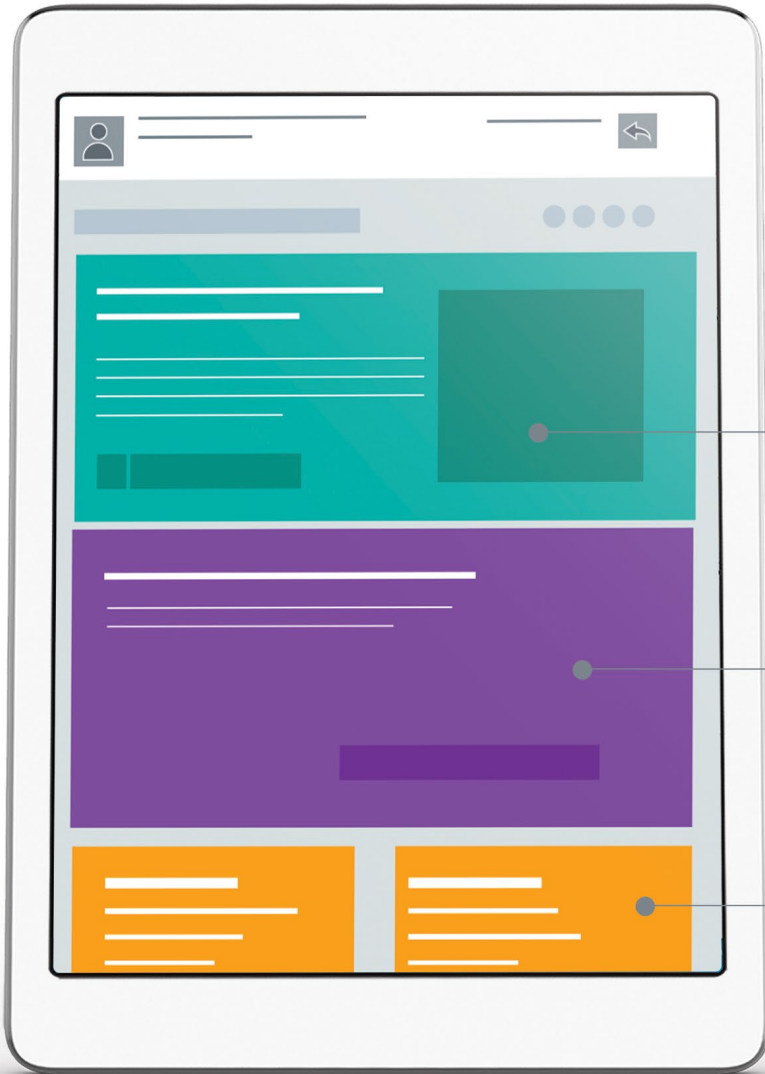


The Email Workbook

BUILD 5 EMAILS FROM BLUEPRINT TO GREATNESS



Personal Data

Dynamic Content

Predictive Content

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Introduction

In the Salesforce thought leadership piece “5 Blueprints for Building Smarter Emails,” we create a road map for constructing great email messages. Now it’s time for you to really dig in. What does your current email design look like? How well do you know your subscribers? Use this workbook to analyze your strategy and get started.



Get the e-book at:
sfdc.co/5blueprints

Instructions

Each of the questions in the following survey will be assigned one of four data categories – and a corresponding color.



General Best Practice is expressed in blue.

Best practices are proven ways to maximize your email strategy.



Personal Data is expressed in green.

Personalized content includes personal data that is unique to each user, such as their name, address, or account information.



Dynamic Content is expressed in purple.

Dynamic content is based upon more general data, like demographics and geography – based on a segment of your market.



Predictive Content is expressed in orange.

Predictive content is based upon a user's individual behavior, browsing activity, and data science.

Before we dive into email types, let's find out how well you know your subscriber.

Please check "Yes", "No", or "N/A". Record your "Yes" answers in the box below. Next to your "yesses", record the number of applicable questions you answered.

	YES	NO	N/A
Do you know your customer's email address?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their first and last name?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their birthday?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their loyalty program status?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know how they opted in to subscribe to you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know when they opted in?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their gender?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their professional title?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their industry?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their location?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their age range?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Please check “Yes”, “No”, or “N/A”. Record your “Yes” answers in the box below. Next to your “yesses”, record the number of applicable questions you answered.

	YES	NO	N/A
Do you know if they have ever opened your emails?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know where they click on your emails?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their online purchase history?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if they have ever made an in-store purchase?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if they have ever abandoned a shopping cart on your website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know their online browsing behavior?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if they're aware of future events/sales?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if they are attending your events?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if they engage you on social media?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Now let's take a look at five different types of emails.

In the next sections, we'll assess the complexity of your welcome, promotional, event registration, transactional, and cart abandonment emails.

1 WELCOME EMAILS

Make a good first impression. These emails are triggered when a person signs up as a subscriber. A good welcome series will include personalized content and a basic welcome message based upon the source through which the subscriber was acquired.

Does your program include welcome emails? Consider the following questions:

YES NO N/A

Is your welcome program a series (more than one email)?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Is your welcome email triggered and automated?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Do you personalize the subject line (or use their name in the header)?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Do you present offers based on customer profile?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Are you promoting a way to build profile information (survey or quiz)?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Do you promote your social properties?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Do you promote a mobile app?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Are you including a photo or video thumbnail based on click patterns?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Do you pull in information from the onboarding vehicle?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

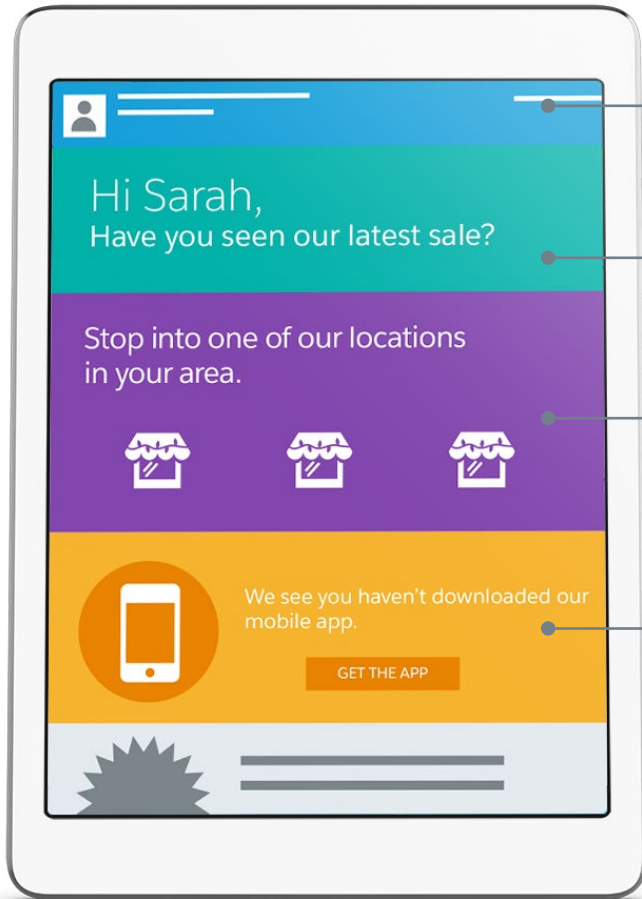
Do you present offers based on customer activity?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------

Yesses / Applicable Answers

_____ / _____

Welcome Email Example:



Include dynamic and personal data to create a strong and engaging subject line.

Add personalized messaging here.

Use dynamic content and personal data in this field to customize the message for each subscriber.

Leverage personal data with Predictive Intelligence to get your customer to opt-in to SMS or to download your mobile app.

Welcome Email Customer Example: The RealReal




A great call to action with an offer gets users shopping right away. It also suggests that you download the app, which is a good way to drive engagement when someone first subscribes.

Can't see the images? [View online](#)

The RealReal
AUTHENTICATED LUXURY CONSIGNMENT

WOMEN MEN JEWELRY & WATCHES ART SALE CONSIGN



WELCOME

Shop authenticated luxury consignment every day.
Plus, take \$25 off your first purchase.


START SHOPPING

NEW ITEMS ADDED DAILY
We'll email you when our flash sales start at **7am and 4pm PDT.**

AUTHENTICITY GUARANTEED
We inspect, professionally authenticate, and process every item.

INTERNATIONAL SHIPPING


WE SHIP GLOBALLY
We offer international shipping to over 60 countries.
[Learn more >](#)




THE REALREAL ON THE GO

DOWNLOAD OUR APP!
Shop, consign and curate a personal feed of favorites on our app.

DOWNLOAD APP



f i t p g+

REALStyle |  Download Our Apps

PRIVACY POLICY | UNSUBSCRIBE | CONTACT US

CORPORATE ADDRESS: 600 4TH ST, #001, SAN FRANCISCO, CA, 94107, USA
©2015 THE REALREAL

2 PROMOTIONAL EMAILS

These emails promote great deals, products, and content. A good promotional email series will look great across all devices, make recommendations based on personal information, and include dynamic and engaging content.

Does your program include promotional emails? Consider the following questions:

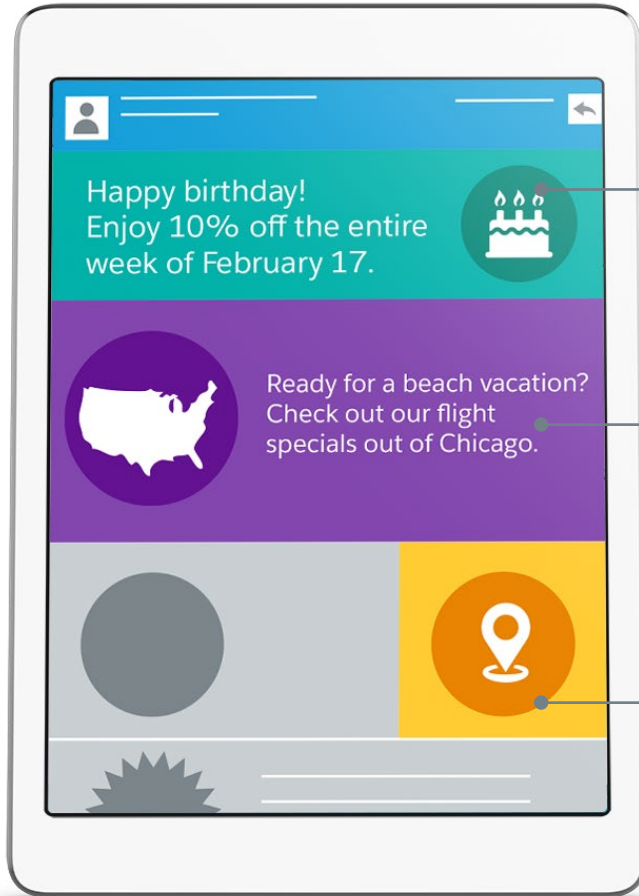
YES NO N/A

Is your content responsive for multiple device types?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you driving content specific to your customer's birthday?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you promoting based on loyalty status?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you gathering customer data through promoting contests or events?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you featuring products based on seasonal trends?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you tailoring content to individual customers based on their location?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you leveraging Predictive Intelligence from your website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you tying your promotional email campaign to other channels?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
· Social or mobile?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
· In-store experience (possibly through QR code)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Promotional Email Example:



Include information unique to them here.

Message based on a specific segment, such as location, here.

Example:

If your subscriber is in northern Indiana, send a relevant message for their area.

Here's your opportunity to use behavioral data.

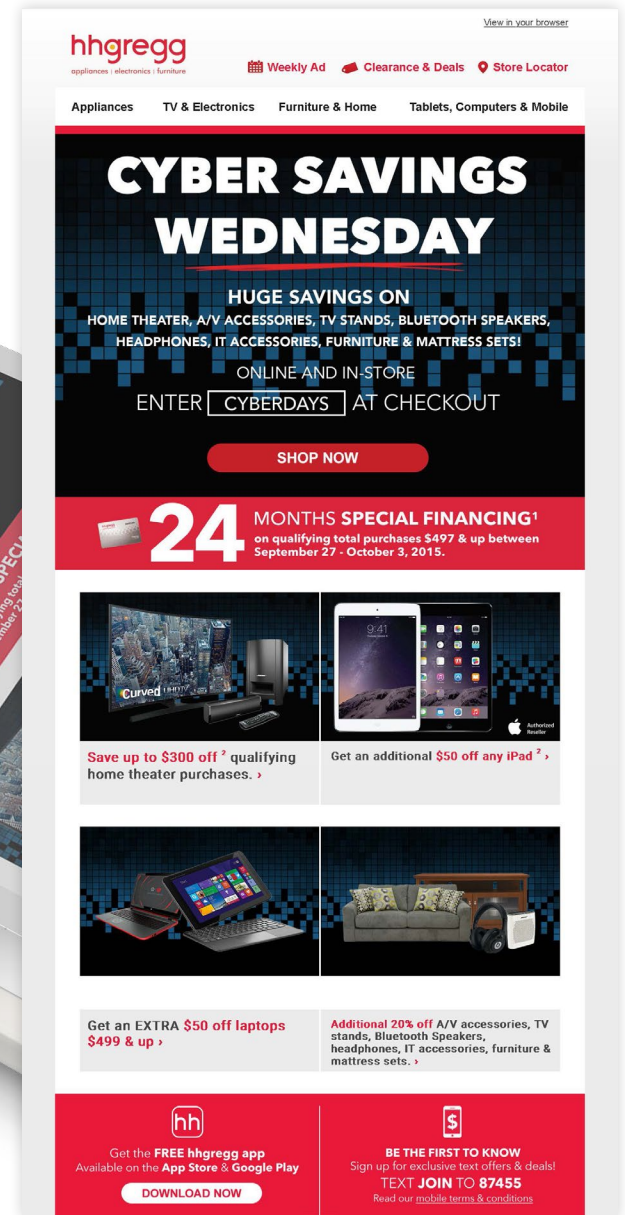
Example:

"Did you enjoy Hawaii? Based on your previous travels, check out these top ten affordable beach vacations."

Promotional Email Customer Example: hhgregg



The user knows exactly what is being promoted with text, image, and a strong call to action. Also, hhgregg clearly calls out other promotions such as special financing, featured discounts, and opt-in texting for a cross-channel experience.



3 EVENT REGISTRATION EMAILS

These emails confirm a person’s registration for an event and give them important logistical information about attending. A great event registration email series includes real-time information and might interface with an event mobile app.

Does your program include event registration emails? Consider the following questions:

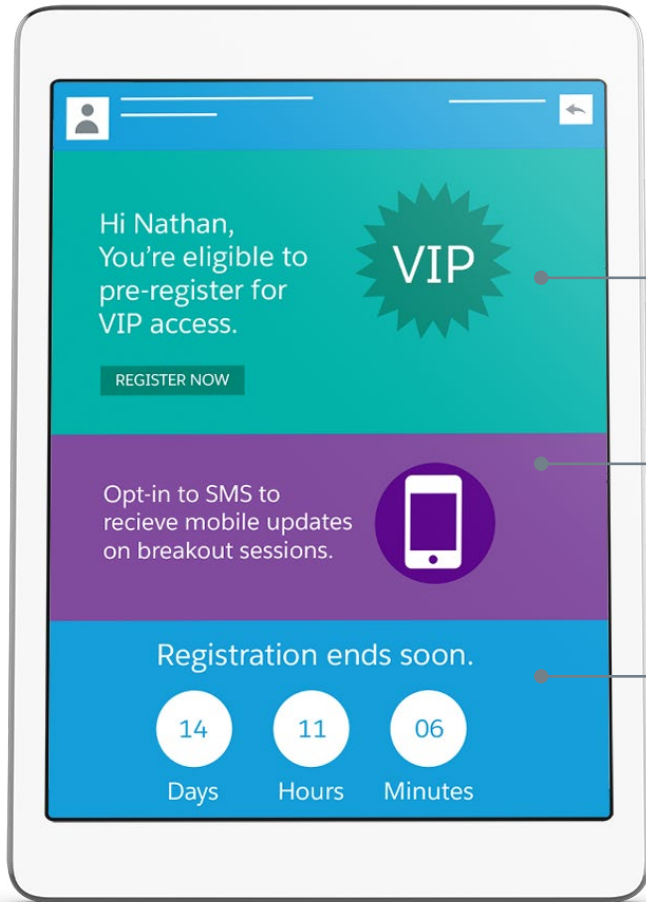
YES NO N/A

Do you promote a post-event survey?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you promote registration to upcoming events?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you customize registration invitations based on user profile information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a pre-event email series based on a user’s purchase history?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you send emails with live updates during the event (weather/traffic)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include travel details based on user location?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you use data to suggest sessions, dinners, or other aspects of the event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you promote event social details and your company’s social properties?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your post-event email series include next steps (videos/decks) based on sessions attended?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you offer preferred status to register for next year’s event based on individual experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you recommend sessions based on viewed sessions on your website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Event Registration Email Example:



Include personalized information here.

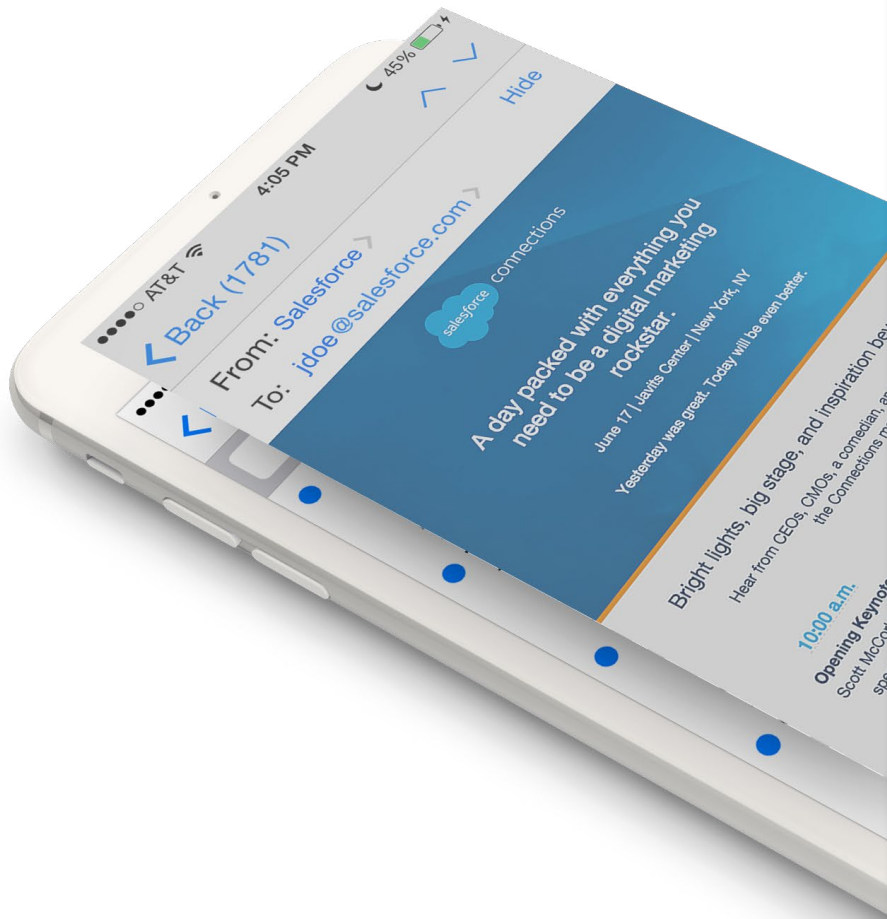
Include an opportunity for mobile opt-in in order to utilize dynamic data after registration.

Use a countdown or strong CTA to instill urgency in registering.

Example:

"Only a few days left. Register now to reserve your spot at Connections."

Event Registration Customer Example: Salesforce Connections



Strong reminder email. The day's agenda is personalized for the user – right down to the keynote sessions. Additionally, the footer encourages engagement on social channels.

salesforce connections




A day packed with everything you need to be a digital marketing rockstar.

June 17 | Javits Center | New York, NY

Yesterday was great. Today will be even better.

Bright lights, big stage, and inspiration beyond belief.

Hear from CEOs, CMOs, a comedian, and a creator — all on the Connections mainstage.

10:00 a.m. Opening Keynote Scott McCorkle and special guests	1:00 p.m. Fireside Chat Seth Meyers and Diane von Furstenberg	1:30 p.m. CMO Panel Gary Briggs, John Osborn, and Katie Bisbee
		





Do what you love. Better than ever.

Dig deep into these sessions we recommend:

- 8:00 a.m.** Registration Opens
- 8:30 a.m.** Marketing 2020: The Future in Five Years
- 2:45 p.m.** How to Make Your Emails Go Viral
- 3:45 p.m.** Social Media: What Have ADP and Michael J. Fox Foundation Learned Since 2006?

powered by:

salesforce marketing cloud

4 TRANSACTIONAL EMAILS

Whether from an online or offline purchase, this email provides a receipt for the items bought. A great transactional email will include images, recommend related products, and include social sharing calls-to-action.

Does your program include transactional emails? Consider the following questions:

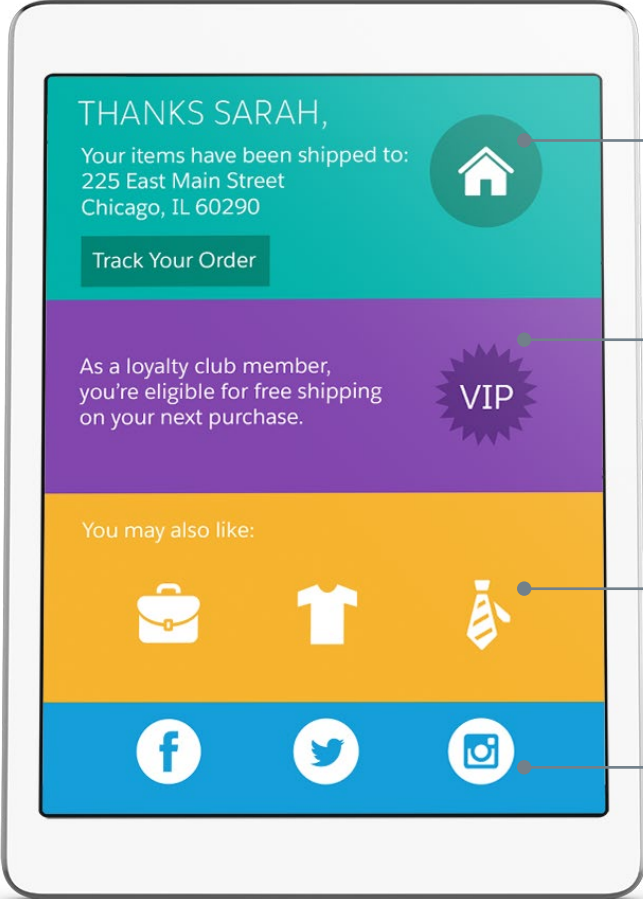
- Are you promoting a mobile tie-in?
- Do you follow up by sending informational emails (warranty info/instructional)?
- Are you emailing a receipt for purchased products or services?
- Do you follow up by sending a product review/survey request?
- Following a transaction, are you recommending products or services based on user profile?
- Are your transactional emails providing an opportunity to capture more data (product or loyalty program registration)?
- Do you include an opportunity to share socially?
- Are you including images of products or services purchased?
- Are you recommending similar products or services in your follow-up email?
- Are you recommending similar products or services based on site activity?

YES	NO	N/A
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Transactional Email Example:



Speak to an individual.

Use dynamic content to reach your best customers with special offers.

Base product recommendations on purchase history.

Drive traffic to your social channels.

Transactional Email Customer Example: Redbox



Redbox does a great job calling out what was rented with description and product image. They also invite users to sign up and text in for future promotional offers.

Text INBOX to 727272

Plus, see what's coming soon.

redbox.
MOVIES | GAMES | LOCATIONS | DEALS

ENJOY THE SHOW

This email confirms your rental. We'll email you a receipt after you return your disc. If you rented multiple discs, you'll get your receipt as soon as the last disc is returned.

RENTAL DETAILS

Renter: Sarah Smith
Date: 07/19/2015 6:58:40 PM
Card: Visa ...1234
Transaction ID: 3336443235

RENTAL LOCATION

[Kroger](#)
1234 Main Street
Fishers IN

YOU RENTED

TITLE

Paul Blart: Mall Cop 2 (Blu-Ray)

TRANSACTION

787109500

BARCODE

877109500

PRICE PER DAY

\$1.50

	Subtotal:	\$1.50
	Tax:	\$0.11
	Total Charge:	\$1.61

Card appearance may vary.

YOU COULD WIN A \$500 VISA GIFT CARD.*

START BY JOINING REDBOX PLAY PASS.

(You'll also start earning points for all your rentals.)

play pass GO >

COMING SOON >

WILDFERRELLS COMEDY

DANCE

BLU-RAY

BLU-RAY

DANNY COLLINS

BLU-RAY

GET THE TEXT

Join our Text Club for deals! Text ALERTS to 727272.†

RESERVE ON THE GO

Get the free Redbox app for your smartphone.

5 CART ABANDONMENT EMAILS

Online shoppers abandoning carts is a natural part of the buying process, but it's also a high-value behavior that's worthy of a response. A great cart abandonment email will include images of the specific products left in the cart, highlight payment options, and promote current sales or free shipping offers.

Does your program include cart abandonment emails? Consider the following questions:

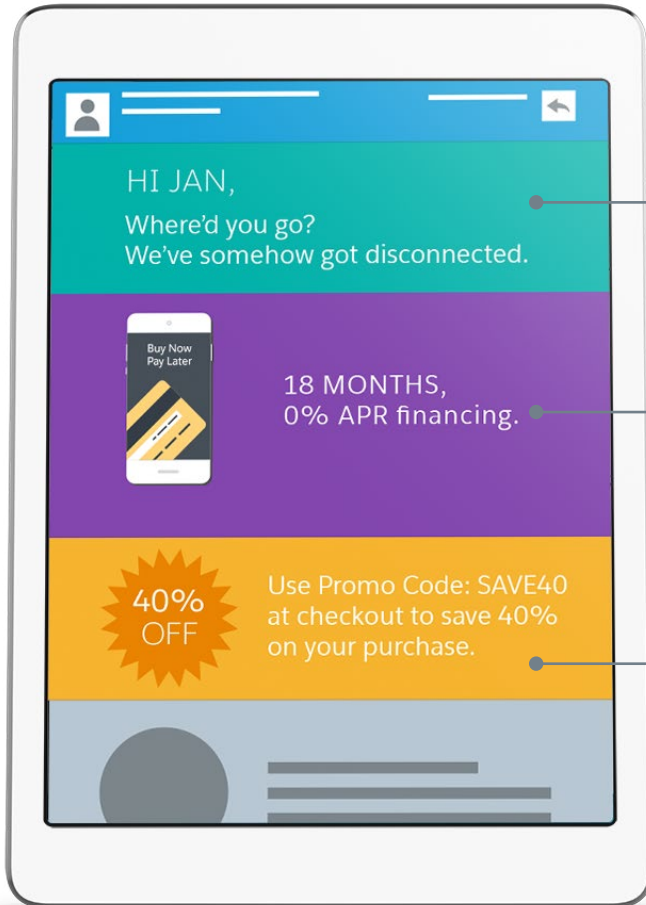
YES NO N/A

Do you include images of products in cart?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your cart abandonment email address the user by name?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include payment options or return policies based on loyalty level?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include current promotions available in their area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you recommend alternative products based on collective buyer data?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include new promotions specific to drive individual cart completion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you send your emails based on a specific cart value?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include a detailed cart list of products or services abandoned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you include details of the products viewed (reviews or description)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you recommend alternative products based on user site activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yesses Applicable Answers

_____ / _____

Cart Abandonment Email Example:



Always use your customer's name.

Offer payment options here.

Example:

"Have you seen our 18 month same-as-cash financing offers? Get the latest styles today, and pay later."


Based on user history, offer a coupon they may not have seen to close the sale.

Example:

"We noticed you didn't apply our 40% off coupon before you left. In case you haven't seen it, here it is."

Cart Abandonment Customer Example: Fanatics



Score Our NEW App! Download Now



College | NFL | MLB | NHL | NBA | MORE

Hi Sports Fan,

Did you know you left some items in your cart? We're here to help!






For your convenience, the items left in your shopping cart are below for quick reference if you are still interested.

[Continue Shopping](#)

Item	Price	Total
 Indianapolis Colts Nike Women's Stadium Fan Top - White Quantity: 1 Product #:1982276	\$41.95	\$41.95
 Indianapolis Colts Cameo Hooded Long Sleeve T-Shirt - Black Quantity: 1 Product #:2034755	\$44.95	\$44.95
Cart Total:		\$86.90

Your purchase with Fanatics is covered by our industry-leading [365-Day Hassle Free Return Policy](#), and your experience with us is backed by an Unconditional Satisfaction Guarantee. We look forward to the opportunity to serve you for all of your sports fan gear needs.

Sincerely,
Customer Experience Team
Fanatics



Copyright 2015 Fanatics Retail Group, Inc.
All Rights Reserved.
5245 Commonwealth Ave.
Jacksonville, Florida 32254

This email was sent from a notification only address.
Please do not reply to this message as the mailbox is unattended.





Fanatics displays an attractive image of the product left in the cart. Note the large call to action and the reminder of the return policy to drive conversion.

Scoring

Count the number of “yesses” that you checked on eligible questions in the previous pages, and record them here for a final breakdown of your email marketing strategy:

	Yesses	Applicable Answers
Customer information (5).....	___ /	___
Welcome email (7).....	___ /	___
Promotional email (10).....	___ /	___
Event registration email (13).....	___ /	___
Transactional email (16).....	___ /	___
Cart abandonment email (19).....	___ /	___
Total points	<div style="border: 1px solid black; padding: 2px; display: inline-block;">___ / ___</div>	
Percent score	<div style="border: 1px solid black; padding: 2px; display: inline-block;">___ %</div>	

What level of marketer are you?

90% or above		<h3>Email Marketing Genius</h3> <p>Incredible. For a deeper dive on your email marketing strategy, check out our Predictive Intelligence demo video.</p>	WATCH NOW
80% to 89%		<h3>Email Marketing Rock Star</h3> <p>Great job. Put Predictive Intelligence to work to maximize your messaging. Here are some details for more information.</p>	GET THE E-BOOK
70% to 79%		<h3>Email Marketing Veteran</h3> <p>Well done. Take your email strategy to the next step by creating dynamic segmented messaging. Check out this e-book.</p>	GET THE E-BOOK
69% or less		<h3>Email Marketing Rookie of the Year</h3> <p>You have a great start, so check out the following e-book on making the most of personalizing your emails.</p>	GET THE E-BOOK



Conclusion

What parts of your existing strategy are really working? How many opportunities still exist for your brand? Salesforce Marketing Cloud email platform helps you take your marketing strategy to the next level with personal, dynamic, and predictive content – to send the most relevant messages and drive conversions. **Make the most of your email marketing strategy.**

See Marketing Cloud email in action.

marketingcloud.com/watch-demo-email

Or to speak to an expert, call us at 1.866.362.4538.

