

Email campaign checklist

A quick guide on how to execute an email campaign

Step 1

Set out clear objectives for your campaign

- What do you want to achieve?
- How are you going to achieve it?
- How will you measure success?

Step 2

Your customers

- Determine which customer groups you want to email, ie those most likely to convert to sales
- Ensure that either the customers on your list have given their consent to be emailed or the 'soft opt-in' applies. This is a legal requirement, and without customers' agreement ('opt-in') the email will be considered as SPAM (Sending Persistently Annoying Email).

The Information Commissioner's website www.ico.gov.uk provides useful information and guidance notes on direct marketing and the Data Protection Act.

Step 3

Timing and frequency of the campaign

Once you have clearly identified your customers for your campaign, you need to decide:

- the best time of day to send your email out
- when you'll make the follow-up phone calls
- a reasonable email quantity for you to follow-up on.

Step 4

Create your email

- **The 'To' section**
 - Insert your customer's email address.
 - If you send the same email to several recipients, ensure all email addresses are not shown for privacy reasons. You can either create a group send option or insert all email addresses in the Bcc section.
- **The 'Subject' section**
 - Consider using a subject line that will capture the recipients' attention but also states clearly the purpose of your email.
 - You can use the copy we've provided as templates online at www.paymentshield.co.uk/toolkit
 - Avoid long titles. 45 characters is the recommended maximum.
 - Avoid using capital letters as this is considered SHOUTING, as well as punctuation marks which are used by 'spammers'.
- **The 'From' section**
 - Use your business name so the recipient automatically recognises who has sent the email. This will influence whether they will open the email or not.
- **Salutation**
 - Personalising your email is the best approach since the initial greeting sets the tone and is one of the first things that will form an impression.
 - However before deciding, consider your customer relationship and whether you have the time to send emails individually or if it would be easier to do bulk mailings.
 - Bulk mailings are quicker but data protection means you need to use the "bcc" field for multiple addresses and you will not be able to personalise.



- **Main copy**
 - Make it readable and interesting.
 - As a rule, email should be 50% shorter than a printed copy.
 - Feel free to use the copy we have provided in our email templates available online in the 'Broker Toolkit' section.
 - You can simply copy and paste this text into your email and update with your company details*.
- **Signature/Sign-off**
 - Use the same business name you have used in the 'From' section.
 - Include your company details.
 - You must give your customer the option to 'opt out' from receiving further emails and give details of how to do this.

Before starting any marketing campaign you should satisfy yourself that your material meets all regulatory requirements.

Step 5

Send your email

- Stick to the timings you have set out in your objectives.
- Ensure before sending that you tick the delivery receipt option. This will show you who has received the email, and hopefully read it.
- Once you have received the delivery receipt, ensure you make a note of this on your customer records. This will be useful in your evaluation of how many emails have been sent and how many have been received. It will also help you in your follow-up calls to know that the information has been received.

Step 6

Follow-up, measurement and evaluation

- Make sure that you follow-up your email by calling the customer within the deadline you have given yourself (provided that you have their permission to do so).
- Before making the call, have the customer's details and your sales aids to hand.
- Evaluate your campaign's success against the objectives you had at the beginning of the campaign.

*Paymentshield cannot accept any liability for changes you make to these documents.

Other useful links

www.asa.org.uk

The Advertising Standards Authority is an independent body set up by the advertising industry to police the rules for non-broadcast advertisements, sales promotions and direct marketing that are laid down in the CAP Code.

www.dmachoice.org

Email Preference Service (EPS)

It lists email addresses of those who have chosen to 'opt out' from receiving unsolicited sales or marketing emails. You can cross-reference their list with yours to check whether your customers have registered with them.

www.fsa.gov.uk

Independent body that regulates the financial services industry in the UK.