

WORKSHEETS

# Forget Everything You Know About Email Marketing

Presented by JEN CAPSTRAW





## Howdy, friend!

Thanks so much for joining my workshop for intermediate to advanced email marketers at Digital Summit.

These worksheets will help you document and prioritize your takeaways from today's session and beyond.

Feel free to ping me at [jen@womenofemail.org](mailto:jen@womenofemail.org) with any questions.

You can get even more support by joining a communities of like-minded marketers. I recommend the [#emailgeeks Slack Group](#) for anyone in email. And for those who identify as female or non-binary, you can also join the [Women of Email Facebook Group](#).

Geek on!  
Jen Capstraw

President & Co-Founder, Women of Email





# Email Program Opportunities

Keep a running list of all ideas for your email program here. It doesn't matter if they're good or bad! Just document the opportunities that come to mind throughout today's session, including new campaigns and ideas for improving existing campaigns.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.



# Which Best Represents Your Customer Lifecycle?

## B2C Audience

Move on to Page 5



## B2B Audience

Move on to Page 6





# B2C Email Program Matrix

Fill in the blanks to identify where your current email programs exist within your customer lifecycle. Any gaps in this chart illustrate where there is an opportunity to introduce a new email campaign. Add those opportunities to the list on page 3.

	Awareness	Acquisition	Consideration	Conversion	Retention	Loyalty & Advocacy
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## IN FUNNEL

### Activation Campaigns, incl:

- New Subscriber Welcome
- New Customer Welcome
- Free Trials
- Loyalty Program Signup
- Tutorials/How-Tos
- Progressive Profiling
- Refer-a-Friend

## FUNNEL FALLOUT

### Re-Activation/Re-Engagement Campaigns, incl:

- Post-Purchase & Cross-Sell
- Abandoned Cart & Upsell
- Abandoned Browse
- Abandoned Form
- Re-Engagement
- Surveys & Polls\*

## ONGOING ENGAGEMENT

### Ongoing Campaigns, incl:

- Offers, Promotions, BAU
- Updates, Announcements, Alerts
- Newsletters
- Loyalty Statements
- Birthday/Anniversary, Holiday Greetings
- Quizzes & Games
- Sweepstakes & Contests
- Surveys & Polls\*





# B2B Email Program Matrix

Fill in the blanks to identify where your current email programs exist within your customer lifecycle. Any gaps in this chart illustrate where there is an opportunity to introduce a new email campaign. Add those opportunities to the list on page 3.

Prospect

Lead

Qualified Lead

Proposal

Contract

Delivery

Renewal

## IN FUNNEL

### Activation Campaigns, incl:

- New Subscriber Welcome
- New Customer Welcome
- Free Trials
- Loyalty Program Signup
- Tutorials/How-Tos
- Progressive Profiling
- Refer-a-Friend

## FUNNEL FALLOUT

### Re-Activation/Re-Engagement Campaigns, incl:

- Post-Purchase & Cross-Sell
- Abandoned Cart & Upsell
- Abandoned Browse
- Abandoned Form
- Re-Engagement
- Surveys & Polls\*

## ONGOING ENGAGEMENT

### Ongoing Campaigns, incl:

- Offers, Promotions/Updates,
- Announcements, Alerts
- Newsletters
- Loyalty Statements
- Birthday/Anniversary, Holidays
- Quizzes & Games
- Sweepstakes & Contests
- Surveys & Polls\*

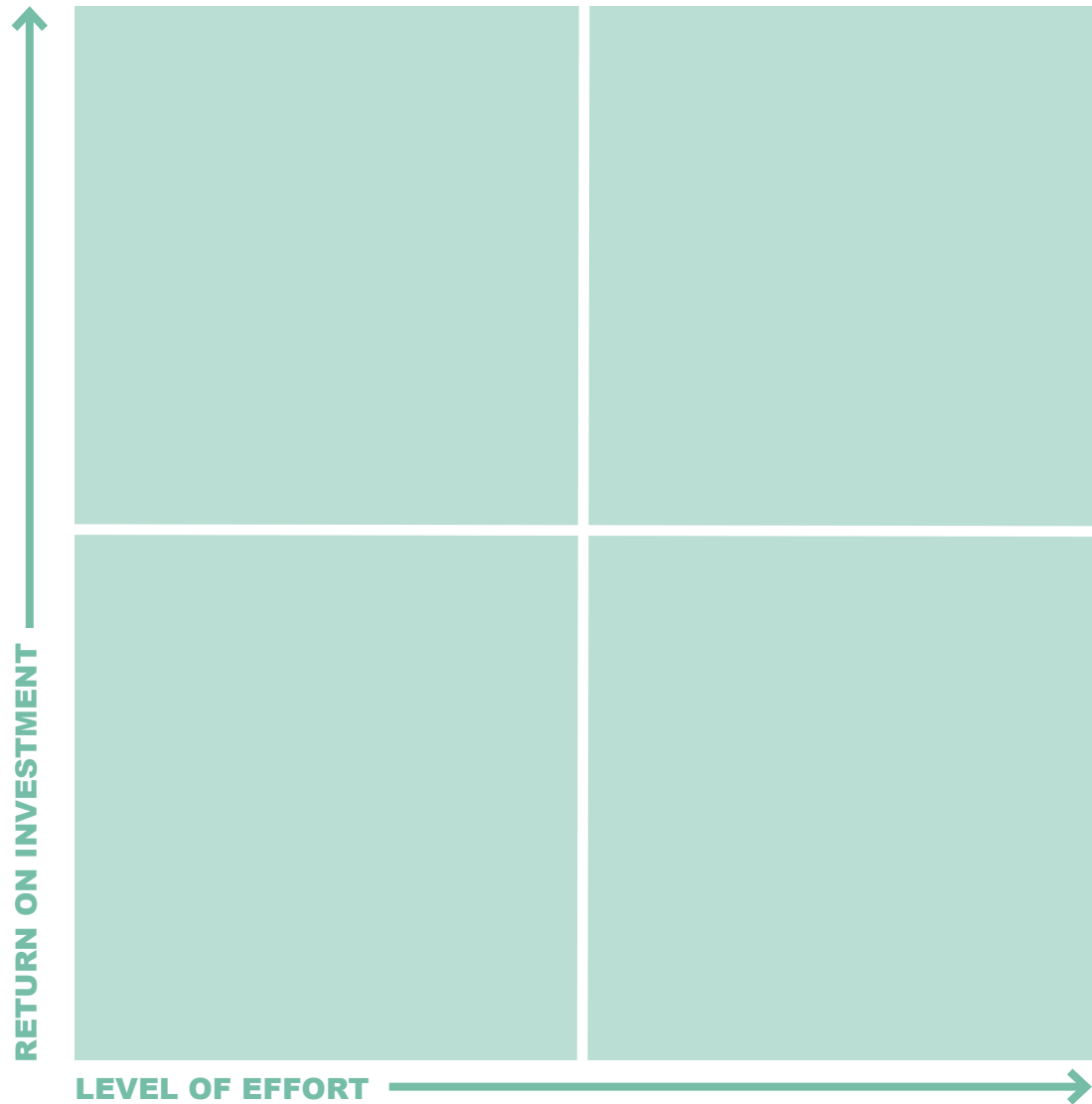




# Prioritization of Opportunities

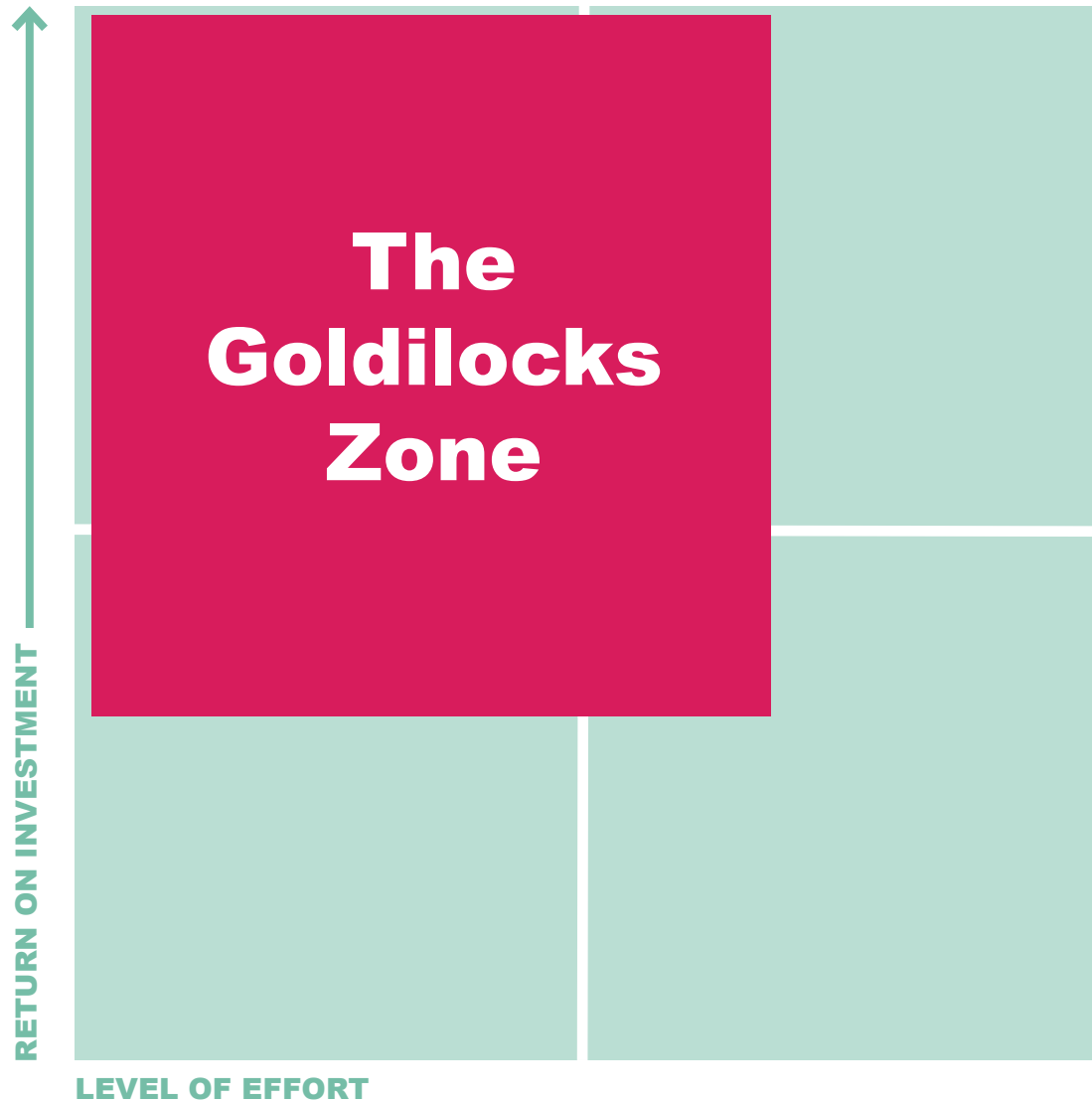
Estimate level of effort and return on investment for each opportunity. Place the corresponding opp number on the chart.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.



# Find the Opps in the Goldilocks Zone

These are typically your best opportunities to improve and expand your email program over the next 6 - 18 months.







# Feeling ambitious? Make a roadmap.

Here's an example of a roadmap aimed at accelerating email marketing maturity. This example is a 12-month plan that includes three unique initiatives. Notice how the data and technology swimlanes influence your ability to roll out new campaigns and campaign improvements. Mock up your own roadmap once you've completed the Prioritization of Opportunities exercise, using the opps that fall into the Goldilocks Zone.

