

# THE SIMPLE GUIDE TO CREATING YOUR EMAIL MARKETING STRATEGIC PLAN

1 New Message

**PATMCGRAW**  
CONTENT MARKETING

---

Baltimore Maryland  
443.470.5911

[pat-mcgraw.com](http://pat-mcgraw.com)  
[info@pat-mcgraw.com](mailto:info@pat-mcgraw.com)

---

# WELCOME

You are searching for ways to grow your business – and you want to make sure you are getting the most from your current activities.

Like email marketing, for example.

You want to increase your subscriber base. And open rates. And click rates.

But you aren't sure how to make that happen.

Sure, you have tried new offers to attract subscribers. Personalized subject lines and even tried emojis to increase open rates. And you have tried short form and long-form text emails as well as newsletters with images in an attempt to generate more clicks.

But all of those efforts were a spur of the moment thing. Not that inspiration isn't a good thing, but sometimes you need to put more thought into your testing so you can get the insight you need to take your email marketing to the next level.

Yes, you need to take the time to write a well thought out plan.

And this guide will help you write that well thought out plan quickly, easily, and effectively so you can get back to work and implement the plan.

So, enough of this already. Let's get started.

---

# STEP ONE: DEFINE YOUR AUDIENCE

Since your goal is to get the right message to the right person at the right time, you need to understand your audience. What are their wants and needs? What are their perceptions and expectations? What is their buying process and selection criteria?

Ahh, you probably thinking ‘Well, that all depends – my audience has a variety of wants and needs!’

And you would be correct.

What this means is you need to identify and understand the segments in your audience so you can create the emails they need at each step of their journey with you and your business.



**FIGURE 1 CONSUMER BUYING OR DECISION MAKING PROCESS**

Their buying process will help you identify what information to share in your emails. For example, in ‘Problem Recognition,’ they realize they have a problem.

The car didn't start like it usually starts.

Their stomach growled.

They don't feel like staying in tonight.

When these realizations occur, they need answers, suggestions, options. They aren't ready to buy anything because things are still unclear.

Do I need to get the car into the mechanic for a repair? Or is it time to buy a new car?

Am I hungry? Or is my stomach upset?

Should I go out for dinner? Or a movie?

## **BUT THIS IS JUST PART OF GETTING TO KNOW YOUR AUDIENCE. HERE'S THE OTHER PART.**

### Daddy Driver



"I do the driving for the family and use the vehicle for business (client meetings and entertaining) so I want safety, style, smart features, room and fuel economy."

#### DEMOGRAPHICS

40 to 45 year old, married, male, Caucasian, college educated - graduate degree in business/finance, 2 children under 18 living in the home, owns home valued at \$500,000 to \$749,999, HH Income \$175,000 to \$200,000, Vice President in financial services industry

#### PSYCHOGRAPHICS

Active, outdoorsman that hikes, camps, avid golfer and cyclist, watches Game of Thrones, reads fiction 6 to 12 books per year

#### GEOGRAPHIC

Southwest US: Arizona

#### NEEDS

Fuel Economy, Safety, Style that reflects successful professional career; prefers gathering information and buying online rather than visiting dealers

#### CHALLENGES

Having the time to gather information, compare and contrast as well as visiting various dealers to see/test drive

#### MEDIA USAGE

##### Television

ESPN, Financial News Network/Bloomberg, HBO Radio Local Talk Radio (Drive Time)

##### Newspaper

Local Daily Paper (Arizona Republic) and Wall Street Journal

##### Magazines

Reads Financial Magazines: Kiplinger's, Bloomberg Business, The Economist

##### Smartphone

Phone calls (business and personal), text (personal), email (business and personal), apps (airline, hotel, rental car)

##### Social Media

Facebook (Family and Friends, News, Information Gathering), LinkedIn (Business only), Twitter (Family, Friends, Social more than Business), No other social media used

##### Internet

Smartphone, Tablet and Laptop computer used for business and personal. Uses mobile devices for email, texting, phone/Skype, social media and gathering information (search, download content, view videos); Entertainment/Personal: Pandora, ESPN App on mobile devices

### FIGURE 2 CONSUMER PERSONA FOR SEGMENTATION

You need to understand who they are, what their wants and needs are so you can develop the right messages and offers for each stage of their decision-making process.

For example, “Daddy Driver” tells us he wants “safety, style, smart features, room and fuel economy” when looking for his next vehicle.

But another segment of your audience might be more interested in horsepower and speed.

And another might be interested in financing and the monthly payments.

Taking this a step further, you need to know what they know about you – because you will want to send different messages to potential new customers, customers and members of your loyalty program.

## FORTUNATELY, THIS INFORMATION IMPACTS ALL MARKETING – NOT JUST EMAIL MARKETING

Yes, this does require some data work but fortunately this work is going to help you in all areas of marketing and sales. You can use the images above to help you determine what information you would like to get and then you can map out what would be appropriate email messages and offers for each segment at each stage of their decision-making process.

Pre-Inquiry	LEAD	MARKETING QUALIFIED	SALES QUALIFIED	SALES READY	PURCHASE	POST PURCHASE
<p><b>MESSAGES/OFFERS:</b> Trying to determine if they have a problem/need and if so what it is and what options exist for solving/filling it. Messaging will focus on educating the individual - how to determine if they have X or need Y; options for people suffering from Z. Offers would be to contact leading solution providers - so another piece of content would be "how to select the right solution provider for your needs"</p>	<p><b>MESSAGES/OFFERS:</b> Gathering specific information about possible solution providers to determine reputation and decide if they make the 'short list' of solutions to consider so messages will focus on quality, reputation, customer satisfaction, awards won, etc. Call to action/offers would be speak with a member of our team to get answers to your questions, attend events/webinar to learn more.</p>	<p><b>MESSAGES/OFFERS:</b> This is where the individual's unique needs and preference begin to be addressed - if they are interested in cost or quality or style. At the same time, you are validating their qualification - do they have a need you can serve? Do they have the budget necessary to acquire your solution? Do they have the authority to spend the budget? What is their timeframe for making the purchase? In this stage, both parties need to be in agreement that moving forward makes sense for both.</p>	<p><b>MESSAGES/OFFERS:</b> This is where the individual's unique needs and preference begin to be addressed - if they are interested in cost or quality or style. At the same time, you are validating their qualification - do they have a need you can serve? Do they have the budget necessary to acquire your solution? Do they have the authority to spend the budget? What is their timeframe for making the purchase? In this stage, both parties need to be in agreement that moving forward makes sense for both.</p>	<p><b>MESSAGES/OFFERS:</b> Congratulations on success, and reminders about key dates. Reminders about what awaits them upon purchasing the product in terms of on-going service and support, saving time, being more efficient and productive, etc.</p>	<p><b>MESSAGES/OFFERS:</b> Congratulations on success, and reminders about other items available now or upcoming events/sales. Reminders about warranties and guarantees, service and support.</p>	<p><b>MESSAGES/OFFERS:</b> Follow up - thank you along with asking about questions and reminding them about [ex] proper care, service, support, guarantees and warranties. Offers/call to action might include cross sell/add-ons [ex] belts and shoes to go with the suit, extra warranty protection, etc.</p>
<p><b>MEDIA PREFERENCES:</b> Broadcast (TV and Radio), Website, Google Search</p>	<p><b>MEDIA PREFERENCES:</b> Email, Direct Mail, Phone Call, Text</p>	<p><b>MEDIA PREFERENCES:</b> Email, Direct Mail, Phone Call, Text</p>	<p><b>MEDIA PREFERENCES:</b> In-person, Phone, Text</p>	<p><b>MEDIA PREFERENCES:</b> In-person, Phone, Text</p>	<p><b>MEDIA PREFERENCES:</b> In-person, Phone, Text</p>	<p><b>MEDIA PREFERENCES:</b> Direct Mail, In-person, Phone, Text</p>

FIGURE 3 MEDIA, MESSAGES, OFFERS BY DECISION-MAKING STAGE

This figure is an example of what you will develop with that data. For this client, I used their sales cycle stages instead of the buyer's decision-making stages – however, you can see the messages and offers, and media used (sometimes, email might not be as effective as a salesperson calling or meeting with the customer).

---

# STEP TWO: DETERMINING YOUR CONTENT

Now that you know your audience and segments, you can start to build out your email marketing content strategy. There were some examples shared in the previous section – but let's dive a little deeper now.

The best place to start is with what you already have. Take inventory of all existing content – paper and digital – and then identify what content can be reused and what content was 'single use' and is no longer relevant or correct.

Other effective approaches include:

- Upcoming Events/Promotional Offers
- Recaps on Past Events
- News Coverage
- Original Content Addressing their Interests at each stage of their decision-making process

\* This can range from blog posts/articles to checklists, case studies, original research reports, interviews with experts and more. And this can be written word, audio or video format too.

For example, my audience is business owners, senior-level marketing executives and freelancers/consultants that have an interest in content marketing, email marketing and copywriting. And their level of experience ranges from novice to highly experienced.

I segment based on their area of interest. Some are exclusively interested in one of the three topics/service areas – and others are interested in all areas.

I also segment based on subscriber whether they are a client – and my clients receive information that's more personalized for them based on our relationship.

Lastly, I ask my subscribers what topics they are interested in learning more about as well as having them rate prior content.

My email marketing campaigns include:

- Welcome Email Series for New Subscribers
- Bi-weekly E-Newsletter that includes blog posts and downloadable original content as well as upcoming events, special offers and In the News announcements

The Welcome Email Series is an automated series of four to six emails that starts with the “Thank You for Subscribing – Here’s the Link” email that is sent immediately upon receipt of the new subscriber’s information into my email platform.

The series also starts building my relationship with the subscriber. I explain what to expect from the bi-weekly e-newsletter, and how I appreciate feedback that can help me provide them with greater value. I also ask questions that help me better understand their expectations as well as their wants and needs – because, after all, I want them to move from ‘subscriber’ to ‘client’.

## **MIX IT UP**

Some people like to read. Some people scan. Some people prefer video and audio. Some people love interactive content.

My point is, don’t limit your content to an image, copy and a link.

Mix it up.

And remember that you want the readers to click and come to your site so offer them an interactive quiz that helps them in some key way. (These are great for attracting new subscribers too!)

## **MONITOR YOUR COMPETITION TOO**

Remember to subscribe to your competitors’ emails so you can understand what they do and how they do it – so that you can be unique rather than the ‘same thing, different URL.’

Go for a unique look and tone. Tackle different topics that are relevant to your audience. Be you – which will be uniquely different.

---

# STEP THREE: DISTRIBUTION STRATEGY

Daily emails? Several times a week? Weekly? Every other week? Monthly?

What's the right frequency? And what is the right day and time to send your email?

The honest answer to these questions is “Test and find out what works best for your audience.” And when it comes to frequency – offer options because people may want to dial the frequency up or down based on personal and professional reasons. And giving them control over the frequency can reduce the number of people that unsubscribe.

## The Best Day To Send Email Is...

S M **T** **W** **T** F S

Tuesday

**#1**

*The best day to email is by far on Tuesday.*

Thursday

**#2**

*If you send two emails a week, choose Thursday for your second day.*

Wednesday

**#3**

*While Wednesday wasn't the most popular, it was mentioned several times.*

You will see information like this chart from CoSchedule from most email platforms, and it tends to be based on all users of the email platform. That makes the data more ‘interesting’ than ‘relevant’.

Once you have determined your schedule, be sure to stick to it.

Let me rephrase that. Before determining your schedule, make sure you develop a schedule you will live up to because it’s a promise to your readers and when you fail to live up to your promise, you are damaging your reputation with current and potential clients.

## **SETTING GOALS**

The long-term goal is to help convert subscribers to customers, and customers to loyal, raving fans that refer others to your business.

But each email should have its own goal that is measurable and tied to your business goals. Sure, open rates and click rates are important too – but if you are trying to generate sales of a new product, that email has a primary goal of selling the product. Then the question is how much needs to be sold.

If the email is an invitation to an online or offline event – the primary goal is driving a specific number of registrations.

Now, you might be reading this and thinking “Well, duh!” But marketers have been known to get all caught up on Delivery Rate, Open Rate, Click Rate – and we all need to remind ourselves that profitable sales pay the bills.

---

# STEP FOUR: YOUR PRODUCTION PROCESS

When you commit to an email schedule, you really need to create a production process that ensures the schedule is consistently met.

In smaller organizations, this should be a much simpler process because there aren't a lot of people and departments that need to provide information, or review and approve the email prior to sending. In larger organizations, the process can be extremely complex – I worked with one large global corporation that required two reviews by the legal department and the CEO insisted on reviewing each email even when he was traveling and hard to reach.

I strongly recommend the following steps in your process:

1. Kick-off
2. First Round of Reviews
3. Creation of the campaign on the email platform
4. Test Email Sent to Key Staff
5. Send Campaign
6. Post-Campaign Review

The kick-off is when you get together everyone who is involved in the creation of the email so that topics, tasks, due dates and deadlines are all agreed upon.

The first round of reviews is focused on the content – copy and images. It's important to do this before someone gets into the email platform and starts creating an email on the fly which can cost a great deal of time to be invested.

Sending a test email to key staff allows you to see the actual email as it would appear in the subscribers' inbox – on your desktop, tablet and mobile device. You also check the links to ensure they are correct.

As for the post-campaign review, review the performance. Did the campaign achieve the desired results? Were there any issues in the production process that need to be addressed? (And, yes, I skipped the "Send Campaign" because I thought was self-explanatory.)

---

# RESOURCES

## **EMAIL MARKETING SERVICES**

[AWeber](#)

[Constant Contact](#)

[ConvertKit](#)

[Drip](#)

[GetResponse](#)

[Keap](#)

[MailChimp](#)

[MailerLite](#)

[SendInBlue](#)