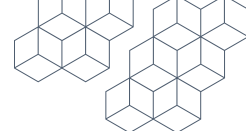


Email Personalization Strategy Workbook



This workbook is designed to help you take inventory of your data sources and plan out your personalization strategy. This will determine campaigns and content that will be customized by segment.



Section 1: Brainstorm what your members want and need.

Questions to get you started:

Why did they join the organization?

- Networking opportunities
- Research
- Community
- Other
- Education opportunities
- Advocacy

What keeps them involved?

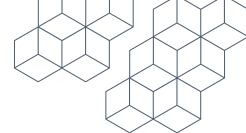
- Relevant events
- Advancement of their career goals
- Other
- Personalized experiences
- Advancement of industry advocacy goals

What problems do they need to be solved?

- Remove blocks to reach career goals
- Advancement on policies that align with interests
- Other
- Notification to stay ahead of certification requirements

What do they need from you?

- Options for networking
- Latest news around the industry
- Other
- Credited education tracks
- Opportunities to contribute to the community



Section 2: Write out your personas.

Who do you want to focus on in this personalization campaign?

Section 3: Plan out your goals and objectives.

What do you hope to achieve with this campaign? How will you measure success?
Write out a sentence explaining your goals and objectives.

Section 4: Outline your campaign.

Subject Line:

Preheader Text:

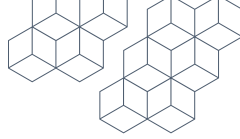


Image:

CTA:

Body Copy:

Section 5: Review the performance of your email campaign.

TOTAL SENT

OPEN RATE

CLICK RATE

CONVERSION RATE

Compare to your overall email metrics for non-personalized sends:

TOTAL SENT

OPEN RATE

CLICK RATE

CONVERSION RATE

After launch, what findings or takeaways did you observe? What would you like to change or improve upon after reviewing results?