

Email Portfolio

Assessment Workbook



This workbook is designed to help you take inventory and review your existing content & segmentation. This will help build the framework for your email marketing program and strategy in the future.



What are some recurring emails you send (event emails, welcome email, member renewals)?

What goals are you hoping to achieve with your email program?

Describe your greatest email program challenges or obstacles.



How do you measure success of an email?

Empty text area for response to the question: How do you measure success of an email?

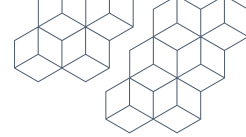
What type of content do you want to improve upon or send more frequently?

Empty text area for response to the question: What type of content do you want to improve upon or send more frequently?

Additional Notes

Empty text area for additional notes.





Section 2: Map Your Segmentation & Content



Identify Your Segments

Outline your segment groups by demographic, buying behavior, email preferences, or membership status.

Do you have formalized personas for your members/subscribers?

Yes

No

Enter subscriber details based on the common segmentation buckets below.

Geography	Areas of Interest
Job Function	Membership Level

Identify other common segmentation fields (buying behaviors, events, committee/chapter)



Fulfill Your Member Promise

What content do you have that fulfills member expectations once they have joined? *(Example: member benefits, newsletters, new member introduction)*



Give Them What They Need

What content do you have specific to their interests or that helps solve their pain points? *(Example: event or webinar registration, meeting announcements, education pieces)*



Retain & Delight Them

What content do you have that will keep your members engaged and convert them to organizational champions, retain them, and keep them active in the community? *(Example: surveys, interactive information, industry tips)*