

A person is shown from the side, sitting at a desk and working on a laptop. The image is overlaid with a semi-transparent purple filter. The person's hands are on the keyboard, and there are some papers and a pen on the desk in front of them.

Automated Campaigns Checklist

eFOCUS
Marketing

The key to successful email marketing...

Automated Campaigns

Right Person

+

Right Message = *RESULTS!*

+

Right Time



Pre-Planning

Know your objectives for the series

If you don't know what you want to achieve by the end of the series, how can you create a structured series of emails to get you to that point?! Is the end objective to make a sale/ prompt another interaction/ provide value, for example?

Have technology in place that can handle the series you want to send

Some Email Service Providers (ESPs) such as Mailchimp, have limited functionality when it comes to automated campaigns; check the functionality of your ESP, or use a system that allows you to create the series you want to create.

Right Person...

Know who the emails are being sent to

(E.g. people signing up through a specific opt in offer (AKA Lead Magnet) / expressing an interest in a specific subject / purchasing something etc.)

Ensure you are attracting the RIGHT people onto your list

It doesn't matter how good your series/offer is if the people subscribing to your list are not likely to purchase your product/service at some point; they are not your ideal customer. Focus on growing your list with relevant, interested prospects.



Remember...

When it comes to list size, it's Quality over Quantity

You're collecting the data you need to trigger this series / personalise the messaging

If you don't currently have the information you need in your database/aren't collecting it, start! If you want to trigger a series to your current list and don't have the data you need, try sending out an incentivised survey to update your records.

If the information is in your database you can use it to trigger or personalise an email

Right Message...

Know what this audience wants to hear about from you

Through market research you should know your audience and what will appeal to them. Think about using surveys, reviewing FAQs and speaking directly to type of prospect you would like to attract.

Don't forget to look at the data contained in your database as well; someone who has previously purchased from you will need very different messaging from someone who has only just subscribed.



Follow best design practices:

- Make the most of the preview pane area (the top half of your email – ensure your call to action resides here for example)
- Back up text with images (don't include the most important elements of your message in images as they are blocked by default in many email clients)
- Ensure consistent branding in your templates to build trust in your brand
- Have one clear call to action presented at least 2/3 times throughout your message (in both text and images)

Use information you know about your subscribers to personalise your message

If you can bring in personal details that you know about the subscriber you do three main things:

1. Build trust |
2. Provide recognition |
3. Make your emails more one-to-one in nature than bulk



Consider each email in the series. Have consistency but just one main focus per email

You don't want to confuse or overwhelm the reader with too many options in one email – focus on one clear message and call to action per email in the series, building up to your end objective as you move through the series.

Each email in your series provides at least one of the following:

- Excitement
- Encourages conversation
- Adds value
- Helps the subscriber

Top Tips...

- On average it takes **at least 7-9 marketing touch points** before someone will buy from you (consider this particularly when planning a sales funnel series)
- After sign up the **first 24hrs** and then the **first 30 days** are crucial and when interest and recognition of you/your brand will be at its highest
- An automated campaign can start from **just 1 email triggered in response to an action / piece of information or make up a series of emails over a whole year for example** – the possibilities are endless!



Right Time...

You have your trigger planned

What is the action or information that will set your series running for each subscriber? For example, it could be your subscribers birthday (if you hold this data in your list), registering for your emails, making a purchase, the run up to an event or turning inactive.

You have your series frequency planned

How often will the emails in your series be sent? Every 2 days? 3 days? 4 days? I would recommend keeping it fairly consistent; however you don't have to have the same frequency throughout your series.

For example if you are triggering a series after someone signs up through your lead magnet for a free 3-part video series; you may want to deliver the emails containing the videos every 2 days, and then the middle part of your strategy every 3 days, before going into your sales offer with an email every 1 or 2 days.



Have you put your information in the right order in your series?

For service based businesses you want to ensure you are providing real value and building a relationship with subscribers before going in for the sale.

For product based businesses a sale will probably appear a lot earlier in the process – perhaps even in the welcome email, but it is still important to provide value and excite your prospects with your content.

Here's a rough split guide:

B2B (Business-to-Business) Companies

60/40 in favour of informational emails adding value
(over sales messages)

B2C (Business-to-Consumer) Companies

60/40 in favour of sales based emails
(over informational messages)



About eFocus Marketing

eFocus Marketing is a leading specialist email marketing agency.

The eFocus Marketing team provides a dedicated email marketing resource to ecommerce companies looking to optimise, automate and grow their email marketing programme.

From strategic consulting, to full service management and training, we address every aspect of an email programme to produce successful email marketing campaigns. If you want to boost your conversions, fix deliverability problems or increase response rates, you need to ensure you are communicating with subscribers at every stage of the email marketing lifecycle.

Our team of experts will work out the best options for your business and offer solutions in bite-size pieces so that you can focus on quick wins that will increase your success as well as longer term changes to become a better sender and increase your results.

eFocus Marketing can assist you in making the most of your campaigns through the following services:

- **Email Marketing Consultancy**
- **Implementation & Management**
- **Bespoke In-house Training**
- **Online Training Courses**



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