# **Email planning template**

## **Planning the email**

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| **What is the aim of the email?**  Consider what action you want the reader to take. It might be to buy a ticket or donate, but it could also be click through to watch a video or share something on social media. |
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| **What do customers need to know to achieve this aim?**  It might be enough to share a link with your readers. If you’re asking for a commitment (such as a ticket purchase or donation) consider if there are extra reassurances you need to give in your email. |
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| **Which customers should we target with this email?**  Consider who will benefit from this email and who would be most likely to take the desired action. This won’t apply to you if the only information you hold is email addresses. |
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| **How will we know if it has been successful?**  This could be about the number of opens, click throughs, tickets purchased, or donations made. Consider how you will measure the success of your email. |
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## **Writing the email**

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| **Main call to action**  Write your call to action first. Make sure you link this back to the aim you’ve set and use active language. |
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| **Supplementary call to action (optional)**  Try to stick to one call to action per email if possible. |
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| **Body copy**  Remember to stick to your organisation’s tone of voice. Try to keep your emails quite concise – give as much information as you need to encourage the reader to carry out your desired action. |
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| **Subject line**  Make your subject line a preheader text different for each email you send and make it specific to what’s contained in the email. Come up with several options and choose the best one, or test out two different versions to see which works best.  [Best practice for subject lines | Mailchimp](https://mailchimp.com/help/best-practices-for-email-subject-lines/)  [How to Write Subject Lines that Get Opened | Whole Whale](https://www.wholewhale.com/tips/subject-lines-that-get-opened/)  [How To Write Effective Email Subject Lines - Email Mastery (deep dive)](https://emailmastery.org/articles/how-to-write-effective-email-subject-lines/) |
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| **Preheader / preview text**  Make sure you use the preview text as it can make a big difference to open rates.  [How to write better preheader text](https://www.campaignmonitor.com/blog/email-marketing/2019/04/improve-email-open-rates-with-preheader-text/) |
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## **Reviewing the email content (pre-send check)**

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| **Does the email answer the question?**  How likely is it that the audience will recognise and carry out the desired action? |
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| **Have I included more than one message / call to action?**  If there is more than one call to action, ensure the hierarchy is correct. Make sure the most important one comes first and make it stand out more by creating a button or using a standout colour. |
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If you’d like to go into even more detail when planning your emails, check out this resource from Litmus: [Litmus Resource Center: Email Marketing Brief & Planning Worksheet](https://www.litmus.com/resources/email-brief-planning-worksheet/)