

Your Exam Study Guide

The following guide walks through key lessons from each of the nine email marketing certification courses. Use this as you prepare for your exam.



1. Email Marketing and Your Business

I. Why email marketing is still important

- What is the traditional marketing playbook?
- Over the past 40 years, people have dramatically changed the way they live, work, shop and buy - how has that impacted this playbook?
- What is the difference between traditional marketing and inbound marketing?
- What is the Inbound Methodology and what are the stages?
- Why is a contact database an important part of doing email marketing well?
- How does email differ from other channels like social media or search engines?

II. How to build an effective email marketing strategy

- How has the increase in mobile devices impacted email marketing? How has it changed the expectations that people have about the emails they receive?
- How does segmentation help you send the right person the right message at the right time?
- Why is personalization considered such a critical part of being successful with email marketing?
- How does one personalize the emails they send beyond just using a contact's first and last name?
- Why is analytics an important part of email marketing, and what are the benefits of analyzing the emails that you send?

III. What a successful email marketing strategy looks like

- What are the three things that all successful email marketing programs have in common?
- Why is stakeholder buy-in important? What does it allow you to accomplish?
- What questions do stakeholder buy-in help you answer?
- Why is software an essential part of doing email marketing well? What features should your email software have?
- Why is it important to contextualize email marketing alongside the other channels your company uses to communicate with leads and customers?

2. Sending the Right Message with Lifecycle Marketing

1. Why lifecycle marketing is important

- What is lifecycle marketing?
- Why is email marketing an important part of closing leads?
 - o How can it help your marketing and sales teams align their efforts?
 - o How can email marketing help qualify the leads you generate?
- Are there any consequences to ignoring where your leads are on their path to purchase? If so, what are they?
- Why is email marketing an important part of helping your customers succeed?
- What type of experience are you responsible for delivering to your customers?
- How can happy customers and vocal promoters help you grow your business?
- What are the benefits of successfully using email to communicate with your customers?

2. How to use email to do lifecycle marketing

- What is the Buyer's Journey?
- What are the stages of the Buyer's Journey?
 - o How do you know which stage of the Buyer's Journey a lead is currently in?
- How should the Buyer's Journey help determine the content that you email your leads?
- Why is it important to identify the key touch-points in your marketing and sales process?
 - o How can email help you communicate with your leads during these key periods in their lifecycle?
- How can tracking your lead and customer lifecycle improve the emails that you send?
- What are the three stages of the customer lifecycle?
- How can you determine what success looks like for your customers?
- How can you use email to help your customers continue to see value from working with your company?
- How can you use email to create evangelists?

3. What a great lifecycle email looks like

- What role does expectation-setting have in sending a great lifecycle marketing email?
- How can lifecycle marketing help you nurture leads through a multi-step process (like an application or a survey)?
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3. Contact Management and Segmentation

1. Why contacts and lists are important

- Why is a contact database the foundation of a successful email strategy?
- What are the biggest barriers that marketers have identified to doing effective email marketing?
- Why is context such an important part of doing inbound email marketing?
- How does segmenting your email sends impact their results?
- What does a great contact database help a business accomplish?
- How does the contact database function like the “nerve center” of your business?
- What is a contact record and why is it important?

2. How to build a segmentation strategy

- What is the number one question you must ask yourself before emailing any contact?
- What are contact properties and company properties, why are they an important part of sending contextual emails?
- What information does a good contact database keep track of?
- How can you keep your contact database up-to-date?
- How do marketers typically segment their contact database?
- What is the difference between implicit data and explicit data? What are some examples of each type of information?

3. What does a successful segmentation strategy look like?

- What are some examples of lifecycle lists worth building?
- What are some examples of engagement lists worth building?
- What are some examples of business-specific lists worth building?
- What are some examples of lists that track the health of your email program and contact database?

4. The Components of a High-Performing Email

1. Why care about sending great emails

- Why is it important to think bigger than clicks and opens when it comes to sending great emails?

2. How to create and send great emails

- What makes a good goal for an email send?

- What is the “Five Why” framework, and how can it help you send better emails?
- What are the components of an email that impact whether people open your emails?
- How do you write a great subject line?
- How can you ensure your emails look great on mobile devices?
- What are the components of an email that impact whether people click on your emails?
- How can you write great email copy?
- What should you do to adequately test your emails before hitting send?
- Why is the Call-To-Action a critical part of your email and how can you build a great one?
- What are the different components of an email that can be turned into a Call-To-Action?
- How can you use images effectively in an email?

3. What a high-performing email looks like

- What does a high-performing email look like before it's opened?
- What does a high-performing email look like once it's opened?
- What tactics do high-performing emails use to entice people to click?

5. Email Design and Functionality

I. Why email design is important

- Why is good email design just as important as good content?
- How can email design help you deliver your message succinctly and clearly?
- Why is it important to create a consistent experience for everyone who views your emails?
- How can good email design help drive conversions for your business?

2. How to design great emails

- Why is selecting a good primary goal for your email the foundation of a well-designed email?
- How many goals should you have for each email? How come?
- What is analysis paralysis and what does it have to do with email design?
- What role does the copy have in an effective email?
 - o How can design help you improve your email copy?
- What is the inverted pyramid method?
 - o How can it help you structure the content of your email?
- How can information density and white-space help simplify your emails?

- What are the two environments that can impact your email's design and functionality?
- What is the difference between email and web design?
- How can you design the layout of your email so it looks good everywhere?
- How can you maintain the consistency of the images and styling in your emails?
- What can you do to create a good mobile reading experience for your readers?

3. What a well-designed email looks like

- How can you use color to draw attention to the most important parts of your email?
- How can the different elements of your email replace text to effectively convey a message?

6. The Essentials of Email Deliverability

I. Why email deliverability is important

- How would you define email deliverability? What is deliverability NOT?
- How much control do you have over whether your email makes it into the inbox?
- How does deliverability impact your company's ability to use email marketing to close leads and delight customers?
- Can previous email sends that had poor deliverability impact your future sending? If so, how?

2. How to take control of your email deliverability

- What are the components of the three-part deliverability framework you should use before sending an email?
- What is the difference between a good and bad source of contacts?
- Is it ever OK to email a purchased list?
- Why is it important to get permission to email a contact directly from the source?
 - o How can a lack of permission impact your deliverability?
- Which engagement metrics should you track, and how will they impact your deliverability?
- What are the different ways that you can lose the ability to email a contact?
- What is an email bounce?
 - o What are the different components of a bounce message?
 - o What are the different types of email bounces?
 - o Which bounce types are correctable, and which aren't?
 - o What is a temporary bounce? Can you fix it? If so, how?
- Why is a spam complaint considered the worst type of contact churn?

- How can you determine how many actual spam complaints your company received in their last send?
- What is a direct spam complaint?

3. What email deliverability looks like in action

- What is the definition of a “rate?”
- How will sending emails to unengaged contacts impact your deliverability?
 - o How can you remedy the impact?
- What does it indicate if the number of unsubscribes increases without any increase in spam complaints?
- What does it indicate if your unsubscribe rate drops dramatically, or reaches zero?
- If you send emails regularly, how low should your bounce rate be?
- What does a high bounce rate indicate?
- How can you remedy an increase in spam complaints?
- What is the four-step plan for recovering from poor email deliverability?

7. Developing Relationships with Lead Nurturing

I. Why lead nurturing is important for your business

- How does lead nurturing help your business generate more revenue?
- Why does lead nurturing make it extra important that your business is using inbound best practices?
- What are some of the benefits of adopting lead nurturing?

2. How to do lead nurturing

- What are the three different models of using lead nurturing for your business? How does each one work?
- How do you know when it's time to pass a lead to sales?
- How should you decide who to add into a lead nurturing workflow?
- How does lead nurturing help you adapt from a marketer-driven to a user-driven approach to doing business?
- Why is it important to pick a clear and actionable goal? What are some examples of good goals for a lead nurturing sequence?
- Should you pick the goal of your workflow first, or should you decide who you would like to nurture first? Does it matter? Why or why not?
- When mapping out your workflow, what should you think about when making these important decisions?
 - o How many emails to send
 - o How long the time delay should be between each email send

- How you can determine the goal of each email in the send
- What is behavioral email?
- How can tracking how people interact with your business online help you send better emails?
- What are some examples of behavioral emails?
- What makes behavioral emails such high-performing emails?

3. What an effective lead nurturing strategy looks like

- What does a great lead nurturing email look like?
- How can you use lead nurturing to appropriately position the next logical step a user should take?
- How can you use lead nurturing to deliver less-than-excellent news and information?

8. Measuring Success with Email Analytics

1. Why email analytics are important

- Why is there no Analyze stage in the Inbound Methodology?
- How can analysis improve the way your business is run?
- How should increased access to data change the way marketers think about their job?
- Why is analysis a critical part of long-term, sustainable growth?

2. How to improve your email analytics strategy

- How are your email metrics similar to a business funnel?
- What do the following individual email metrics measure, and why are they important to the success of your email marketing?
 - Sent
 - Delivered
 - Opened
 - Clicked
 - Converted
- Which elements of your email impact whether a contact will open it?
 - What questions should you be able to answer to improve the likelihood that a contact opens your email?
- Which elements of your email impact whether a contact will click on your call-to-action?
 - What questions should you be able to answer to improve the likelihood that a contact clicks on your call-to-action?
- Which email channel metrics should you measure? How do they relate to the individual metrics that you should be tracking?

- Why is it important to track the growth/decay of your email database?
- How do you calculate the return on investment of your email marketing efforts?
- What do email health metrics track? Why are they essential to the long-term success of your email program?
- What is graymail?
 - o How can you find out if you are sending graymail?
 - o What is the impact of sending graymail?
 - o How can you stop sending graymail?
- What questions should you be able to answer when debriefing why a contact marked your email as spam?

3. What email analysis looks like in action

- How can you solve the problem of setting poor subscriber expectations?
- How can you improve engagement from your disengaged contacts?
- How can you refine the focus of your email to increase clicks on your call-to-action?
- How can you improve your email's conversion rate?
- How can optimization help you lower your contact churn?

9. Email Optimization and Testing

1. Why optimize your email marketing

- Why is email optimization a critical part of your email strategy?
- What is Conversion Rate Optimization? How does it relate to your business funnel?
- How does email optimization help you figure out the unique characteristics of your contact database?
- In what way does optimization help you identify, plan and structure experiments to improve your email marketing?

2. How to optimize your email marketing

- What is an A/B test?
 - o What is the four-step process to running an A/B test?
- Why is a well-segmented, up-to-date contact database the foundation of a good email test?
- What is statistical significance and how does it impact the validity of the tests you run?
- How is email optimization similar to the scientific method?
- What are the testable elements of an email that impact click and open rates?
 - o Of these, how do you determine which element to test?
- How do you know that you've created a good hypothesis for your email test?

- What is the PIE framework and how can it help you prioritize which experiments to run?
- What types of emails are ideal for running experiments?