VIP group, receives VIP perks (early promotions, new product announcements, double entries into contests, free loyalty points)

- Makes a referral – gets loyalty points to be redeemed for product or coupon

- Collects redeemable amount of points – receives notification for redemption options

❑ TECHNOLOGY SEGMENTATION

Everyone has a bunch of different devices, like laptops, desktops, mobiles, tablets, and, of course, different email addresses. Someone might be on Yahoo, Gmail, Outlook, or a different email app for viewing their emails. Technology segmentation helps you understand how subscribers are viewing your emails and how to provide them with the best user experience.

Technology segmentation looks at a subscriber's email-viewing device (mobile/desktop/tablet), as well as their email address domain and their email client to determine how to display messages and/or tailor content in the best way.

Sample uses:

- Mobile-first templates for mobile users

- Only sending to engaged Gmail subscribers, while being laxer with non-Gmail domains (Gmail weighs heavily on engagement metrics)

- Code optimizations for MS Outlook

❑ ACQUISITION CHANNEL SEGMENTATION

Acquisition channel segmentation looks at dividing subscribers based on how they entered the email list. In short, it is all about the source of the subscriber acquisition and how to utilize this to segment your messaging correctly.

Here are a couple of examples:

- Sweepstakes or contest subscribers receive a much more concentrated sequence of Welcome Emails with a shorter delay

- First-time customers receive a Post-Purchase Flow

- Repeat customers receive more personal messaging, incentives, calls-to-action to promote the brand

- Blog subscribers get more content-focused emails and fewer direct sales-based emails

- Suppressing Amazon.com customers for compliance reasons

5. A/B TESTING

Even small changes in your email campaigns can have a big impact on the results. A/B testing can help you optimize your emails for top-notch performance.

The list of testing variables is rather long and includes:

- ❏ CTAS

- ❏ PREHEADERS

- ❏ SUBJECT LINES

- ❏ DESIGN OF SPECIFIC ELEMENTS IN THE MESSAGE

- ❏ IMAGES

- ❏ PERSONALIZATION

- ❏ PRODUCT OFFER

- ❏ SEND TIMES

- ❏ CONTENT

- ❏ LAYOUT

- ❏ DELAYS

To identify the winning variable, consider these metrics:

- ❏ OPEN RATE

- ❏ UNIQUE OPENS

- ❏ CLICK RATE

❏ UNIQUE CLICKS

❏ CONVERSION RATE

❏ REVENUE

❏ REVENUE PER RECIPIENT

❏ AVERAGE ORDER VALUE

❏ BOUNCE RATE

❏ UNSUBSCRIBE RATE

❏ SPAM RATE

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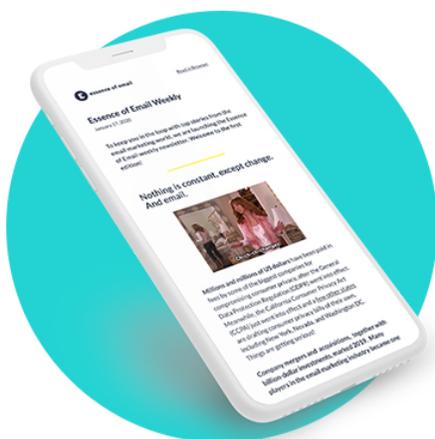
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