

MASTERCLASS WORKBOOK

AUTHENTIC AUTOMATION



*Do's & Don'ts for Creating Effective
Conversations in the Inbox*



Moments that Made You Say “AHHHH!”

Key Concepts	AH! Moments <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____
Action Items: <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____	



Customer Journey Map Template

PROCESS	Awareness	Engage	Engage	Engage	Convert
CUSTOMER GOALS					
TOUCHPOINTS & EMOTIONAL RESPONSE					
CUSTOMER THOUGHTS					
OVERALL CUSTOMER EXPERIENCE	<div><div>😊</div><div>😐</div><div>😞</div></div>				
Recommendations					
IDEAS TO IMPROVE					



Creating Conversations in the Inbox

A Best Practice Checklist

- ☐ Your subject line should be 6-70 words
- ☐ Use phrases like "act now," "you deserve this," or "don't miss out" to create a sense of urgency
- ☐ Use preview text to give your subscribers a solid idea of what's inside the email
- ☐ Short and brief is best
- ☐ Use "I" and "you"
- ☐ Keep it conversational
- ☐ Avoid industry jargon
- ☐ Talk about benefits instead of features
- ☐ Break up your copy with lots of white space: huge blocks of text will send readers running for the back button
- ☐ Use bulleted lists, short sentences and questions as needed to get your point across
- ☐ Always lead with your reader, not you
- ☐ Make them curious to read more
- ☐ Keep your opening lines short
- ☐ Don't worry about grammar - it only matters if it matters
- ☐ Be specific - create word pictures
- ☐ Use pop culture references your One Reader would know and care about
- ☐ Tag subscribers based on what they click/ do
- ☐ Give each email one job to do
- ☐ Use images to support messages (not the other way around)





Campaign Planning

Below is a guide for planning an email campaign. For this example, we're using a *welcome series*. Based on your campaign goals, what conversation are you starting that will allow subscribers to know, like, and trust you?

Campaign Name	Welcome Series
Goal	<i>What is the goal of this email series? (introduction, sales, etc.)</i>
Audience	<i>Who is your target audience for this campaign?</i>
Overview	<i>Give a detailed description of the campaign strategy.</i>
Email Template	<i>Describe the type of email you are sending.</i>
Total # of emails	<i>How many emails do you need to convey your message?</i>
Campaign Trigger	<i>How does someone get on the campaign?</i>
Campaign Exit	<i>What triggers someone to no longer receive emails from this campaign?</i>

Sample Campaign Draft

Include a page break between emails to keep each message focused!

Email

Timing from the last email

From: [SENDER'S NAME]

Subject: [CURIOSITY CREATOR]

Email Body Structure:

GREETING	<i>Dear [firstname],</i>
INTRO	<i>{opening/teaser copy - sets the tone for the email}</i>
BODY	<i>{the core of your message} {add photos/images if necessary}</i>
CALL TO ACTION	<i>{offer or what you want someone to do next}</i>
CLOSING	<i>{include email signature lines from the sender}</i>
P.S.	<i>{BTW...this is a great place to offer another CTA or reinforce this email's offer}</i>





Campaign Planning

Now, it's your turn! What type of campaign will be most useful to you right now?

Campaign Name	
Goal	
Audience	
Overview	
Email Template	
Total # of emails	
Campaign Trigger	
Campaign Exit	

Campaign Draft

Remember to include a page break between emails to keep each message focused.

Email

Timing from the last email

From: [SENDER'S NAME]

Subject: [CURIOSITY CREATOR]

Email Body Structure:

GREETING	
INTRO	
BODY	
CALL TO ACTION	
CLOSING	
P.S.	





Sample Campaign Outline

The general structure of an email campaign outline should be:

DAY - EMAIL TYPE - GENERAL MESSAGE/FOCUS

SAMPLE: Welcome Series

- Day 1 - Welcome - Introduction
- Day 2 - Additional Resources - Links to your blog/resources
- Day 3 - "What did you think?"
- Day 5 - Quick Tip or Takeaway - Related to your service and/or lead magnet
- Day 7 - "I'm here if you need me!" - Offer CTA

SAMPLE: Post-purchase Series

- Day 1: "Thank you!" - Confirmation of purchase
- Day 2: Shipping & Delivery Info
- Day 4: Support
- Day 7: "How did we do?" - Set a trigger to ask for a testimonial and Google Review when you have a satisfied customer.

SAMPLE: Lead Nurturing Series

- Day 1: Lead Magnet Delivery
- Day 2: "What did you think?"
- Day 3: Additional Resources - Links to your blog/resources
- Day 5 - Quick Tip or Takeaway - Related to your service and/or lead magnet
- Day 7 - Offer CTA
- Day 10: Bonus Resource/Lead Magnet

SAMPLE: Re-engagement Series

- Day 1: "Is everything okay?"
- Day 3: "Is this still [name]'s email?"
- Day 5: "Hey [name], are you stuck?"
- Day 7: "[Name], can you help me?" - One question survey

SAMPLE: Win Back Series

- Day 1: "I want you back!"
- Day 2: "I've got a gift for you (Ssshh...it's a surprise!)"
- Day 3: "Am I still welcome in your inbox?"
- Day 5: "Should I unsubscribe you?"
- Day 7: "Is this goodbye?" -Finality in this only applies if you are removing them and never commuting again





Tracking Results

Optimization Audit

Once you begin tracking your results, you may be curious about what to audit and how to optimize. Let's talk about these audit points:

- ☐ Archive contact lists and segments that are not being used Identify new audience segments
- ☐ Check your lead scoring rules
- ☐ Check custom field data
- ☐ Form auto-responders & tags are working
- ☐ Check your drip email KPIs (open rates, CTRs, and unsubscribes)
- ☐ Review email content for relevance
- ☐ Content links are active and correct
- ☐ Update your reports

Drip Campaign Reporting

When it comes to measuring your results, you want to know where you are starting so start by tracking results and set your benchmarks by going back and tracking results for the past 12 months.

Do this by using a [Tracking Report](#) in Google Sheets.

As you do this, you can see what your current results are and start focusing on improving those results over time.

