

# Email Marketing — Workbook

This workbook turns course concepts into applied practice. Work through each section as you complete the corresponding module — the exercises are designed to produce real deliverables you will actually use, not busywork. By the end you will have a lead magnet brief, a segmentation map, a campaign draft, and a live welcome sequence.

## Building Your Email List

Apply the list-building strategies from Module 1 by defining your ideal subscriber, designing your lead magnet, and configuring your first opt-in form.

### Exercise: Define Your Ideal Subscriber

Before you build anything, get specific about who you are trying to attract. Vague audiences produce vague lead magnets. Answer each prompt in 2–3 sentences.

- Who is your ideal subscriber — describe their role, situation, and what they are trying to accomplish?  
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- What is the single biggest problem they face that you can help with via email?  
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- What outcome do they want within the next 30–90 days that your emails can support?  
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- What would make them immediately unsubscribe — use this to set what you will NOT do?  
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### Worksheet: Lead Magnet Design Brief

Complete this brief before creating your lead magnet. It ensures your offer is specific, deliverable, and matched to your ideal subscriber. Fill every field — skip nothing.

Lead magnet title (benefit-first, 10 words or fewer)

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Format (checklist / template / mini-course / quiz / toolkit / sample)

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The one problem it solves

\_\_\_\_\_

Who it is for (be specific)

\_\_\_\_\_

Time to consume (target: under 5 minutes)

\_\_\_\_\_

Where you will host the file or resource

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Delivery method (welcome email link / automated email attachment / landing page redirect)

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How you will test the concept before building it

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## Checklist: Opt-In Form Launch Checklist

- Form headline states a clear benefit, not a mechanism ('Get the checklist' vs 'Subscribe')
- Form is limited to one field (email only) unless first name is needed for personalisation
- Button text is action-specific ('Send me the template', not 'Submit')
- Social proof line added below the button (number of subscribers or a short testimonial)
- Privacy statement added in 8 words or fewer
- Form placed above the fold on homepage
- Form embedded inline in your highest-traffic blog post or page
- Thank-you page or confirmation message written and live
- Lead magnet delivery tested — subscribed with a personal email and confirmed receipt
- Form connected to your ESP audience or list (not a test list)

## Segmentation and Audience Management

Map your audience into segments you can act on, configure engagement tiers, and document your authentication setup.

### Exercise: Map Your Segmentation Strategy

Sketch out the segments you will create in the first 90 days. Think about what you know about your subscribers at signup and what behaviours you can track after they join.

- List three questions you could ask on a signup survey or quiz to segment subscribers immediately at the point of joining.

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- What two behavioural signals in your emails would tell you a subscriber is ready to buy? (e.g. clicked product link twice in 30 days)

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- Describe what your 'VIP' segment looks like — what actions or characteristics define your most valuable subscribers?

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## Worksheet: Engagement Tier Setup

Document your three engagement tiers and the rules that move subscribers between them. You will implement these rules in your ESP's segment builder.

Active tier definition (e.g. opened or clicked in last 30 days)

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Active tier send frequency

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Warm tier definition (e.g. last activity 31–90 days ago)

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Warm tier send frequency and re-engagement plan

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Cold tier definition (e.g. no activity in 90+ days)

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Cold tier action (re-engagement sequence or suppress/delete)

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Platform and segment path where you will create each tier (e.g. Klaviyo > Segments > Create)

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## Checklist: Deliverability and Authentication Checklist

- SPF record added to DNS for your sending domain
- DKIM signature enabled in your ESP domain authentication settings
- DMARC policy record added to DNS (start with p=none to monitor before enforcing)
- Sending domain verified in Mailchimp, Klaviyo, or ConvertKit
- Unsubscribe link present and functioning in every email template
- Physical mailing address added to email footer (required by CAN-SPAM and CASL)
- Hard bounces confirmed to be auto-removed by your ESP
- Re-engagement automation built and active for 90-day inactive subscribers
- Spam complaint rate monitored in Google Postmaster Tools (free, set up if you use Gmail recipients)

## Campaigns and Copy That Convert

Draft your first campaign using the AIDA structure, write five subject line variants, and build your campaign calendar.

### Exercise: Write Five Subject Lines for Your Next Campaign

Use the six frameworks from the lesson to write five subject lines for your next campaign. Write one using each of the following frameworks, then score them yourself on a scale of 1–10 for curiosity and relevance to your audience.

- Write a curiosity gap subject line for your next send.  

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- Write a specific, number-led subject line for the same campaign.  

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- Write a direct benefit subject line — make the outcome clear and believable.  

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- Write a question-format subject line that triggers a self-check response in your ideal subscriber.  

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### Worksheet: Campaign Draft Template

Use this structure to draft your next broadcast campaign before you build it in your ESP. Writing the copy here first prevents the distraction of fighting with the email builder while trying to think.

Campaign goal (what action do you want the reader to take?)  

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Target segment (who is receiving this email?)  

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Subject line (chosen from your five options above)  

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Preview text (under 90 characters, extends or contrasts the subject line)  

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Email 1 — Opening sentence (must earn the second sentence)  

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Email body — Core idea in 3 short paragraphs  

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CTA button text (outcome-specific, not 'Click here')  

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CTA destination URL  

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Send date and time  

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Success metric and benchmark you are comparing against

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### Checklist: Pre-Send Campaign Checklist

- Subject line and preview text both written and reviewed
- Email viewed in mobile preview in your ESP before sending
- All links tested — every link in the email resolves to the correct page
- CTA button present and visible above the fold on mobile
- Sent a test email to yourself and read it as a subscriber would
- Personalisation tags tested with fallback text (e.g. 'there' if first name is blank)
- Unsubscribe link verified as working in the test send
- Send time confirmed for the correct timezone
- Segment selected correctly — double-check the count before sending
- UTM parameters added to all links for analytics attribution

## Automations, Flows, and Metrics

Plan and configure your welcome sequence, document your automation map, and set up your metrics tracking system.

### Exercise: Plan Your Five-Email Welcome Sequence

Draft the purpose, angle, and CTA of each email in your welcome sequence before you write the copy. Planning at this level takes 30 minutes and prevents scope creep when writing.

- For each of the five emails (Day 0, 2, 4, 7, 10), write one sentence describing the single idea or story that email will communicate.

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- What is the CTA in Email 5 — what specific action do you want a warm subscriber to take, and what makes it a low-risk yes?

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- How will you tag or segment subscribers who click your Email 5 CTA so you can follow up appropriately?

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### Worksheet: Automation Library

Document every automation you have live or plan to build. This becomes your maintenance log — review it quarterly to confirm each automation is performing.

Automation name

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Platform and flow type (e.g. Klaviyo Flow / ConvertKit Sequence)

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Trigger event

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Number of emails in the sequence

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Total duration (days from first to last email)

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Last reviewed date

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Open rate benchmark vs actual

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Click rate benchmark vs actual

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Action needed at next review

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### Checklist: Metrics Monitoring Checklist

- Campaign metrics spreadsheet created and shared with any collaborators
- Baseline benchmarks documented for your industry (open rate, CTR, unsubscribe rate)
- Metrics recorded within 48 hours of every campaign send
- Open rate, CTR, CTOR, and unsubscribe rate tracked per send
- Revenue per email tracked for any promotional or offer-based sends
- Monthly review scheduled to compare rolling average against benchmarks
- A/B test log started — document hypothesis, variant, result, and winner for every test
- Re-engagement flow triggered automatically when a subscriber reaches 90 days inactive
- Google Postmaster Tools or DMARC Analyzer used to monitor sender reputation quarterly

### Your Action Plan

1. Define your ideal subscriber profile in writing before touching any platform or tool
2. Create your lead magnet concept and validate it by posting the idea to your community or a relevant forum before building
3. Set up domain authentication (SPF, DKIM, DMARC) in your ESP before sending a single email
4. Build and publish your first opt-in form with a benefit-led headline, single email field, and outcome-specific button text
5. Write and activate a five-email welcome sequence connected to your opt-in form
6. Create three engagement tier segments (Active / Warm / Cold) in your ESP and set up a re-engagement automation for the Cold tier
7. Draft your campaign calendar for the next 30 days with a 3:1 value-to-promotional ratio
8. Write five subject line variants for every campaign and A/B test the top two against your list
9. After your first five sends, record all six core metrics in your campaign tracker and compare to industry benchmarks
10. Review every active automation quarterly — open rate, click rate, and exit logic — and update copy or timing that is underperforming









