Keap email marketing planning & tracking tool

How to use the tool

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Getting started

Starting an email marketing program can be challenging for any small business owner. If email marketing is new to you, or you want to learn more about it, be sure to read our complete guide to a successful email marketing program for small business first.

The email marketing planning and tracking tool is designed to help you plan and track the results of your marketing emails so you can send marketing emails strategically, rather than going in blindly.

After your email marketing program has taken off, you can continue to use this tool to identify patterns in your email results. You'll be able to see what's working well and what can be improved upon and adjust your plan accordingly to boost email subscriber engagement and accomplish the marketing results you set out to achieve.

Using the tool

The following instructions are a quick-start explanation of the type of information you'll include in the tool.

Let's quickly review the information you'll enter into each column in the spreadsheet.

Email planning sheet

Send date: The date you will send the email.

Day of the week: The day of the week the email will be sent.

Campaign type: Which type of campaign are you sending? (e.g., newsletter, offer, piece of valuable content, or event promotion)

Email template (HTML) or plain text email: The type of email you're sending. HTML email templates are formatting with images while plain text emails are plain text without formatting or images.

Email name: The name of your email campaign.

Email subject line: Copy that will entice email subscribers to open your email in 50 characters or less.

Email preview text: Attention-grabbing secondary copy that will appear below your subject line in the email subscriber's inbox. Using personalization like first name usually catches the reader's eye.

Email list segment(s): The segments from your email list you want to receive this email.

Excluded segment(s): The segments from your email list you want to exclude from this email.

Content description: A brief description of the email topic and content.

Image or video: The graphical elements in the email. Keep it below 102KB to prevent your email from being marked as spam and delay loading times.

Offer: The offer you're including in the email. Is it a promo code or a free ebook?

Call-to-action (CTA): The copy for your CTA button or link. (e.g., "Try now," "sign up," "free trial," and "download now")

Landing page: The web URL you're sending readers after they click on the CTA.

UTM parameters: The text string you'll include at the end of the CTA URL you'll use in your email. This allows Google to track where the traffic to the CTA URL is coming from.

[Learn more about UTM parameters](#) and use this [free campaign URL](#) builder to create them for your email campaigns.

Series or standalone: Is this email part of a long-term nurture series or a one-time email blast?

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Email tracking sheet

Number of emails sent: The number of emails that were sent in the email campaign.

Number of emails delivered: The number of emails delivered to the inbox in the email campaign.

Deliverability rate: The percentage of emails that were actually delivered to email recipients' inboxes (not counting bounced emails).

Number of opens: The number of email recipients who opened the email.

Open rate: The percentage of the total number of email recipients who opened the email.

Number of unique clicks: The number of recipients who clicked on at least one link in the email.

Click-through rate: The percentage of email recipients who clicked on at least one link in the email.

Click-to-open rate: The number of unique clicks divided by unique opens to determine the effectiveness of the email content.

Number of unsubscribes: The number of email recipients who unsubscribed from your email list.

Unsubscribe rate: The percentage of email email recipients that unsubscribed after receiving the email.

Adding information to the spreadsheet

- When you enter information in the email name and send date fields in the email planning sheet, the information will automatically carry over to the email tracking sheet for your convenience.

- Collect the email metrics from the email marketing tool you use (e.g., Keap, Mailchimp, etc.) and enter it in the corresponding fields in the email tracking sheet.

TRAINER'S BOX

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