# Email planning template – welcome email

## Planning the email

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| What is the aim of the email? What’s the most important action a new subscriber could take? |
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| What do customers need to know to achieve this aim? For this question think about two things:   * What information do they need – is it a link, a discount code or a phone number? * What trust signals do you need to give – how will you assure them that they want to carry out the action? |
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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 (CTA) 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. You might sometimes have 2. For example, your main call to action might be to watch a welcome video from your CEO. A supplementary CTA might be to read a welcome message for people who prefer not to watch videos. |
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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 and 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.  [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. This is the snippet of text that appears under the subject line in the inbox.  [5 Preheader Text Examples that Will Increase Your Email Open Rates | Email on Acid](https://www.emailonacid.com/blog/article/email-marketing/5-preheader-text-ideas-to-increase-your-email-effectiveness/) |
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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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| Is the content evergreen? If there is time-sensitive information in your welcome email, can you alter it so that the content doesn’t have to be changed too often? |
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