

## 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?