



50 Best Practices for Email Marketers

Engaging Moments, Delivered Efficiently

The illustration features a woman with curly hair and glasses, wearing a yellow shirt, smiling while holding a tablet. The tablet displays an email from 'northern trail outfitters' with the subject 'Lauren, your favorite item is still in stock!' and a product image of a 'Women's Jacket'. A 'Send email' button is visible at the bottom of the email preview. To the right, a bear mascot wearing a grey t-shirt with a blue cloud logo stands on a green hill. In the background, there are orange bars representing a chart and a circular graphic showing a line graph with a 'Goal reached!' notification. The overall scene is bright and colorful, with a white background and orange accents.

Great email leads to great moments.

Marketers' use of email continues to increase, year over year.* But nowadays, email marketers are focused on increasing email effectiveness, boosting campaign performance, and optimizing conversion rates. And today's customers expect relevant, personalized email that addresses their needs in the moment. To master this balance, marketers need real-time data and intelligent analytics, as well as a thoughtful, human touch to create email that moves customers closer to important moments – and ultimately into trusted, loyal customer relationships.

To help you reach these goals, we've assembled 50 tried-and-true tips to guide you. If you're just getting started with email – or if you're looking to improve what you've already built – this book will help you create email that both resonates with customers and proves its own value.

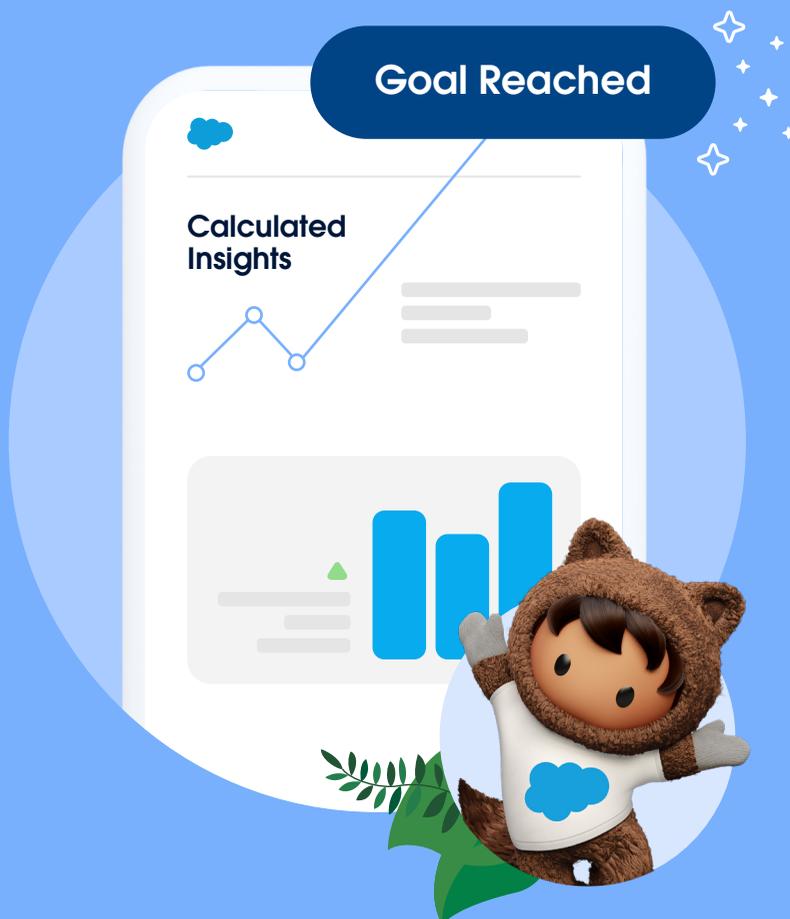
* "State of Marketing" report, 8th edition, Salesforce Research.

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Setting Goals and Measures

Creating an email campaign takes time, energy, and resources – but it can be tremendously rewarding. Ensure your efforts end with a big ROI and plenty of high-fives. Kick things off with some discovery to align everyone involved and get set for success.





1. Get your mantra ready.

First things first. Your team should develop a statement to rally around – and share it with your boss. This is your succinct response anytime someone asks, “So, what are you working on?” For example: “We’re developing an email program to re-engage inactive subscribers, acquire new customers, and better optimize our current marketing spend.”



2. Set customer-focused goals.

Once you understand your email program vision, establish goals focused on the customer. Define clear intentions to improve the value of your emails for customers. Perhaps you’ll aim to add the ability to reach customer service in one click within all of your digital marketing over the next 12 months. It could be anything designed to benefit that special individual opening your email.



3. Get other teams — and data — involved.

Email doesn’t operate in a vacuum. Bring your teams and departmental data together for a holistic understanding of your customer and the state of your business. With a single, real-time view of your customer across different communications, your emails can work in tandem with other departments to meet customer needs at every stage in their journey with your brand.



15%

increase in the
number of outbound
emails this year

* Data and Marketing Association (DMA).





4. Know what worked before.

Establish a benchmark for success. Gather data on previous email programs to see what subscribers responded to before – and where there’s room for improvement. Were there periods of high engagement? Were there periods of mass unsubscribes? Understanding your history will help optimize your strategy effectively.



5. Bring efficiency into your strategy.

Audit how your email processes can be more timely and effective in meeting your goals. Review how your team goes about email creation. Identify areas to save time with automation. Examine how you collect and unify data for a better understanding of your customers and their preferences and behaviors. Do your email goals align with their needs?



6. Determine your KPIs.

Knowing your benchmarks for success upfront will influence how you build and send email. As KPIs like open rates are going away, make sure to prioritize more meaningful metrics, like click-through rate, deliverability rate, and bounce rate. You can even dig deeper for hard data on conversions and customer lifetime value. Overall, align your benchmarks with what is driving revenue growth.





7. Understand your objectives.

What targets does your email program need to hit? Is it a 5% increase in subscriber base over six months? Is it a reduction in unsubscribes or a boost in clicks to conversions? If you don't know, you could wind up over-sending emails just for the immediate conversions. Sending too many emails without established goals can lead to subscriber fatigue, wasted time, and lower customer trust.



8. Check up on your progress.

Regularly review how your emails are performing. Look high and low, at an aggregated top level, at categorical campaigns, and at individual email sends. See which ones are driving the best engagement. Add what works to other campaigns. Compare your findings to the benchmarks from step two. Share your insights with broader organization partners.



9. Turn data into action.

Regularly translate your data and findings into actionable insights. An increase in conversion rates is terrific news: What caused it and how can you apply it to other sends? Tie email wins to business results. How are your sends impacting the bottom line?

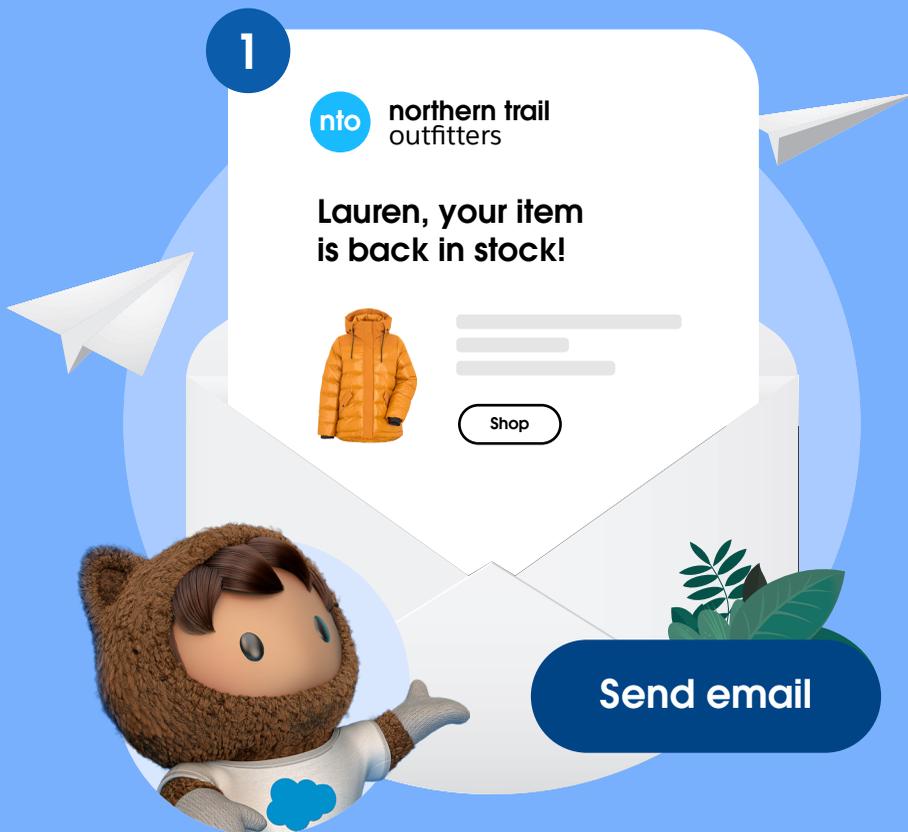


10. Recalibrate.

With the data you uncover, point out where there's room to grow. Consider which adjustments you can make to reach your objectives. Pivot toward the strategies and tactics that are driving ROI and engaging customers the most. Remove or correct any that haven't met expectations. Make a tangible plan for addressing your challenges and opportunities.

Building Trust

Even the world's greatest email campaign won't do much good sitting in a spam folder. Follow these recommended steps to stay at the top of the inbox – and earn your subscribers' confidence to open every message.





11. Get their permission.

Be explicit about what your subscribers are opting into. Clearly ask permission to send promotional emails. Keep opt-in boxes unchecked by default, and explain how the permission will be used. Whenever you collect addresses, ensure your customers are informed before agreeing to your terms.



12. Set expectations.

Tell customers the benefits of opting in. Describe what you'll provide in exchange for their information. Say why it's valuable, explain how often they'll hear from you – and anything else they should know. Immediately after a subscriber opts in, send them a confirmation email reiterating the perks.



13. Champion quality over quantity.

It's less important to have a lot of subscribers than it is to have quality subscribers. Do what it takes to know where they're coming from. Then confirm that each of them has given their permission to receive emails. Do not send messages to an email address if you don't know its source.



14. Make “goodbye” easy.

Email marketers never want to hear “goodbye” – but for customers, it should be short and sweet, and easy to do. Make unsubscribing possible with one click, while also giving options to control preferences like frequency and types of content. An unsubscribe is better than a spam complaint.



15. Get in all the details.

Include contact information, social sharing buttons, and unsubscribe links somewhere in your email. That way, recipients can share your content or communicate with you should they have any questions or needs.



16. Let the unengaged go.

Stop sending unengaged subscribers the same emails as the rest of your database. If someone hasn't opened or clicked one of your emails in over 90 days, move them over to an advertising audience. Send them one or two win-back emails. Automate this process to save time and execute at scale.



17. Warm up your IP address.

If you send an email to every prospect in your database right away, it will raise a red flag for spam monitors. Start off with your best lists to build a reputation. Keep volume proportionately low during the first week. That way, you can spot issues with initial sends before more emails bounce. Next, form a plan for increasing sending volumes until you reach your goal.



18. Be consistent.

For your overall email marketing program, consistency in volume and frequency is critical. Once you've warmed up IP addresses, internet service providers look for consistent sending from each IP.



19. Set up authentication.

Email authentication verifies that the email your business sends is actually from you. It protects your reputation from spammers who could pose as your organization. Your email service provider can help you set up rules that determine how your emails are sent so fraudulent senders can't imitate you. Most mail servers use systems called SPF, DomainKeys, or DKIM to do this.



20. Own your sending practices.

Keep an eye on bounce rates. Analyze them carefully to uncover why they're happening. After a while, you'll start to recognize warning signs and red flags.



80%

of all outbound
messaging is
email-based.

"State of Marketing" report, eighth edition, Salesforce Research.



Designing for Maximum Impact

Readers are busy. They can only give your message so much time, even when it's pertinent. It's best to design your email with efficiency and readability in mind. Help audiences learn what you need them to know faster with a look that's both visually appealing and proven to be more effective. Here's how:





21. Design a methodology.

The magic behind good design goes beyond the creative department; it applies to all facets of business and technology. Collaborate with your team to develop the frameworks, workflows, and strategies that allow creativity to flow.



22. Plan your template.

After considering which types of messages you're sending, develop a design system for those communications. A modular framework helps turn your vision into reality. Determine if one template with different modules will fit all your needs, or if you'll have to create templates for different communication types.



23. Keep the journey in mind.

Each email is a step in the overall customer experience. Design every message to fit in with all the other communications your subscribers could receive from your brand. Make the look and feel consistent. It should be easy to identify any newsletter, onboarding welcome, or password reset (for example) as your content.



24. Account for mobile.

Make sure your email looks great on any device and every email client. Provide an elegant mobile experience, beginning with your initial welcome email. The world is increasingly mobile-first, so these things matter.



25. Give your imagery purpose.

Add context and interest through photography or illustration. Use imagery to appeal to the subscriber's emotions and communicate functionality. Including visuals in your emails can break up the monotony of text, too. Note: Beware of stock photography that doesn't align directly with the message and the subscriber.



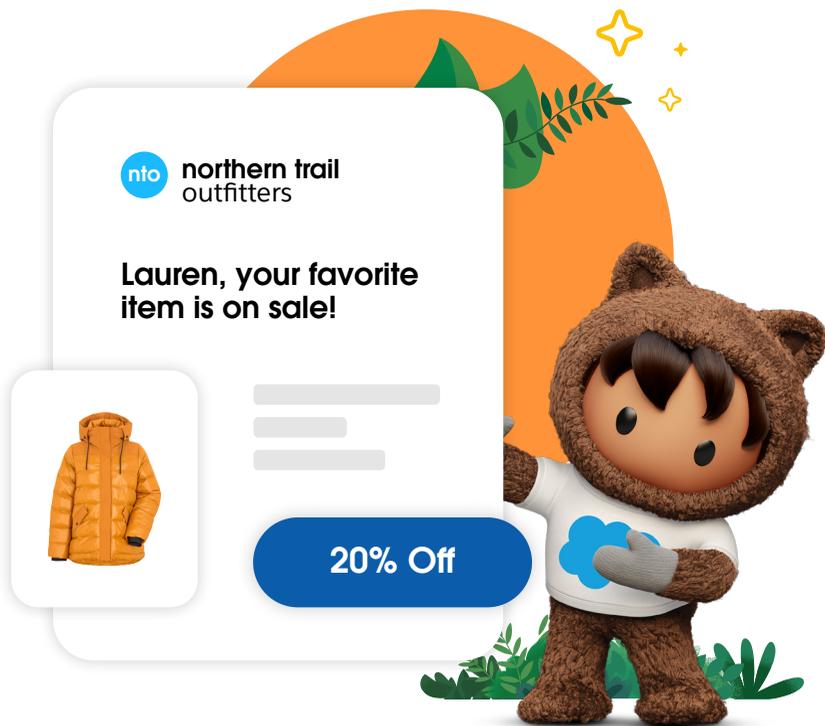
26. Make the CTA shine.

Distinguish your call to action through color, placement, and text treatment. Readers will quickly understand the purpose of your email. More importantly, this will make it easier to act on it.



27. Break things up.

Consumers tend to scan emails for important points that pertain specifically to them. Divide your email into bulleted text and short paragraphs for better readability.





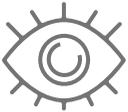
28. Be inclusive.

Build messages for everyone in your audience. Be considerate of individuals' needs. Think about alt tags, readability, black text on white backgrounds, and other features that make your emails accessible to all.



29. Test it without images.

You've got five seconds to get your subscriber's attention – maybe less. Make it count. Test with images turned off to see what your email looks like with a weak connection. Is there still content to read right away? Is the call to action still apparent?



30. Preview and review.

You likely already previewed every message before hitting send. Make sure you've considered every variable. If you include dynamic content, check the different permutations. If your message is complex, build a checklist to catch everything as you review.



65%

of customers prefer to use email when communicating with companies.

"State of the Connected Customer" report, fifth edition, Salesforce Research.



Delivering Meaningful Content

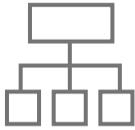
What moves a subscriber to open your email? These tried-and-true methods will encourage engagement and show off how appealing, effective, and trustworthy your brand is.





31. Stay relevant.

Consider your audience: Why are they receiving this message? Does it address what they're trying to do or what they want? Focus less on the sell, and think about what the customer actually needs.



32. Set a content hierarchy.

Can your subscribers answer what, why, and how after just a few seconds of looking at your email? Order your content so the most important message is visible before any scrolling. From there, ensure every piece of content directs the reader where to go next – and why.



33. Tell a story.

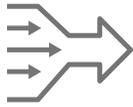
Email can make for a compelling narrative. Think about how you'd like customers to understand your core values. What is your brand's story? When drafting it, consider narratives that peek behind the scenes, address social activism, or reveal product origins – for example.



88%

of customers say they expect to see brands demonstrate clear and strong values.

“State of the Connected Customer” report, fifth edition, Salesforce Research.



34. Keep it simple.

Try to focus each email on one message. When you do have to include multiple viewpoints, think of ways to streamline the presentation. You may need to send an additional message. Bring teams together to collaborate, if necessary.



35. Trim it back.

After you write and design your email, reread the copy for readability. You'll often find you can trim it down by up to half and not lose any impact. Customers move from one experience to the next at a rapid pace, so be sure they can see and understand your key message and call to action at a glance.



36. Grab their attention.

Short and medium-length subject lines have higher open rates than long ones, which ultimately affects conversion rates (the percentage of people who take action on your email). Subject lines are often truncated depending on device or service provider, so limit them to 50 characters or fewer.



37. Include a preheader.

The preheader is the text that follows the subject line in an email preview. It can be as important as the subject line itself. Make it a call to action or use it as a short summary of the email content. Just make sure it supports the subject line. Limit this preheader to about 100 characters.



38. Save time with AI.

Consider adding artificial intelligence (AI) to your marketing toolbox. AI can do the personalizing, segmentation, product recommendation, and even database cleanup for you, at scale. (And much more.) It saves teams time on tedious tasks and lowers costs.



61%

of consumers are comfortable with companies using relevant personal information in a transparent, beneficial way.

“State of the Connected Customer” report, fifth edition, Salesforce Research.



39. Drive results with a strong CTA.

Make your call to action in the email specific and relevant. Maybe it's a limited-time offer, entry to a contest, a prompt to visit your website, or an invitation to an event. Give your customers an irresistible reason to click through and take action.

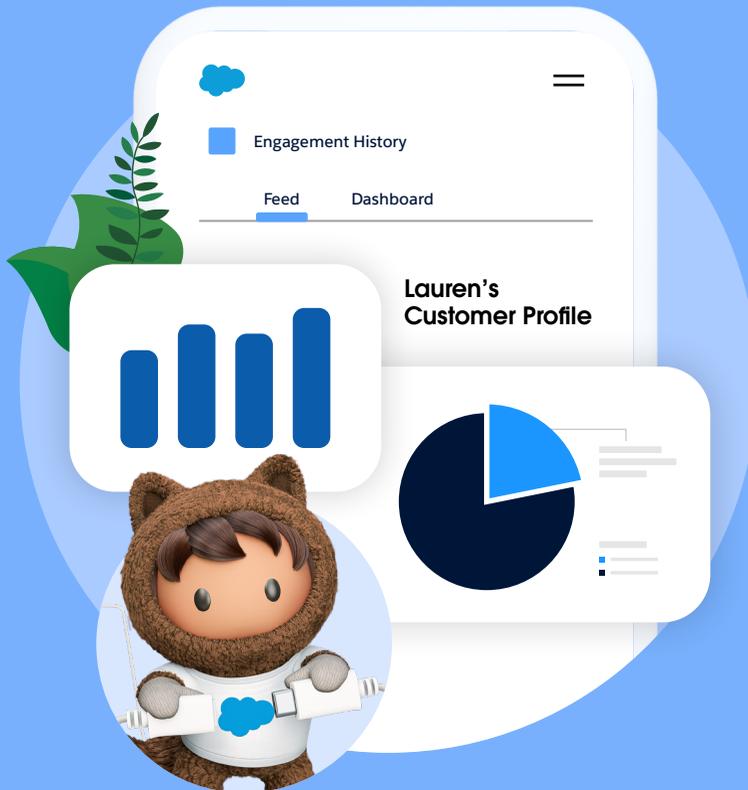


40. Test. Test. Test again.

Test variances in the preheader, body, and specific content blocks. Try out different send days and times. Compare performance of different subject lines. A/B testing shows how subscribers respond to elements like subject lines or content personalization. Try out different journey paths: AI can help support multivariate testing. Pick the winner, but never be afraid to run another test.

Growing Trusted Customer Relationships

More than ever, growing trusted, lifelong customer relationships is critical. The key to success? Connected data, unified into a single source of truth, personalized with AI. Your email can put that data to work, so you can make every moment count.





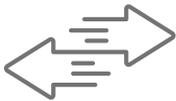
41. Use a CDP.

A customer data platform, or CDP, combines all of a customer's data across channels in real time. That's a tremendous advantage with personalizing email to be relevant in the moment. The unified profile a CDP creates will help you redirect dollars toward the right subscriber for the right offer.



42. Map the customer lifecycle.

Chart the most common customer experiences with your brand. (This has to be only as detailed as you like.) Visualize how customers engage, when they hear from you, and when they like to hear from you. Then determine which types of messages are optimal for these moments.



43. Get more out of transactional messages.

Transactional emails (like e-receipts and shipping confirmations) encourage higher engagement than other content. So, apply all design and delivery best practices to your transactional sends. Use them as an opportunity to introduce services or complementary products.



44. Respond to behavioral triggers.

Be ready to react to the many behaviors of individual customers. Automate messages to bring back consumers who drop off midpurchase. (Abandoned cart messaging is a good example of this.) Set message frequency and content based on purchase cycles, customer behavior, and other data about the subscriber.



45. Embrace automation.

Perfect candidates for automated messages are lifecycle series like onboarding, re-engagement, or friendly messages on birthdays or anniversaries. These messages may be complementary to your newsletters and other sends. Use them to make your job easier.



46. Be proactive.

Helping your customers means anticipating their needs. To save customers from endlessly searching for information, you should proactively reach out to them with everything they need to know – from important company news to changes to their accounts. Proactive action can give your customers answers in a moment of need, and free your staff from responding repeatedly to the same questions.



47. Make it personal.

You've got the customer data. You know your audience well. Now you can personalize anything, from simply including first names to complex messages individualized for each subscriber. Personalization doesn't have to be complicated, either way. Start simple with what you have today and build from there.



88%

of consumers expect offers to always be personalized.

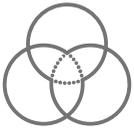
“State of the Connected Customer” report, fifth edition, Salesforce Research.





48. Make sense with segmentation.

Group subscribers into segments like product preference, position in the customer lifecycle, and lifetime value. You may establish segments for message types based on the intersection of your customer's and your brand's needs. Defining your segments in creative briefs and reporting will help your organization align around shared objectives.



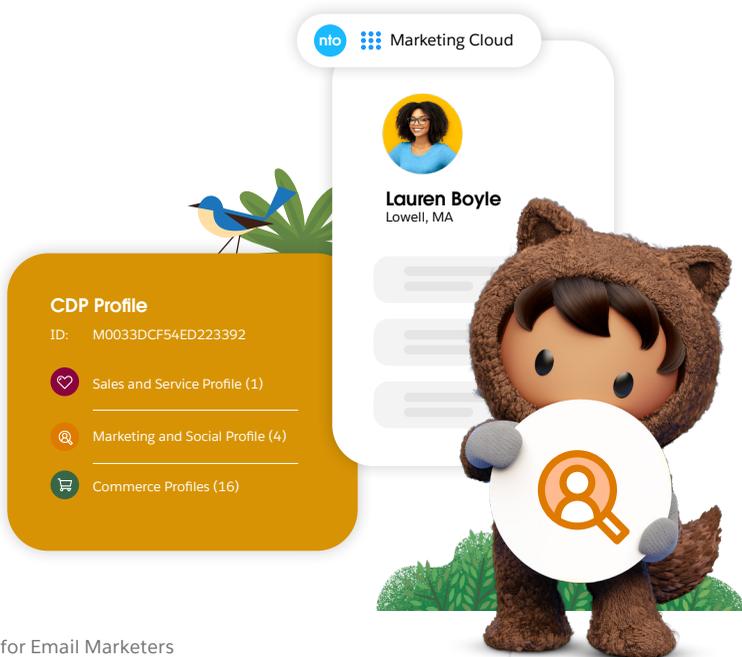
49. Find your sweet spot.

Your product or service type, plus your campaign tracking data, help determine what constitutes too many emails and not enough. Marketing automation tools can help you strike this balance. You can use them to set actions based on variables like timing and prospect behavior.



50. Put the customer at the center.

We're all customers. Think about how you like brands to treat you, and what makes you passionate about a product. Allow your favorite experiences to influence your marketing. Don't be afraid to put a plan into action. If one initiative isn't successful, the lessons learned from it could make the next one a big hit.



What's Next?

Now you've got 50 tips for creating data-guided, emotionally resonant email. That's a lot to think about. Consider choosing only a couple of tips from each chapter to implement at first.

When implementing any new practice, it's best to keep a reasonable pace, so benefits can be tracked and changes can stick. Why not kick things off with some goal setting?

Use the conversation starters on these pages to determine your first steps. Work with your team to determine what happens after you close this book. In this exercise, you'll create three goals you can start working on right away.

When working through these exercises with your team, remember to ask yourself:

- Is this specific?
- Can we measure this?
- Is this feasible?
- What's our timeline?
- Can this be revised later?

Let's identify your areas of focus: what's working and what needs work.

Think about email campaigns from the last year or two. Bring in thoughts, numbers, reports, or feedback. Which performed best? Why? What could be improved?

After you have this discussion, write down the three most important themes and needs you discovered:

1. _____

2. _____

3. _____

These will be your three goals. Turn the page to break them down into manageable, actionable plans to empower your team.

Ready to make every moment count with your email? Build relationships and grow loyalty more efficiently with Marketing Cloud Engagement. Visit [sfmc.co/EngagingEmail](https://sfmc.com/EngagingEmail) to learn more.

Goal 1

Goal Write the first goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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Goal 2

Goal Write the second goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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Goal 3

Goal Write the third goal you discovered.	Action Item 1 What can you start doing today to get closer to this goal?
	Action Item 2 When that's done, what can you do next to keep things moving?
	Action Item 3 What will you need to do to consider this goal complete?
Why is this goal important?	
How can we measure success for this goal?	

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