

# Email Marketing Guide & Workbook



Learn the science behind email marketing so you can make data-driven decisions to increase sales from your emails.

# Hey, I'm Kay

I'm so glad you decided to invest in this workbook!

Prior to becoming a coach, I was a VP of Marketing and Analytics.

In this workbook you'll find key metrics I used over my 12 year career to help businesses scale into multiple six and multiple seven figures a year using email.

How did I do it? By tracking email data and then analyzing and interpreting it - which I'll also show you how to do in this workbook!

You could read a bunch of blog posts and articles about what you should write emails about, but the most impactful thing you can read is your own data!

As you'll see, data will always tell you what your next move should be. Marketing is truly a science!

To your success! 🥂

*Kay*



# Tracking Email Metrics

Tracking email metrics helps you understand the type of content that the people on your email list resonate with the most.

The stronger the recipients resonate with the message, the higher your sales will be.

There are only three key metrics you need to track when it comes to sending emails.

## **1. Open Rate**

Open rate simply tells you how good you were at getting someone to open an email. The more people who open your email, the greater your chance of getting one (or many) of those people to buy.

If a person never opens your email they can't possibly make a purchase (from the email) so having a strong open rate is important.

One thing to keep in mind is that due to recent Apple privacy changes, recipients who open emails on Apple devices can no longer have their opens tracked. Therefore, open rates are now estimated in most email marketing platforms; however, these estimates will be fairly accurate and can still be used to gauge whether your open rate is strong or needs to be improved.

## **2. Click-Through Rate (CTR)**

Click-through rate tells you how good your message was at convincing recipients to learn more or consider purchasing.

# Tracking Email Metrics

Having a strong click-through rate is vital because a purchase cannot take place within an email itself. The recipient must click-through to your site to enroll, schedule a discovery call/consultation, make an appointment, or send you a DM to request more info.

Click-through rate can be calculated in two different ways.

The first is the [overall click-through rate](#) which takes into account how many people the email was sent to, and then how many people clicked.

[For example](#), if you send an email to 1,000 people and 50 people clicked then your overall click-through rate would be 5%.

There is also the ["open-to-click" ratio](#) which is also sometimes called a click-through rate. This takes into account how many people clicked after opening the email.

[For example](#), if you send an email to 1,000 people and 100 people open it and of those 100 people 25 click, then your open-to-click ratio would be 25%.

Because open rates can vary a lot between emails but your list size is likely to grow at a steady rate, I recommend tracking your overall click-through rate so that you can more easily compare one email against the next to know which message is resonating the best.

(In the next section I'll give you a chart you can fill in to start tracking your metrics. I'll also provide some insights into how to interpret the data to make data-driven decisions.)

# Tracking Email Metrics

## 3. Conversion Rate / Sales

The third and final key metric that is important to track is the conversion rate of email recipients into paying clients, and also the actual amount of revenue generated.

This one is fairly self explanatory: you want to know which emails are generating money for you so that you can send more of them!

## Getting Started

Now that you know which three key email metrics you should be tracking, it's time to get started.

You might already look at your email results on an individual basis but what I want you to start doing is tracking your results over time. The goal is to compare different subject lines, body copy, calls-to-action, images, and so on.

Look for positive patterns - which options generate the best results for you?

Once you compile the data you'll discover the answers to the following questions:

- Which type of subject line performs best
- Which type of message does my audience resonate with (emotional, fact-based, benefits-driven, etc.)
- Which call-to-action generates the best results

Armed with those answers you will be able to send emails that sell!

# Email Analytics Data

## Your Assignment: 90 Day Project

Track key metrics for every email you send over the next 90 days.

### Newsletter/Informational Email

Sending newsletter/informational emails should be all about providing value and demonstrating your expertise.

These are not meant specifically to sell (although you can and should include a link where someone can buy from you if they want to).

Because these emails are meant to nurture your leads vs. to sell to them directly, the most important metrics will be your open and click-through rates because they will tell you the type of messaging your audience resonates with.

Let's look at mock data for a Sleep Hygiene Coach:

Subject Line	Opens	CTR	Sales
5 Ways to Boost Your Energy in the A.M.	24.5%	5.4%	\$0
Why You're Always Tired After Lunch.	32.6%	4.3%	\$0
Not Sleeping Through the Night?	18.9%	6.7%	\$0
Need a Coffee Right Now?	20.0%	1.2%	\$0

You can find empty worksheet pages at the end of the guide.

# Email Analytics Data

## How to Analyze This Newsletter Data

In the mock data above we can see the "Why You're Always Tired After Lunch" email had the strongest open rate by 8%.

What this tells me is that other subject lines related to daytime sleepiness would likely also resonate with the email recipients.

With that in mind I would think of other subject lines to try such as:

- Falling Asleep at Your Desk?
- 5 Ways to Boost Your Energy in the Afternoon
- Learn How to Beat the Afternoon Slump

Had the "5 Ways to Boost Your Energy in the A.M" subject line performed the best I would try other subject lines related to improving morning energy such as:

- How to Jump Out of Bed and Take on the Day
- Wondering Why You Wake Up Still Tired?
- Do These 3 Things to Wake Up Refreshed

The truth is, the body copy of all six of these emails could contain the same or very similar copy about how to improve sleep hygiene.

But by identifying that open rates are higher when we talk about daytime sleepiness vs. morning grogginess we now know that the recipients on the email list more closely identify with daytime sleepiness. Now we can craft future emails around this problem that they more strongly resonate with.

# Email Analytics Data

All of the click-through rates were pretty similar in the sample data, although the call-to-action in the "Not Sleeping Through the Night" email generated the highest click-through rate by over 1%.

Because of that I would try using a similar call-to-action in future emails to get more clicks.

When you know which type of subject line gets the most opens, and which type of call-to-action gets the most clicks you can marry them together to create a super powerful email.

For example, based on the mock data, for the next email we might try:

Subject Line:

Learn How to Beat the Afternoon Slump

And in the body copy we might say something like:

One way to beat the afternoon slump is to fix whatever issue is that's causing you to not sleep through the night peacefully.

In my latest blog post I share how to figure out why you're not sleeping well (even if you are pretty sure you're not waking up at night - hint: it could be a mild case of sleep apnea which is easily treated).

[ Read the Blog Post ]



# Email Analytics Data

## Sales / Promotional Emails

Sending sales or promotional emails is vital to turning email marketing into a profitable channel for you.

When you're sending sales emails it's important to track all three key metrics; but don't get bogged down by just the final sales number.

Remember, if you send an email promoting your group coaching program and it generates \$2,000 because one person signed up, you shouldn't compare that to a different email you sent promoting your \$50 guide that generated \$500 in revenue.

In fact, the email that only generated \$500 in revenue resulted in 10 individual sales whereas the group coaching email only generated 1 sale.

Only compare metrics for specific offers against each other, not against other offers in your product suite.

Let's look at some more mock data for a group coaching program:

Subject Line	Opens	CTR	Sales
Cart is Open for Sleep Well Coaching	20.1%	3.1%	\$2K
Learn How to Sleep 8 Hours Like Sarah	27.2%	9.6%	\$8K
Learn to Say Goodbye to the P.M. Slump	31.9%	4.1%	\$6K
Learn How to Wake Feeling Refreshed	19.2%	7.1%	\$2K

# Email Analytics Data

## How to Analyze Sales / Promotional Email Data

In the mock data above we can see the "Learn How to Sleep 8 Hours Like Sarah" email had the highest open rate, highest click-through rate, and also the highest sales volume.

When you have an email that's a clear winner in all three areas like this you know exactly what to do.

Write more subject lines like the winning subject line, such as:

- Learn How Joe Went From Exhausted to Well Rested
- See What Jane Did to Start Sleeping Through the Night
- Do THIS To Get Better Sleep like Harry

And also write more email body copy and include more calls-to-action like you did to get the 9.6% click-through rate that generated \$8K in sales.

But what do you do when you are comparing emails where there is no clear cut winner?

For example, the "Cart is Open for Sleep Well Coaching" and "Learn How to Wake Feeling Refreshed" emails both generated \$2K in sales and had very similar open rates.

However, they did have very different click-through rates.

This is really important because this data is telling you something huge (and probably not what you think)...

# Email Analytics Data

Let's say both of those emails were sent to an email list of 5,000 people.

The "Cart is Open for Sleep Well Coaching" email achieved the following:

- 20.1% open rate = 1005 opens
- 3.1% click through rate = 155 clicks
- 1 sale of \$2,000 which is a 1.55% conversion rate

The "Learn How to Wake Refreshed" email achieved the following:

- 19.2% open rate = 960 opens
- 7.1% click through rate = 354 clicks
- 1 sale of \$2,000 which is a 0.28% conversion rate

While they both achieved the same amount in revenue, they did not both perform the same way.

Despite the fact that the "Wake Refreshed" email generated 7.1% clicks vs. the "Cart is Open" email only generating 3.1% clicks, the "Cart is Open" email actually performed 5.5X better.

Whaaaaaaat? Let me explain!

The conversion rate on the "Cart is Open" email was 5.5X higher than the conversion rate on the "Wake Refreshed" email (1.55% vs 0.28%).

Even though the "Wake Refreshed" email generated more clicks, the people who clicked-through based on the message that was included in that email were not as convinced to purchase - resulting in a lower conversion rate.

# Email Analytics Data

This is really noteworthy because most people would assume the "Wake Refreshed" email performed better simply because it got more clicks.

When it comes to newsletter/informational emails that's totally true.

With newsletters you want to get more clicks to pages where you can give more information of value.

But when it comes to sales emails your goal is to SELL, which means looking at your conversion rate (rate at which you convert leads into customers)

Often times soft sell emails (meaning those that come across as informational and try to sneak the sale in) will generate more clicks but when the recipient gets to the sales page they exit out right away because they think "oh, this wasn't what I was expecting."

Whereas hard sell emails (those that directly speak about the program, benefits, and registration process) may get less clicks, but the people who click will do so with the intention to buy or at least learn more about buying. Therefore we want to expand upon this, not the sneaky emails.

So, what is this mock data is telling us to do is:

- Send more emails like "Cart is Open" where the copy connects to the sales page really well
- Modify copy + CTA slightly to increase the click-through rate (you can do this simply by including a convincing testimonial)
- Test different subject lines to get more people to open the email and see the message

# Email Best Practices

Now that you know how to analyze your email marketing data, I'm going to share a few best practices to get you started with your next email!

## **Don't Use Clickbait for Your Subject Lines**

*this*

When you send clickbait-y subject lines like "Open for a Surprise" or "I've Got a Secret" you may get higher than usual open rates, but if the surprise or secret is just "doors to my program are opened" your audience is going to be annoyed and you may lose their trust, resulting in them not opening future emails.

Be clear with your subject lines.

If you don't want to say something as specific as "Enrollment is Now Open" you can at least say something like "Learn How to..." at least the expectation is set that when the person opens that email they will be told how to learn something vs. just finding out a secret that's not really ever a good secret anyway.

## **Use a Button in Addition to a Text Link**

Buttons just look clickable; they are proven to boost click-through rates because they draw the eye to them; they're colorful, they stand out, and because they grab attention better than text links they can improve your click-through rate even if you don't change anything else about your email.

## **Keep Paragraphs to 5 Lines or Less**

The average person gets over 100 emails per day. Very few people in this world are willing to read a novel from you without first knowing

# Email Best Practices

that what you have to say is going to be of value.

Because of that you want to keep your paragraphs short and skimmable. Anything over 5 lines (lines not sentences) is too long for an email.

Breaking up big paragraphs by turning them into a bulleted list is a great way to make an email skimmable AND draw attention to really important points.

Use a bulleted list instead of a paragraph to list out key features / benefits or tips if you really want them to get read.

## **Shorten Your Emails**

If you're sending a particularly lengthy email ask yourself - does this email need to be this long?

Could I instead write a shorter email and link people to a blog post or sales page where I could share longer-form information?

The benefit of linking people to your website is that people cannot purchase from you from inside of an email. If you want people to buy from you then you have to move them to your website.

## **Add Images to Really Long Emails**

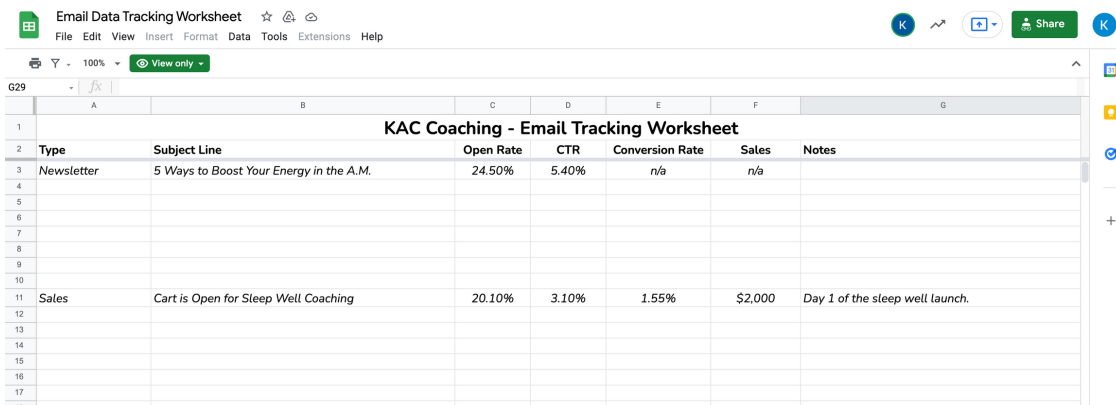
If you decide that a really long email is necessary, be kind to your recipients and break up the large wall of text with some relevant images or fun gifs. Very few people go to their inbox to read a novel, so at least give them a picture book if you're going to write a lot.

# Your Worksheets

On the following pages you'll find worksheets you can fill in to track your email metrics over the next 90 days (and beyond).

**Feel free to print these worksheets out, or you can access an expanded digital version of them at [kayallencarr.com/bonus](https://kayallencarr.com/bonus).**

The digital version is a Google Sheets spreadsheet that you can save to your computer as an Excel document if you prefer to use Excel.



The screenshot shows a Google Sheets spreadsheet titled "Email Data Tracking Worksheet". The spreadsheet has a menu bar (File, Edit, View, Insert, Format, Data, Tools, Extensions, Help) and a toolbar with a search icon, a "View only" dropdown, and a "Share" button. The spreadsheet content is as follows:

KAC Coaching - Email Tracking Worksheet						
Type	Subject Line	Open Rate	CTR	Conversion Rate	Sales	Notes
Newsletter	5 Ways to Boost Your Energy in the A.M.	24.50%	5.40%	n/a	n/a	
Sales	Cart is Open for Sleep Well Coaching	20.10%	3.10%	1.55%	\$2,000	Day 1 of the sleep well launch.

## To use the Google Sheets spreadsheet:

1. Go to [kayallencarr.com/bonus](https://kayallencarr.com/bonus) to access to spreadsheet.
2. Make a copy of the spreadsheet by clicking File > Make a Copy.
3. Once you've made a copy feel free to edit it.

You can also click File > Download to download it as an Excel file.

Enjoy!









# It's Your Time to Shine

I hope you found this workbook really resourceful, and that you'll commit to the 90-day email tracking activity.

I feel certain that if you commit to 90 days that this will become a habit, and it will serve you for the lifetime of your business.

Learning to track data, analyze it, and interpret it is a skill that I firmly believe every business owner needs to develop at some level.

In this guide I shared how to track and interpret your email marketing data, but this same process can and should be applied to all other marketing channels that you're investing time and/or money in.

Follow me on Instagram @KayAllenCarr for daily tips and advice for using data-driven marketing to grow your coaching business or private practice!

Cheers to your success!



@KayAllenCarr

# PS: Want the VIP Treatment?

If you are curious about what it's like to work with me, I offer two levels of VIP 1:1 support for coaches and private practice owners.

## 90 Minute Intensive

- Personalized 1:1 session
- Held over Zoom
- We discuss your business goals
- We map out your product suite
- I put together a custom marketing strategy for you

Perfect for the business owner successfully selling a single offer and ready to branch out, create additional offers, and build out automated marketing systems to scale.

## Private Coaching

- 3 months of 1:1 coaching
- Grow your email list
- Send emails that sell
- Setup automated emails (the right way... to sell)
- Launch social media ads
- Launch + sell an evergreen offer\*
- Bi-weekly calls
- Unlimited Voxer support M-F

Ideal for the 6-figure business owner who is looking to setup marketing systems to scale into multiple 6 or even 7 figures, and wants 1:1 guidance.

\*Not mandatory to launch and sell an evergreen offer but available if you want to do it to increase your time freedom.

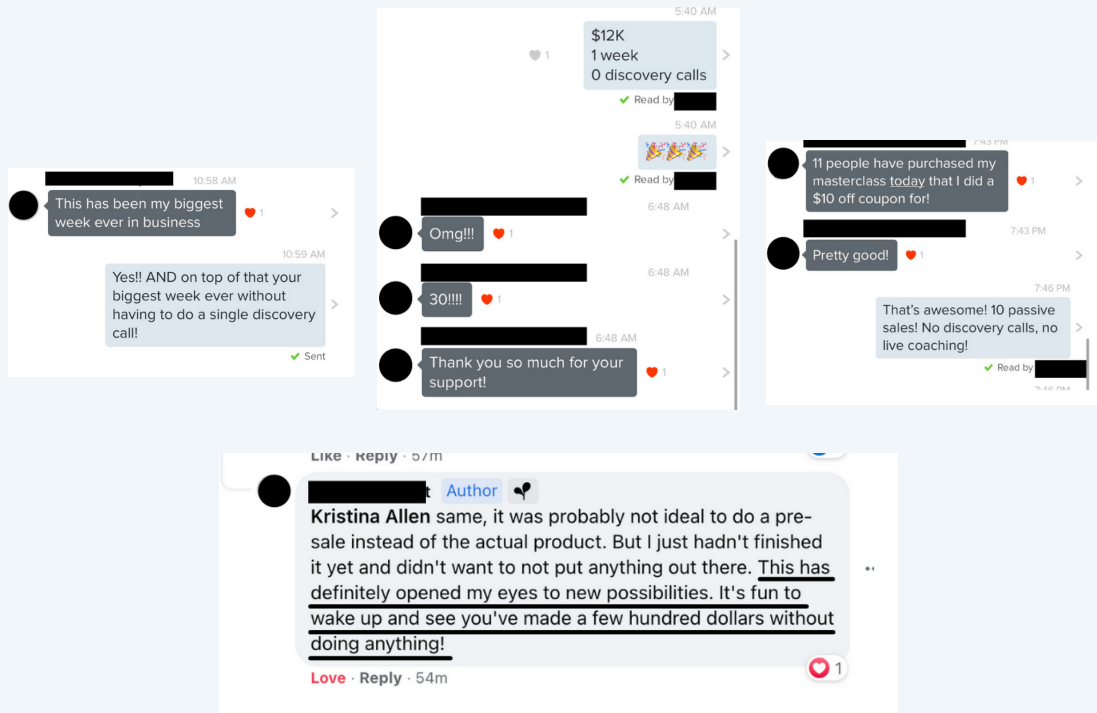
Visit [www.KayAllenCarr.com/Coaching](http://www.KayAllenCarr.com/Coaching) to learn more and apply for one of the VIP packages to work with me 1:1.

# What My 1:1 Clients Are Saying

"Over the past 3 months, I have grown my email list by 10%, created a new lead magnet with a true email funnel, and pre-launched my first lower-priced digital product. I have also gained the confidence that it is possible to branch out beyond just nutrition coaching services and have more passive income sources." -Sam, R.D.

"I launched my first lead gen ad with a freebie and have gained almost 500 leads from it to my email list! I also feel like my email marketing has improved a ton. I was able to convert someone who has been on my email list for over 6 months to a group coaching client with your strategy! -Marissa, R.D.

Your support is truly unmatched, you can really feel the difference when a coach actually cares about your results and it is so relieving."  
-Lauren, R.D.



Visit [www.KayAllenCarr.com/Coaching](http://www.KayAllenCarr.com/Coaching) to learn more and apply for one of the VIP packages to work with me 1:1.