The Beginner's Guide to
EMAIL MARKETING
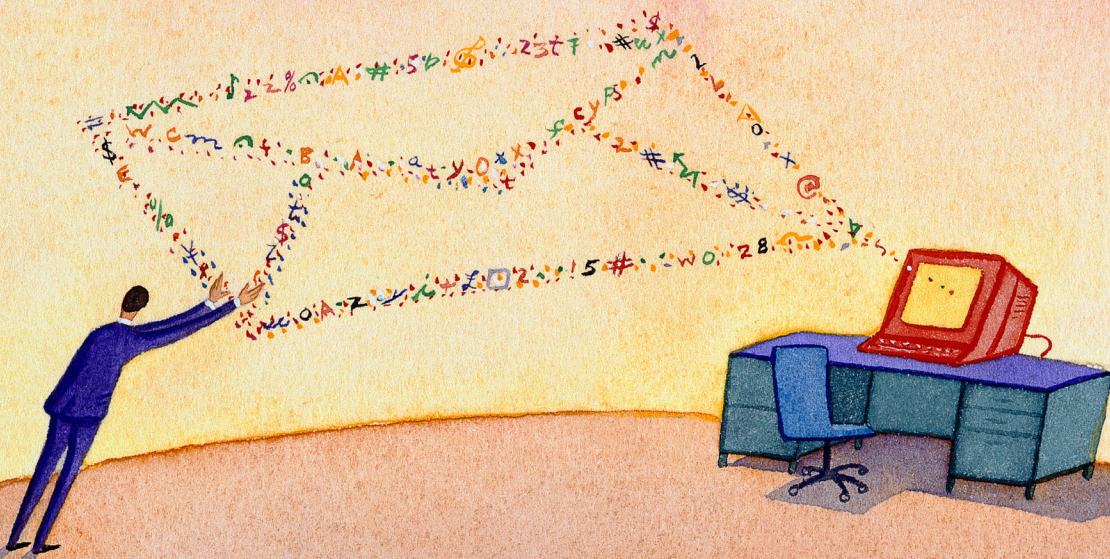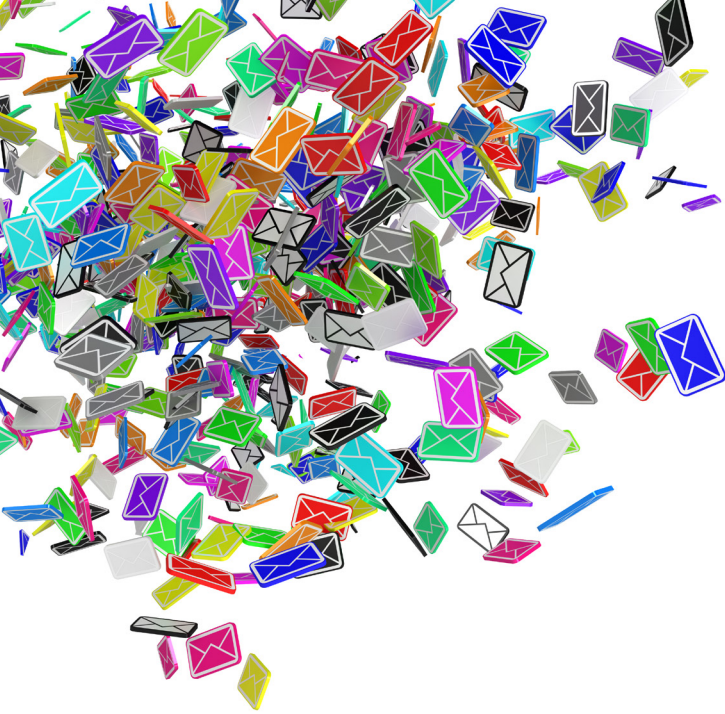
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INTRODUCTION

Companies often list email as one of their most powerful marketing channels. With **email usage worldwide projected to reach 3 billion users by 2020,** businesses simply have to continue using email marketing to reach their audiences if they want to scale quickly.

But "doing email marketing" is not as easy as it may seem. Anyone who's tried email marketing knows it's not as simple as quickly drafting a message and hitting the "send" button. You have to build a healthy email list, make sure you're complying with CAN-SPAM regulations, segment your lists so you're delivering the right messages to the right people, create different types of emails for all different situations (newsletters, thank-you email, and so on), design attractive, on-brand emails, analyze results...

Whew! The whole process can feel complicated and overwhelming at times. Effective email marketing takes time, effort, and a strategy. But don't worry: This guide will take you step-by-step through how to get started with email marketing, starting at the very beginning.

By the time you've gotten through it, you'll have all the information you need to start a successful email campaign on your own.

Growing Your Email List

To get the email results that'll put a smile on your boss's face, we need to start with your email list. Before you roll out your new email marketing campaign, you'll need to build a list of recipients to get those messages to first or grow the existing list you currently have.

When you create an audience by building an email list, you'll have the opportunity to nurture and develop them in a way that keeps highly engaged and interested in what you have to say. After all, by signing up for your emails, these readers (and potential customers) have already expressed that they want and need your help. This makes selling what you're offering a lot easier later down the line.

But as you may have (begrudgingly) figured out, it's pretty hard to capture email addresses from total strangers. Getting readers to sign up for your email list takes trust-building and effort — and there are no shortcuts along the way.

There are so many different list-building strategies that it may be hard for someone just getting started to find the one that works best for their brand.

While we highlighted 25 clever strategies to build your email list in this post on the HubSpot Blog, our favorite two tips work pretty universally, so we recommend trying them first:

Tip #1: Create a free opt-in offer.

One of the best ways to capture email addresses organically is to give away something valuable for free.

This freebie could be any form of content that shows off your brand's expertise, such as an ebook or email series packed with helpful lessons, or a consultation or demo of your product or service. You'll want to offer a more top-of-the-funnel piece of content, like an ebook or email series, to people who need a little more nurturing before they're ready to make a purchasing decision. For folks who have clearly expressed interest in your product or service, you can offer something more bottom-of-the-funnel, like consultations or demos.
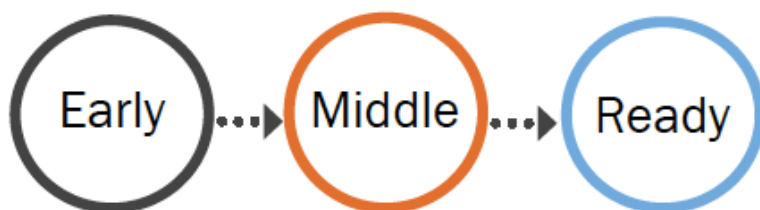

What you create and send up to you, but the underlying strategy is the same: Deliver something useful to your audience, and they'll happily trade you their email address in return.

Tip #2: Make subscribing to your email list easy.

Many brands tuck their newsletter sign-up boxes way down at the bottom of their homepage. There's a good chance this prompt will go unnoticed by many would-be-interested visitors. But if your main goal is growing your email list, then you need to prioritize placing multiple opportunities for people to give you their email address throughout the page.

As soon as a potential customer lands on our blog homepage at HubSpot, for example, they have multiple, easy ways to keep in touch if they like what they see. We place three options to subscribe to our blog on the blog homepage itself. The first sits just below our banner image on the homepage so you can't miss it:
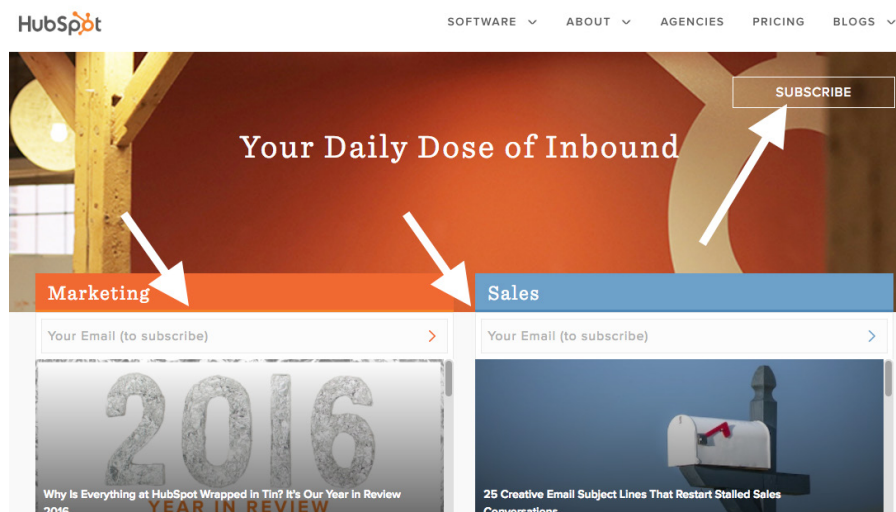
Underneath both Marketing and Sales columns, you'll notice a box prompting visitors to enter their email address to subscribe to our list.

We use the words "to subscribe" as our call-to-action to encourage readers and visitors to enter their email addresses. As for our individual blog posts, we use an in-line form at the bottom of blog posts to spur subscriptions:
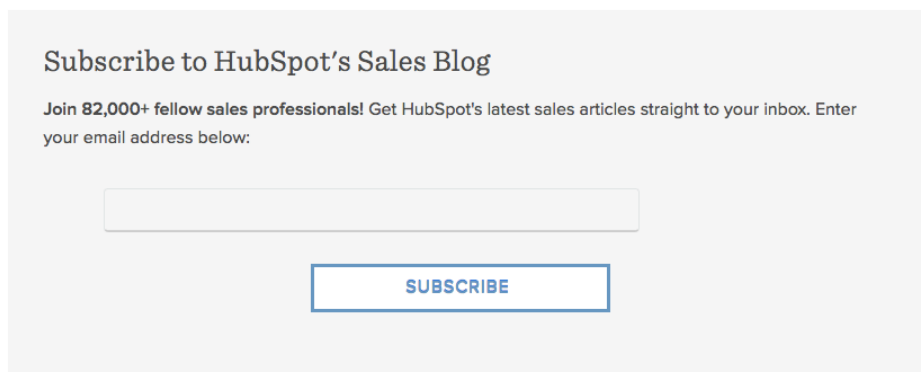
You'll want to pay special attention to your top-visited webpages and blog pages and make sure you've placed email forms on those pages. Why? Because your top pages might be garnering a lot more traffic (from organic search and other sources) than your average page, and you can reap the benefits of that traffic by adding email subscription CTAs -- if that's your main goal.

By giving your readers several prompts throughout your site to sign up, the more likely they are to follow through.

Why Buying Email Lists is Always a Bad Idea

It may seem more efficient to buy an email list instead of building one from scratch, but this is never a good strategy. First of all, good email addresses aren't for sale. If it's for sale, it means that the email addresses on it have already been spammed by all the other people who have purchased that list and emailed the people on it.

There are plenty of reasons why buying email lists is a bad idea, but we'll touch on the most important points against this practice here.

Reason #1: Recipients won't trust you.

If you received an email from a business you never heard of, how would you react? Most of you would wonder how that business got your information and why they're bothering you.

No one likes spam, and this is a spammy tactic. It's similar to those annoying cold calls you receive during dinner from random companies you don't know.

Building trust with your potential customers is hard enough, and using an email list that you didn't grow yourself is a surefire way to never build trust with your audience. The reality is, these readers don't want to hear from you, and they'll never truly listen to what you have to say. Talk about a waste of time.

Reason #2: You put your deliverability (and reputation) at risk.

Third-party lists are notorious for containing old and inactive email addresses. When this happens, you're likely to see more hard bounces and error messages connected to your email's deliverability. If enough of these surface, you'll start raising red flags with your email service provider.

First, they'll see that you've suddenly acquired an email list out of nowhere. This situation may not be completely out of the norm since importing a list from an old email provider happens regularly.

However, if you pair this action with an increased number of recipients marking your messages as spam, or an even higher amount of messages that could not be delivered altogether, you'll raise an even bigger flag.

[Your sender credibility will take a hit](#), and you'll put your account status in jeopardy. This could potentially block you from being able to send any emails in the future. Yikes!

Reason #3: You can't trust purchased lists.

The last major issue regarding purchasing an email list is that you really don't know what you're getting yourself into. Are these email addresses for recipients outside of your target demographics? Was this list also sold to your closest competitors? There's almost no way to know these important answers for certain. What we do know for sure is that buying a list is never worth it.
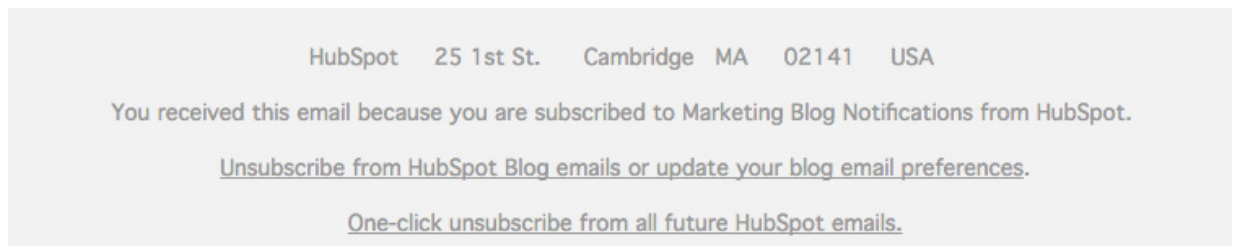
Tips for Remaining CAN-SPAM Compliant

In a nutshell, [CAN-SPAM](#) (**C**ontrolling the **A**ssault of **N**on-**S**olicited **P**ornography **A**nd **M**arketing) is an act that gives recipients the right to have a business stop emailing them. Violating this act can result in penalties as high as $16,000 per email. To avoid these hefty fines, always keep these rules in mind:

Tip #1: Include an unsubscribe link (without being difficult).

It may seem counterintuitive to give people the chance to leave your list, but it's actually a good thing. There's no point in keeping someone on your list who doesn't want to be there. And you'll see lower open and engagement rates by making it hard for people to unsubscribe.

Since you only want to send marketing messages to a targeted list of readers, think of the unsubscribe button as a way to automatically refine your list of prospects and advocates. Plus, it also keeps you CAN-SPAM compliant, so it's truly a double win.

Make it as easy as possible for users to unsubscribe once they do hit that link at the bottom of your emails. If recipients have to jump through several hoops and a myriad of questions, they're more likely to bail on the process and flag your emails as spam. Again, this will only hurt your sender credibility.

HubSpot   25 1st St.   Cambridge   MA   02141   USA

You received this email because you are subscribed to Marketing Blog Notifications from HubSpot.

Unsubscribe from HubSpot Blog emails or update your blog email preferences.

One-click unsubscribe from all future HubSpot emails.

At HubSpot, for example, we give our visitors the ability to fine-tune their email preferences so we strike an ideal balance. At the same time, we also clearly explain that our unsubscribe process only takes one click so they can easily unsubscribe if they want to.

Tip #2: Actually remove people who have unsubscribed.

Next, you have to physically remove those who unsubscribed from your list within 10 business days, according to CAN-SPAM regulations. Generally speaking, your email service provider should have a feature that helps automate this process so you don't have to get stuck doing it manually each time.

Tip #3: Include your physical location in your email signature.

Many email providers are making this a required feature, but not all of them have

implemented it yet. Either way, you should always include your physical location (in the form of a valid postal address) in your emails. While this may seem unimportant, it's an ideal way to show transparency in your brand. A simple address builds trust for your readers and proves that you're a credible, accountable sender to your email service provider.
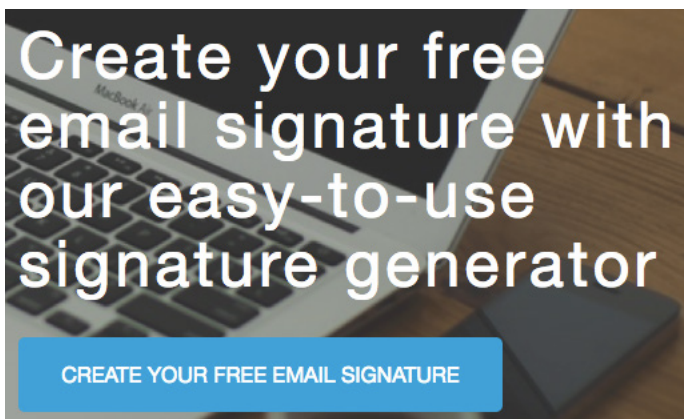
What It Means to Be "Whitelisted"

When someone marks your email as spam, they're essentially blacklisting you. This makes it extremely tough to reach them in the future since your emails will be automatically filtered out. Unfortunately, sometimes even CAN-SPAM compliant emails wind up in the junk folder.

To avoid this, it's important to ask your recipients to whitelist your emails. A whitelist works the opposite way a blacklist does: By adding the sender's email address to the person's contact or address book, your recipients will mark your emails as trusted and important instead of as junk.

One way to ask subscribers to add your email to their address book? Ask them in your thank-you message that pops up whenever a visitor subscribes to your list. If you skip this crucial step, many readers could miss your messages even though they actually want to hear from you.

CHAPTER 2:
## Email Marketing Automation

Email marketing may take time and dedication, but since you can streamline certain aspects and set future tasks on autopilot, it's a busy marketer's best friend.

Well, **64% of marketers say they saw the benefits of using marketing automation within the first six months of its implementation.** Let's explore why.

How Email Marketing Automation Saves You Time

Email automation means you can create emails ahead of time and set them to launch automatically whenever a user completes a certain action.

For example, when a visitor signs up for your newsletter, you can send them an automatic thank-you and welcome message right away. This takes the hassle out of manually replying to every new subscriber who joins your list, while also making your new reader feel as if someone is personally welcoming them to interact with your brand. We recommend you email new contacts within 24 hours.
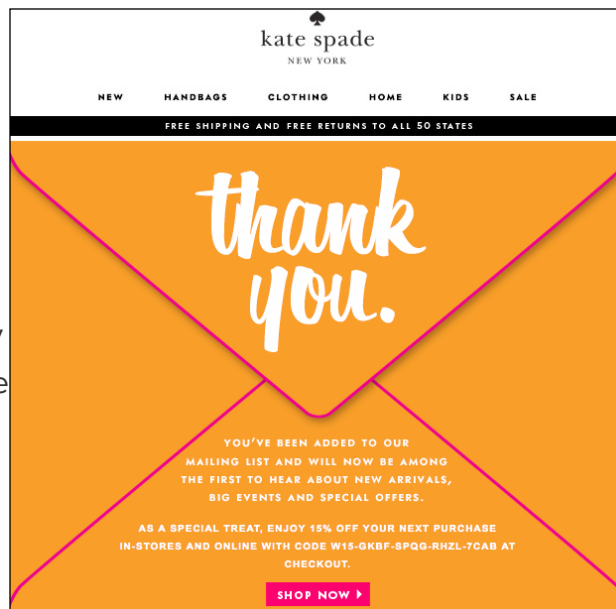
To set up an automatic email workflow, you'll need to create a series of emails that guide your reader through your funnel. (We'll cover more on this in the next chapter). If this is not a feature your current email provider offers, you're missing out on key opportunities to nurture and engage your readers at prime milestones in your relationship. You can also pre-schedule emails to send at a specific time so you never forget to hit the send button or determine a cadence for automated email sends, such as a weekly email with the week's blog posts.

Once you identify the best times and days to send an email, all you have to do is schedule yours to launch right when your audience is most likely to pay attention. (Use HubSpot's free email scheduling tool to start scheduling emails directly from your inbox.)

An Introduction to Lead Nurturing

Once you've provided valuable content to your readers and converted some of them into leads, it's time to nurture those leads so they can become opportunities and can be taken over by your sales team. After all, **at least half of the new leads you generate are probably not ready to buy from you.** Nurturing emails help you stay connected to the leads you collect that aren't ready to buy from you yet, and build up trust until they're ready.

Automate your welcome and thank-you emails.

To start nurturing your sales leads, automate that welcome message and thank-you email we mentioned earlier — and then begin nurturing them with appropriate nurturing emails.

Let your new email subscribers know what they can expect from your site (a weekly or monthly update, for instance), and give them a clue as to what else is in the works, such as product discounts, new ebooks, and free tools.

Additionally, you can include a list of your most popular articles or pages in this email or mention that this list will be on its way tomorrow or within a few days. The idea is to keep your new subscribers interested and engaged from the get-go.

## Send different emails to people in different stages.

Another way to nurture your email list is by sending different messages to readers in different stages of the buyer's journey. We'll talk more about segmenting your list later on, but for now, let's start with an example.

Imagine you've created a five-email course using an automated workflow. After viewing your email metrics, you might notice a few readers drop off in engagement after the first few emails, while others breeze through the entire series eagerly.

Those in the latter group have progressed to the next stage in your funnel, which makes them a perfect segment to focus your attention on. These readers are more interested in what you have to offer, so they'll be more inclined to pay attention when special incentives and discounts are sent their way.

However, sending the same incentives and discounts to those readers who didn't make it to email #5 will likely lead to unopened emails.

Using automated workflows (like HubSpot's), you can set up two separate autoresponders to engage with these readers based on their actions. And because these are automatic triggers, you can target your message specifically to the precise stage of the buyer's cycle your readers are in.
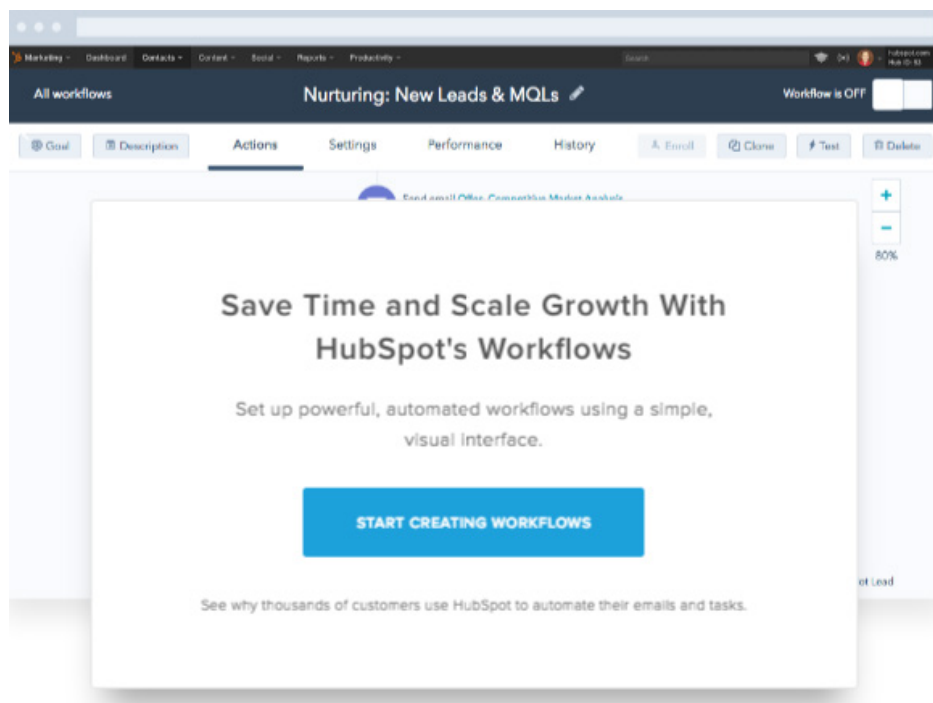
When you take the right steps to nurture your relationship during this initial period, odds are much higher that your readers will turn into evangelists for your brand. This is a pivotal moment when you can encourage your reader to share your information with their friends, family, and social networks.

An easy way to get to this point is with another (automated) thank-you message. After your reader completes a defining action, such as finishing your five-part email series or buying your project, set up an automated message that thanks them.
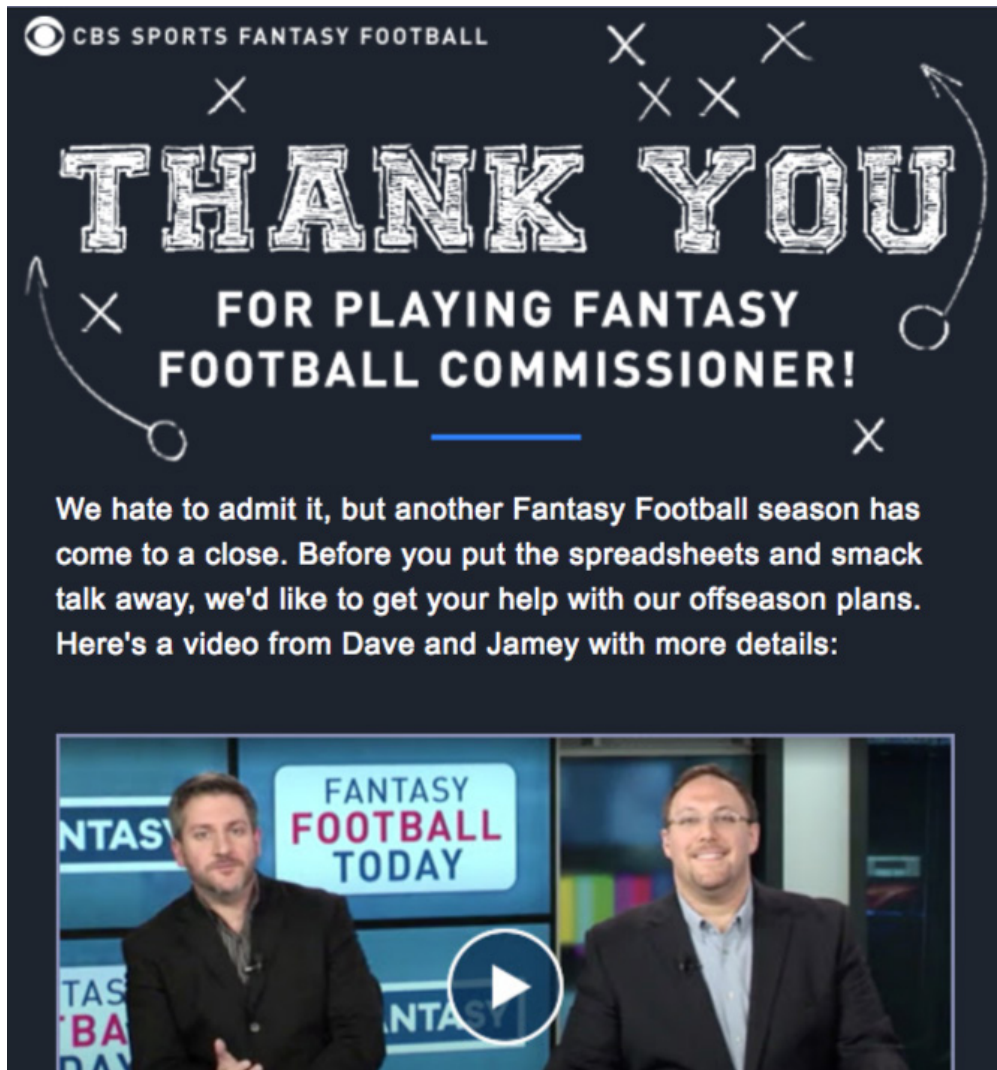
In that email, consider encouraging readers and customers to share your content with their friends and family since they found it so helpful. A great way to build awareness is to make satisfied readers and customers into advocates for your brand.

How & Why to Segment Your Email Lists

As we mentioned earlier, segmenting your list ensures that you're delivering the right message to the right reader.

Segmenting also provides a more personalized approach to connecting with your readers based on where they are in your funnel, which will naturally increase your open rates, clickthrough rates, and conversions. MarketingSherpa found that **segmenting your emails can increase the amount of revenue generated by 50%.**

Unfortunately, despite all the positives associated with segmenting, **42% of marketers do not send targeted email messages**, according to a MarketingProfs report.

Furthermore, they reported that **sending irrelevant content was the #3 reason why consumers marked a message as spam.** That's what happens when you don't segment your list: You risk your emails being marked as spam.

45.8% - They emailed too often
36.4% - I didn't purposefully subscribe
31.6% - They sent irrelevant content
10.4% - Their emails were impersonal
18.6% - None of the above

N=472

Source: TechnologyAdvice
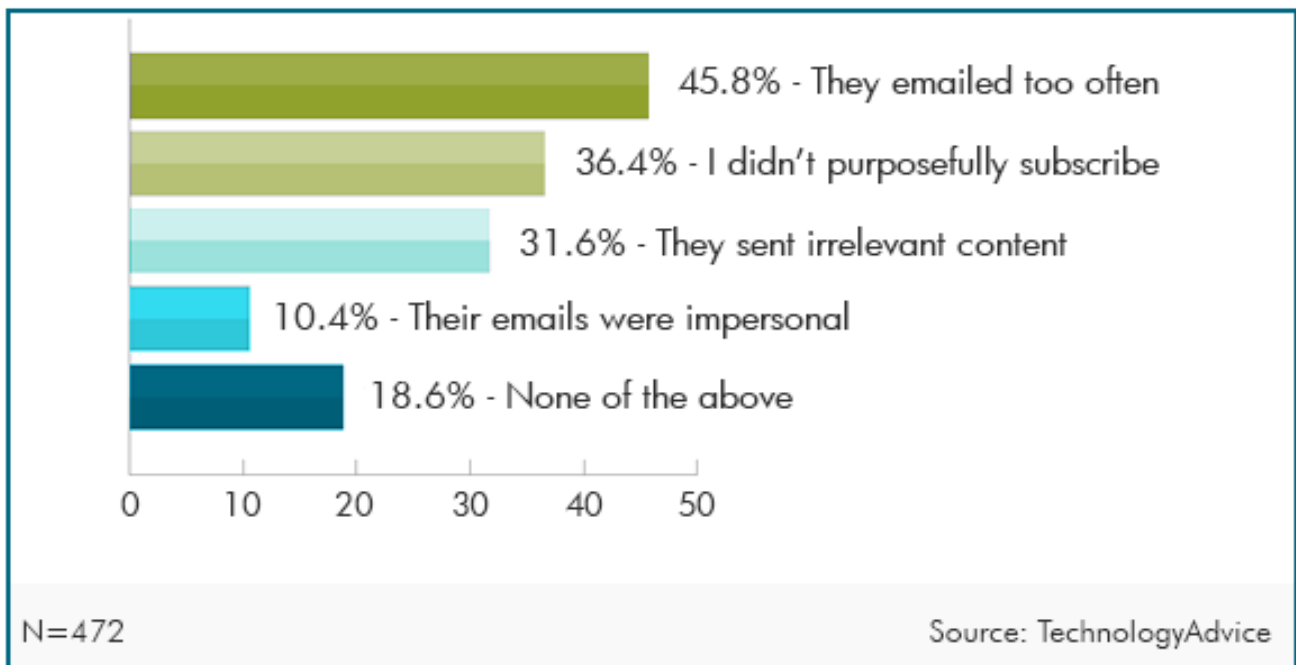
Ready to start segmenting your email list? You have a few options.

The most popular ways to divide yours include separating users by the following traits:

- **Lifecycle stages** (subscriber, lead, MQL, SQL, customer)
- **Demographics** (gender, age, location, job title, or buyer persona)
- **Behavior** (Did they complete your email course, or did they stop after the first two emails?)
- **Buying frequency** (Do they purchase your products monthly, quarterly, or yearly?)
- **Where they signed up** (Did they sign up for your newsletter or a content offer?)

Start segmenting right away. The sooner you categorize where your customers are currently at, the faster you'll be able to deliver targeted content and see the positive ROI that makes email marketing worthwhile.

CHAPTER 3:
The Different Kinds of Marketing Emails

Now that you have a list of interested recipients, it's time to step up your email game. If you're only sending an email newsletter, you're missing out on all the other different types of emails geared towards generating revenue from your leads. Plus, in some cases, you may not even need a newsletter. We'll cover this and more in this chapter.

Plain-Text vs. HTML Emails: Which is Better?

The debate about whether plain-text emails or HTML emails are better has gone on for years now. While HTML emails are more visually appealing, they're not always the best choice.

Why? For one, if an HTML email isn't coded properly and there are broken tags, it might just be destined for the spam folder — which means you won't be able to send anything to that email address in the future. Basically, you'll be penalized in both the short and long run.

Plain-text emails, on the other hand, are readable regardless of the recipients' email clients, they have higher deliverability rates, and there's a much lower risk of something "breaking" within the email.

After some A/B testing of our own, we found that **our HTML emails actually had a 25% lower open rate than our plain-text emails.** We concluded that this could be due to factors like Gmail filtering out "commercial" messages anytime an HTML or image tag is read.
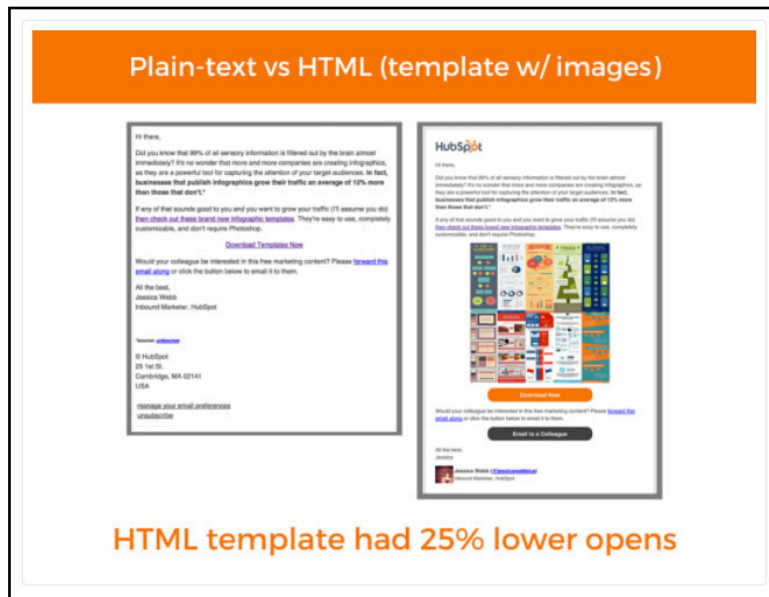
On top of shrinking your open rate, we found that **HTML emails had lower click-through rates with the inclusion of just one image.**

We recommend using plain-text emails over HTML since they're more likely to be delivered, opened, and clicked through. If you're dead-set on HTML, always include a plain-text version and double (or triple!) check for issues in your code. Most email marketing tools will let you easily create plain-text versions within their email editor.
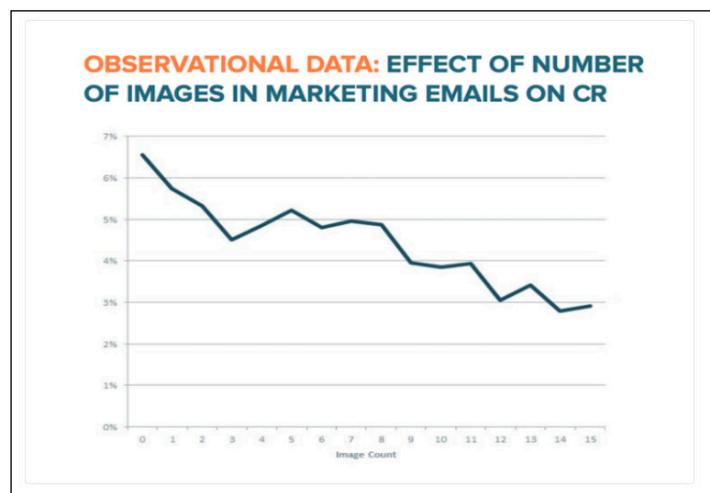
4 Types of Marketing Emails

Now that you have a list of interested recipients, it's time to step up your email game. If you're only sending an email newsletter, you're missing out on all the other different types of emails geared towards generating revenue from your leads. Plus, in some cases, you may not even need a newsletter. We'll cover this and more in this chapter.

1) Newsletters

A newsletter is an email you send regularly (say, monthly or weekly) to certain segments of your email list that helps you interact and build relationships with your leads and customers. Typically, these newsletters are summaries of recent content you created.

Not every brand *needs* a newsletter. To find out if your brand can benefit from having one, you'll need to do some research.

First, check out what's going on in your industry. Do other companies promote a newsletter? Do they advertise what readers can expect by signing up? This gives you an idea of what's in their newsletters for reference.

Next, examine your real goals for sending out a newsletter. Are you trying to increase your number of leads? Or qualify leads so they move on to the next stage of your funnel and speak with a salesperson?

A newsletter can be beneficial you're trying to generate leads and traffic to your site, maintain relationships, better qualify leads, and close more deals. If your brand's goals line up with any of those, you need to craft killer email newsletters.

2) Lead Nurturing Emails

The autoresponder series that we mentioned earlier is a perfect example of lead nurturing emails. These emails are usually part of a connected series that guides users further down your sales funnel. They're launched automatically whenever a user takes a specific action, such as downloading a content offer on a landing page or requesting a trial.

To maximize your returns with lead nurturing emails, it's important to segment your audience by behaviors so you're delivering highly targeted messages to readers at every stage of the buyer's journey.

3) Informational Emails

Similar to a newsletter, this type of email delivers an update to a large group of readers. In these emails, you could send announcements relating to:

- New content
- Product updates
- Upcoming events
- Event updates
- Co-marketing partnerships

For example, if you want readers to sign up for your webinar, your informational email should contain facts pertaining to registration windows, times and dates of the event, a short description, and how readers can sign up.

Dedicated send emails are also informational. The only difference is that they're sent to a smaller number of readers as opposed to your entire list. You would send an event update to only those subscribers who are actually registered for the webinar and have their seats reserved, for instance.

4) Transactional Emails

Once you've grown your email list a little bit, how do you engage the prospects and customers you have a relationship with? Transactional emails are automatically triggered when a reader performs a specific action, such as signing up for your newsletter, purchasing a product, and so on.

Here are three of the most frequently used examples.

Welcome Emails

Welcome emails to a new blog or newsletter subscriber or to a new customer helps

Confirmation Emails

Welcome emails to a new blog or newsletter subscriber or to a new customer helps you make a positive first impression on behalf of your brand.
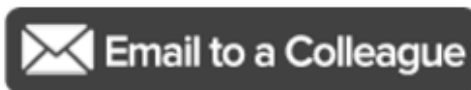
Follow-Up Emails

When people fill out and submit a form on your website, send them a follow-up email to thank them for downloading, registering, or whatever they did on your site. It's also a great opportunity to encourage sharing or forwarding with friends or colleagues, or downloading another, related piece of content.

To determine which emails your brand should use, identify the goal of your email first and work from there.

Don't be afraid to do some A/B testing to determine if your emails are in fact resonating with your audience. (More on A/B testing in the next section.) You may find that your newsletters filled with mixed content don't perform as well as your informational emails that focus on one specific topic.

CHAPTER 4:
Measuring Your Email Efforts

To gauge your email marketing efforts, you'll want to track a few important metrics. Which metrics you measure will depend on your goals. The goal of *your* company's email marketing may be very different from the goals of another company, even one like yours. In fact, it may even vary within your own company over time.

Here are a few of the most important email metrics you should consider measuring.

The Email Metrics to Measure (With Formulas)

1) Clickthrough Rate

[(# of users who clicked a link) ÷ (# of email opens)] x 100

Expressed as a percentage, CTR represents the ratio of people who clicked on one or more of your links to the total number of people who opened your email. CTR gives you immediate insight as to how engaging your content is for your readers.

2) Conversion Rate

(# of people who took a desired action) ÷ (# of emails opened)

A conversion is recorded anytime a reader takes action after following a link in your email. Similar to your CTR, it's measured as a percentage. So if the goal of your email is to get readers to sign up for your next webinar, and 300 readers out of 10,000 do actually sign up, then your conversion rate would be 3%.

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3) Bounce Rate

1 – [(# of emails delivered) ÷ (# of emails sent)]

An email bounce happens anytime an email cannot be delivered. These bounces are distinguished as "hard" or "soft", depending on the circumstances.

> **A hard bounce** is due to inactive, closed, or incorrect email addresses. This is a common problem with purchased lists. Hard bounces prevent the email from being delivered in the future.
>
> **A soft bounce** is less serious and not as permanent; it happens when your recipient has a full inbox or their email server is down, for example.

When this occurs you have two options: Wait to see if the provider resolves the issue and delivers your message, or re-send your message to any addresses marked with a soft bounce.

5,119
Sent

98.3%
5,031
Delivered

4) List Growth Rate

([(# of new subscribers) – (# of unsubscribes + email/spam complaints)]
÷ Total # of email addresses on your list]) x 100

As we mentioned earlier, growing your list is a top priority. To track your efforts, you'll need to pay attention to the rate at which your email list is growing.

Your email marketing database will naturally degrade by [about 22.5% each year](#) as people switch jobs, abandon old email address, and unsubscribe, which makes growing your list and paying attention to this metric even more crucial. Unless you're refreshing your contacts database with fresh leads every year, your marketing strategy will be based on a dying asset.

5) Email Sharing/Forwarding Rate

(# of people who click share/forward links) ÷ (# of email opens)

These important figures represent the percentage of readers who clicked on a "share this" button or a "forward to a friend" link. In both cases, your email recipients are spreading your brand's message to help you generate new leads. Growth-focused brands and those hoping to create evangelists must improve both of these numbers for success.

6) ROI (Return on Investment)

[[($ in additional sales made) – ($ invested in the campaign)] ÷ ($ invested in the campaign)] * 100

The ROI for email marketing is no different than what you're already used to: It's your total revenue divided by your total spend. The formula above is the most basic formula to calculate ROI, but there are actually several ways to approach it. Depending on your type of business, you might prefer a different one.

If you haven't yet, set up an SLA system (a.k.a. a sales and marketing Service-Level Agreement), whereby you assign different values to various types of leads based on their likelihood to generate revenue for your company.

How many of each of these types of leads did you generate via email marketing? How does this translate to potential revenue? Actual revenue? These are the types of metrics that will help you show your boss and your sales team how valuable email marketing is as a channel that drives real, tangible results.

Now you'll have an email marketing ROI which you can then use to show your boss how effective your strategy is. You should be able to find a direct correlation between your email marketing and your positive sales numbers right there in black and white.

A/B Testing Emails

Once you've built an email list of at least 1,000 subscribers, you can start A/B testing. A/B testing emails means sending two slightly different emails to your readers (an A version and a B version) to see which one garners more engagement.
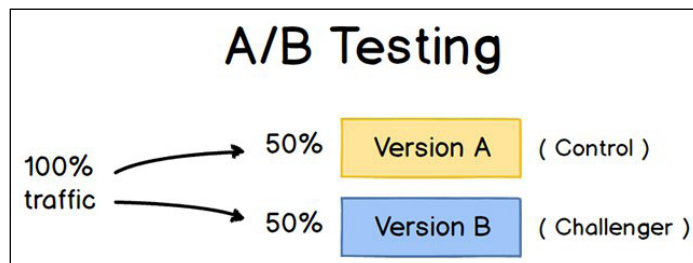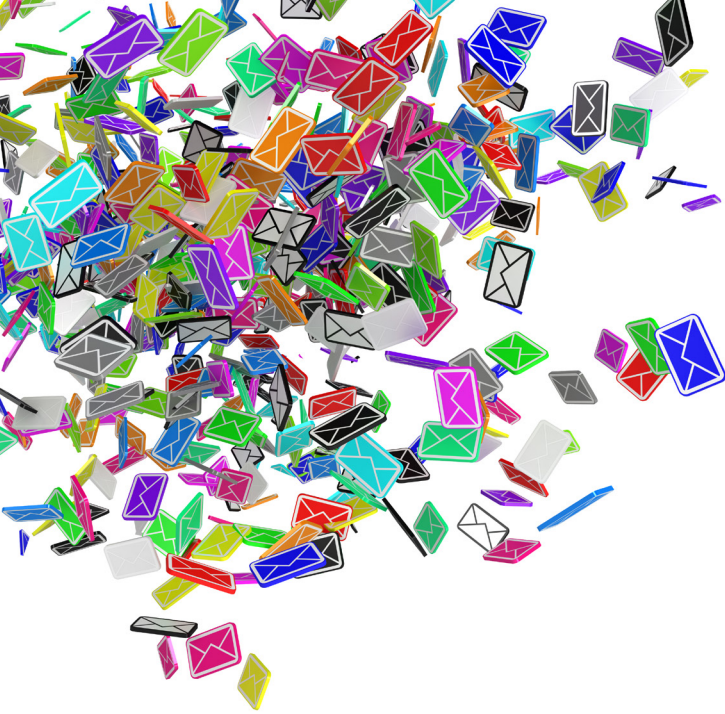

Image Credit: Conversion XL

To perform an A/B test, follow the checklist in this HubSpot blog post, outlined here.

Your A/B Testing Checklist:

☐ Pick one variable to test.

☐ Choose your goal.

☐ Set up your "control" and your "challenger."

☐ Split your email list equally and randomly.

☐ Determine your sample size.
(Click here for help on this.)

☐ Decide how significant your results have to be.

☐ Split your email list equally and randomly.
(Click here for help on this.)

☐ Use an A/B testing tool like HubSpot's to test both versions simultaneously.

☐ Run the test long enough to get substantial results.

☐ Use our A/B testing calculator to measure the statistical significance of your results.

Determine what you should be testing first based on the metrics we talked about in Chapter 3. For example, if you're fighting low open rates, your subject lines could be at fault. So your first order of business should be A/B testing subject lines. If you're dealing with a low CTR, A/B test a different CTA or swap out a link for a button. By looking at those metrics beforehand, you can quickly see what's working and what needs additional testing.

A/B testing may seem like a step you can skip, but it's the easiest way to improve your email marketing and ultimately help you achieve a positive ROI

CONCLUSION

All right, folks. Now it's time for you to start sending and some emails.

With the basics of email marketing now under your belt, it's time to take advantage of email – one of your brand's most powerful marketing tools. Follow the tips in this ebook and you'll find that you don't need to be a seasoned email marketing expert to see a positive ROI in a short amount of time.

To get started, work on building your email list so you can eventually nurture and develop an audience that's highly engaged and interested in what you have to offer. Then, figure out how to segment your list as soon as possible so you can deliver automated messages that are specifically suited to your readers' needs depending on where they are in your sales funnel.

Monitor the important metrics we covered to gauge how well your emails and offers are resonating with your audience. If you find any glaring issues, craft a way to A/B test your options to improve your rates.

By the time you've completed all of this, you'll have a solid foundation of email marketing to build all of your successful campaigns on. Good luck!
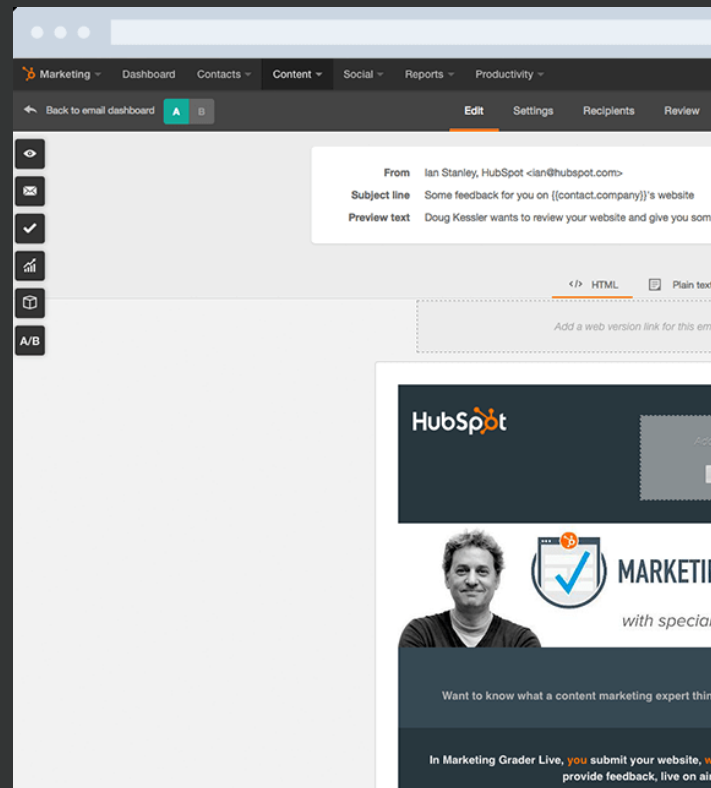
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✓ Personalize emails to get more opens and clickthroughs

✓ Optimize email campaigns with A/B tests and analytics

✓ Works seamlessly with HubSpot's blogging, landing pages, lead mangement, and other tools

✓ Minutes to learn, not months

HubSpot's email marketing software helps you attract new subscribers and grow your list, and create beautiful emails that don't require help from design or IT.

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