



DESIGNING YOUR FIRST EMAIL TEMPLATE

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EXPECTATIONS + IMPORTANT LINKS

Students are expected to ...

- Have access to a designer HubSpot account
 - You'll need to first sign up for a free Designer account here:
<http://offers.hubspot.com/hubspot-developers-and-designers-free-hubspot-account>
- Possess a working knowledge of HTML5/CSS3

Important links ...

- We'll also be using this ...
<http://academy.hubspot.com/projects/customer-projects-create-email-newsletter>
<https://marketplace.hubspot.com/templates/email-templates/sonata>
<http://knowledge.hubspot.com/email-user-guide-v2/how-to-create-a-custom-email-template>
<http://designers.hubspot.com/docs/cos/email-template-markup>

AGENDA

1. Introduction to Email
2. Tour the Email Tool
3. Creating Your Email Template
4. Creating Your Email
5. Styling Your Email
6. Tips and Best Practices
7. How to ...



1

INTRODUCTION TO EMAIL

WHAT IS CAN-SPAM?

- CAN-SPAM (Controlling the Assault of Non-Solicited Pornography and Marketing)
- Passed in 2003 ...
 1. establishes the rules for commercial email and commercial messages,
 2. gives recipients the right to have a business stop emailing them, and
 3. outlines the penalties incurred for those who violate the law



Spam Email












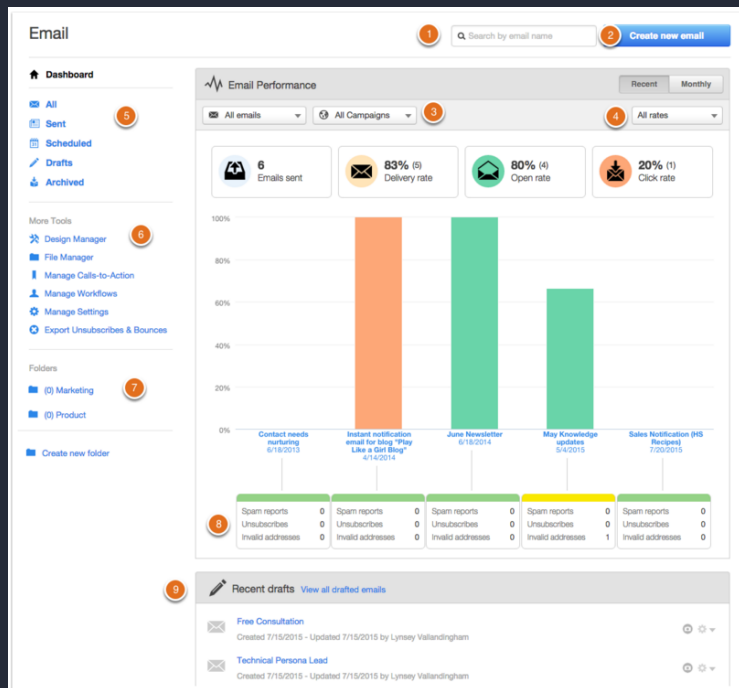
WHAT ARE EMAIL TYPES?

- Gives contacts the ability to decide what kinds of email communications they want to receive
- If you have a Basic Information email type where you send most of your communications but also a Blog Notification email type which alerts your contacts of new blog posts, wouldn't you want your contact to be able to decide to hear from one or the other?
- Give your contact the power to make that choice
- Perhaps, the blog post will entice them further to come back to your site for more content
- Each time you send an email, you must choose an email type.
- Email types are the category of emails you send

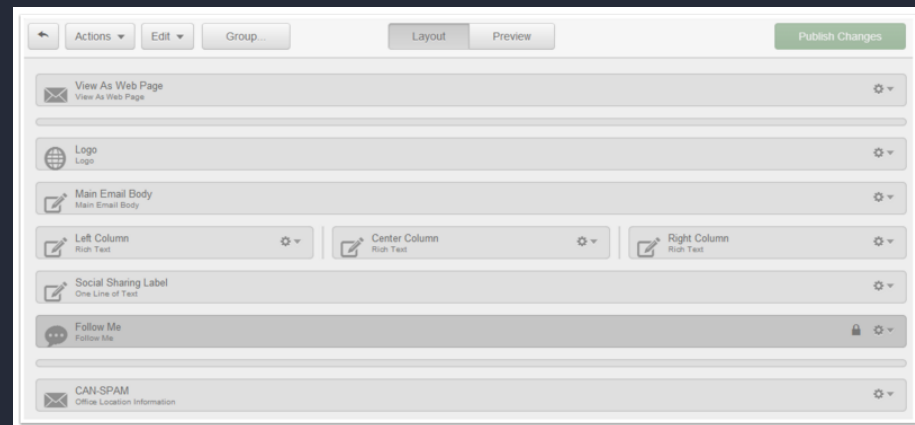
Email Types [What is this?](#)

Show Inactive Email Types

Active	Name	Description	Actions
	Blog	Send Blogs via email	Actions ▾
	EBooks	EBooks from WSU SBA	Actions ▾
	Events and Conferences	Marketing events and conferences.	Actions ▾
	GMAT	GMAT Information	Actions ▾
	Internal	Internal Emails to Employees	Actions ▾
	ISM Course Offerings	ISM Course Offering Emails	Actions ▾
	Marketing Information	Marketing offers and updates.	Actions ▾
	Our Innovation Ideas Blog! Subscription	Receive timely updates with the latest blog posts.	Actions ▾
	Student Associations	Student Association Information	Actions ▾



EMAIL ANALYTICS



EMAIL TEMPLATE

AN EMAIL TOUR

<http://knowledge.hubspot.com/email-user-guide-v2/a-quick-tour-of-the-email-tool>

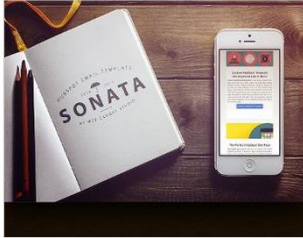
Email Templates

Look at Email Templates

- Template Packs
- Individual Templates
- https://marketplace.hubspot.com/282916/templates#type=email-templates&sortBy=price_low_high&view=single

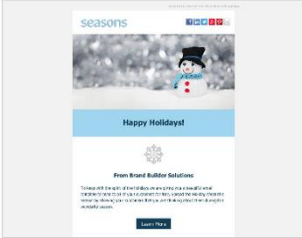
Email Templates | All Code Compatibility | Price Low to High

440 different templates in the marketplace.




Sonata Pack Price: \$0

INCLUDES:	PRICE
Sonata	\$0



Season's Greet... Pack Price: \$0

INCLUDES:	PRICE
Season's Greetings - Happy Hol...	\$0




A Briefcase Em... Pack Price: \$0

INCLUDES:	PRICE
A Briefcase Email	\$0

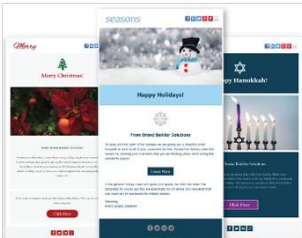
Email Templates | All Code Compatibility | Price Low to High

46 different template packs in the marketplace.




A Briefcase Ca... Pack Price: \$0

INCLUDES:	PRICE
A Briefcase Email	\$0
A Briefcase Landing Page	\$0
A Briefcase Thank You Page	\$0



Season's Greet... Pack Price: \$0

INCLUDES:	PRICE
Season's Greetings - Happy Hol...	\$0
Season's Greetings - Christmas	\$0
Season's Greetings - New Year...	\$0
Season's Greetings - Hanukkah	\$0



Simple Letter ... Pack Price: \$25

INCLUDES:	PRICE
Simple Letter Single Column	\$15
Simple Letter Double Column	\$15

Email Newsletter Template

Next Steps ...

- <http://academy.hubspot.com/projects/customer-projects-create-email-newsletter>
- <http://knowledge.hubspot.com/email-user-guide-v2/how-to-create-a-custom-email-template>

Hold on, got a few questions?

How do I edit a template once I've purchased it?

Once you purchase a template and feel you want to dive in and make changes to the design, be sure you create a clone of the original template file. You don't want to edit the original and then not be able to go back to a clean slate.

To clone the template, go to your [template builder](#), choose the template you want to edit, and then click on the "Clone" button near the top of the screen. This newly cloned template is where you will want to experiment with customizations. When you've created something you like, be sure to rename it and save (update.)

How do I get support for my template?

If you have troubles with the template you've purchased, your best source for support will be to try and contact the designer of the template. Calling HubSpot support is always an option, but HubSpot support does not assist in custom styling or custom HTML. All of the templates are tested before being released into the Marketplace but as with any technology, things can come up. Always feel free to contact us at the Marketplace if there is something you think we can help you with. You can reach us at: services@hubspot.com.

How do I hire someone to add custom styling to my template?

Now that you've purchased a template and you see the possibilities, perhaps you want some custom work done to yours and you don't want to do this yourself. You can always go to the [Service Marketplace](#) and hire a Provider to do custom template work.

How do I leave reviews for the template?

Love your new template? Have great suggestions or comments for the designer? Write a review for the template. On each template page, you can write a review for the template which gives valuable feedback to the designer as well as any customers that may be interested in buying it.

2

TOUR THE EMAIL TOOL

Email Tour

Email Dashboard

1. Search by email name
2. Create a new email
3. Filter by email types and/or campaign
4. Filter by All rates, Click Rate, Open Rate to change what appears in your graph.
5. Display All emails, Sent, Scheduled, Drafted, or Archived emails
6. Quick access to more tools.
7. Click into existing folders or create new folders for email organization.
8. Look at Spam reports, unsubscribes, and unknown users within recent email sends.
9. List of recent email drafts.

The screenshot shows the HubSpot Email Dashboard interface. It includes a search bar (1), a 'Create new email' button (2), filters for email types and campaigns (3), and a dropdown for email rates (4). A summary section displays key metrics: 6 Emails sent, 83% Delivery rate (5), 80% Open rate (4), and 20% Click rate (1). A bar chart shows performance for five campaigns, with a table below it detailing spam reports, unsubscribes, and invalid addresses for each. A 'Recent drafts' section (9) lists two draft emails: 'Free Consultation' and 'Technical Persona Lead', both created and updated on 7/15/2015 by Lynsey Vallandingham.

Campaign	Spam reports	Unsubscribes	Invalid addresses
Contact needs nurturing (6/18/2013)	0	0	0
Instant notification email for blog "Play Like a Girl" blog (4/14/2014)	0	0	0
June Newsletter (6/18/2014)	0	0	0
May Knowledge updates (5/4/2015)	0	0	1
Sales Notification (HS Recipes) (7/23/2015)	0	0	0

Email Tour

Preview in Inboxes

Preview in other inboxes ✕

Find out what your email will look like in different email clients.

Email Apps and Devices View Results

The 10 email clients most commonly used by HubSpot customers have been preselected for this test. You can customize your test by adding or removing clients below. And remember, this is only a test. No emails will be sent to any of your contacts at this time.

Test my email now Add Test Contact

Mobile Select All

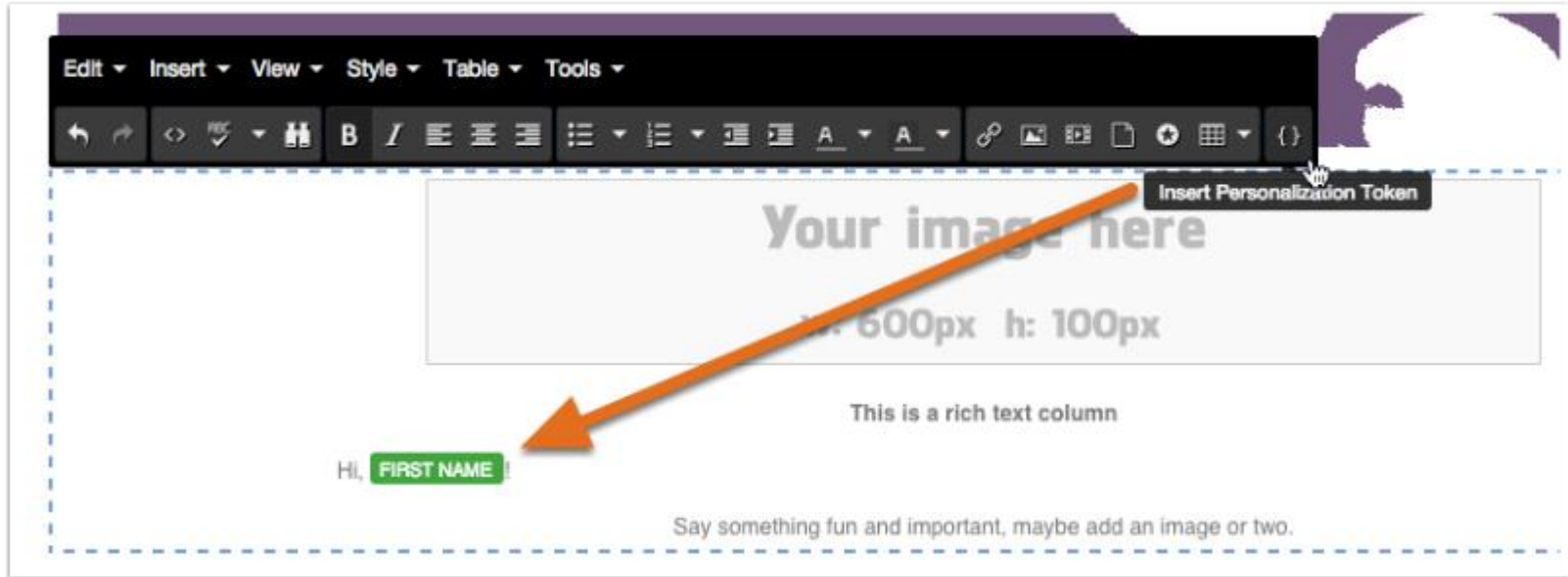
- Android 4.2
- BlackBerry 4 OS
- BlackBerry 5 OS
- Gmail App (Android)
- iPad (Retina)
- iPad Mini
- iPhone 5s (iOS 7)
- iPhone 5s (iOS 8)
- iPhone 6
- iPhone 6 Plus
- Windows Phone 8

Desktop - Mac Select All

- Apple Mail 7
- Apple Mail 8
- Outlook 2011
- Outlook 2016

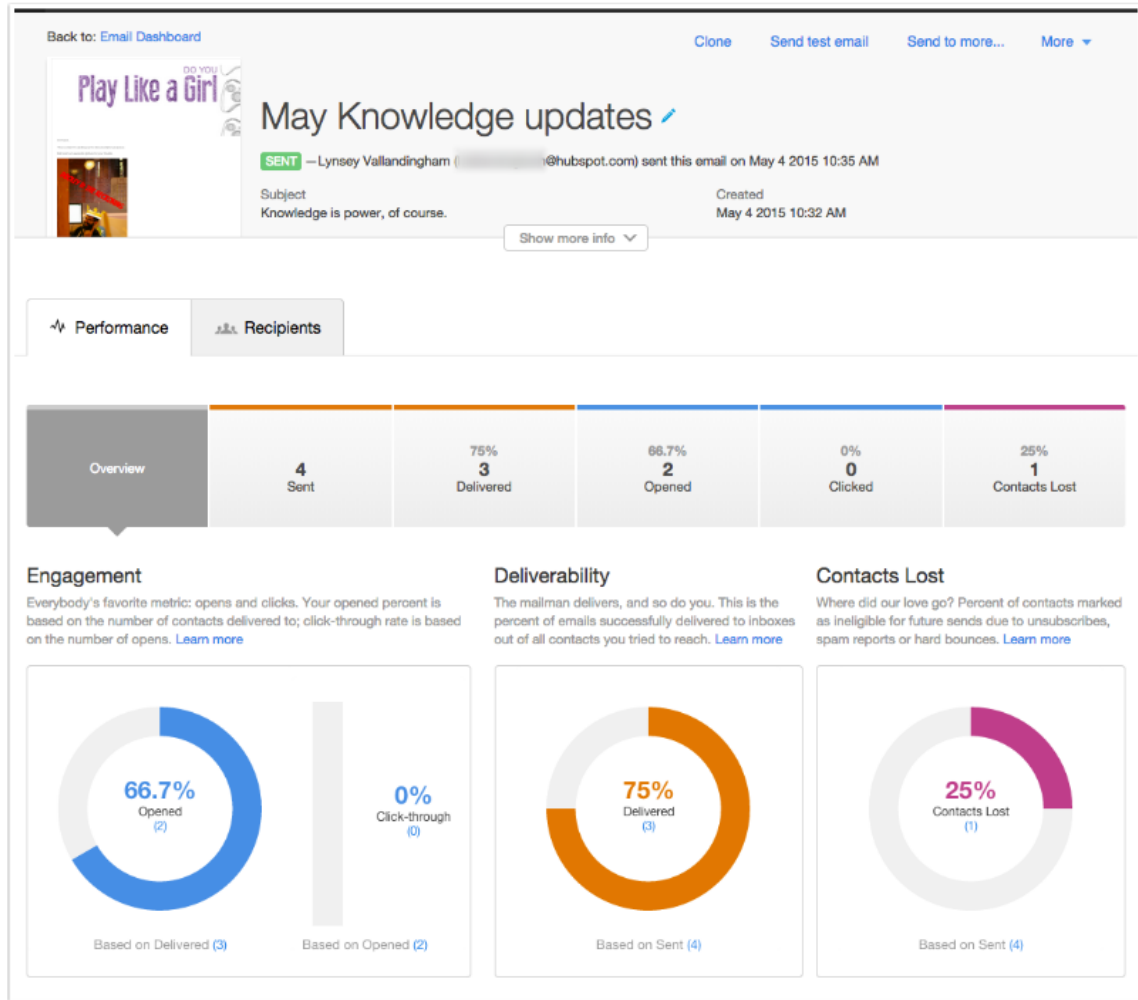
Email Tour

Personalization



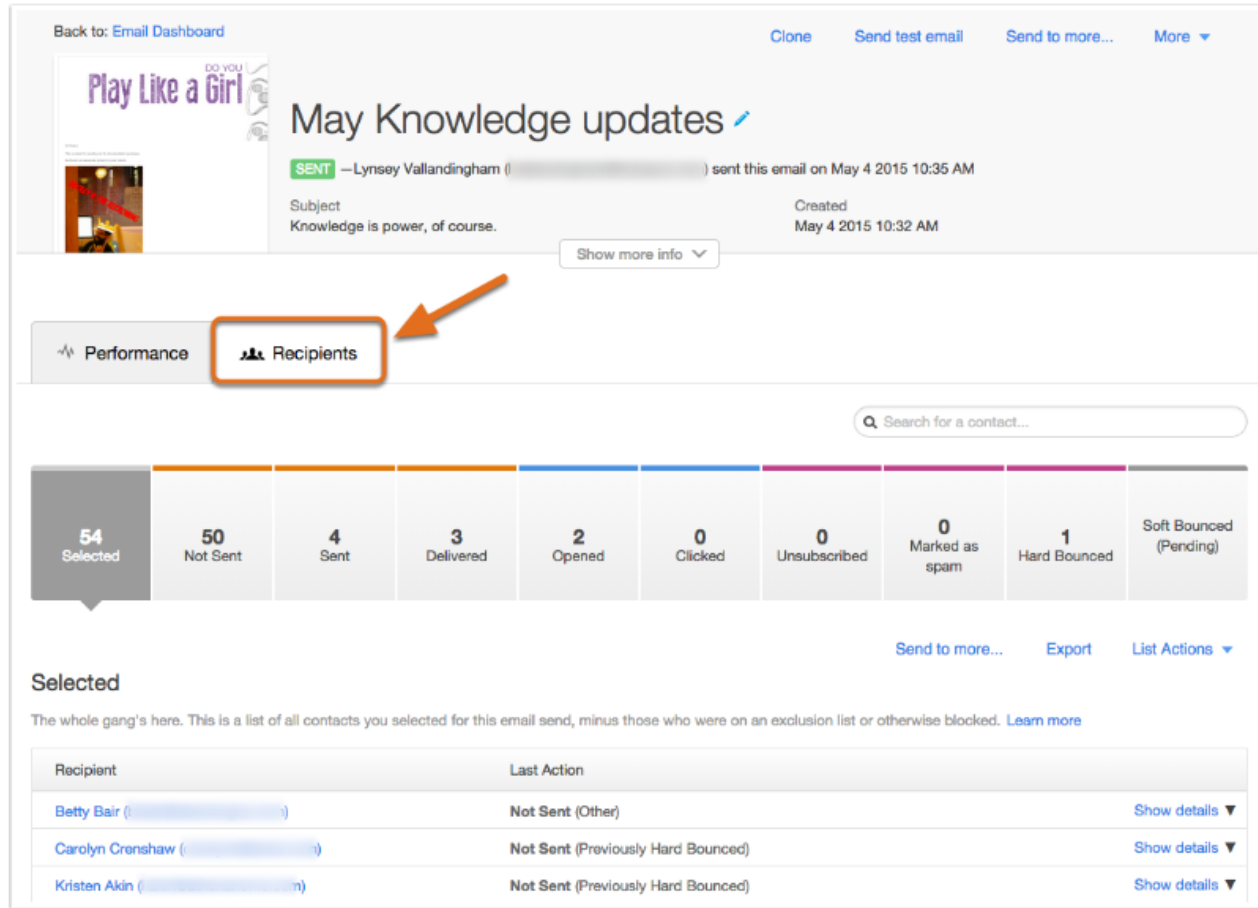
Email Tour

Analytics - Performance



Email Tour

Analytics - Recipients



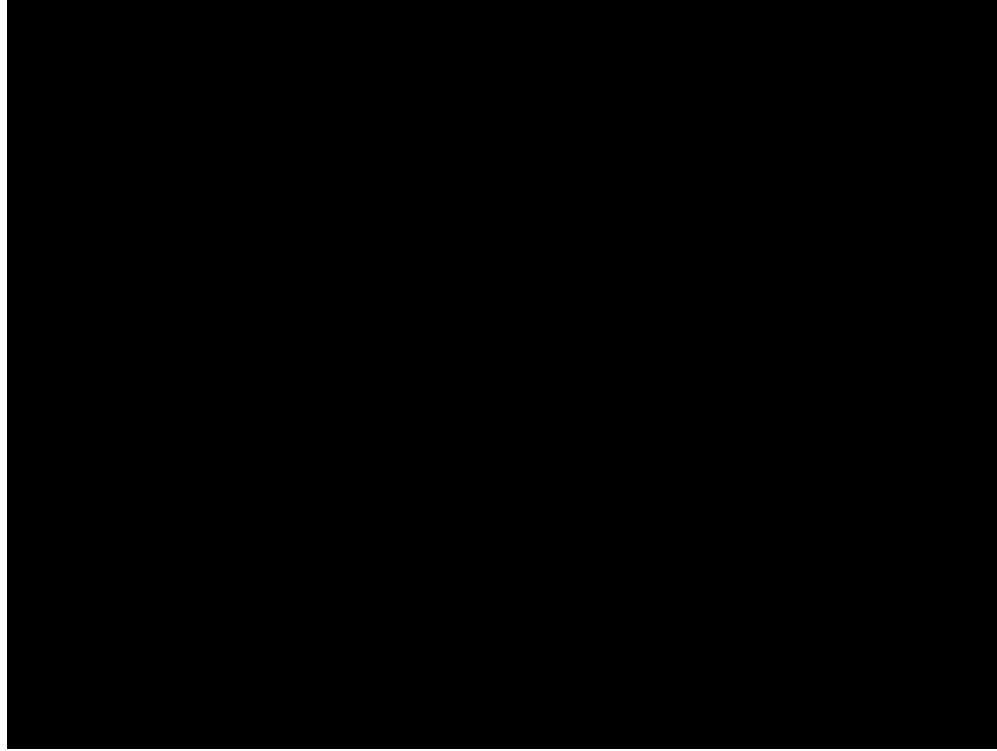
The screenshot shows the HubSpot Email Analytics interface for a specific email campaign. At the top, there's a navigation bar with "Back to: Email Dashboard" and several action buttons: "Clone", "Send test email", "Send to more...", and "More". Below this is a preview of the email being analyzed, titled "May Knowledge updates", with a subject line "Knowledge is power, of course." and a "SENT" status. An orange arrow points to the "Recipients" tab in the analytics menu, which is highlighted with a red box. Below the menu is a search bar and a bar chart showing the distribution of email statuses: 54 Selected, 50 Not Sent, 4 Sent, 3 Delivered, 2 Opened, 0 Clicked, 0 Unsubscribed, 0 Marked as spam, 1 Hard Bounced, and Soft Bounced (Pending). Below the chart, there are buttons for "Send to more...", "Export", and "List Actions". The "Selected" section contains a list of recipients with their last actions and "Show details" links.

Recipient	Last Action	Show details
Betty Bair ()	Not Sent (Other)	Show details ▼
Carolyn Crenshaw ()	Not Sent (Previously Hard Bounced)	Show details ▼
Kristen Akin ()	Not Sent (Previously Hard Bounced)	Show details ▼

Part 1: How to Grow Your Email List the *Right* Way



Part 2: How to Get Delivered to Your Contacts' Inboxes



Sender Score

✓ <https://www.senderscore.org>

✓ <https://returnpath.com>

A Smarter Way to Use Data.

We help the world's leading companies promote and protect their brand.

REQUEST A DEMO

Email Optimization

Reaching the right inbox, with the right message, at the right time means better relationships, greater response rates, and increased revenue. The Return Path Email Optimization Suite helps brands make sure their emails are seen, read, and acted upon.

Email Fraud Protection

Every day, cybercriminals send emails that spoof your brand. That's why protecting the email channel is critical. Email Fraud Protection uses advanced threat intelligence to detect, block, and respond to email threats targeting your customers in real-time. Defend your customers. Defend your brand. Defend your bottom line.

Consumer Insight

The Inbox provides a unique view of consumer behavior, from brand preferences to detailed purchase records, including SKU-level data. Consumer Insight helps businesses analyze the experience of millions of shoppers to make more confident decisions.

Sender Score

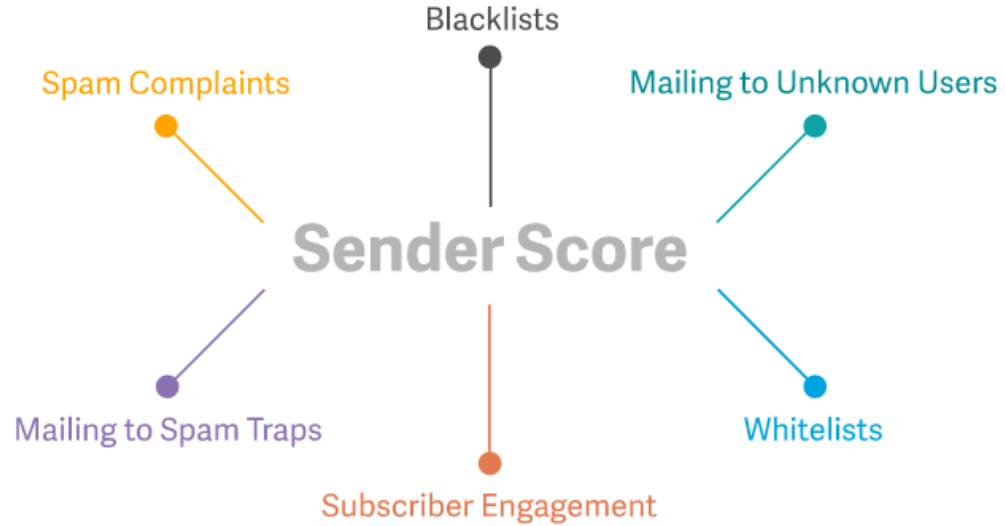
✓ <https://www.senderscore.org>

✓ <https://returnpath.com>

What is Sender Score by Return Path?

Sender Score is a number between 0 and 100 that identifies your sender reputation and shows you how mailbox providers view your IP address. Your Sender Score is like a bank running your credit score to gauge your credit history.

Sender reputation is an indication of the trustworthiness of an email sender's IP address. Mailbox providers take a lot of metrics into consideration to determine your sender reputation including spam complaints, mailing to unknown users, industry blacklists, and more.




Sender Score



<https://www.senderscore.org>

A Sender Score is assigned to each IP and is a numerical representation of the IP addresses reputation as a sender of mail. The score is determined by factoring performance across key reputation measures important to both ISPs and recipients of email. Sender Scores are on a scale of 0 to 100, with 0 being the worst, and 100 being the best score.





Only 28% of all messages sent worldwide ever reach the inbox.

IMPROVE YOUR SCORE

A Sender Score Below 70 Gets Aggressively Filtered

Whether you are on the high or low end of the Sender Score spectrum, there's always room for improvement.

Recent Campaigns

Subject Line	Date	From Domain	% Inbox	Spam
 [INCOMPLETE Application] Wayne State University - Undergraduate Admissions	04/01/16	wayne.edu	Contact us for details	
 Open House is coming soon	03/24/16	wayne.edu	Contact us for details	

Sending IPs ?	Hostname	Volume ?	Sender Score ?	
20746.100.252	mail-by2hn0252.outbound.protection.outlook.com	Very High		
20746.100.253	mail-by2hn0253.outbound.protection.outlook.com	Very High		
20746.100.254	mail-by2hn0254.outbound.protection.outlook.com	Very High		
157.56.110.251	mail-bn1hn0251.outbound.protection.outlook.com	Very High	3	
194.80.238.138	exchange-fr1.smuc.ac.uk	Very High	9	
203.116.2145	kbsmtao145.starhub.net.sg	Very High	15	
220.181.130.174	mx52.dns.com.cn	Very High	18	
81.136.237.241	host81-136-237-241.in-addr.arpa.world.com	Very High	20	

Part 3: How to Get More Email Opens



<http://fast.wistia.net/embed/iframe/h5t6wmpn5h>

Part 4: How to Improve Your Clickthrough Rate



Part 5: How to Improve Emails Using A/B Testing



3

CREATING YOUR EMAIL TEMPLATE



Custom HubSpot Template Development Like A Boss

Custom template development for the HubSpot platform has been a hot topic as of late. Users who have been utilizing HubSpot for their marketing efforts are starting to realize how powerful and useful HubSpot can be, not only for their landing pages, blog and email - but their entire website system as well. The team at HubSpot has been working day-in and day-out to make this platform something true marketers can't say "no" to. And you know the best part? They are succeeding. See our latest release regarding Custom HubSpot templates and sign up for more information.

[Read More](#)

Create an email template like this one!

Email Newsletter Template

Download the Email Newsletter Template

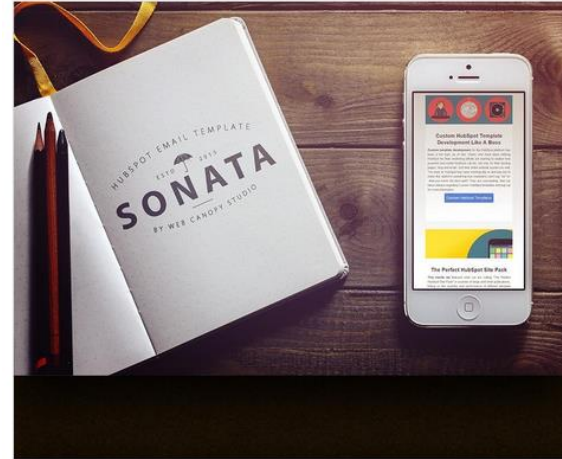
- <http://academy.hubspot.com/projects/customer-projects-create-email-newsletter>

Template Marketplace ▶ Sonata

Sonata

email template by Web Canopy Studio

Download for free



About this template

Statistics for this template

Rating ★ ★ ★ ★ [Read reviews](#)
Views 2,959
Purchases 935

Compatibility

Drag and Drop Layout, IE 8+, Safari, Firefox, Chrome, iPhone, Android, Gmail, Outlook, Yahoo, Hotmail, AOL, Apple Mail

Performance

Sonata has been used by 0 companies for 0 campaigns with the following results:

Metric	This Template	Marketplace Avg
Delivered / Sent	0.0%	88.5%
Opened / Delivered	0.0%	30.8%
Clicks / Opened	0.0%	15.0%

About Web Canopy Studio

Web Canopy Studio is a growth driven design and inbound marketing firm in Centerville, IN. We specialize in large HubSpot migrations and love working with companies that are looking to bring their website over to HubSpot. We develop

Required email template variables

In order to be [CAN-SPAM](#) compliant, all emails sent through HubSpot require certain company and opt-out information; therefore, HubSpot email templates required certain variables. There are additional optional email variables listed [further down this page](#).

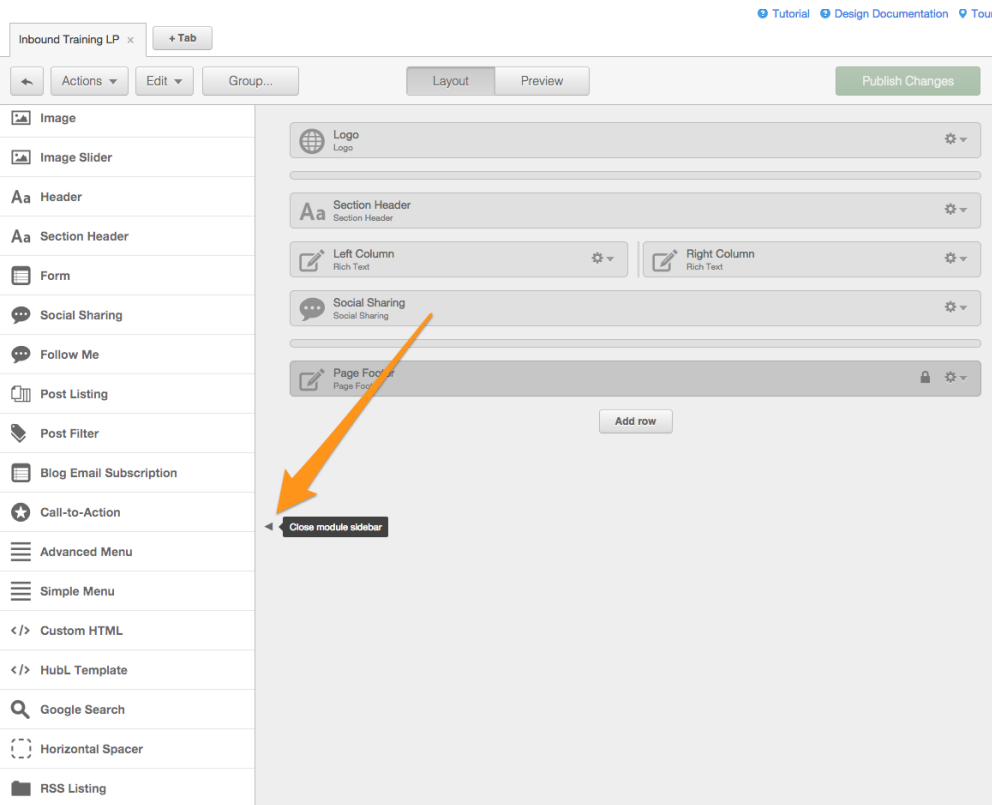
Variable	Type	Description
{{ site_settings.company_city }}	string	Prints the company city (set in Content Settings > Email > Footer Information).
{{ site_settings.company_name }}	string	Prints the company name (set in Content Settings > Email > Footer Information).
{{ site_settings.company_state }}	string	Prints the company state (set in Content Settings > Email > Footer Information).
{{ site_settings.company_street_address_1 }}	string	Prints the company address (set in Content Settings > Email > Footer Information).
{{ unsubscribe_link }}	string	Prints the URL of the page that allows recipients to manage subscription preferences or unsubscribe from email communications. This variable should be used in the href attribute of an <a>.

<http://designers.hubspot.com/docs/hubl/hubl-supported-variables#required-email-template-variables>

Required Email Variables

To see a full list of email variables

<http://designers.hubspot.com/docs/hubl/hubl-supported-variables#email-variables>



CODED TEMPLATE

To see a full list of modules available for the type of template you're working on, click the little triangle on the left to view the module sidebar.

[\(Standard modules explained\)](#)

<http://knowledge.hubspot.com/design-manager-user-guide-v2/hubspots-standard-modules-explained>

HubL Delimiters

Statements

- used to create ...
 1. editable modules,
 2. define conditional template logic,
 3. set up for loops, &
 4. define variables

{% statements %}

Expressions

- set/print values stored in the context of the template

{{ expressions }}

Comments

- non-executable code

{# comments #}


Universal Customizations


Module To Change CSS


```
{% set linkColor = "#2C6674" %}  
{% set hoverColor = "#5C96A4" %}  
{% set brightColor = "#1081d5" %}
```

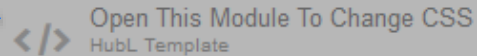
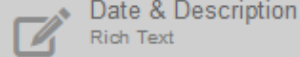
<style>


```
#contentTableOuter {  
  background-color: #ffffff!important;  
  border: none!important; box-shadow: none!important;  
  padding: 0px!important; }  
  
.table { padding: 0px !important; }  
h1 { font-size: 26px; line-height: 1.3em !important; }
```

 View As Web Page
View As Web Page Text

 Module Group

 Module Group



 Module Group



Universal Customizations

Module To Change CSS

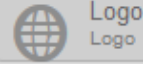
```
.feature-item h2 { text-align: center!important; }
img { max-width: 600px!important; max-height: 350px !important;
      margin-top: 10px; margin-bottom: 20px; }
.logo img { width: auto !important; height: auto !important; }
.articles-listing img { margin-top: 7px; margin-bottom: 20px; }
.articles-listing .hs-cta-wrapper img { padding-top: 0;
      background-color: transparent; }
.title-image { max-width: 100%!important; }
.articles-listing p { max-width: 79%; margin:0 auto !important;
      float: none! important; }
.articles-listing h1 { max-width: 79%; margin-left:auto !important;
      margin-right:auto !important; float: none !important; }
a:link { color: {{ linkColor }}; text-decoration: none; }
a:visited { color: {{ linkColor }}; text-decoration: none; }
a:active { color: {{ linkColor }}; text-decoration: none; }
a:hover { color: {{ hoverColor }}; text-decoration: none; }
```



View As Web Page
View As Web Page Text

Module Group

Module Group



Logo
Logo



Date & Description
Rich Text



Open This Module To Change CSS
HubL Template

Module Group



Link Item
Rich Text



Link Item
Rich Text

Universal Customizations

Module To Change CSS

```
.further-action-section table { margin: 0 auto 30px; float: none;
    text-align: center; padding: 15px 30px;}
.further-action-section table tr      { border: 1px solid #dfdfdf;}
.further-action-section table tr td   { padding: 30px 50px;}
.further-action-section h2, .further-action-section h3 {
    color: {{ brightColor }} !important;}
.further-action-section p { max-width: 79%; margin: 0 auto; float: none;}
.further-action-section table p      { max-width: 100%;}
.date-area p { max-width: 79%; margin: 0 auto; float: none;}
```



View As Web Page
View As Web Page Text

Module Group

Module Group



Logo
Logo



Date & Description
Rich Text



Open This Module To Change CSS
HubL Template

Module Group



Link Item
Rich Text



Link Item
Rich Text


Universal Customizations


Module To Change CSS


```
@media only screen and (max-width: 480px)
{
  .feature-item td[class~="column"] { padding-bottom: 10px!important; }
  .further-action-section table { max-width: 90%; }
  .further-action-section p { max-width: 95%; }
  .articles-listing p, .articles-listing h1 { max-width: 95%; }
  .date-area p { max-width: 95%; }
}

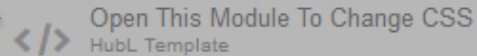
.social-icons img { max-width: 24px!important; height: auto;}


</style>
```

 View As Web Page
View As Web Page Text

 Module Group

 Module Group

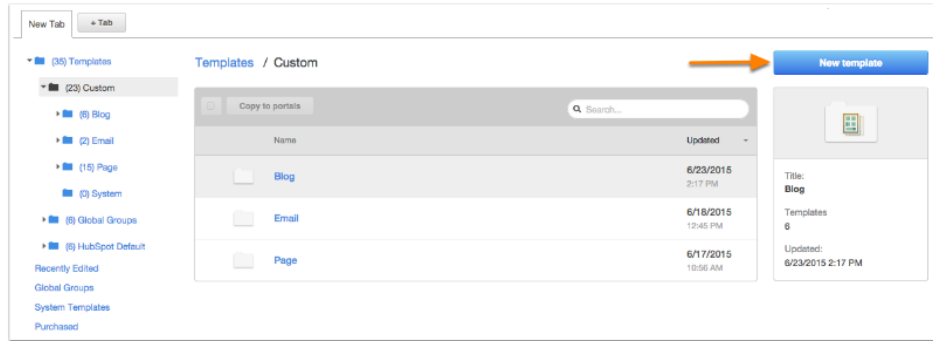


 Module Group



Step 1.1: Create a new email template

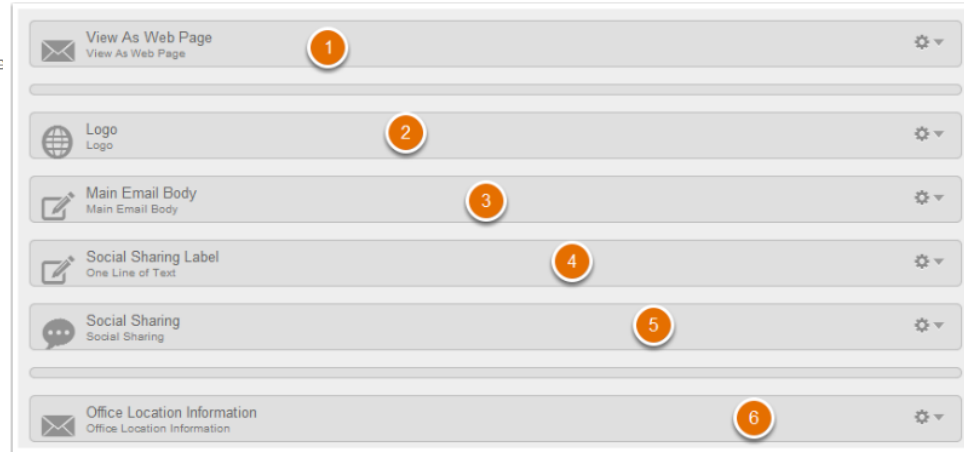
1. Navigate to your Design Manager
2. Click on the New Template Button
3. Select Template Builder & Email, then Create
4. Name the email template



Step 1.2: Create a new email template

When you're finished, you should have a template that looks like this:

- 1. View as Web Page:** This module is automatically added to the top of your email template and allows the user to see text that advises them to click a link to see a web page version of the email, in case the email isn't rendering properly in their email client.
- 2. Logo:** The logo module pulls whatever logo you have set up in Content Settings. This way you have proper branding already within your email.
- 3. Main Email Body:** This is essentially a rich text module where you'll put the main content of your email.
- 4. Social Sharing Label:** This module gives you the option to label the social sharing icons that are in the module below. So you can say something like "Share this email with your friends!"
- 5. Social Sharing:** This module populates buttons for social media (Facebook, Twitter, LinkedIn, etc.) so that when the user clicks one of the buttons, it gives them the quick ability to share your email with their friends or co-workers.
- 6. Office Location Information:** This module populates the email footer information (company address) from your Content Settings. *This module is required in order to save an email template.*



Step 2: Unique CSS

1. Module → Edit CSS

1. **Text Color:** your text color.
2. **Background Color:** the background color behind your text.
3. **Border Color:** the color applied around your content.
4. **Border Width (px):** the width of the border surrounding your content.
5. **Inner Spacing:** the spacing between your text and the border around your text.
6. **Outer Spacing:** the spacing between the outside of your border and the content beside this module.
7. **Preview Pane:** this will show you a preview of the changes as you make them within this window.
8. **Custom CSS Class (advanced):** allows you to add a class name to this module to [target elsewhere](#).
9. **Custom Inline Styling (advanced):** allows you to add inline styling to this particular module.

The screenshot shows the 'Edit CSS Declarations' dialog box with the following settings and callouts:

- Text Color:** #000000 (Callout 1)
- Background Color:** #dbbdb (Callout 2)
- Border Color:** #9c4e9c (Callout 3)
- Border Width (px):** 10 (Callout 4)
- Inner Spacing:** 10 (Callout 5)
- Outer Spacing:** 10 (Callout 6)
- Custom CSS Class (advanced):** grey-rounded-box (Callout 8)
- Custom Inline Styling (advanced):** background: whitesmoke; padding: 30px; border-radius: 15px (Callout 9)

The preview pane (Callout 7) shows a purple-bordered box containing the text: "This is example text. This is example text."

Buttons: Done, Cancel

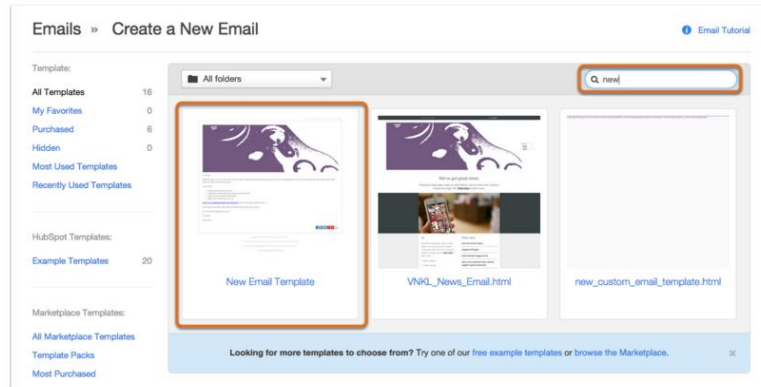
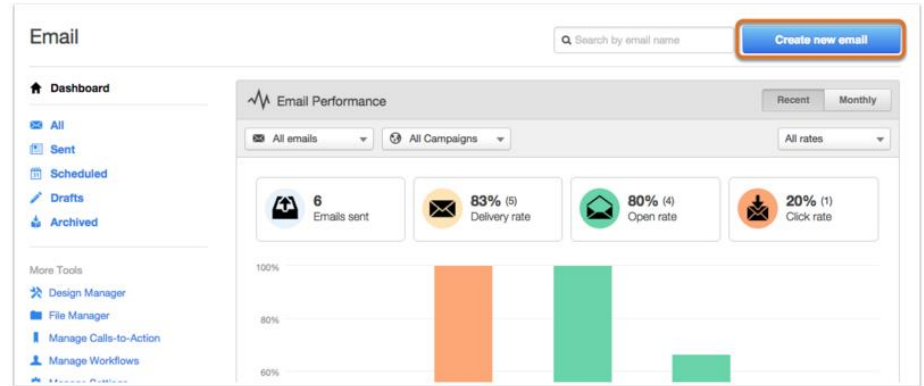
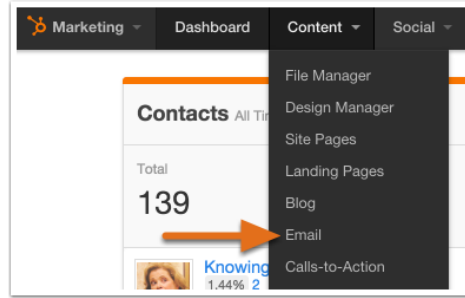
Footer: You'll still need to save and publish the template layout to apply these changes.

4

CREATING YOUR EMAIL

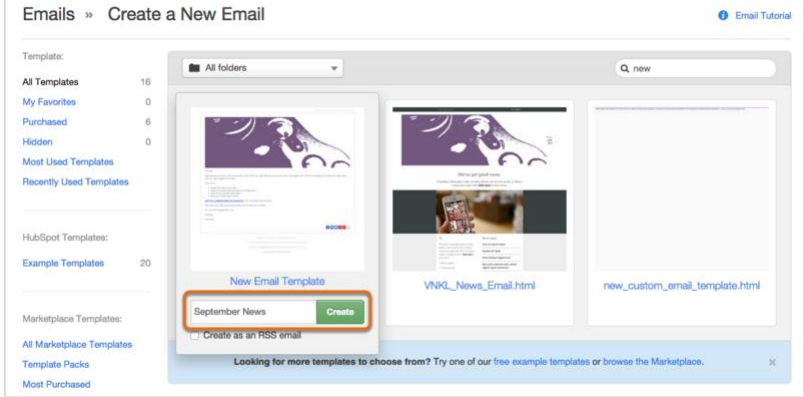
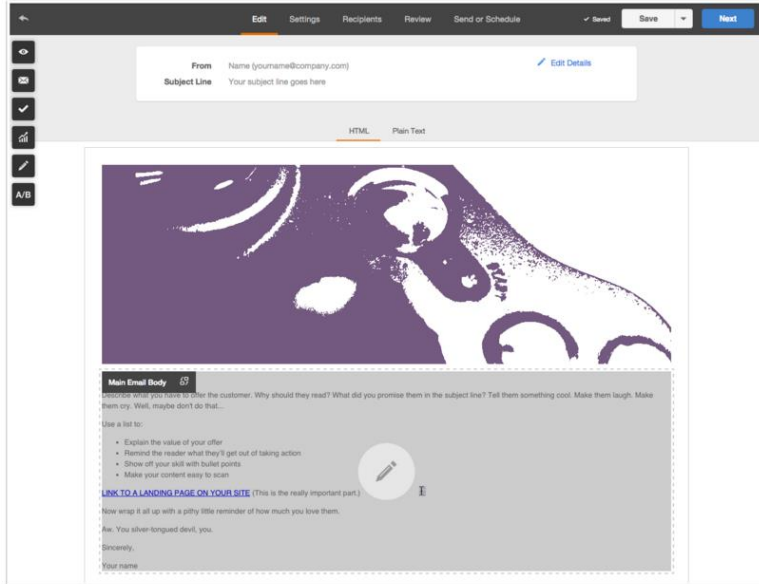
Step 1: Add Email

- Navigate to Email
- Click Create New Email
- Choose Template



Step 2: Edit Email

1. Create Email
2. Edit Email



Step 3: Email Details

Details

Text Version

From Name (yourname@company.com) [Edit Details](#)

Subject Line Your subject line goes here

← Edit Settings Recipients Review Send or Schedule ✓ Saved Save Next

From Name (yourname@company.com) [Edit Details](#)

Subject Line Your subject line goes here

HTML **Plain Text**

Plain Text Version [Edit](#)

Play Like a Girl (<http://272301.hs-sites.com/>)

Hi {{contact.firstname}},

Describe what you have to offer the customer. Why should they read? What did you promise them in the subject line? Tell them something cool. Make them laugh. Make them cry. Well, maybe don't do that...

Use a list to:

- Explain the value of your offer
- Remind the reader what they'll get out of taking action
- Show off your skill with bullet points
- Make your content easy to scan

LINK TO A LANDING PAGE ON YOUR SITE (<http://hubspot.com/>) (This is the really important part.)

Now wrap it all up with a pithy little reminder of how much you love them.

Step 4: Email Settings

Email Settings

Internal Email Name ?

September News

Campaign ?

Select a campaign

Add new

Email Type ?

Marketing Information

Web Version

Enable Web Version

Create a shareable web version of your email (this will be a stand-alone web page)



Page name ?

September News

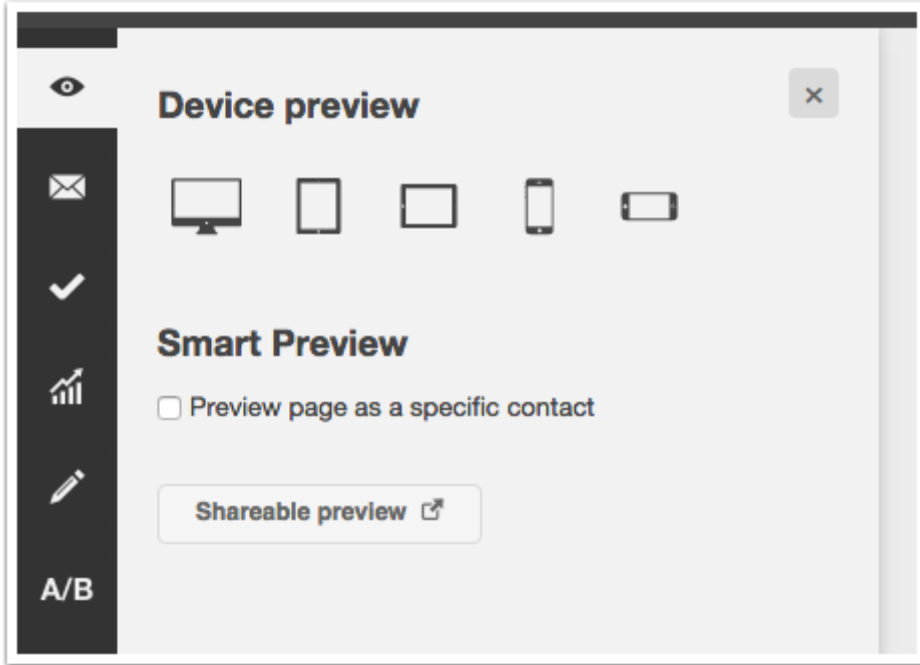
Page URL ?

http://272301.hs-sites.com september-news

Meta description ?

Thanks for checking out our newsletter for September.

Step 5: Preview Email



Step 6: Test Email

Send a test email

Make sure your email hits all the right notes. Send a test version to yourself.

Recipients

x @hubspot.com

Receive email as specific contact

Choose contact to preview (optional)

Send plain text version

Send test email

Preview in other inboxes

Find out what your email will look like in different email clients.

Email Apps and Devices [View Results](#)

The 10 email clients most commonly used by HubSpot customers have been preselected for this test. You can customize your test by adding or removing clients below. And remember, this is only a test. No emails will be sent to any of your contacts at this time.

Test my email now [Add Test Contact](#)

Mobile [Select All](#)

| | | | |
|---|--|--|--|
| <input checked="" type="checkbox"/> Android 4.2 | <input type="checkbox"/> BlackBerry 4 OS | <input type="checkbox"/> BlackBerry 5 OS | <input type="checkbox"/> Gmail App (Android) |
| <input type="checkbox"/> iPad (Retina) | <input type="checkbox"/> iPad Mini | <input type="checkbox"/> iPhone 5s (iOS 7) | <input type="checkbox"/> iPhone 5s (iOS 8) |
| <input type="checkbox"/> iPhone 6 | <input type="checkbox"/> iPhone 6 Plus | <input type="checkbox"/> Windows Phone 8 | |

Step 7: Optimize Email

The screenshot displays an email optimization dashboard with a dark sidebar on the left containing icons for eye, envelope, checkmark, bar chart, pencil, and 'A/B'. The main content area is divided into two sections: 'TO-DO' and 'DONE'.

TO-DO

DELIVERABILITY

- Your portal is not using Email Sending Domains. [i](#)

SENDING

- You're sending at 11:23 AM. [i](#)
- You're sending on Monday. [i](#)

CONTENT BODY

- Your email includes 0 images. [i](#)
- There are 0 call-to-actions in your email. [i](#)

EMAIL SUBJECT

- You haven't added any preview text. [i](#)

DONE

CONTENT BODY


- You're not using shortened links. Perfect. [i](#)
- Your email has a low spam score. You're amazing. [i](#)
- Your email includes 1 link. [i](#)

Step 8: Send Email

Select recipients

Add recipients Save for automation

Lists Individual contacts

| List name |
|--|
| All contacts with error "INVALID_EMAIL" (0) |
| Xavier Leads (15) ✓ |
| Manually added (1) |
| Customer static list (13)  <input checked="" type="checkbox"/> Include <input type="checkbox"/> Exclude |
| Lifecycle stage - Lead (71) ✓ |
| Empty List (0) |
| Contact whose company has 200+ employees (1) |
| Contacts that attended a trade show (0) |
| Teacher Ted Persona - Customers (0) |

Send to

- ✓ Xavier Leads (15) ✕
- ✓ Lifecycle stage - Lead (71) ✕

Don't send to

No recipients excluded.

Total recipients 71

Step 9: Send Email

The screenshot shows the 'Send or Schedule' interface of an email client. The top navigation bar includes a back arrow, 'Edit 1', 'Settings', 'Recipients', 'Review', 'Send or Schedule', '✓ Saved', a 'Save' button with a dropdown arrow, and a blue 'Schedule' button. A vertical sidebar on the left contains icons for eye, envelope, checkmark, bar chart, pencil, and 'A/B'. The main content area is titled 'Sending Options' and is split into two columns. The left column, 'Send now', features an envelope icon, the text 'Send now', and 'Your email will be sent immediately.' with an unselected radio button. The right column, 'Schedule it for later', features a clock icon, the text 'Schedule it for later', and 'Set a future time and date for your email to send.' with a selected radio button. Below this are input fields for the date '08/17/2015' and time '11:23 AM', each with a calendar and clock icon respectively. The time zone is set to 'US/Eastern' with a link for 'Timezone settings'.

Send now
Your email will be sent immediately.

Schedule it for later
Set a future time and date for your email to send.

08/17/2015

11:23 AM

US/Eastern
[Timezone settings](#)



5

STYLING YOUR EMAIL



Styling your modules:

ASSIGN CSS CLASSES



6

TIPS AND BEST PRACTICES

Common Email Best Practices

1. Content in King

- Design is important but **content is king**.

2. Work within the Editor

- do as much work as possible within the email editor
- If not possible, write your content in a simple text editor
- copy and pasting from Microsoft Word brings over extra code/formatting that can cause styling conflicts

3. Responsive Design

- Most people are reading their email on-the-go

4. Email will NOT look the same across different email clients

- Each mail client renders based on their own CSS and HTML standards
- <http://knowledge.hubspot.com/email-user-guide-v2/common-email-design-questions-and-best-practices>

Common Email Best Practices

Email Tools

- Keep your template simple – focus on the Message
- Keep email width under 600 pixels
 - email clients such as Outlook can view your email in their vertical preview pane
- Abide by CAN-SPAM rules
 - include an unsubscribe option in every email, as well as company name & address
- Create templates with HubSpot template builder
- Use code-friendly software
- Design with tables
- Use inline CSS

http://knowledge.hubspot.com/articles/KCS_Article/Email/HubSpot-Email-Tool-Best-Practices

7

HOW TO ...

How to ...

How to perform various email tasks

1. Create responsive email templates
2. Set email body widths
3. Customize email footer for Can-Spam compliance
4. Create and edit email types
5. Set From Name and Address Personalization

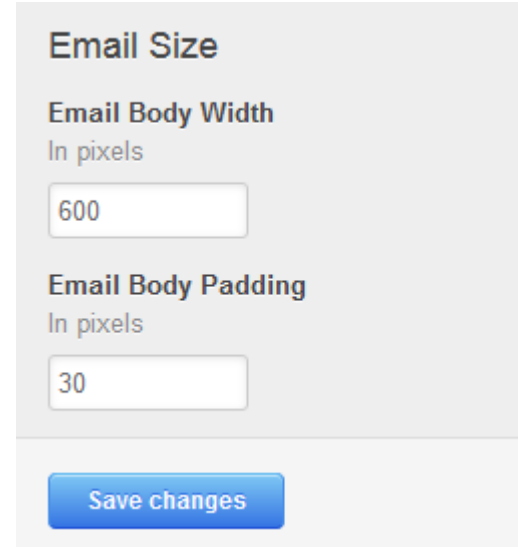
1. Responsive Email Templates

Email templates are responsive by default

1. To convert the email template to a fixed width template:
 - Locate the template layout in **Design Manager**
 - Click **Actions > Make Basic**
2. To convert a basic fixed-width template to a responsive template:
 - Locate the template layout in **Design Manager**
 - Click **Actions > Make Responsive**

2. Set Body Width for All Emails

1. Change your email ***Body Width*** for **ALL** emails
 - navigate to: **Testing > Content Settings > Email**
 - scroll down to **Email Size**
2. Set any numerical value for the **Email Body Width**
 - click **Save changes**



The screenshot shows the 'Email Size' configuration panel. It includes two input fields: 'Email Body Width' with a value of 600 and 'Email Body Padding' with a value of 30. A blue 'Save changes' button is located at the bottom of the panel.

Email Size

Email Body Width
In pixels
600

Email Body Padding
In pixels
30

Save changes

http://knowledge.hubspot.com/articles/KCS_Article/Email/How-do-I-change-the-body-width-for-all-emails

2. Set Body Width for a Particular Email

1. Change your email body width for a Particular email:

navigate to: **Testing > Content Settings > Email**

scroll down to **Email Size**

2. Set any numerical value for the **Email Body Width**

click **Save changes**

http://knowledge.hubspot.com/articles/KCS_Article/Email/How-do-I-change-the-body-width-for-a-particular-email

3.1 Customize CAN-SPAM Email Footer

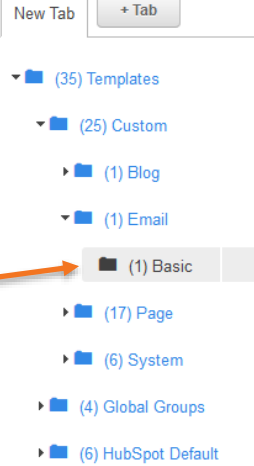
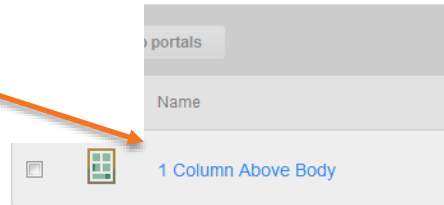
Customize email footer:

✔ Navigate to: **Testing > Content Settings > Email** or
navigate to: **Design Manager**

✔ Select: (any email template)

✔ Click the gear icon: **Edit Options**

Templates / Custom / Email / Basic



3.2 Customize CAN-SPAM Email Footer

The 5 tokens that **must** be included in a CAN-SPAM footer in order to send an email are:

- Company Name
- Company Street Address 1
- City
- State
- A link to Email Preferences OR Unsubscribe All

Edit Module Options

Label
Labels help categorize and sort types of modules in the content editor. Can be changed at any time.

Office Location Information

Module Defaults

Email Can Spam
Insert custom email properties: Office location information ▼ + Unsubscribe
+ View webpage link

Edit ▼ Insert ▼ Style ▼ Table ▼ Tools ▼

← → <> **B** *I* A A [List icons] [Link icon] [Image icon] [Add icon] [User icon] [Refresh icon]

NAME ADDRESS 1 ADDRESS 2 CITY STATE ZIP COUNTRY

You received this email because you are subscribed to EMAIL TYPE from NAME.

Done Cancel You'll still need to save and publish the template layout to apply these changes.

http://knowledge.hubspot.com/articles/KCS_Article/Email/What-information-is-required-in-the-CAN-SPAM-footer

4. Create and Edit Email Types

1. Change your email body width for ALL emails:

- ☑ navigate to: **Testing > Content Settings > Email**
- ☑ scroll down to **Email Types**
- ☑ To edit an existing email type, click **Actions > Edit ...**

make the changes to your email type **Name** or **Description**

(or making the **email type** active/inactive)

click **Save changes**

- ☑ To create a new email type ...

Email

Footer Information

Subscription Settings

Resubscription Settings

Compliance Copy Email

Double Opt In

Tracking

Email Types

Personalization

RSS Email Date Formats

Create a New Email Type

Name

Description

Create subscription

Cancel

<http://knowledge.hubspot.com/email-user-guide-v2/how-to-create-and-edit-email-types>

4. Create and Edit Email Types

1. Change your email body width for ALL emails:

- ☑ navigate to: **Testing > Content Settings > Email**
- ☑ scroll down to **Email Types**
- ☑ To edit an existing email type, click **Actions > Edit ...**

make the changes to your email type **Name** or **Description**

(or making the **email type** active/inactive)

click **Save changes**

- ☑ To create a new email type ...

Email

Footer Information

Subscription Settings

Resubscription Settings

Compliance Copy Email

Double Opt In

Tracking

Email Types

Personalization

RSS Email Date Formats

Create a New Email Type

Name

Description

Create subscription

Cancel

<http://knowledge.hubspot.com/email-user-guide-v2/how-to-create-and-edit-email-types>

5. Email Personalization

1. Change your email personalization:

EMAIL RESOURCES

- 1 What is Can-Spam _ FAQs

<http://blog.hubspot.com/marketing/what-is-can-spam-ht>

- 2 [HubSpot Design Forum](#)

- 3 [HubSpot Designer Documentation \(and HubL Resource\)](#)

- 4 Email User Guide

<http://knowledge.hubspot.com/email-user-guide-v2>

- 5 Email Newsletter Project

<http://academy.hubspot.com/projects/customer-projects-create-email-newsletter>

Homework

- 1 Sign up for a free Designer account:
 - <http://offers.hubspot.com/hubspot-developers-and-designers-free-hubspot-account>
- 2 Add -- John Heinrichs -- DrJohn7994@gmail.com -- to your portal
- 3 Create your Email Template / Email
- 4 Email me -- ai2824@wayne.edu -- your email template url for grading

QUESTIONS?

