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Marketing solutions for small businesses.

Email Drip Campaign

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What is an email drip campaign?

Just what you probably think. It's an automated email campaign sequence that drips information to leads and those who have engaged with your brand at some level. It is aligned with a business goal, tracked, and measured for success.

In many cases, it starts with an initial point of contact, such as completing a website form, signing up for a webinar, joining a newsletter list, contact at a conference, etc. It is often managed with an automated tool, such as SalesForce®, Infusionsoft®, MailChimp®, Constant Contact®, and so on.

The hard part is the logic. Knowing when to send an email and to whom, is the key.

Additional Tips

Email titles are important. Avoid "spammy" email subject lines as well a trigger words the spam filters love to hate. Here is a comprehensive list from Sprout Social.

Work with a copywriter to help with grammar and prose. Nothing can kill a campaign quicker than misspellings and poor grammar.

Here are some tips to help get you started.

Know the email sequence's goal. Is it conversions, brand awareness, or customer retention? No matter what the effort, it should align with a business goal.

Logic determines frequency. How often should you send the campaign elements within the sequence? Here's a rule of thumb, avoid sending more than one per day or five per week. Space the emails out so recipients are not overwhelmed with the messaging. Leave enough space between messages to give your recipients time to digest the information. The more complex the content, the further they should be spaced apart – within reason.

Sequencing must be right to avoid looking like a scammer. Think through the email sequence and what should be presented in each step, in order. This is the hardest step. Flowchart it or draw it out if needed. Getting this step right could be the campaign's success. Poorly-developed sequencing will sink a campaign—guaranteed.

Test the campaign all the way through before launching it. Do a friends and family test or test it within your own team. Be sure the sequence is right, and the call to action and offer is tantalizing enough to execute toward the goal.

Track, measure, and report on the sequence to determine success/failure. You may need to tweak copy or the calls to action before it works well.

Email drip campaigns can be time consuming, but produce solid leads. What questions do you have about email drip campaigns?

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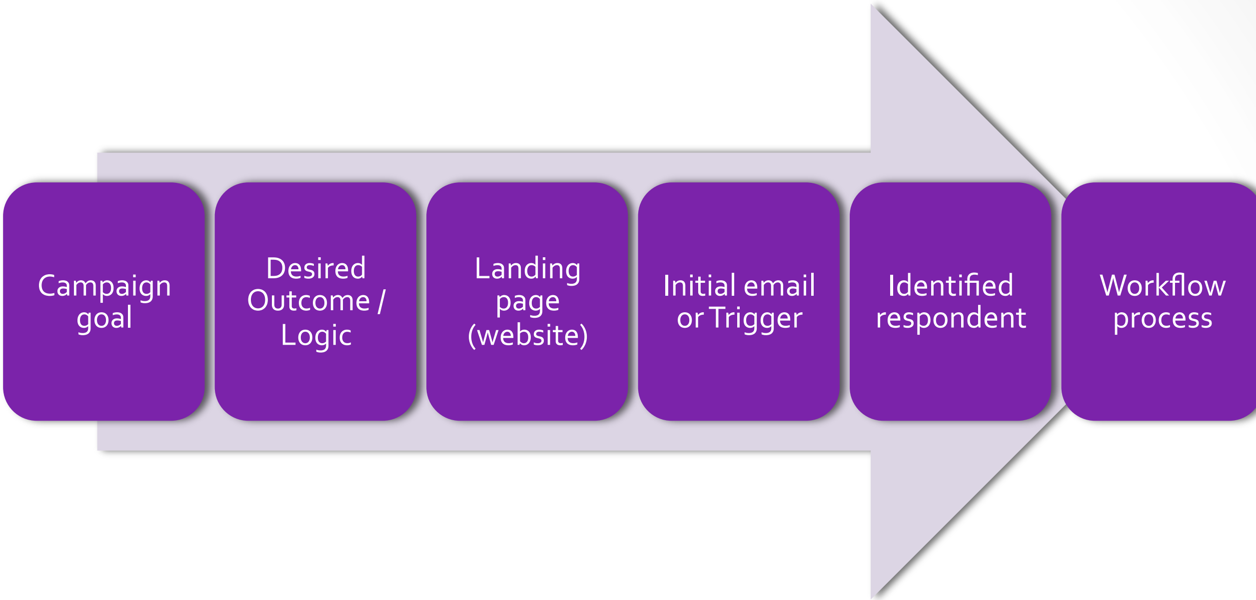
Items Needed

Before you start an email drip campaign, there are many elements that need to be in place before the campaign is created, such as:



Campaign Goal: What do you want the campaign to accomplish, e.g., increase newsletter registrants, increase webinar attendees, identify leads who need tax assistance, etc.

Desired Outcome: What do you want the website visitor to accomplish? Complete a form, sign up for a webinar, register for a consultation, send more information, etc.

Landing Page: This is where all the communication points, e.g., social media, emails, online ads, post cards, traditional media, etc.

Initial Email / Trigger: What will be the driver of the initial message to draw in the leads? Is it email, social media, an ad, etc. What does that message say? What are three key benefits that will draw in the lead to complete the desired action?

Identified Respondent: Who on the team will get the lead's form? For example, if it's a lead for a webinar registration, who would get that information? If it's a lead for a 30-minute consult, who would get that information?

Workflow Process: Define the logic that happens throughout the drip campaign. How many messages should be created? When does someone's information just end up on the list? When is a call or in-person meeting to be set up and by whom?

Each step needs to be defined and may require additional steps before a workflow is complete.

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Example

Here is a five-step process for post-whitepaper download. After a person has clicked on a download form "submit" button, consider the following steps.

Landing Page

- Graphic
- Benefits
- Form

Response Email

- Thank them for download
- Sends lead to sales team no contact yet

Second Email in string (Day 4)

- Include reference to first download
- Identify what they might also like
- Add a call to action for free consult
- Send lead to sales team for call follow-up

Third Email in String (Day 6)

- Highlight another benefit
- Encourage them to call with a more urgent call to action
- Send lead to sales team for follow-up

Decide (Day 7)

- No form request to call; send email and name to the email newsletter list; remove only upon opt out. –OR -
- Send final "We haven't heard from you" email. If form is completed, their name/email is moved to a new workflow. If not, add the name to the monthly email list until they opt out.

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Example, cont.

Here is the same process with details and an example.

After a person has clicked on a download form "submit" button, consider the following steps.

Day 1: Welcome email thanking them for their recent whitepaper download. Include one of the features mentioned in the white paper. Provide a scenario of a problem that is solved within the whitepaper, which encourages them to read it. Don't expect the person to contact you, yet.

Day 4: Add a catchy headline, something that was called out in the whitepaper or highlighted in a pull quote. Provide another scenario of a problem and how it was solved. Add a free consulting call to action in this email to encourage them to contact someone for a free 15-minute call.

Day 6: Highlight another problem and the solution. Encourage them to call with a new call to action.

Day 7: If the user hasn't called by now, you have two options:

1. Move their email address into another marketing funnel that puts them on a generic email list (monthly emails perhaps, until they opt out).
2. Send a final "We haven't heard from you" email notice with something like, "We haven't heard from you, but believe you are seeking a solution to one of the problems mentioned in our [insert whitepaper title] whitepaper. Let's chat soon. You can easily schedule a free, 15-minute consult with one of our team members by clicking here." Then link them to an online scheduling tool if you have one; if not, link them to some form of calendar tool or call feature. This action then starts another email drip campaign sequence, and moves the user from one marketing funnel location to another (from the top to the middle of the funnel).

This process may be automated based on a user's actions, in many cases called automated workflows. However, the logic needs to be defined before the email campaign is developed to ensure the right sequence of emails happens, as well as the branching sequences.

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Client Example – Add Me To Your Email List

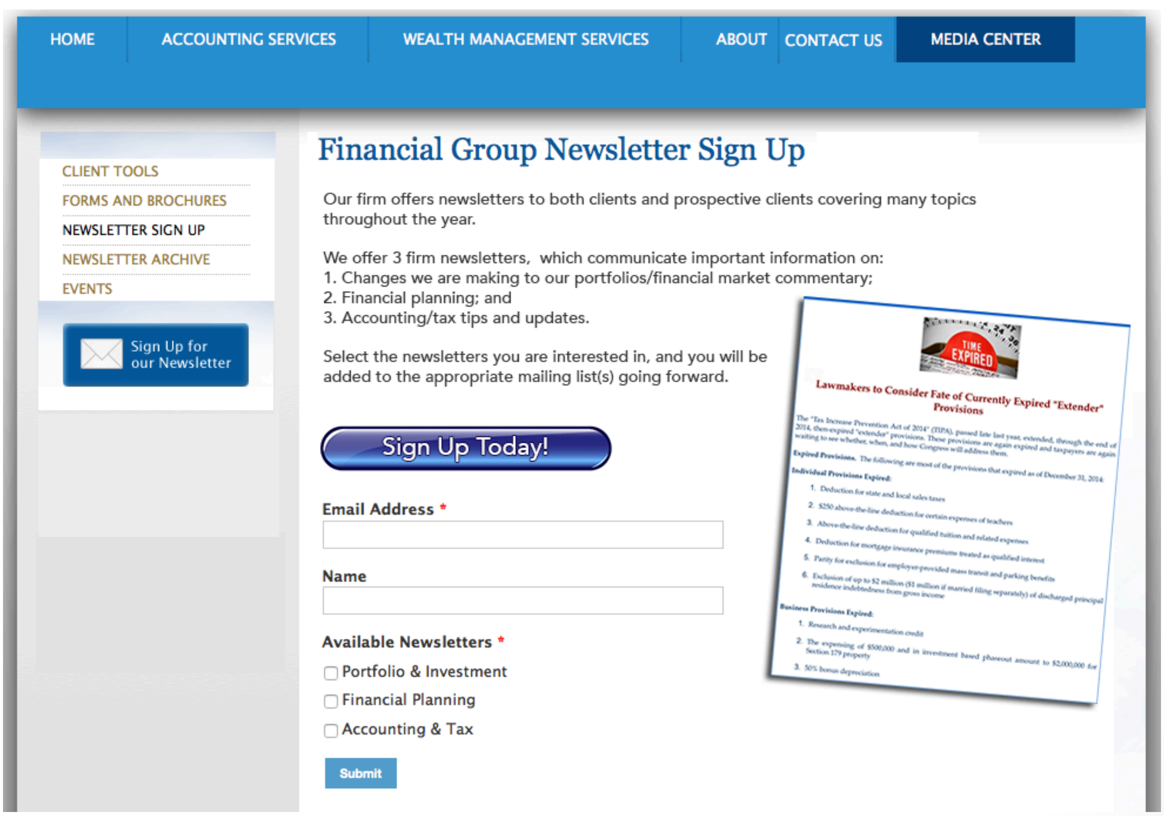
Here are the steps in an automated email submission request.

Goal: Increase newsletter sign ups by 10% over the next quarter.

Desired Outcome: Click on the newsletter form and submit name to monthly email database. Confirm submission.

Trigger: Social media campaign posted throughout the month on our social media platforms, and a request made to staff to share that post. Also create an email campaign to all clients on email list to share the email with people they know. Also consider asking them to share the post on social media, include sample social media messages in the email.

Landing Page: Note the changes from the existing page (http://www.firmswebsite.com/newsletter-signup). An image was added, only three bullet points are mentioned, the call to action is clear, the form is short. All other information on the page should be removed. It is a distraction.



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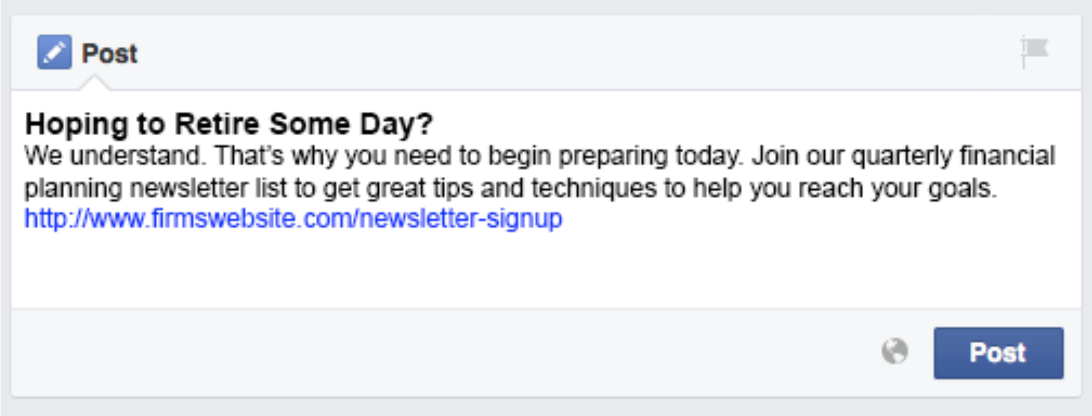
Example – Add Me To Your Email List, cont.

Triggered Events:

1. **Social media.** Create social media posts supporting the effort to increase sign-ups for the newsletter. Scatter them over a period of five or six week, or the duration of the campaign. The copy should be different for each one, and have a tantalizing headline and simple call to action.

Here is a sample Facebook posts. A photo should accompany each and you may consider boosting them once they are posted.



Create your social media post to announce the newsletter sign up:

Facebook

Twitter

LinkedIn

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Example – Add Me To Your Email List, cont.

Triggered Events:

2. **Email Campaign:** Create an email campaign that highlights the various newsletters, and only them. Send it to all your clients with a call to action to sign up, or share with others. Provide a series of social media post they can share on social to help get things started.

Here's an example email:

To: Full Email List or a Segment if focusing on one newsletter
Date: Someday in the Future
Subject: Hoping To Retire Some Day?

We understand. That's why you need to begin preparing today.

If you haven't done this already, join our quarterly financial planning newsletter list to get great tips and techniques to help you reach your financial goals before and during retirement.

Sign Up Today!


TIME EXPIRED

Lawmakers to Consider Fate of Currently Expired "Extender" Provisions

The "Tax Increase Prevention Act of 2014" (TIPA), passed late last year, extended, through the end of 2014, then-expired "extender" provisions. These provisions are again expired and taxpayers are again waiting to see whether, when, and how Congress will address them.

Expired Provisions. The following are most of the provisions that expired as of December 31, 2014

Individual Provisions Expired:

1. Deduction for state and local sales taxes
2. $250 above-the-line deduction for certain expenses of teachers
3. Above-the-line deduction for qualified tuition and related expenses
4. Deduction for mortgage insurance premiums treated as qualified interest
5. Parity for exclusion for employer-provided mass transit and parking benefits
6. Exclusion of up to $2 million ($1 million if married filing separately) of discharged principal residence indebtedness from gross income

Business Provisions Expired:

1. Research and experimentation credit
2. The expensing of $500,000 and in investment based phaseout amount to $2,000,000 for Section 179 property
3. 50% bonus depreciation

Also think about sharing your experience on social media.
Here are some posts you can send to your social media connections.

Twitter
Get great retirement tips and techniques in this newsletter. [link] #RetirementNews

Facebook/ Google Plus
Want to retire some day?
If you're like me, you want to retire some day. Consider this retirement tips newsletter to get where you want to go. [link] #RetirementNews

LinkedIn
Want to retire some day?
If you're like me, you want to retire some day. I have found this retirement newsletter to be helpful in my retirement planning, and you might to. Consider this retirement tips newsletter to get where you want to go. [link] #RetirementNews

Thank you!
The Firms' Financial Group Team

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The Workflow

Many email programs offer automated workflows where you can automate the messages that support a completed action by using built-in workflows, like signing up for the newsletter. Here is the process.

1. Initial sign-up email is sent.
2. If they join, a return email is sent to them automatically for completing the form. Something with "Thank you for signing up for the [Enter newsletter name]. Look for your next newsletter this [month/quarter]. In this email, also have another call to actin that triggers something, such as "Additional Resources You Might Like. " Provide a bulleted list of items that align with the newsletter topic, such as blog articles, tip sheets, whitepapers, etc.
3. The links within that email would have a **special URL** associated with them** so you know when a click goes to the website, it came from this email campaign.
4. The logic for this workflow would be developed within the email tool and the emails themselves would need to be written and uploaded to the system.

** You can use URL builders to create long emails with tracking codes in them. Some free products include:

- Google Analytics URL builder: https://gaconfig.com/google-analytics-url-builder/
- ROI Revolution: http://www.roirevolution.com/google-analytics/google-analytics-url-builder.php
- Terminus: http://www.terminusapp.com/blog/best-analytics-url-builder/

Find out more about the actual process within Constant Contact at http://search.constantcontact.com/campaigns.

In Summary

Automated emails help to generate leads, but it should not be a set-it-and-forget-it process. Someone should be maintaining the process and updating emails and logic when needed. Keep in mind the items needed to create a powerful email campaign, including:

- Goal
- Desired Outcome
- Logic
- Landing page
- Trigger(s)
- Responsible, internal recipient
- Workflow process, including measurement

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Who is Penheel Marketing?

Social media and digital marketing consulting firm for CPA firms, small businesses, and non-profits.

http://Penheel.Com

Blogging
Create blog content quickly while getting SEO tips and best practices pointers.

Social Media
Publish content to your social accounts, then nurture leads based on their social engagement.

Marketing Analytics
Website analytics, online advertising analytics. See which sources are generating the most leads.

Search Engine Optimizations
Improve your rank in search engines by finding and tracking your most effective keywords.

Email
Send personalized, segment
Emails based on any informa
in your contact database.

Lead Management
Track leads with a complete timeline-view of their interactions with your firm.

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