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EMAIL MARKETING IN 6 EASY STEPS

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# A BEGINNER'S GUIDE IN EMAIL MARKETING

Strategies and Examples for Starting an  
Email Marketing Program

A Guide from Mailee.me

# Introduction

## Getting started with Email Marketing

Email is one of the most powerful tools for brands. Extremely democratic, email can be a part of the marketing strategy of small, medium and large business. Even though new ways to communicate with clients and potential clients are created every single day and we have more options such as SMS, geo-located marketing and social media, email still is one of the most efficient tools. It is so because almost everybody has an email account. Not only that, but researches show us that 91% of the population check their email at least once a day. Email is a really good way to boost ecommerce sales: according to researches, 66% of people have already bought a product that they have seen in an email, and people in general are three times more likely to buy a product if they see it in an email than in social media links.

These habits may change, of course, but it is important to say that **email is here to stay. It's cheap, provides high ROI**, and is a good way to send promotional material, keep in touch with your clients and strengthen your brand's presence.

Don't be fooled, though. Email is simple, but cannot be done just like that, without a plan. **If you are not careful with strategy this can cost your company money and worse, your brand's reputation.**

If you don't know where to start, don't worry. That's what this ebook is all about. We'll go through several topics here that will provide you the knowledge to start sending professional campaigns. By the end of this ebook, you will know how to take your email marketing program to the next level. And who doesn't want that, right?

Mailee.me Team



# Gathering contacts

## Step 1

How to gather contacts correctly and efficiently, building up your sending base



# Gathering Contacts

In order to send email campaigns you need... contacts, of course. Your recipients are central to your email program, they are the people with whom you want to maintain a relationship. You should think about email marketing as a conversation. So, even if you're the most extrovert person in the world, you still wouldn't start talking to a lot of people, at the same time, without even knowing them. This is an extreme example, but states a very important email marketing rule: don't buy lists! Don't send messages to people who don't know your company. They will not like it.

Simple as that.

## The disadvantages of SPAM

The negative repercussions of sending messages to people who have not authorized it are plenty. Purchased lists usually have a lot of old, invalid contacts. These contacts will generate a lot of bounces. Besides that, what do you do when you receive a message you have not asked for? You go for the SPAM button. Add bounces and SPAM complaints and you will see a drastic decrease in your reputation. SPAM filters are always checking these stats, and any increase will affect your messages, making them go straight to the SPAM folder.

SPAM makes you lose money. A precious part of your budget, that could be used to stay in contact with those who want to hear from you, wasted. Finally, SPAM harms one of your most important assets: your brand's image. Do you want to be known as "those guys who keep spamming me?". Didn't think so.

That being said, we are left with the question:

**How to gather the email addresses of people who are really interested?**



The best, and most popular way, according to the industry, is through a form on your website. It is common to use a modal window - that window that opens above your page and asks for your contact's email before continuing to navigate. You can also have a scroll-triggered form on your page, as well as one on your footer, header, and anywhere you can think of, on your page, usually asking for the name and email of the person visiting your site. It is important to set the tone on your form's texts, letting people know the quantity and frequency of emails sent, so that they know what to expect from you.

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Messages should be sent to those who wish to receive them. Never buy lists!

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Another good way to grow your list is make use of your social media presence to gather subscribers. Try creating a cool image and publish that with a link to your website, put a form on your Facebook page (see how to do that using [Mailee's forms here](#)) or try using Twitter's cards.

## What exactly is double opt-in?

You must have seen the term double opt-in in around, specially when it comes to email marketing best practices. It is the double confirmation suggested for subscription forms. When someone subscribes to your list, he/she receives an email asking him/her to confirm the wish to subscribe. With this confirmation, it is possible to be more certain that this contact has really subscribed, and that his/her email address hasn't been wrongly used. CAN-SPAM recommends always using double opt-in.



Several companies use off-line events to collect emails. Conventions, congresses and industry events can be a great opportunity to stay close to people on your industry. **Be careful, though, with events' lists: when collecting addresses, state very clearly that you will use these emails to send communications.** When sending to the list, add a disclaimer reminding them why these emails are being sent.

There are several possibilities to start and grow your lists: you can mix strategies and try different approaches. The important thing is to remember that you should always send to those who have opted to receive your messages.



# Campaign Types

## Step 2

Which are the different types of email marketing campaigns, and how to leverage them



# Campaign Types

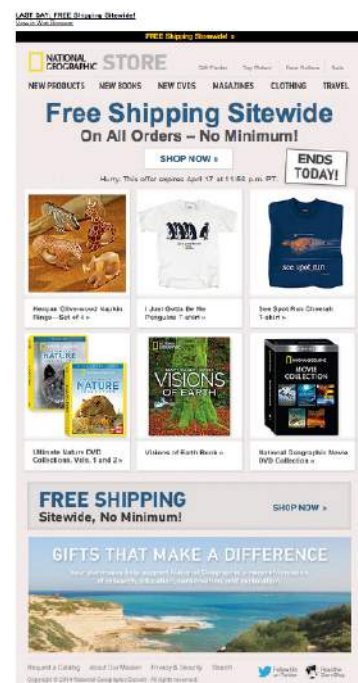
Now that you already have the contacts that wish to receive your messages, we can start to think about the messages per se. One of the many benefits of email marketing is the possibility to use it for several types of communications. It all depends on the strategy you want to follow.

We'll go through the four most popular types of campaigns, that can be employed by many companies with different sizes. The type of campaign depends on the goal and the frequency in which you'll send the messages. The first question, then, is: what is my goal with this campaign? What do I want to achieve?

## If you want to sell - Promotional Campaigns

Promotional campaigns are e-commerce's best friends. In these campaigns, it is all about about the product and the links to buy it in your website. Here are a few important points you need to consider in order to produce a good promotional campaign:

- Invest in your email design: don't treat your email as a flyer that people hand to you on the street. Use high quality images and try to achieve a good, balanced design.
- Don't send just one big image: yes, images are really important for these campaigns, but don't just use them (again, this is not a flyer). Think about your copy, a good call-to-action and the right links for the right products. One big image with only one link? You can do better than that.
- A good subject line is essential: invest time in your subject line. Take a time to





think about it, because it may be what gets your email opened (or not).

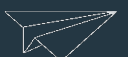
- Researches tell us that a person takes 3 to 4 seconds to decide whether is going to open an email or not. With so little time, it is important to create a good first impression.
- Test, test and test: links, prices, everything good to go? Never underestimate the power of checking before sending. It's better to test every way to avoid problems.

## If you want to inform - Informative campaigns

Oh, the newsletter. Who doesn't love a good newsletter? They are one of the main communications tools used by businesses. You can send a newsletter to you customers, to your employees, to your business partners. Newsletters are mostly informative campaigns, focused on articles, that can also have videos and images. To have a newsletter that really stands out, you should consider these aspects:

**Frequency:** newsletters are usually sent periodically, once a month, every week, every other week, it depends on the content you're sending. The important thing is to state this very clearly to those who subscribe to your newsletter and respect it.

**Template:** since newsletters are such a particular kind of email, use this in your template. Choose a template model for your campaign that is different from your promotional email, for example. If your company sends more than one newsletter (one for your blog and one for your website, for example), show this difference in the design.



**Sender's name and email:** you may wonder if this is really important to your newsletter, but trust us, it is. First of all, you want your contacts to recognize, in their inbox, from whom they are receiving the message. In some mobile email clients, subject lines are shortened and the sender's name becomes the most recognizable element, that may define whether the message is opened or not. One way to approach this situation is by using a name and an identification of the company, such as Bruna from Mailee.me. Choose the sender's name carefully and, under no circumstances use a [donotreply@yourcompany.com](mailto:donotreply@yourcompany.com). How can you treat email marketing as a conversation if you're not willing to listen?

## If you want that something extra - Occasional Campaigns

It is difficult to define exactly these campaigns, since they can serve so many goals. The difference from this campaign to the others is that it doesn't necessarily want to sell a product, but it doesn't have the determined frequency of a newsletter. These campaigns can be sent to invite people to an event, to send a special information, to launch or promote an ebook or white paper.

## Integrating Email Marketing with your Content Marketing strategy

If your company already has a blog or is working on content marketing products (such as ebooks, white papers, tutorials, how-to guides), email marketing is an excellent way to promote this content. Remember to always use a clear and identifiable call-to-action and create a good landing page to direct your contacts to.



**Invitations and special messages:** what do you think of inviting your best customers to check out discounts or new products before everybody else? Or maybe invite them to your company's launch party or anniversary? In messages like those, try to keep it real personal, use segmented lists and personalize messages with the contact's name or other information you may have.

**Tutorials:** you can send a tutorial when you change something in your system or introduce a new feature. Including a step-by-step or even a video explaining these new things may help you to connect and engage your customers. You can use this opportunity to ask for their opinion, see if there's any other tutorial they may want and urge them to share your content with friends. By doing this, you can spread your message and even get more subscribers.

## Searching for the perfect campaign

There is no secret to a perfect email marketing message. Success comes from understanding what your customers want and delivering it. One of the worst things you can do is fail to meet expectations: if you promise only informational messages, do not fill the inbox of your contacts with promotions that have nothing to do with them. If you promised one email per month, don't send four or five.



# Email Templates

## Step 3

What are email templates, how to pick the best template for your situation and how to use them



# Templates

Template is the blank canvas to your campaign, the basic structure of a message, an HTML file you can edit and modify according to the message you're about to send, keeping the structure intact. Usually a template has the brand's visual identity and basic contact information.

Here are some items that should exist in your template. They will make your life easier, trust us.

**Unsubscribe link:** this is a must have. Every message has to have a visible unsubscribe link. It is better to let contacts unsubscribe than wait for them to mark your message as SPAM.

**View message in browser:** it is very important to always provide an option to let your contacts view the message in their browser, because sometimes email clients may not show messages correctly.

## Mobile email marketing: is it worth it?

### The answer is: YES!

This is not new and you probably have already noticed that people are increasingly checking email on their phones. According to Litmus, in 2013, **about 50% of emails were opened in mobile devices.**

If your audience is using mobile devices to open email messages, you should be prepared and offer a good experience in all screen sizes.

So, if you're thinking about making this transition to mobile, you should probably ask yourself: which strategy to choose? You can opt for a responsive design strategy or an scalable (or universal) strategy.



Responsive design is an approach that provides a design that adapts to more than one device through CSS3 media queries, that adjust layout and elements according to the screen in which the email is opened. In order to do that you should invest a lot a time coding your email.

Scalable strategy is more about minimizing the damage and showing the same layout that works in all screens, without changing or adapting to the screen size. This layout uses mobile elements to provide a design that works well across several devices.



Regardless of the approach you decide to follow, there are a few things you should always be careful when creating a message to be opened in mobile devices.



**Buttons and call-to-actions:** remember that people will be using their fingers, and not a mouse to “click” on your button, so design them bigger.

**Simplify:** in smaller screens it is difficult to accommodate several images and text blocks. Since there is a significant chance your email will be seen in a mobile device, try to make everything simpler.

**Subject line:** some mobile email clients don’t show the subject line, so think about shortening it, making it even more direct. You should opt for subject lines with 30 characters.

**Landing page:** remember that your landing page should also be mobile friendly, otherwise all of your efforts will be in vain.

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Some mobile email clients show only a part of the subject line. Try to write something right to the point, in 30 characters or less

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# Content

## Step 4

What is the best content for your message? Learn about texts, images and subject lines.





# Content

Now that you have the contacts and have set the campaign, it's time to think about the content. There are various types of content that in your message and all need to be well thought: subject line, text, images and call-to-action should talk to each other and should reflect the idea of your message, its ultimate goal.

## Subject line

The subject line is the first impression that your message will cause on recipients: according to Litmus, each person takes about three seconds to decide whether it will open a message or not. With so little time, the subject line needs to get people's attention at the time, and stand out among the many, many messages claiming for attention in the inbox. What you can try in your subject line:

**Short text - straight to the point:** the idea is to keep the subject line short, get the message in a few characters: keeping the subject line around 30 characters (going up to 65) is considered a good practice.

**Questions and lists:** are good ways to attract people's attention, but it is important to remember the need to maintain the subject according to the content of the message.

**Urgent, but not so much:** creating a sense of urgency can instigate people to open the message right away. A special offer with expiration date, or an event with limited seats. But be careful not to use this strategy for all messages.

**Local information:** If you have information about your contacts, use it - To know more about customization, take a look in the next chapter. Information about the location of the contact can make your message more relevant.



**There is no secret formula:** however much we may think of the length of the subject line, the right thing to do is always test. If you want a little help in time to mark the progress, download Mailee's spreadsheet for testing subject lines.

## Email copy

And the text of your message? Do you think about it? The text in your message should reflect the purpose of the whole, and also needs to be related to the content of the subject line. You asked a question in the subject line? The content must answer it!

The main question you need to ask yourself about the message content is: how to establish relevance? You need to deliver content that is useful to the recipients, where they see value and with which they want to interact. In the first paragraph is already nice to make it very clear what the message is about. Is it a birthday campaign? Congratulate them! Is it an informative newsletter? Talk about the content of the articles you are linking to.

**Think of it this way: it's already very difficult to get the attention of contacts, you wouldn't waste this attention with some irrelevant content, right?**

Since we are treating email marketing as a conversation, change the focus to the other party: use more "you" than "I" or "we", show the recipients how important they are for your brand. This strategy, combined with customization, can bring good results. Within this idea of changing the focus, think of ways to enhance your offers by highlighting the benefits it can bring to people who open the message.



## How about my email's images?

Images are essential for a good email marketing campaign to showcase products, illustrate concepts and leave the message visually nice. Because of course, beyond an engaging text, a message should attract attention for the eye! Most email clients, however, still block images; to avoid this, the best way is still to use alt tags (the text that appears when images are blocked). The right thing is to seek a balance between images and texts: the only thing that can not happen is sending one image as the only content of the message. In addition to all the issues of message composition, you still run the risk of falling into the spam box.

## Call-to-Action

Call-to-action, or just CTA, is a way to present to the recipients of your campaign what is the action you want them to take: buy something at your store, register for your event or download the file you are sending.

This action will be closely related to the goal of your campaign, whether it is a promotional or informational campaign, or even other types.

Some tips for your Call-to-Action:

**Make it clear:** you can use some word games in the subject and text of your email, but in the case of CTA it is best to leave it pretty straightforward. "Try it now", "Get started", "Buy". Here is the rule of simplicity.

**Likewise, avoid the phrase hit "Click here".** Of course people should click there. This kind of copy ends up being predictable, and not attracting more attention. Try to use more verbs connected with what you are offering. "Try", "test", "buy", "go", "download", etc.



**Button:** using a button is a great idea to highlight your offer, but make sure it stands out regarding the background of the message, and that it's large enough to be noticed - and accessed on mobile emails (on Mailee's webpage you can find a nice example of a CTA button with adequate contrast and size).

**What button should I go with?** The button can be a good ally to generate a click, but using an image can cause problems in email clients that block them. To circumvent this difficulty, you can use the alt text or create a button in HTML, to ensure its display.



# Strategy

## Step 5

How to better use personalization, segment and test your campaigns.



# Strategy

## The key to email marketing success: be relevant!

Your message's content needs to offer some advantages to the person who will open it, otherwise your message may not be seen, specially considering how full the inboxes are.

Being relevant to your audience is all about understanding that they are not all the same. Going back to the conversation idea: would you talk about the same subjects in the same tone with all of your friends, family and coworkers? Probably not, right? So why would you send the same message to all of your audience's members?

## Segmenting

Segmenting is a very important tactic to keep the relevance of your email marketing campaigns. According to MarketingSherpa, one of the main ways to segment your base is based on action: who has clicked on a campaign, or who has already opened a message. Other factors you can take into account to segment are: geolocation, age, gender and interests.

In your systems you probably already have valuable information about your contact's preferences, specially if they already have a history with your business. Use this information to think about targeted messages.



# Interests

If you have a large contact base and don't have enough information to start segmenting, you can try sending a campaign with several options, and then segment according to the content each person has chosen to receive.

# Personalization

Including contacts' information in your messages may be a good way to approach your audience: you can do that by using this info in the subject line and the body of the message. You can include, besides the person's name, other data such as musical preferences, occupation, or a sports team information. If you can get this information, it can be very interesting to use them according to the campaigns you send.

You can quickly add a snippet of code that automatically does the job. It retrieves your contact's information from your list and shows it in your message. It is super practical and helps keep you close to your audience.

# Birthday Campaign

Sending an email on your contact's birthday is a great way to use personal information in your campaigns. You can set automatic birthday campaigns on Mailee that will send a message on each contact's birthday, keeping this proximity between them and your brand.

Truth or Myth: is there a best day to send messages?

There are several researches that point to the best day and hour to send email marketing campaigns. They're all valid, interesting researches, but it is best to keep in mind that these data are relative. Each industry and audience has its characteristics and, according to the offer you are sending, may have a different response. The thing is: you have to test and see what works with your audience.



# Metrics

## Step 6

Choose and track the most suited metrics to measure your email efforts and better understand your ROI





# Metrics

After planning and sending campaigns, it's time to see the results. Understanding the metrics of email marketing is very important to learn when and where to change some aspects of the campaign. In short, they are thermometers of your strategy.

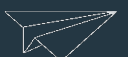
It is through continuous and close watch of the results of different actions that we can plan what the next step to take is.

## Which is the best metric?

Clickthrough or open rates of email campaigns are the metrics most closely watched by professional email marketers. They are usually the first place analysts look. Numbers are important, but seeing this data **in isolation** can result in errors.

That does not mean that low clickthrough rates are good. But what should be the goal of clickthrough rates and openings? No one, of course, would expect a rate of 100%. So, would 5%, 10% or 15% be the right answer?

The thing is: this is the wrong question. Keep in mind that these numbers vary greatly according to the type of email marketing you send, and the business sector in which you operate. The right question involves revenue and profit. The metric, then, must involve revenue per contact per month. In short, is email marketing is generating revenue for each hit contact? But remember, this is not written in stone, and you should see if this is in accordance with the objectives established for your campaigns.



That said, keep in mind that the global standard rate of openings in email marketing, for 100% opt-in lists, is between 10% and 11%. Thus, any number above that already has a positive potential.

## KPI and Diagnostic Metrics: consider this important differentiation

**Key performance indicator (KPI).** This represents the indicator of your process that is key to understanding its performance. Thus, figuring out what is your KPI is crucial. If your goal is to generate revenue, pay attention to conversions coming from your email campaigns. A good strategy is to divide the revenue you're getting for the investment spent on campaigns, to calculate your return or ROI.

On the other hand, if you are more interested in generating awareness for your company, the rate of openings or clicks is more appropriate.

The important thing to keep in mind is that open rates and clicks are always important to watch, as they translate how is the acceptance of your message to the contacts, but at the same time are not necessarily **essential** data.

**Diagnostic metrics.** Other metrics, such as bounces, SPAM complaints, results by domain, system and location, besides openings and clicks (if they are not your KPIs) are more useful to create a diagnosis if you experience any problems or want to change your email strategy.

Let's take a look at some details about those other metrics

**Bounces:** those are the emails that could not be delivered. They returned. If your bounce rate is very high (above 20%), you may be jeopardizing your sending reputation. Keep an eye on the reasons you're bouncing: many non-existent addresses? Check your lists to see if there was any typo. Remember that corporate emails tend to change constantly, so be careful with that old B2B list.

**Keep your lists always updated.**



**Unsubscribes:** those are the people who preferred to stop receiving your messages. One of the main reasons for unsubscribing is a high frequency of emails, followed by irrelevant content. If your unsubscribes are too high, it may be time to change strategy.

**SPAM complaints:** Watch out! If the number of complaints is greater than 1 in 1000 contacts in a message, you may be compromising the quality of your sendings. Remember: keep an unsubscribe link always visible, and that good old sentence explaining why your contacts are receiving the campaign can help.

## When to act?

You should look at these numbers at least in the period when you can act on them. So if you send a weekly email marketing campaign, it is best to pay attention to them at least weekly, to see how they are changing. Remember that email is an asynchronous communication: contacts do not open and read the message as soon as you send it, this happens mostly within 24 hours after you hit the send button. In general, the measurements of campaigns must be understood according to your business cycle.

**Pay attention** to check patterns between changes in KPIs and correspondence in diagnostic metrics. If the numbers of conversions fall and there is an increase in complaints of SPAM or returns, you will want to see what is happening and review your opt-in policies.

**Blacklists can always appear.** Make sure to always follow the good practices of sending emails and constantly track the results in order to act more quickly. Out of date lists have a very high chance of generating SPAM and bounces. Avoid them.

**Do not freak out** every time you see declines in some metric. There is often short ascents and falls in a day, and this does not mean you need to change



something. Remember that there are people behind these numbers, and they may be reacting differently to your material for a variety of reasons. In the case of emails, many technical factors can influence the delivery. Remember to look for patterns, even those who remain.

Trends for several days may indicate a problem involving some email domain or reputations regarding anti-spam filters. Look closely to see what might be happening and if you have any questions, please contact us. Therefore, enjoy that Mailee has a good historic of the evolution of campaigns, for you to check how things change over time.

## Analytics

To better assess the results of your actions, you can integrate your email marketing campaigns with Google Analytics of your site and view the source of clicks. To do this in Mailee just check the option when creating a campaign.

## Comparing results

One way to take advantage of metrics is to send messages within the same campaign. This way you can see the evolution of your campaign as time passes. You'll observe the metrics according to the changes and tests that you apply. This may help you understand some differences: for newsletters, for example, this is a great way to know which edition pleased more your contacts, and which content generated more clicks.



# Using resources from Mailee

## Subscribe Form

Start right now to gather your contacts through your largest digital asset: your website. This is done through a registration form.

To include a registration form integrated with Mailee. Access your account and click Settings > Integrate > Subscribe. Just choose the lists in which the contacts from the form will be registered, and click Generate new HTML. Then, copy this HTML code and paste it on your site, in a prominent location.

Do not forget to replace the fields of URL\_OK (this should be the URL of the page on your website that appears after the contact is successfully inserted in Mailee), and URL\_ERROR (the page that appears after a problem occurs at the insertion of contact) .

Done. This will generate a form automatically tied to your account on Mailee.me.

Learn more about it [here](#).

## Birthday campaigns

One of the easiest ways to be near your audience is to demonstrate your attention to important moments. One of them is the birthday. So, Mailee offers a practical and effective way to accomplish this: automatic birthday campaigns.

When creating a new campaign (Campaigns > Create), check the option Birthday Campaign. Once created, it will be triggered automatically for birthdays every day, for the list you choose. Learn more about this [feature](#).



# Customizing Messages

You already know how customizing messages is important to maximize results. Doing this in Mailee is very simple.

In your template, simply insert the following codes:

{{name}} - Contact's name

{id}} - ID number on Mailee.me

{{internal\_id}} - ID number on your system

{{sex}} - Contact's gender

{{birthday}} - Contact's birthday date

{{age}} - Contact's age

{{phone}} - Contact's phone number

You can also use fields other than those standard in Mailee. Simply import your contacts with the desired information in a separate column, with the right name in the header.

Learn more about it [here](#).

## Dynamic Links

Dynamic links are links that perform special actions for the contact. For example, the links to unsubscribe or to view the message in the browser. In Mailee, there is support for 4 different types of dynamic links. They are the following:

**Unsubscribe** - Unsubscribes the contact from your messages

**View on the web** - Allows the contact to open the message in the browser

**Forward the message to a friend** - Allows the contact to forward your message to



another email, automatically including a link with which other addresses may also subscribe to your sendings

**Add to contact list (whitelist)** - Allows the contact to add your email address to the list of trusted senders.

Adding these links is quite simple, as there are ready-made solutions. Just add the following:

#### *Unsubscribe*

`<p> For no receiving our messages anymore, <a href="#" class="unsubscribe">click here</a>. </p>`

#### *Open in browser*

`<p> To open this message in your browser, <a href="#" class="weblink">click here</a>. </p>`

#### *Forward message*

`<p> To forward this message for your friends, <a href="#" class="forward">click here</a>. </p>`

#### *Add to the contact list*

`<p> In order for our message arrive correctly to your inbox, please add our email on your contact list by <a href="#" class="whitelist" >following our instuctions</a>. </p>`

Learn more about this [here](#).



# Reports of messages and campaigns

Mailee.me has efficient reports, geared so you can understand your metrics and plan the evolution of your email marketing strategy. Opening the Messages tab and clicking on the desired message, you have access to its reports. In it, you find the following information (among others):

- Open rate, bounces and emails that haven't accessed

- Number of clicks on each link

- Location of contacts when opening the message

- Results divided by mailing list

- Results divided by domain and system.

- Contacts that unsubscribed

In addition to the statistics of each message, you can access the results of your campaigns as a whole. To view the reports, go to the Campaigns tab and click the desired campaign. In addition to a graph, a table at the bottom of the screen displays the amount of total and unique clicks and views, and other information about each sending. These data are useful so you won't be confused with contacts that open or click on your message more than once.

Through the chart, you have quick access to the following information of your campaign:

**Total** – Amount of messages sent

**Unique views** – Amount of contacts that opened your message

**Total views** – Amount of openings, considering more than one by contact

**Unique clicks** – Number of clicks, not considering more than one by contact

**Total clicks** – Total amount of clicks, considering more than one by contact

**Unsubscribes** – Number of contacts that unsubscribed from your messages

**Bounces** – Number of emails that bounced, for some technical issue. Involves hard bounces and soft bounces (temporary error).

Learn more about this [here](#).





PUT WHAT YOU'VE LEARNED INTO  
PRACTICE

START SENDING MESSAGES WITH  
MAILEE.ME NOW

TRY IT FOR FREE

