



eBook

A Guide to Building a Better Email: The Welcome Series

The welcome email is one of your best opportunities to build the foundation for a lasting relationship with a customer. It has among the highest open and read rates of all marketing emails, giving it the potential to be highly impactful. But the stakes are high—depending on your approach, you can gain or lose a customer in that initial contact.

At Movable Ink, we know email can do amazing things. We make email dynamic, personal, contextual, and even more profitable. Our "Guide to Building a Better Email" series will walk you through the fundamentals of email marketing, so you can take your email campaigns to the next level.

In this edition, we'll guide you through the steps to build a welcome series that will turn your subscribers into loyal customers, while collecting valuable data along the way that will drive action—and ROI — throughout the customer relationship.

You've got a new subscriber to your mailing list — congratulations! You now have a unique opportunity to introduce them to your brand. So, where should you start? At the beginning, with what is arguably the most important building block of your new relationship: the welcome email. And since you don't get a second chance to make a first impression, the welcome email carries a lot of weight.

Across industries, the welcome email has one of the highest open and read rates of any type of marketing email. With such low hanging fruit, many businesses give into the temptation of sending out only one welcome email in which they jam every idea and call to action (CTA) overwhelming the subscriber with too much information at once.

This is a missed opportunity to open a two-way conversation, effectively drive additional action, and create an exceptional subscriber experience.

A welcome email isn't about simply responding to a user action or even converting. Don't let your eagerness to drop your new subscriber into your next campaign sabotage your marketing efforts.

Instead, create a series of well-thought-out welcome emails—each creating a customized experience that builds off learnings collected from the previous email.

*Welcome emails
average 34%
higher read rates.*

– Emma

With proper planning and data, the story a brand lays out in a welcome series can build a lasting relationship with the consumer.

Planning

Your welcome email series, which can run anywhere from three to 10 emails (or more), should be rooted in careful planning. Before you write a single word of copy, define your objectives so you know what you want to say and why you should say it. By establishing overall goals and mapping each email to a clear set of objectives ahead of time, you have created the groundwork for a cohesive series that results in a happy, loyal customer and greater ROI.

Welcome emails have 86% higher open rates and 3X the transaction rates of regular emails.

– Experian

Set Goals

The most obvious goal for your welcome series is to turn subscribers into paying customers, but supporting that goal takes a thoughtful approach. All content in your series should align with one (or more) of three foundational goals for your series. Designing your series with the goals laid out below in mind will more effectively drive your subscriber down the path to purchase than one premature CTA, and help you build a consumer profile to inform future communications.

- ***Provide value.*** Your welcome series should set the tone for your relationship with the consumer, and let them know immediately you're there to add value to their lives. Doing this effectively will build trust; the reader will come to count on your emails to be relevant, easily digestible, and a worthwhile read.

- **Compel.** Each email should guide your subscriber toward an action, whether it's making a purchase or providing more information about themselves. Stick with one CTA per email, and make it as easy as possible for them to complete the action.
- **Profile.** Use this opportunity to start a conversation with your reader that builds a consumer profile over time. User data is one of your most valuable assets when building personalized, relevant emails, but most subscribers aren't likely to proactively engage with a profile page or preference center. Progressive profiling within each email allows you to collect reader information—in a fun and engaging way—without sending them to a preference center to create a profile at the risk of losing them along the way. This profile can be used to help tailor each email to the subscriber's needs with valuable content that's most likely to drive engagement and conversion.

Messaging and Cadence

Now that you've established the goals you want to reach with your welcome series, think about what matters to your business and to your customers most, and consider how you can use this information to make your welcome emails shine. To start, list five things you need to know about the reader in order to create the best experience for them and ultimately increase conversion.

If you're a B2C business, you might want to know more about who the subscriber is in relation to who they're purchasing for, what kinds of products they're interested in, and what kinds of discounts and offers would be most valuable to them.

Are you a B2B marketer? It would be helpful to know more about your subscriber's role in their organization, how they prefer to engage with content, and their biggest concerns and pain points.

Next, list five things you want the reader to know about your brand. Would your subscribers warm to the fact that your company is a family-run business, or would they be excited to learn about a points reward system for loyal customers? Whatever you want to highlight that reinforces the core story of your company, put it on the list.

After you've identified what you want to include, figure out how many emails it will take to effectively collect (and relay) that information. Remember, although each email may contain a good amount of valuable information, it should have only one CTA. This will help determine how many emails your welcome series should have in order to build the relationship and effectively meet your objectives. While there's no "right" number, your series should consist of at least three core emails.

Now, you can relax (a little) — the initial steps of brainstorming and organizing your ideas are out of the way. It's time to create your first email.

Building the Series

Email #1: Welcome!

This email may be the subscriber's first peek into your brand, or it could be one in a series of brand interactions. Either way, keep in mind that it's important that the tone, flow and design of the email, as well as any destination landing pages, are consistent with your brand.

Now is the time to bring your creative and brand team on board, as well as any other key stakeholders, to make sure your first contact with a new subscriber represents your brand at its best.

To ensure you're meeting your subscriber's needs, as well as your organization's, take some time to break down this email—and all emails that follow—into primary, secondary, and tertiary objectives. Each email's objectives should be unique. By offering content that delivers on these objectives, you're strategically building the conversation—speaking to the subscriber on their terms, while still focusing on business goals.

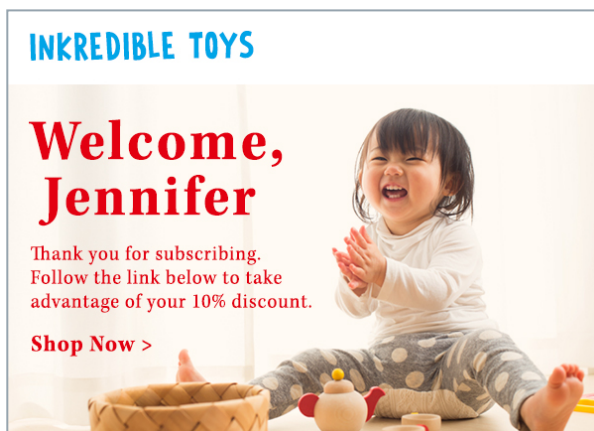
While the formula for each email may need to be adjusted a bit based on your own audience's needs and your business goals, the objectives laid out below for our Inkredible Toys welcome series are a great start for all organizations—ensuring that you'll meet your subscribers expectations, collect valuable data and drive action. We've also mixed in some B2B examples throughout for those of you who want to cater your welcome series to other businesses.

Objective 1: Deliver on the promise

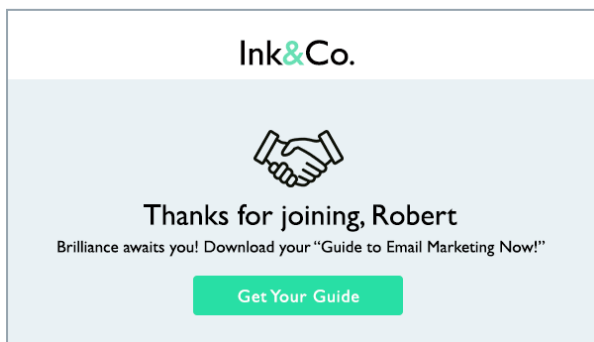
Your first responsibility in your initial welcome email is to deliver on the offer made to the reader when they handed over their email address to you.

Whether they responded to an offer for a discount or to download a piece of content, this email should welcome them—in your brand voice—and immediately give them access to the offer.

Deliver the offer



B2B Offer



Objective 2: Set the Stage

Your reader has given you something valuable to them. In addition to their time and attention, they gave you access to their inbox. Let them know it was worth it. Set expectations for what kind of content you'll be sending in future emails and how often.

This is also a good opportunity to let them know this is a two-way conversation and you want to hear from them—through live polling

and social media. Start by giving your subscribers a way to share, and a sense of community, with a link to your social media channels. You can also pull in live social feeds to share what your existing fans are saying about your brand.

Live Social Feed

What our customers are saying



Holly Roberts @hroberts 21 Jan 2015
Big moment. I just bought my daughter her first big girl bike from @inkredibletoys



Tracy Nixon @Trixie 21 Jan 2015
My 14 months old son absolutely loves his new playmat from @inkrebletoys



John Richards @frugaldad 21 Jan 2015
I'm smiling just as big as my kids. I just saved 40% off my online order @inkredibletoys.

Objective 3: Start Profiling

One of the most important components of your welcome series is the data collected along the way through progressive profiling that can inform the content offered in each subsequent email. As you continue to collect this data on the back-end, you can develop a profile of demographics and preferences that can be used to offer specifically tailored email messaging, personalize the website experience, or target offers and discounts that will be most valuable to your reader.

By taking a “brick by brick” approach to building the profile, you avoid the pitfall many marketers fall into—sending subscribers to a preference center to fill out a profile.

What is Progressive Profiling?

A form of polling that lets marketers gradually collect consumer data over time.

The biggest challenge to that approach is most subscribers have little interest in visiting a separate page to fill out personal information and select content preferences.

Progressive profiling lets you gradually gather information about your subscribers, and the gamification of polls provides a fun, interactive experience readers are more likely to engage with. You can put these insights to immediate use—offering content in future emails based on your learnings from previous ones.

What questions should you ask? This is where your first list—the five things you need to know about your subscriber—comes into play. Keep it simple and straightforward. The questions should be fun and easy for your subscribers to answer. And consider phrasing your questions in a way that will elicit a more genuine, emotional response.

For example, if you're a B2C business, you may want to know which loved ones they enjoy buying for most, so you can incorporate messaging for more tailored products into future emails.

Progressive Profiling

Who do you love shopping for the most?

 My Infant	 My Toddler
 My Grandchildren	 My Nieces & Nephews

What toys do your grandchildren love playing with the most?



Dolls



Toy Trucks



Board Games

Do you work for a B2B company? Ask what their role is in their organization to narrow down specific pain points and offer solutions.

B2B Progressive Profiling

What's your role in your organization?

A.



Sales

B.



Marketing

C.



Client Services

Which content format fits best with your work habits?

A.



Blog

B.



Social Media

C.



eBook

Subscribers respond well to progressive profiling. Gamification makes it fun and offers a promise that future communications will be useful. And as you see how often your subscribers respond to polls, you can adjust the frequency in future emails.

Email #2: Establishing A Relationship

The second email in your welcome series builds on the promise of the first. You've engaged your subscribers, they've told you more about themselves and you can start a more personalized conversation with them. You can also begin to share more of your brand story.

Objective 1: Introduce your story

Now it's time to start tackling some of the objectives from your second list—the five things you want the subscriber to know about your brand. Start sharing more about what makes your company great. What's the best thing about your brand? What do you think they will love and react to?

Tell Your Brand Story

INKREDIBLE TOYS



Inkredible Toys is a family owned business. Each of our products are thoughtfully made by hand here on the family farm.

Objective 2: Make a connection

What's the best way to solidify your new relationship with your subscriber? Create an emotional bond. Instead of talking about the features of your products and services, illustrate the differences those products or services can make in your subscriber's life. What problems can your product or service solve for the subscriber? How

will they live differently? Better? What is their emotional connection?

Make an Emotional Connection



We know the little ones in your life are your most valued treasures. We're here to help you keep them safe and sound.

[Learn more about why you can use our products with confidence >](#)

Objective 3: Offer value

You've gathered some valuable data from progressive profiling in your first email. Now is the time to start using that information by offering content relevant to what you learned. You can also move down to the next question on your list of subscriber questions, and gather more information with another polling question.

Email #2 is also a great opportunity to offer value by highlighting customer testimonials or social validation. Let your current fans be your advocates. A web crop lets you pull testimonials from your website directly into your emails. You can also use a live social feed to include real-time messages from fans.

Live Social Feed



@jsdillon 2 hrs

Charlie loves playing with his new block set from @inkredibletoys. #quiettime #play #charlie

Email #3: Educate

The third of the core emails in your welcome series is all about deepening the relationship even further. For some businesses, objectives may have been met and this will be the final email in the series. For others, it will be one in a longer series of messages designed to add value while addressing any remaining priorities on both lists.

Objective 1: Offer more targeted content

The primary objective of this email (and of each email that follows) should be to continue to build on the subscriber's previous experience. If the reader indicated a preference in the second email's poll, the third email should offer content that delivers on that preference.

Tip: Keep it to One-Click

One-click actions provide the best user experience and increases the likelihood your readers will follow through.

Something like, “You told us you were interested in gift ideas for your nephew, so here’s our free “Guide to Shopping for Kids.” Even if they’ve chosen not to interact with your polls in the past—add something of value. Work off your list of what’s most important to tell them about the brand. Link them to high-quality content on your blog or social media, or use a web crop to pull in resources from your website.

Targeted Content

The image shows a preview of an email. On the left is a vertical banner with a blue background. It features a photo of a smiling young boy with blonde hair. Above the photo, the text 'GUIDE TO SHOPPING FOR KIDS' is written in white. Below the photo, there is a small white box with the text 'GET YOUR GUIDE >'. To the right of the banner, on a solid blue background, is a block of white text. The text reads: 'Shopping for your nieces and nephews is a joy, but it can be hard to keep up with their changing needs and tastes as each year passes. Take a look at our "Guide to Shopping for Kids" to find tips on choosing age appropriate gifts, as well as a look into the hottest trends.' Below this text is a white button with the text 'Get Your Guide >'.

Shopping for your nieces and nephews is a joy, but it can be hard to keep up with their changing needs and tastes as each year passes. Take a look at our “Guide to Shopping for Kids” to find tips on choosing age appropriate gifts, as well as a look into the hottest trends.

Get Your Guide >

B2B Targeted Content



We know one of your biggest challenges as a digital marketing manager is proving ROI for new platforms. Our new eBook, "5 Steps to Getting Executive Buy-in for New Platform Investment" will help you overcome the challenges and secure the budget you need.

[Download eBook](#)

Objective 2: Offer relevant deals

If you've successfully gathered data on their purchasing habits and preferences with polling, you can now send even more targeted offers, deals and incentives. Present a clear CTA that will take them to a destination page to the offer with a seamless experience.

Welcome emails with coupons have up to 2.5X higher transaction rates.
— Experian

Tailored Offers

INKREDIBLE TOYS

Charlie's Favorites Now on Sale



[Shop Robots >](#)



[Shop Dinosaurs>](#)



[Shop Trucks>](#)

Objective 3: Continue to build the experience

Continue to build your subscriber profile by moving down to the next question on your list. This may be your last chance to get information from any subscribers who haven't participated with polls in the past, so consider offering an incentive to entice them.

Polling with an Incentive

Which would provide the most fun for your family?

Tell us now and we'll give you a 30% coupon code to share with freinds and family

		
Allergy-free Cookie Recipes	Fairytale Bedtime Stories	DIY Instnuctions for Building a Couch Fort

Emails #4-10: So Happy Together

For brands extending their welcome series beyond three core emails, the objective for ongoing communications is deepening the relationship. Continue to lay out your story in the remaining emails with a focus on providing value. However, emails four through 10 offer you more of a blank canvas. Ask what makes sense for your business and put the consumer profile data you've been gathering to work. For example, if you're a shoe retailer, you could provide an online custom shoe builder or an online sizing guide for kids.

Complete the Profile

Remember, this is a conversation that deepens over time. If subscribers have interacted with your polls, continue to ask the remaining questions on your list to complete their profile.

If they haven't shown interest in your polls, you can still offer them a way to participate on social channels. Deep linking to your subscriber's social apps offers a one-click action that bypasses account sign-ins, so they won't get stuck on login screens, and can easily engage with your brand. This is also a great opportunity to incentivize engagement by offering "Friends and Family" discounts to share on social media.

Tip: Avoid the Social Kiss of Death.

Don't link to a social site's URL. You risk throwing subscribers into a loop of forgotten passwords and unintended troubleshooting. Use deep linking to detect and open a readers social app, creating a seamless user experience.

Social Deep Linking

INKREDIBLE TOYS FRIENDS AND FAMILY SALE

Get 10% Off Your Next Purchase by
Tweeting About Our Friends and
Family Sale.

Click to Tweet

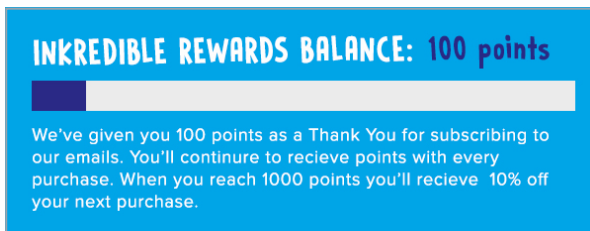
Continue the Story

Revisit your list of the most important aspects of your brand story, and continue to share it. Which pieces of your brand story remain? Which would be most interesting to your subscriber? You can:

- Highlight charities
- Link to social content
- Show real-time rewards program benefits

Identify the content that delivered the most success and continue to build on that type of content.

Offer Real-time Rewards Program Points



INKREDIBLE REWARDS BALANCE: 100 points

100 / 1000

We've given you 100 points as a Thank You for subscribing to our emails. You'll continue to receive points with every purchase. When you reach 1000 points you'll receive 10% off your next purchase.

The image shows a blue rectangular box representing an email notification. At the top, it says 'INKREDIBLE REWARDS BALANCE: 100 points' in white, bold, sans-serif font. Below this is a horizontal progress bar. The first 10% of the bar is filled with a dark blue color, and the number '100' is displayed in white on this segment. The rest of the bar is light gray, and the number '1000' is displayed in gray at the end of the bar. Below the progress bar, there is a paragraph of white text explaining the reward: 'We've given you 100 points as a Thank You for subscribing to our emails. You'll continue to receive points with every purchase. When you reach 1000 points you'll receive 10% off your next purchase.'

Make the most of “Welcome!”

Extending a “Welcome!” is a unique opportunity to build a strong and lasting relationship with a customer. Make the most of it! With a well-thought-out series of emails—that starts out with a solid plan and builds on your story, as well as subscriber preferences collected over time, you begin to build a connection that drives action.

Combine that with a personalized, satisfying user experience, and content that’s relevant to their needs and interests—like live social feeds and tailored content—and you have created a loyal, lifetime customer.

Welcome Series Checklist

☐ Map out your goals for the series, and your objectives for each email.

☐ List the top five things you need to know about the subscriber to create a personalized, valuable experience.

1. _____

2. _____

3. _____

4. _____

5. _____

☐ List the top five things you want the reader to know about your brand.

1. _____

2. _____

3. _____

4. _____

5. _____

☐ Map out the number of emails your welcome series will need to tell your story, and collect needed data, through the items on your lists and any additional CTAs.

☐ Start creating an amazing welcome experience.

Movable Ink

Founded in 2010, Movable Ink pioneered the application of contextual experiences to email. Movable Ink clients can use any email service provider to deliver dynamic content that changes, in real-time, according to the context of each individual consumer. More than 300 innovative companies including The Wall Street Journal, eBay, Finish Line and Saks Fifth Avenue use Movable Ink to Market in the Moment and optimize their email campaigns to drive ROI. The company is headquartered in New York City with offices in London and San Francisco. For more information, visit movableink.com.

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