

A woman with long, wavy brown hair and black-rimmed glasses is looking down at a laptop. She is wearing a black leather jacket over a mustard-colored turtleneck sweater. Her right hand is on the laptop keyboard, and her left hand is resting on the desk. The background is a blurred office setting.

# Getting Started with Email Marketing Automation



# Introduction

We all know the phrase “content is king.” Inbound content strategy continues to dominate the marketing landscape. Your customers want valuable, personalized content, and you need to be able to serve it to them regularly in order to remain relevant and top-of-mind. If you’re not able to maintain a consistent stream of relevant, varied content, your customers are likely to go to competitors who offer them the information they’re looking for.

When it comes to all the different aspects of running a business and growing sales, it simply isn’t possible to serve the volume of content at the level of personalization each of your customers expects. By effectively leveraging email marketing automation, you can consistently deploy content to your individual target audiences.

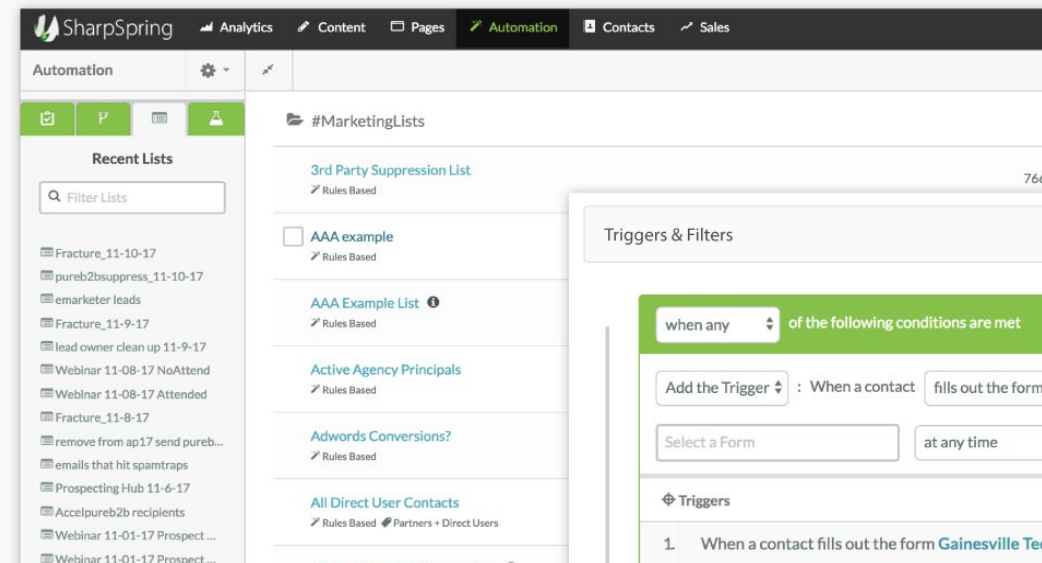


# What is marketing automation?

Marketing automation refers to technology that automatically serves content to target audiences. Most automation tools do this through digital workflows focused on a specific channel. Sophisticated marketing automation will place prospects into specific workflows based on actions, helping your sales and marketing team gain a clear understanding of how your audience engages with your brand.

Marketing automation operates on a “trigger and action” framework. In essence, a prospect does something to engage with your brand, which triggers an automated response from your brand. For example, let’s say a prospect downloads a white paper from your site. This is a pretty common trigger in inbound marketing, which usually results in the prospect receiving an email or follow-up call.

Automation methodology can get pretty sophisticated—for instance, let’s go back to the prospect who downloaded



a white paper as a trigger, and receives an email as the response to that trigger. Based on how they engage with that email, your automation workflows can branch out accordingly. If they open it and click through to your site, they’re a “hotter” lead who is more likely to benefit from decision-level sales material or promotions. If they open the email and don’t click through, they might benefit more from additional awareness and consideration level content. If you send them multiple emails that don’t get opened, it might make sense to put them into a more periodic awareness-based drip so that you remain present without annoying them.

# What type of automation makes sense for my business?

While marketing automation can be employed for social media, web-based chat, and even direct mail, email marketing is the most commonly automated marketing channel. It makes sense to invest marketing automation efforts into email marketing—it's generally pretty easy and cost-effective to personalize, deploy, and monitor email campaigns.

In addition to being simple, email marketing automation pays off. A recent study by McKinsey & Company found that email is about 40x more effective for customer acquisition and conversion when compared to Facebook and Twitter. Both B2B and B2C customers expect email outreach from brands, and automated emails generally see a 119% higher click rate than manually-sent email blasts.

Email automation that nurtures potential customers who have engaged with your brand (through a sign-up form, previous purchase, or other outreach) can take them from consideration to conversion. By automating this customer journey, minimal human effort is needed until a potential buyer needs assistance or is ready to make a purchase, saving you and your team time and money.



# How do I build an email marketing strategy?

Email automation doesn't exist in isolation from your other marketing efforts across various channels. To start building an automated email campaign, there are a few key steps you need to take:

## 1. Identify your target audience.

You need to know who you're trying to reach, what their mindset might be, and pain points they might be experiencing. If you understand who you're trying to reach and what problems they're trying to solve, you can more effectively tailor email content to address those needs.

Be sure to identify additional questions and considerations that could impact their decision down the road. Also, be sure to consider the various personas who might be interested in your product. Are there multiple groups who might be interested in your product? How are their needs different, and how does your product address their varying concerns?



## 2. Develop valuable content.

You need to give your audience a reason to open an email. In most situations, coming straight out of the gate asking for a sale can make you look pushy, resulting in prospects unsubscribing from your emails, or worse, landing your carefully crafted emails in a spam filter. When you're mapping out content, be sure to create a variety of content that addresses different customer needs at various stages of the customer journey.



Fortunately, leveraging email marketing doesn't mean you have to create new content from scratch. Consider email as an outlet for your overall content marketing strategy, and leverage blogs, videos, resources, and newsletters you've already published as part of your automated email campaign. In fact, a study by The Lenskold and Pedowitz Groups found that automated messages help marketers repurpose 61% more content than ad hoc messages, meaning that content you create for your website or blog is working more than twice as hard when you employ it in your email automation efforts.

### 3. Identify the entry point to your email campaign.

We know that automated drip campaigns need a trigger in order to begin, so carefully consider how your prospects are going to pull that trigger. Have they filled out a contact form on your site, downloaded a resource, or clicked on a "subscribe" button in order to get a discount code? Knowing the initial trigger of the campaign can help you ensure that you're sending content relevant to that particular customer at their purchase decision-making stage.

For instance, someone who has downloaded a white paper or other resource is likely in the early awareness stage, at the

top of your sales funnel. They will most likely be just starting out their research before making a purchase and need additional blogs, videos, or other educational content to help their decision making. On the other hand, someone who has signed up for an email list in order to unlock a discount code is much more ready to make a purchase. They'll benefit more from content about:

- Product updates
- Complementary products
- Other promotions to increase brand loyalty

### 4. Identify your ultimate CTA.

When thinking about your email campaign, consider what you want buyers to do when they reach the end of the drip. Of course, your goal as a marketer is to drive conversions and purchases, but how are you doing that?

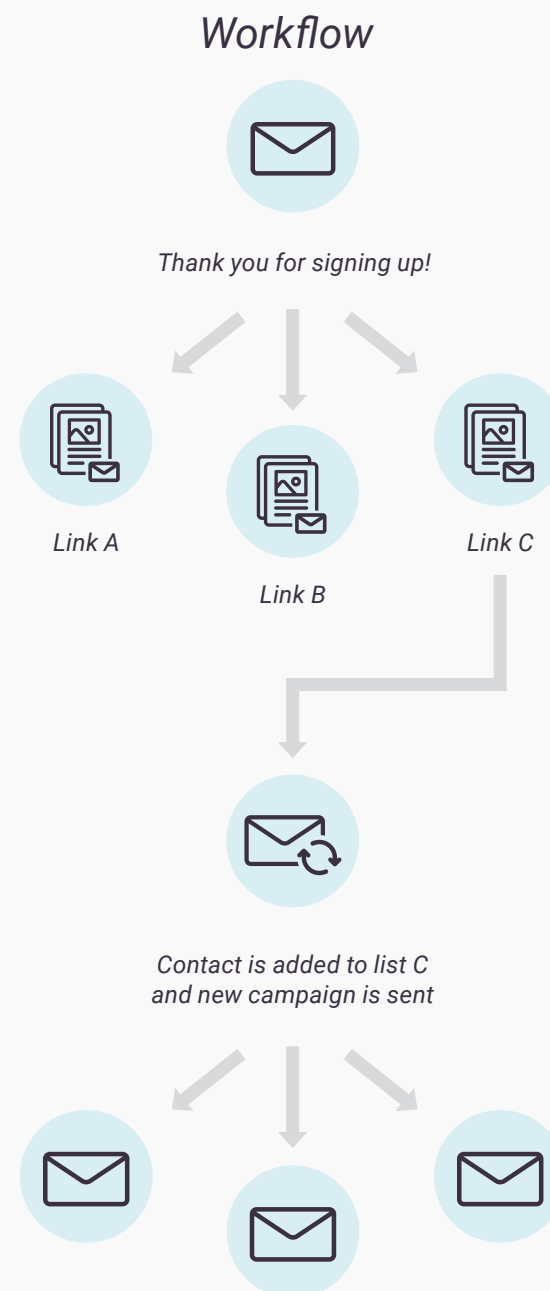
At the end of your drip campaign, your potential buyers should have a clear idea of what comes next. They've read your content, they're learning about your product and how you can help solve their pain points. At the end of the drip, are they ready to make a direct purchase? Or does your sales process dictate a consultation or demo of your product?



## 5. Start mapping out your workflows

This is the most time-consuming part of email marketing automation. You've done the foundational work of identifying whom you're speaking to, what content you're able to deliver them, and where you want them to end up. Now you're ready to start mapping your email marketing campaign to your customer journey.

The “customer journey” isn't just a marketing buzzword—it refers to the decision-making process a potential customer goes through while considering your product, and the steps you take to help them reach that decision. There are multiple approaches and various levels of sophistication you can build into your workflows, but it's easiest to start by mapping your content to this journey. Consider where each piece of content will be most useful in the buyer decision process, and map out touchpoints that help them reach your final call to action (CTA) from your initial trigger.

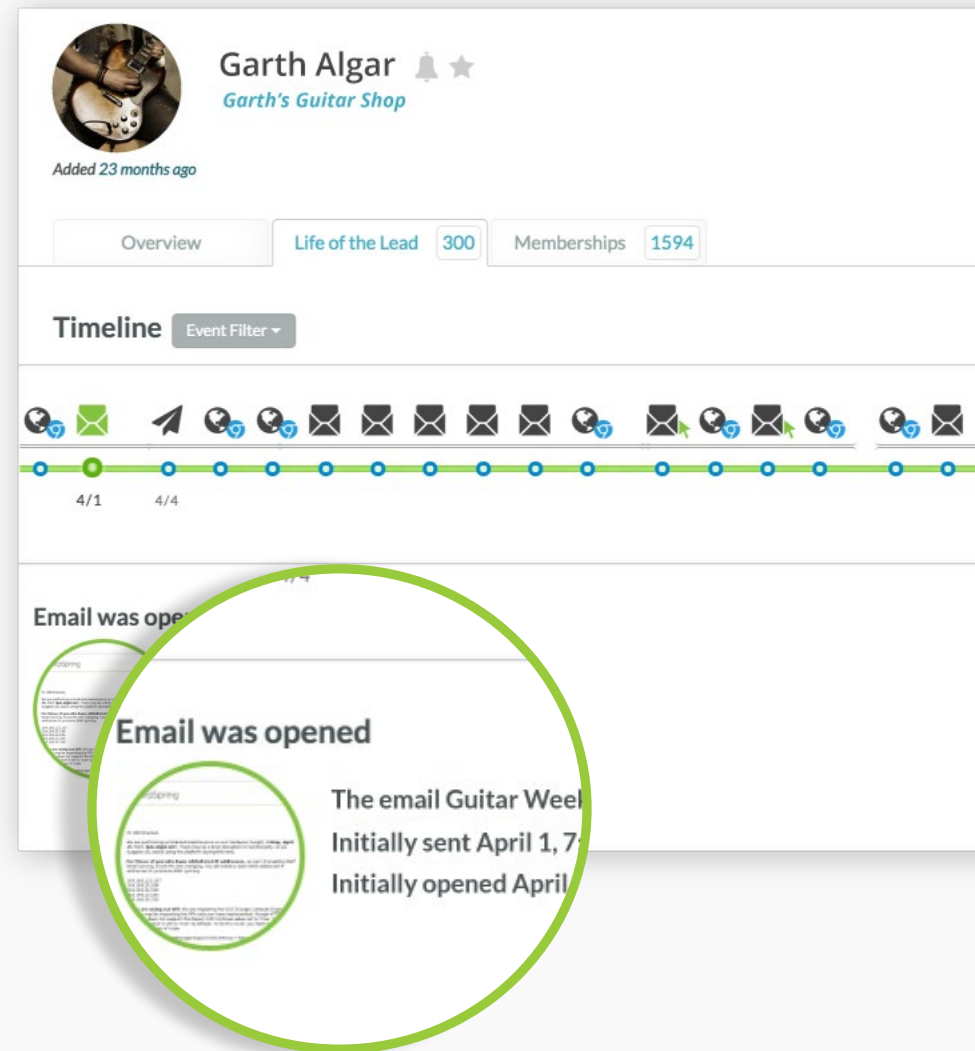


# What are the key performance indicators (KPIs) for email marketing automation?

Once you've built and launched your email marketing campaign, you can't simply "set it and forget it." You need to measure performance to understand whether or not your efforts are actually working and to get a clear picture of how users are engaging with your content. There are a few core metrics that help give insight into email performance.

## 1. Open Rate

Open rate is the number of times your email has been opened. This is a pretty obvious starting point for measuring the performance of your email automation efforts. If your emails aren't getting opened, they're obviously not going to have much impact on your marketing efforts and conversions. If your open rate is low, consider changing your subject line and pre-header text (sometimes called preview text). These are the first things a user will see when scanning their inbox and will have the biggest impact on the open rate. Be sure to also look independently at desktop and mobile open rates to understand where most users are looking at your messages.





## 2. Click-Through Rate (CTR)

Click-through rate, abbreviated frequently as CTR, refers to the number of times users click on an element in your email. This is often broken out into the various clickable items in your email. For instance, you might have a link, a CTA button, and a clickable logo in the header of your email that takes users to a landing page or your home page. It's key to understand not only how frequently your users are clicking, but also where they're clicking so that you can control the user journey.

Be sure to not only look at CTR as a metric but also to look at unique clicks. Unique clicks refer to the number of individuals who have clicked through, while your overall CTR includes repeat clicks. Both are useful metrics, as repeat clicks indicate a user has come back and clicked on your email multiple times and are highly interested in your content.

## 3. Bounce Rates

The bounce rate refers to the number of emails that were returned undeliverable because of an invalid or deactivated email address. It's critical to understand the quality of your lead database and maintain a low bounce rate. A high bounce rate can hurt your sender reputation with email services,

resulting in more of your messages ending up in spam filters. Plus, depending on the marketing automation tools you use, you might have to pay to store contacts by volume. Not monitoring your bounce rate could mean you're paying to store bad information that can't be used.

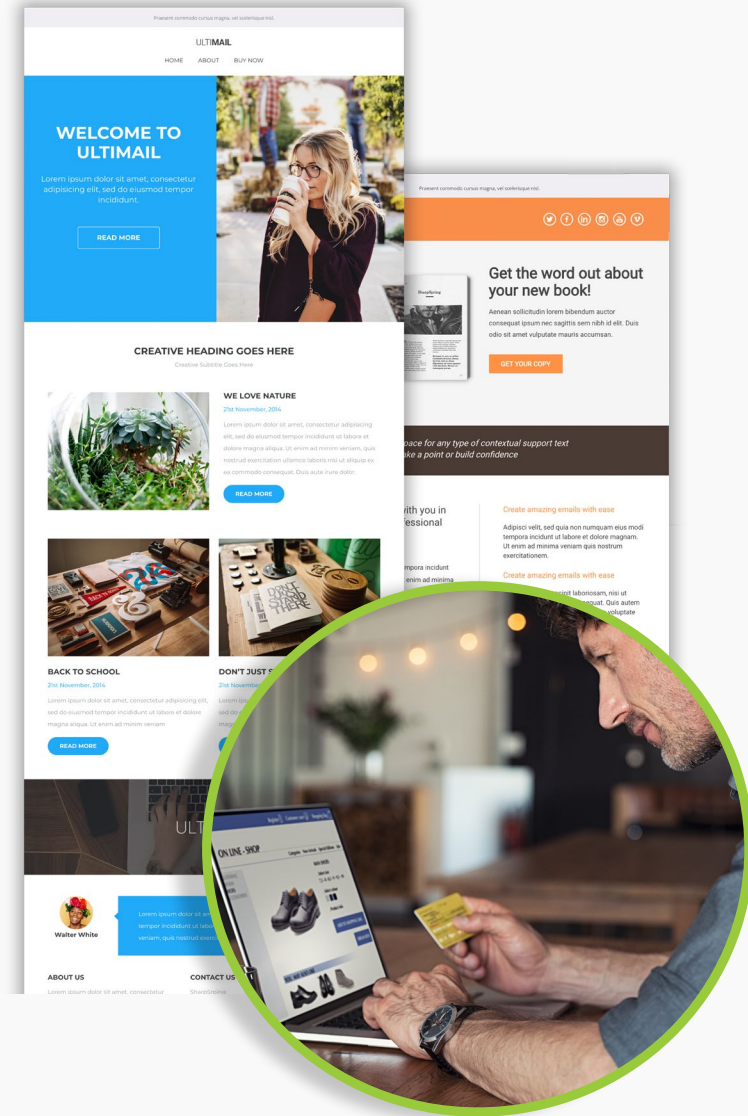
## 4. Unsubscribe Rates & Spam Flags

If your messages are resulting in a high rate of unsubscribes or ending up flagged as spam, that's an indicator that something is wrong. A high unsubscribe rate could indicate that you're either sending messages too frequently or that the content in your messages is in some way putting off customers. When measuring the performance of your email campaign, look at unsubscribe rates across the life of the campaign. If one message has an abnormally high unsubscribe rate compared to the rest of your campaign, remove it from the drip. If all of the messages you're sending have an equally high unsubscribe rate, it might be worth pausing the campaign and rebuilding it.

Meanwhile, spam flags are an even worse indicator that your content isn't being presented in a valuable way. High spam rates indicate that recipients are manually flagging your messages as spam, or filters are automatically picking them up and users are never seeing them. Having high spam rates can also damage your sender reputation, resulting in your future messages also ending up in spam and making your email efforts wasted.

## 💰 5. Conversion Rate

Your conversion rate is the number of email subscribers who clicked through and ultimately made a purchase (or took the next step in your sales process). It's not enough to simply track how many users have opened your emails and clicked on your CTAs; you need to be able to map your efforts back to actual purchases. Conversion rate is the most important metric to prove ROI for campaigns focused on driving decisions (rather than simply generating brand awareness or encouraging engagement).



# What should I look for in an automation platform?

Not all marketing automation platforms are created equal. When you're ready to get started with email marketing automation, there are a few factors to consider before investing in a new technology platform:

1. How intuitive is the platform? Will it require in-depth training to get up and running?
2. Will the new platform integrate with your existing tools and systems?
3. What are the potential roadblocks to adoption? What questions and objections will your key stakeholders have when choosing a platform?
4. What's included? Does the platform have all the customization and analytics capabilities you need or will you need to add those on separately?
5. Can you collect information through your automation tool on landing pages or from form fills that add users directly into drips?
6. Does the platform function for other channels, such as social media, or is it an email tool only?
7. If there is a built-in CRM, does it have both lead scoring and visitor identification capabilities?



**Lead Score Ranges**

Specify the lead score ranges you would like to highlight. This is useful when you can only get to a limited set of leads a day.

Mark leads importance with the following ranges.

> 30      > 125

228,021      8,565

**Completeness**

Rules to measure a lead's information (e.g. address, phone, email).

Add 1 point      If a First and/or Last Name is provided.

Add 1 point      If a Company Name is provided.

# Conclusion

Email marketing is expected by modern audiences and, when done well, leads to higher conversion rates from more qualified leads than most other channels. Email marketing automation can help you deliver the high-quality content your audience expects while reducing the hours spent manually scheduling and deploying emails. Give careful consideration to who your potential customer is and their decision-making journey when mapping out your email campaigns. Be sure to constantly monitor performance to make improvements and capitalize on your efforts.

SharpSpring is a full-service marketing automation platform that can connect your sales and marketing efforts across channels to streamline and empower collaboration. If you want to take your marketing automation to the next level, reach out today to see how SharpSpring can work for you.

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