

Email Marketing & List Building — Workbook

This workbook turns the course into a working list-building system for your own business. Move through it in order: define your subscriber value and design a lead magnet, choose and authenticate your platform, write and test copy that earns opens, and build the automations that turn subscribers into revenue. The templates give you a ready-to-edit subscriber-value and growth tracker, a domain-authentication setup checklist, and a copy and A/B-test log so you can stop guessing and start compounding.

Why Email, and Building a List You Actually Own

Put a dollar value on a subscriber, design a high-converting lead magnet, and lock in permission and placement before you collect a single address.

Worksheet: Calculate the Value of a Subscriber

Fill this in before spending anything on list growth. Once you know what a subscriber is worth, you can decide how much you can afford to pay to acquire one. If you have no sales data yet, estimate conservatively and revisit in 90 days.

Total revenue attributable to email last 12 months (dollars)

Average number of active subscribers over that period

Annual revenue per subscriber (revenue divided by subscribers)

Average customer lifetime in years

Estimated lifetime value per subscriber

Maximum you can afford to spend to acquire one subscriber (target payback under 12 months)

Current monthly list growth, net of unsubscribes and cleaned addresses

Exercise: Design a Lead Magnet That Matches Your Offer

Pick the one paid offer you most want to sell, then design a free resource that attracts exactly the person who would buy it. Narrow and specific beats broad and generic.

- What is the single paid product or service you want this list to eventually buy?

- What one narrow, urgent problem does your ideal buyer have right before they need that offer?

- Which format solves it fastest (checklist, template, quiz, mini-course)? Why that format?

- Write the specific, benefit-driven title for the lead magnet (avoid the word Ultimate).
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Exercise: Choose Your Opt-In Placement and Consent Model

Decide where your forms will live and whether you will use single or double opt-in, then confirm you meet the consent laws for the regions you mail.

- Which two form placements will you launch first (inline, landing page, exit-intent, header bar)?

 - Will you use single or double opt-in, and what is your reason given your audience and regions?

 - Which laws apply to you (CAN-SPAM, GDPR, CASL), and what does each require of your form and footer?

 - How will you store proof of consent for each subscriber?
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Checklist: List-Building Foundation Checklist

- Subscriber value and acquisition ceiling calculated and written down
- Lead magnet created, with a specific benefit-driven title
- At least two opt-in form placements built and live
- Single or double opt-in decision made and configured
- Unsubscribe link and valid physical mailing address in every email footer
- Consent-capture method confirmed for every region you mail
- No purchased or rented lists anywhere in your setup

Platform Setup and Inbox Deliverability

Choose the right platform for your business model, authenticate your sending domain with SPF, DKIM, and DMARC, and warm up before you scale volume.

Worksheet: Platform Selection Decision Sheet

Score the platforms you are considering against what your business actually needs. Decide before you import contacts, because switching later is costly.

What you sell (physical product, course, service, newsletter)

Automations you must have (welcome, abandoned cart, post-purchase, segmentation)

Whether you need SMS alongside email

Expected subscriber count in 12 months

Monthly price at that subscriber count (not just the free tier) for each candidate

Does it allow authenticating your own sending domain? (yes/no per candidate)

Final platform choice and the single most important reason

Checklist: Domain Authentication Setup Checklist

- Sending domain or authentication settings opened in your email platform
- SPF TXT record added at your DNS host (only one SPF record exists)
- DKIM record (CNAME or TXT) added exactly as the platform provided
- DMARC record added starting at policy p=none with a reporting address

- [] Waited up to 48 hours for DNS propagation
- [] Verified all three records pass using MXToolbox or a similar checker
- [] Reminder set to tighten DMARC to quarantine, then reject, after reviewing reports

Worksheet: New-Domain Warm-Up Schedule

Plan your sending ramp so a new domain builds reputation instead of looking like spam. Fill in target volumes and adjust if opens drop or complaints rise.

Week 1 daily send volume and which engaged segment receives it

Week 2 daily volume (roughly double if metrics held)

Week 3 daily volume

Week 4 daily volume

Target full daily volume and the week you expect to reach it

Open-rate floor that triggers a pause in the ramp

Complaint-rate ceiling that triggers a pause in the ramp (keep under 0.1 percent)

Exercise: Build a List-Hygiene Routine

Decide the rules that keep your list clean so deliverability stays high over time. Write the specific thresholds and cadence you will actually follow.

- How will you handle hard bounces, and how quickly?

- After how many days of no opens will a subscriber enter re-engagement?

- How often will you run a list-cleaning pass (monthly, quarterly)?

- Which blocklist-monitoring tool will you check, and on what schedule?

Copywriting That Earns Opens and Clicks

Write subject lines and preview text that win the open, structure body copy around a single action, and segment so the right people get the right message.

Exercise: Write Five Subject-Line and Preview-Text Pairs

For your next campaign, draft five subject lines using a different formula each, and pair each with deliberate preview text that continues the hook. You will A/B test the top two.

- Curiosity-gap subject line and its continuing preview text

- Specific-benefit subject line and its continuing preview text

- Urgency or scarcity subject line (with a real deadline) and its preview text

- Personalized subject line and its preview text

- Which two will you A/B test first, and what open rate would count as a win?

Worksheet: One-Email-One-Goal Planner

Plan a single email around one action using the proven hook, context, value, single call to action, and postscript structure. Fill each field before you write the full draft.

The single most valuable action for this email (the one goal)

Hook: the first line that earns the second line

Context: why this matters to the reader right now

Value: the insight, tip, or offer delivered

Call-to-action button text (describe the outcome, not Click here)

Postscript line that restates the offer or adds a deadline

Where the primary button sits relative to the mobile fold

Exercise: Build Your First Three Segments

Define three meaningful segments and the different message each should receive. Start small; even three segments beat sending everyone the same email.

- Segment 1, engaged subscribers: how is it defined and what should they receive more of?
 - Segment 2, customers: how is it defined and how does their message differ from prospects?
 - Segment 3, dormant contacts: how many days of inactivity defines it and what is the re-engagement angle?
 - One personalization beyond first name you can use (past purchase, downloaded magnet, lifecycle stage)?
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Checklist: Pre-Send Copy Checklist

- Subject line and preview text written deliberately and read as a pair
- Exactly one primary call to action, with outcome-focused button text
- First line is a hook, not a throat-clearing introduction
- Copy uses you far more than we and reads aloud like a person talking
- Primary button visible without scrolling on mobile
- Correct segment selected (not a batch-and-blast to everyone)
- A/B test configured on subject line where the platform allows

Automation and Measuring What Matters

Build the welcome, abandoned-cart, and re-engagement flows in priority order, then run a monthly metrics loop that compounds improvement.

Worksheet: Map Your Five-Email Welcome Sequence

Outline each email in your welcome sequence with its timing and one goal. Give generously before you ask for the sale. You will build this once in your platform and it runs forever.

Email 1 (immediate): how the lead magnet is delivered and the one-line welcome

Email 2 (day 1 to 2): the story and why you do this

Email 3 (day 3 to 4): the single best free value you can give

Email 4 (day 5 to 6): how your core offer solves the reader's problem

Email 5 (day 7 to 8): the offer and any gentle deadline or bonus

The trigger that starts the sequence (form, list join, tag)

The platform feature you will build it in (Sequence, Flow, Customer Journey)

Exercise: Prioritize Your Automation Build Order

List the automations your business needs and rank them by revenue impact so you build the highest-value flow first. Most businesses go welcome, then abandoned cart, then post-purchase, then re-engagement.

- Which automations apply to your business (welcome, abandoned cart, post-purchase, browse abandonment, re-engagement, replenishment, birthday)?
 - Rank them by expected revenue impact for your model.
 - For your abandoned-cart flow, what timing and how many emails, and will the final one carry an incentive?
 - At how many days of inactivity will your re-engagement flow trigger, and what is the win-back offer?
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Worksheet: Monthly Metrics Review

Record your core numbers each month against benchmarks, then run the improvement loop. Tracking month over month matters more than any single send.

Open rate this month (benchmark 20 to 40 percent, directional)

Click-through rate this month (benchmark 2 to 5 percent)

Unsubscribe rate (keep under 0.5 percent per send)

Complaint or spam rate (keep under 0.1 percent)

Revenue per subscriber this month (revenue divided by subscribers)

Net list growth this month (signups minus unsubscribes and cleaned)

The single weakest metric and the one hypothesis you will A/B test next month

Your Action Plan

1. Calculate your revenue per subscriber and the maximum you can afford to spend acquiring one.
2. Create one specific, benefit-driven lead magnet matched to the offer you most want to sell.
3. Choose your email platform based on business model, automations needed, and price at 12-month scale.
4. Authenticate your sending domain with SPF, DKIM, and a p=none DMARC record, then verify all three pass.
5. Build at least two opt-in forms and decide on single or double opt-in with documented consent.
6. Warm up a new sending domain over four to eight weeks, mailing engaged contacts first.
7. Write and A/B test your subject lines, and structure every email around one clear call to action.
8. Define three starter segments and stop batch-and-blasting your entire list.
9. Build the welcome sequence first, then the abandoned-cart and re-engagement flows.
10. Run the monthly metrics loop: review, pick the weakest number, form one hypothesis, A/B test, repeat.

