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EMAIL MARKETING BASICS

tradecraft

by ✉ ConvertKit

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IN THIS ISSUE

Letter from the editor
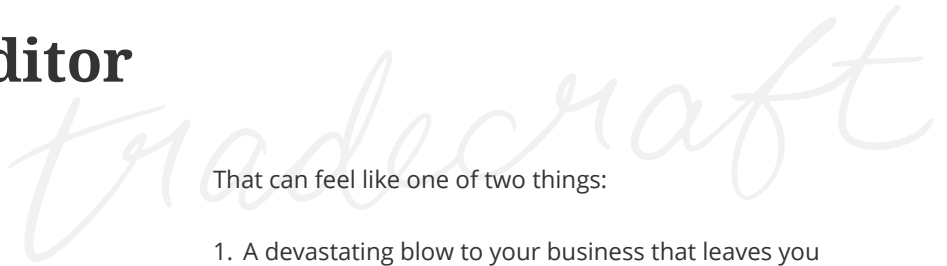
Fundamentals.

Fundamentals are the building blocks of any complicated endeavor. Fundamentals are how the baseball player hits home runs with consistency. Fundamentals are how the magician makes us believe he's doing the impossible. Fundamentals are how a runner learns to run for distance without injury. Fundamentals are how smart investors ensure they're ready for retirement.

Fundamentals aren't hard because they're complicated. They're hard because we all know we should be doing them, but they take discipline. And discipline is hard.

The fundamentals of online business are no different. They're the building blocks necessary for any online entrepreneur to *make it,* whatever that might mean to them.

Building websites. Blogging, vlogging, and podcasting. Building products. Selling. Building relationships with customers. These are the fundamentals.

But everything falls apart without the cornerstone: email marketing.

Email is the glue that holds online business together. Sure, every once in a while, a shortcut comes along. Facebook natives discover the power of targeted ads. Instagrammers discover have2have.it. Youtubers make money directly from native ads.

These feel like a way around the fundamentals when we discover them. "Maybe I won't have to have to work so hard and have so much discipline after all," we think to ourselves.

But eventually the rules of the game change. Ads get more competitive (and therefore more expensive). Instagram outlaws affiliate links. YouTube changes the payout model. The shortcut breaks.

That can feel like one of two things:

1. A devastating blow to your business that leaves you reeling and with no way to recover

2. An unfortunate event that sets you back a few dollars but that you've been prepared for

The difference between the two is being in control of your audience. As much as we might vilify it and wish it would go away, email is the thing that gives you control of your audience.

Email marketing is the quintessential fundamental of online business. You really can't (or at least shouldn't) live without it if you want to make a full-time living from your blog, vlog or podcast.

In this month's issue, we cover everything from the 8 ways you can get someone to join your list, to small but fun ways to delight your email subscribers, to writing CSS to customize your opt-in forms, to tagging and segmenting subscribers, to free ebook templates to help you design an opt-in incentive, to making sure you land in your subscribers inboxes instead of their spam folders. **In other words, this month's issue is a playbook on doing email marketing well from the start of your online business.**

Email marketing is how you connect your craft and your ability to make money. It's how you get one of your die-hard fans to take action on a new thing you've made. It's how you run a successful online business.

So don't delay a second longer. Use this issue of Tradecraft to step your email game up a notch (or get started on the right foot).

And if you have questions, email us. Email marketing is how we make a living and we're here for you.

Barrett and the ConvertKit Team

Email Deliverability: How to Make Sure You Land in the Inbox

No matter how amazing your email content might be, if it never reaches your subscriber's inbox, all your work will forever go unnoticed. No one will find out about your products, you won't gain that strong trust with your potential customers, and it will be extremely difficult to make a living with your online business. But finding your way into an inbox isn't as simple as just sending an email. You have to take email deliverability into consideration.

When it comes to email marketing, email deliverability can be one of the most confusing concepts. So to help you know how to get your content from your email service provider (ESP) to your subscriber's inbox, today I'm breaking down the basics of what email deliverability means, how it affects your sending, and how to increase your chances of good deliverability.

First off, there will be some words and concepts that might sound like gibberish to anyone new to this topic. If you fall in this category or just want a little refresher about what I'm talking about, here's a handy cheat sheet of deliverability terms you can download now to reference as you read.

Download the deliverability terms cheat sheet

What is email deliverability and how is it determined?

Deliverability is a partnership between your IP/domain reputation, your email content, and your subscribers' email provider. As an ESP, our goal at ConvertKit is to get you in the door, meaning inbox deliveries within email providers like Gmail, Outlook, and Yahoo. There are quite a few factors that determine how your email is filtered once it's received by an Internet Service Provider (ISP), but your IP/domain reputation are likely the most determining factor on whether your messages are delivered into an inbox or a spam folder.

While your IP/domain reputations are determined through a combination of factors, research within our industry has shown that the most important factors are: Subscriber Engagement, Limiting Negative Metrics, Authentication, and Content. So let's talk about how these four things come into play in terms of your email deliverability.

Subscriber Engagement

These days ISPs are paying close attention to how previous customers of that provider have interacted with email sent from your domain/IP. That means the future of your deliverability can depend on what your subscribers do with your emails right now.

For example, Gmail often will make assumptions on where to filter your email based on trends seen from their customers. That means if the majority of subscribers are deleting your emails without opening them, marking the messages as spam, or taking no action on it all, Gmail will make the determination to increase spam or promo folder filtering for your IP/domain and will lower your overall reputation with Gmail.

On the other hand, if a lot of people are opening and clicking (showing positive engagement), Gmail is more likely to deliver future messages from your domain and IP into their inbox. This makes it extremely important to make sure that subscribers are receiving email content they actually want and on an expected schedule established upon signing up for your email list.

Limiting Negative Metrics

High levels of user spam complaints and hard bounces can be the quickest way to go from good IP/domain reputation to bad. Spam complaints at high levels (> 0.3%) give email providers indicators that a marketer is potentially sending unsolicited content, which is a violation of CAN-Spam or CASL regulations. Marketers observed exhibiting this type of behavior will lose trust in the eyes of ISPs, which will typically result in very poor inbox placement levels.

When ISPs observe spikes in hard bounce levels this often raises questions about the marketer's list collection and hygiene (or cleaning) processes. Purchasing or using third party lists can often result in high levels of hard bounces based on the fact that many of these types of subscribers are un-verified. Many companies that provide these types

of lists use web-scraping tools to gather email addresses from all over the Internet (many of which are spam traps), and they sell them to marketers that are looking to grow their client base. This is a huge 'No-No' in the eyes of an ISP and will often result in drops in your reputation.

Sending to older segments of subscribers can also show spikes in hard bounce levels. A general rule of thumb is that if a subscriber or list hasn't been sent to in over a year, it's best to get rid of that group. While this can be a scary thought, as many marketers never want to throw away subscribers, we have to remember that ISPs value quality over quantity.

We have to always look at the big picture here. Sending to an older list may provide you with a small amount of conversions, but if it results in all of your Gmail subscribers receiving their email in their spam folder going forward, is it really worth it?

Authentication

ConvertKit offers assistance in setting up your SPF and DKIM records to align with sending through our platform. Whether you're sending your email through convertkit.com or through a custom domain setup (ck.yourdomain.com), we look to make sure that emails sent through your account show 'Passes' for SPF and DKIM authentication levels.

Before an ISP delivers an email they first examine the email headers of that message, looking for permission for your domain to be sent across our IP addresses. If the SPF and DKIM records show failures within the message headers, your domain does not give permission for it to be sent across any of the IPs that are not stated within these records.

Here's how it works:

By default when you get started with ConvertKit, you're sending on one of our sending domains. It usually looks something like ckmail2, 3, 4, etc. We have about five of these spread out among customers so multiple ConvertKit customers can be using the same sending domain. There are both benefits and disadvantages to how this affects you and your email deliverability.

If you're just starting to build your domain's reputation,

using a sending domain other customers are using and have been using is a great thing. It quickly helps build up your reputation. However, it is possible that the consequences of another customer's poor sending practices can impact you negatively.

We have a lot of controls in place to prevent that from happening and we regularly redistribute our customers across our sending domains, but it's still possible that a shared sending domain will negatively affect your deliverability.

For our customers who are most serious about deliverability, we offer a custom sending domain that allows you to rely solely on your own domain reputation. To find out more about custom sending domains and how to set one up, contact our Customer Success team.

Content

Your content plays a big role in how an email is delivered as well. Think of a typical newsletter you receive from a retailer, like Target or Bed, Bath and Beyond. They usually contain a ton of pictures with really complex HTML that almost mimics visiting their webpage in your browser. When Gmail sees messages like this, with primarily images and complex HTML, they will often filter it as a promotional email. At Convertkit, we put a major emphasis on simple emails like the ones you write to a friend, which helps us avoid those promo filters.

Simple, plain text emails are more likely to be delivered into a primary inbox, period. Even though we recommend sending plain text emails to improve your deliverability, there still aren't any absolute changes that can be made to guarantee inbox placement within the Primary Tab.

Recent studies have shown that the usage of Gmail Tabs has dropped to roughly 33% (a 66% decrease in users since 2013). The prevailing thought here is that this filtering will have less of an impact going forward because those Gmail users that are savvy enough to set this up are usually the same users that will routinely check these folders.

Now that you know what affects email deliverability, let's increase your chances of hitting those primary inboxes, shall we? The four high level deliverability concepts we've covered can be broken down into actionable, daily takeaways. Here's how...

10 email deliverability best practices

Email deliverability doesn't have to be rocket science. There are very easy practices you can put into action every day and with every email you send to help increase your deliverability chances. Here are 10 (easily actionable) email deliverability best practices.

Don't buy lists (Seriously, don't be THAT lady)

Like I said earlier, purchasing and using third party lists will result in high levels of hard bounce based on the fact that many of these types of subscribers are un-verified. So while you have a big list of, let's say 50,000 subscribers right up front, the trouble is that they didn't choose to be on your list. A vast majority of those emails will go straight to the SPAM folder, many more will mark them as SPAM once they're opened, and then another large number will unsubscribe immediately. So even if you're left with a few thousand in the end, they aren't people who are choosing to hear from you.

Create opt-in incentives that attract the right subscribers

Some opt-in offers are better than others when it comes to building an email list full of qualified subscribers. For example, because giveaways and freebies attract a wide range of people, you'll most likely get a high volume of signups that will never open your later emails or might even move them to their spam folder. Their negative engagement can eventually end up sending your emails to other subscriber's spam folders as well.

To combat this, make sure your opt-ins are always targeted to an audience that would be interested in your topic. You always want to be attracting readers who would likely open your emails and eventually become customers.

So if you're planning on running a contest with giveaways, make sure you're setting yourself up for the outcome. If you're wanting to grow your list with a targeted audeince, create a giveaway that only that group will want. Or if you just want to get your name out there and build a large list, create a giveaway that will appeal to a wide audience.

Use simple design (Or none at all)

Like I said earlier in the content section, simple emails will always deliver better. Even when it comes to images or tables in your emails, too many will decrease your deliverability. You can read more about our theory on why text-based emails are the way to increase your email deliverability in our post Why Fancy Email Templates Aren't the Answer.

Add alt text when you use images

Images in and of themselves are not bad. Everyone loves a beautiful picture or graphic and they often help convey a thought or point quicker than actual text. But when you use an image, make sure to write accurate alt text or title instead of simply using the image's file name. This way if an image gets blocked for any reason, a reader will still know what your image is. This also helps prove that a human sent the email instead of a spam robot.

How to- After you've added an image to your email in ConvertKit, click the image again and then click the edit button that pops up. In the edit box, write a title for that image that describes what is happening in your image, ie- your call to action or the details of a promotion.

Watch out for these trigger words

Sadly, because of those spammers out there, there are some words that have developed a bad wrap. When used in subject lines for emails, these trigger words can signal the possibility of spam and usually will send an email straight to the abyss. Here are a couple of those words to avoid in your email subject lines (and your content, if you can):

- Free
- Financial freedom
- Make money online
- Credit card offer
- Cash bonus
- Apply now
- $$$
- Weight loss
- Order now
- Price
- Increase sales

Enable double opt-in for all new subscribers

Setting up the double opt-in process adds an extra layer of subscriber qualification for you. If a subscriber clicks through a double opt-in:
- You can confirm every subscriber so your list is more accurate. That means if there's a typo in their entry they won't end up clogging up your list with email addresses that will ultimately fail.
- They are confirming interest and are more likely to open your emails in the long run, which improves your deliverability rankings.
- You know they are not fake subscribers and spammers with false email addresses that can ultimately affect your monthly fees.

With ConvertKit, setting up a double opt-in process is as easy as clicking a button.

Set up a custom sending domain

Again, setting up a custom domain for your reply-to email address will increase your deliverability. That means your days of using freemail like Gmail, Hotmail, and Yahoo are over. Learn how to setup your custom sending domain with ConvertKit: contact our amazing Customer Success team.

Keep a clean list

No matter how exciting or targeted your content is, there will always be a group of subscribers who aren't engaged with your emails. Since those unopens can affect your email deliverability, it's a good idea to run a re-engagement email sequence every 90 days to filter out what we call cold subscribers. Cleaning out your subscriber list will help it be healthy and high quality (plus, you'll save money).

Ask subscribers to move emails from their spam or promo folder to their inbox

Sometimes email to new subscribers end up in their spam folder for reasons beyond your control. If those subscribers end up getting in contact with you asking where the email went, ask them to check their spam folder and take a second to move that email from the spam folder to their

inbox. It might sound like a silly request, but doing this teaches that ESP that your email actually belongs in the inbox. Doing this will not only help with that particular subscriber's emails, but it will also help similar users whose emails might be ending up in spam as well.

Optimize your email subject lines

The last thing I want to mention that often gets mistaken for a deliverability issue is the subject line. While a subject line could potentially impact deliverability, it has it's greatest impact on engagement. A subject line is the first and sometimes only thing a subscriber reads of your email. If it doesn't clearly communicate what the email is going to be about and entice them to open it, then they won't. Subject lines are often the simplest thing to tweak that have the greatest impact on opens and clicks.

Tools you can use to help check your email deliverability

Ready to start increasing your chances of optimized email deliverability? To find out where you stand right now, there are a couple tools you can check out. MailTester and GlockApps both test against Spam Assassin to tell you how your emails are delivering.

Once you've got that information you can start putting all those email deliverability best practices I talked about into place. Then it's time to watch those clicks and conversion rate numbers rise.

Nicole St. Germain

How to Convince Someone to Join Your Email List

Growing your email list is no easy task, but if you've been around bloggers long enough, you've probably heard just how important building your email list is. That direct communication and permission to meet a reader in their inbox is your number one mission whether you're new to blogging or have been around the block a few times.

It's in those personalized moments that you can send targeted, directed, and specialized content to urge your subscribers on a journey that hopefully ends in you making money. But before you can get to any of that, it all starts with that email list.

Eight lead magnets you can use to convince a reader to join your email list

It's a great privilege for someone to allow you to pop up in their inbox, and you should treat it like the honor that it is. Most people aren't just going to give you their email address. Sure there are people who love signing up for anything and everything because they either love information or just want to be a part of it all.

But more often than not, you'll find a resistance, and rightfully so! Too many people have been burned by joining an email list and then receiving countless spam messages without the ability to unsubscribe. To break down those protective walls, you need some strategies to help you convince people to trust you enough to join your email list.

There are infinite tactics passed around on the subject of growing your email list. Some work, some don't, and some are just super scammy. But you just can't go wrong if you're bringing readers into your fold by providing them with excellent content that solves their problems.

Whether you've heard them called lead magnets or incentives, these bonus materials are something you can

give a reader in exchange for their email address. That way, if they've never heard of you before or are hesitant but still liking what they see on your blog, you can give them an extra nudge of confidence in you by giving them something completely free. It's that extra step that helps you build trust with a reader and show them a little more about what you know about your topic.

Here are eight lead magnets you can use to convince a reader to join your email list:

Newsletters

Let's get real for a second. If you're going to offer a "newsletter" as your opt-in incentive, you better be one of the most interesting bloggers in the world. Your content needs to speak for itself if you're going to use this as your call to action.

Newsletters are the old standby of email marketing. Whether you release them weekly, monthly, or just whenever you have something to announce, a newsletter (we call them Broadcasts) is the standard way for bloggers to directly connect with their audience right in their inbox.

While any blogger certainly has the ability to create their own newsletter and use it as an incentive, I wouldn't recommend this channel as the end all be all to a beginner blogger. For a newsletter to really be worth the while of a new audience member, there has to already be a large amount of trust and authority between reader and blogger.

Newsletters will only work as a true incentive to opting into your email list if you are at the level of authority where people want to read everything you write. I'm talking Maria Popova, James Clear, and Marie Forleo level. That's not to discourage you, but just to be clear: if you're just promising content they could read on your blog, it needs to be great. So follow through.

If you're a mere mortal like the rest of us, a promise of a newsletter probably won't be enough of an incentive for a reader browsing your blog to hand over their email address. You still need to prove yourself worthy of their interest and time. For you bloggers that fall into this category, the rest of this article is how you can make it happen.

Downloadable giveaways

Readers signing up for your email list generally want something in return– it's just the way the blog-o-sphere works these days. And one of the most popular means of incentives is the downloadable giveaway.

These free downloads can take many different forms. When deciding what kind of download to create you should consider what type of content your reader most wants from you, what your business is and does, and what content and assets you already have on hand. For example, if you blog about graphic design you can create a font bundle or if you blog about wedding cakes you can create a video teaching how to create flowers with frosting.

Other examples of downloadable giveaways are:

eBooks

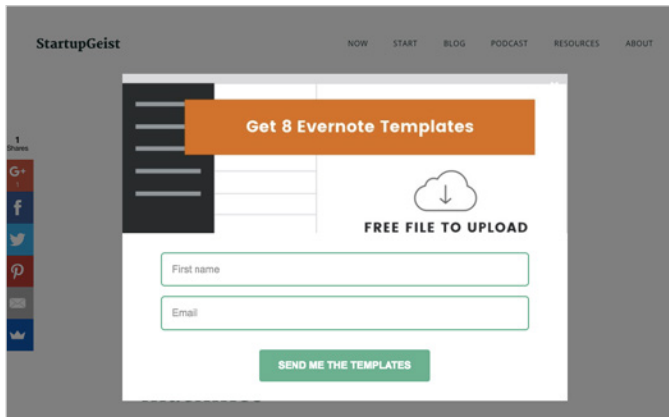eBook from WayneStiles.com

Video files

Video training from TheOrganisedYou.com
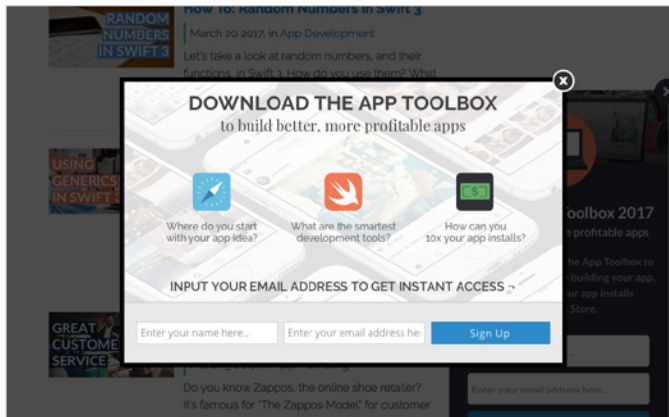
Worksheets
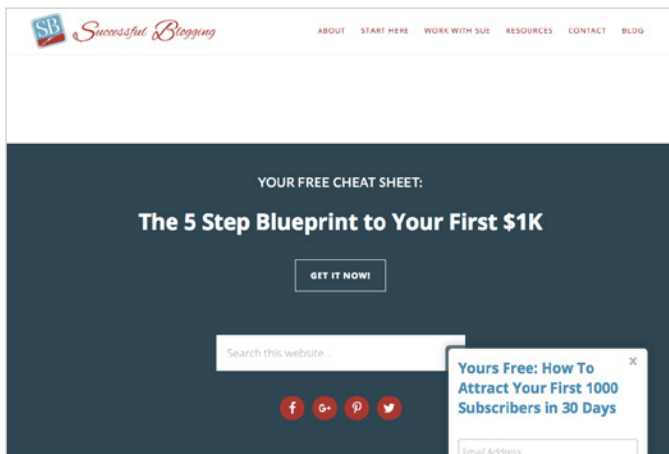
Cheat sheet from Successfulblogging.com

Templates

Template from StartUpGeist.com

Tools (calculators, budget sheets, etc)

App toolbox from LearnAppMaking.com

Content upgrades

A content upgrade is a bonus piece of content that you can offer your readers in exchange for their email address. Sounds just like a downloadable giveaway, right? They are very similar, but the major distinction between the two is that content upgrades are linked to a specific blog post where as downloadable giveaways can be found statically throughout your site.

This form of incentive works well because you can capitalize on the fact that your reader is already interested in that particular blog post. By upselling and elaborating with more information on that topic, you're giving your reader more of what you already know they want. Just make sure your upgrade is perfectly aligned with the original article and keep it evergreen so that a reader who sees that post months from now will see the same value as someone who sees it tomorrow.

To start implementing content upgrades to your blog, find the five to 10 most visited posts on your blog and think about what you can create to add even more value to that post. Would your readers benefit from a checklist of your actionable steps, a printable of your design to hang on their office wall, or a bundle of your stock photography images? Some more examples of content upgrades are:

- List of top resources or tools
- Checklists
- Timelines
- Transcripts of a podcast
- Report/whitepapers
- Assignments

Email courses

One of the most powerful ways to build your email list is through a free online course. Courses are a handy, timely, and effective medium your readers can access at any time to buck up on the topic at hand. And as for you, courses help you grow your email list by being seen as the authority that you are.

To make your course as effective and beneficial as possible, make sure your number one focus is on your audience. What are they struggling with and how can you/your business help them overcome that struggle to reach their

goal? The more valuable information you can pack in your giveaway course, the more likely your new reader is to trust you on your subject matter and buy your products when you pitch them later on, like a full course on the same subject.
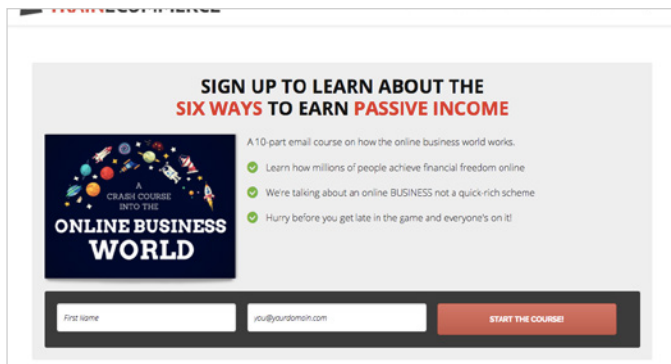
Email course from TrainECommerce.com
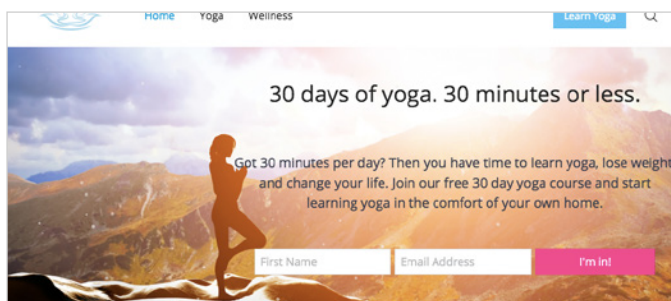
Email course from 42yogis.com

Discounts for physical products

If you sell products on your blog, sometimes offering a discount is well worth the small dip in revenue. First, making your product more available to the reader is a sign of good will, but you can also exchange that discount for their email address. Often these discounts come with a limited time offer messaging to create scarcity and urge readers to act quickly.

You can let the reader know about the discount with a pop up (also called a modal) window. Understanding that this type of offer works best for readers who are already browsing your products and reading your blog, you could set your pop up to engage either after a certain scroll percentage or after a certain amount of time on the page.

Webinars/workshops

Webinars are your best bet to clearly communicate to your audience and add a personal touch to your marketing strategy. Getting your face and personality out in front of your audience helps you build the trust and credibility you need to be known as an authority on your subject. That's why webinars are an incredible way to convert casual readers into devoted subscribers.

They're also a go-to for list growth because anyone who wants to attend your webinar must register with their email address. You can move those emails right on over to your list after your webinar and now you know you have a list of people who are interested in whatever topic your webinar covered.

Make sure to record each webinar as well to use as downloadable giveaways later on. You can keep them as a limited time run to create a little scarcity or turn them into an evergreen piece of content. Either way, you'll have high-quality video you can continue to give your readers in exchange for their email address.

Personalized content deliveries

Everyone enjoys consuming content in their own way. We noticed this need in our own readers when we published our first issue of Tradecraft. Version 1 was available on the blog or through an email sequence, but we had so many people email in asking us to create a PDF version they could download and read when they had time.

By doing this, we were not only giving our readers what they wanted, we were also creating an extra way for us to gather emails. Just as we had previously done for sequences, we create forms on the blog for the PDF download so readers can opt-in for their personalized experience.

You can easily do this with the content on your blog as well. Whether it's a PDF, an email sequence, a podcast transcript or even an audio file of you reading your blogs out loud, giving your readers a choice in what format they want most is a great way to incentivize them to join your list.

🎁 Contest/giveaways

Contests and giveaways are a great interactive way to grow your email list. When they're constructed well with clear communication, ease of use, and exciting prizes, people are always happy to volunteer their email address to enter.

To enhance the contest for your list building benefits, make sure your prize is something that can help you validate readers. It should be niched down to something that your ideal reader is already looking for or wanting. So again if you're blog is about wedding cakes, your prize or giveaway could be a set of high-priced piping tips. The more specific your prize, the more likely the people entering to win will stick around your blog after the contest is over.

Just be ware, there will be people who could care less about what your mission is and are just after the freebies. So when you're considering a giveaway, either make sure that what you're giving aligns with your mission and values to attract the niched down audience you desire, or don't worry about it all and know that you're going to get quite a few unengaged subscribers.

Delivering your incentives

Now that you have eight ways you can convince someone to join your email list, you can go out and start creating interesting and valuable content that blog browsers just can't resist. But your job isn't done when the reader opts in for your incentive. There's one more major step to follow through on that can make or break your entire opt-in user experience– the delivery.

You have to make sure you can deliver on those promises. How quickly, easily, and efficiently your readers receive their downloads, discounts, and upgrades can either create a raving fan or stern critic. But if you've done your job well with creating valuable content on your blog and can honor your word to deliver, these exclusive pieces will continue to set you up as a trusted blogger and an authority on your topic.

Setting up an incentive email form

If you're using ConvertKit, we've made delivering your incentives extremely easy! Here are some quick steps to upload your content:

How to Set Up an Incentive Email

1. Simply create opt-in forms in popular areas of your blog, website, and other entities for your readers to come across. Obviously for content upgrades you should create in-post forms in the corresponding posts and upgrades, but for all these other incentives, you can place your forms throughout your site.

2. In the Settings tab of your form, click on Incentive Email in the left toolbar.

3. Customize the content for your subject line and message. That can include what you'd like your button to say as well.

4. Upload your incentive by clicking the URL button to redirect your reader to a site you've set up or click the Incentive download and upload the file you created.

5. Click Save and you're ready to go!

It's as easy as that. Your readers can have their incentive and you'll have a new email list subscribers in minutes.

Take the challenge

Choose one of these incentives and implement it in your blog this week. Think about what your readers are struggle with and create a valuable asset that they just can't pass up. Let me know how it goes or if you have any questions about what type of incentive would work for you.

■ *Dani Stewart*

How to Customize Your Opt-in Forms for Performance and Growth

Of all the pieces that come together to build your email marketing plan, opt-in forms generally get the brush off. Most of the time these forms are undervalued and just get thrown together at the last minute. But they can actually be powerful when you utilize them to their fullest potential.

Opt-in forms are the cornerstone of your list building strategy and should be dealt with accordingly. They are the gateway to first contact between you and your new subscribers, and they're the tool you use most to grow your list. Don't you think it's time to understand their importance and give them the respect they deserve?

This article will help you understand a little bit more about your opt-in forms and how you can customize them to fit your brand.

What is an email opt-in form and why you need them

Opt-in forms are the building blocks of targeted and segmented email lists. They are those little forms on the sidebars of websites or at the bottom of blog posts that asks a reader to enter their email address.

While you can have an opt-in form that simply asks for the reader's email address so you can "keep in touch" and join your newsletter, the best practice for opt-in forms is to incentivize them. This means you create something of value for your reader and offer it for free in exchange for their email address.

Creating these opt-in incentives are a win-win for you and your reader:

• Your reader gets free information on a subject they're interested in

- You grow your email list by adding a new reader
- Your incentive helps you build trust and authority with your new subscriber

To get these incentives in your reader's download folders and start growing your list, you need to create forms that are eye-catching, informative, and deliver on your promises.

What makes a good opt-in form

You'd be surprised how a few improvements to your opt-in forms can go a long way when it comes to increasing your revenue. From how you write a form's copy to where you place it on your site, even the smallest tweaks can turn a blah opt-in form into one that converts. Here are a few rules of thumb to keep in mind when creating your opt-in forms:

Keep it quick and simple

The whole point of an opt-in form is to entice your reader into accepting an offer in exchange for their email address– so don't make it any more than that. You'll be competing against short attention spans, busy work days, and an overload of advertising, so it's best to keep your email opt-in forms as concise, direct, and to the point as possible. From copy to design, remember that less is more.

Here's a couple do's and don'ts on simplicity.

- Don't cram it full of custom fields. You can get more information on subscribers later on in their journey. When Expedia eliminated just one field from their opt-in form it resulted in a $12 million profit.
- Do ask for their email address. Maybe ask for their first name too.
- Don't write multiple paragraphs about your offer.
- Do write one strong call to action.
- Don't add multiple images or generic stock photos.
- Do stay on brand with your visual identity when creating forms.

Focus on one solution

Your offer should target a very specific part of your audience if you want it to be effective. This will not only help you build an audience that is organically niched down

to your topic, it will also help you segment your readers later. So figure out what your reader's biggest problem is and create an opt-in form and offer that solves it.

Make it consistent

Thinking through the consistency of your opt-in forms is generally overlooked. But following through with tone, imagery, and onboarding goals will help your opt-ins feel more like an actual part of your blog strategy instead of a one-off attempt at more signups.

To find more consistency, walk yourself through your reader's signup process. What page are they on when they sign up? What are they reading when your opt-in offer pops onto the page? Once you've gone through these steps you might see some ways to improve your messaging or even the incentive that you're offering.

It should be convincing

Everything about your opt-in form from the copy, the style, and the length needs to be enticing enough to grab a reader's attention and convince them to take a step further into your world. That means it's time to put on your persuasive writing cap and make your readers an offer they can't refuse.

Here are a few ways to do that:

- Make sure your headline clearly describes the benefit of the opt-in. For example, the headline for our opt-in form for a PDF of this issue is "Experience this issue your way". That headline speaks to the benefit you get from downloading the PDF.
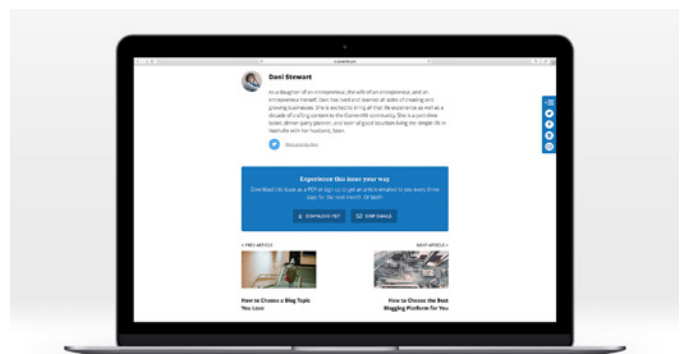
- Did you say enough, but not too much? Use bullet points to convey your information in a quick and easy to read format.
- Use strong action words on your CTA buttons compelling the reader to click through

 The next step to optimizing your opt-in forms is to understand where your reader sees them.

Where to place opt-in forms

Close your eyes for a second and envision an opt-in form. Where do you see it on the website? If the first place you thought of was the sidebar, you're not alone. It's very common to see opt-in forms on the the sidebar of most sites, but have you thought about all the other places on your blog they could go?

Here are 12 new places for your email opt-in forms:

- After blog posts
- With content upgrades
- At checkout in your shop
- In a homepage feature box
- On a custom landing page
- In your website footer
- On your Facebook page
- As a Twitter card
- On your contact page
- In a popup box
- On a slider
- On your YouTube channel
- On your about page

Obviously, the more locations you have opt-ins, the higher your conversion rates can be. But just because you can add more doesn't mean you should. When you're adding your forms to new places on your site, make sure you're thinking through your reader's experience, the hierarchy of your site content, and the main objective of the page you're placing the forms on. Never add a form if it doesn't flow with the content or makes the page feel cluttered or confusing. Keep maintaining your consistency and focus on your placement as well.

Complete guide to customizing opt-in forms in ConvertKit

Now for the fun part. It's time to teach you how you can customize your opt-in forms to better fit the style, flow, and tone of your brand.

From here on out, don't let your opt-ins be afterthoughts.

Read our complete guide to opt-in form CSS customization

Dani Stewart

The Power of Email Segmentation & How to Use It

When it comes to your email marketing, you already have a lot working against you in a subscriber's inbox. Family news, party invites, and every other online business owner vying for some attention are your competition, and you've got to find a way to rise above the chatter. The best way to do that? Email segmentation.

The name itself might not initially sound like a strategy for increased open and click rates, but once I start to unpack it a little more, you'll quickly see why email segmentation is going to be your new best friend. In fact, according to DMA, 77% of email marketing ROI came from segmented, targeted, and triggered campaigns in 2015. So I'm not just talking about deliverability anymore – I'm talking about product sales and money in your pocket.

Stated simply, email segmentation is the process of putting your email subscribers into different buckets and speaking to each of those groups directly. Think of it as meeting your subscribers where they're at on their customer journey so you can send them targeted content that speaks specifically to their needs and goals at that point in time. To do that, you're going to need to do some recon on your subscribers, but we'll talk about that later. First let me tell you a bit more about the benefits of email segmentation.

Why you need email segmenting in your email marketing

Email segmentation is one of the key distinctions between a list that converts and one that makes it hard to reach your goals. Knowing your subscriber's backstory and how they interact with your content is key to understanding how to communicate with them and pitch your products.

For example, if you know that your subscriber is a newbie on your topic, you can specifically send them your intro level eBooks for free and put them into a sequence where

you teach them the basics of your topic to gain their trust and build authority.

But if you find that another of your subscribers is more knowledgeable on your topic, you can send them one of your more complex eBooks and put them into a sequence that eventually pitches them one of your more expensive and advanced products. See how that works?

Knowing certain data points about your email subscribers will help you know where they are on their journey and can help you continue to move them along from blog reader to email subscriber to customer.

Now you know that email segmentation helps you meet your subscribers where they're at, but here's what segmentation actually means for your email deliverability:

Increased Open Rates

An email in an inbox is only as good as the person reading it. Having a segmented list allows you to send the same email but with custom subject lines to specific subscriber groups that appeal to their needs.

Your customers aren't all the same person and segmentation can help you get more specific with smaller groups of your list.

Better Click-Through Rates

Once you have those custom subject lines set up for your different subscriber groups and you've sent your emails off, it's up to your subscribers for the next step– click-throughs.

Setting up targeted emails alone won't put money in the bank. You need your email subscribers to interact with your content by clicking through on links to your articles, videos, and, ultimately, your products.

ConvertKit customers with targeted segmentation often see click-through rates of as high as 10-14%. Considering the industry average across all email marketing platforms is roughly 6%, that's at least a 66% increase. Your subscribers are also much happier as they're now getting emails they actually want to open and click on. It's definitely a win-win.

Maximized Conversions

When you've reached that trust point and are ready to send your sales email to your list, the last thing you want to see is zero conversions. If you're emailing your entire list of subscribers who may or may not be interested in that particular offering, you risk losing them as a subscriber and you certainly risk losing the sale. You've got to narrow your audience based on your subject.

With good segmentation you can track who clicks on your links and then send targeted emails just to those people with a reminder about any details, some FAQs, or anything else they need to know to seal the deal. Emailing just the people who have shown direct interest is not just a smart business move, it makes you look like a real human on the other side of the computer screen too.

Less Unsubscribes

Even though unsubscribes can be good for your list health overall to get rid of un-engaged subscribers, you still don't want to lose your subscribers at alarming rates. After all, when someone unsubscribes from your emails they're gone for good – no more possible conversations (or conversions) with that person.

Using segmentation to your advantage will keep the number of unsubscribes to your account at a minimum. You'll still have people who clean up their inboxes for time to time, but the more targeted you can get with the emails you send, the more likely your subscribers are to hang out.

Avoid The Dreaded SPAM Filter

The whole point of email marketing is to have the emails you send actually delivered and read, right? Spam folders are notorious for making that hard on marketers, but there are actions you can take to make it better.

Email service providers (ESPs) want to see that your subscribers are opening emails, clicking on links, sharing emails, replying to emails, marking them as important, and not immediately hitting delete. Sending targeted email content through segmentation helps you avoid being flagged by those ESPs.

Want to know more about how to increase the quality of your list and avoid the SPAM filter? Read up right here.

Hopefully now you see that email segmentation is the best way to create targeted content for your email subscribers to help with your click rates, revenue, and so much more. Now let me tell you how easy it is to create segmentation in ConvertKit.

How to segment email subscribers with tags in ConvertKit

In ConvertKit, we create segmentation by tagging subscribers and then grouping those tags together. So basically tags organize people and segments organize tags.
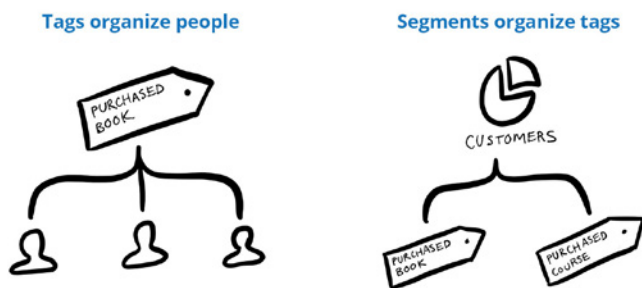
Tags allow you to organize and group your subscribers based on actions, interest, and more. Because we are subscriber-centric and not list-centric, you only have one list of subscribers, and tags help you keep that one list organized.

Ways you can add tags to your customers are:

- With Link Triggers, you can add a tag when a subscriber clicks a link.
- With certain integrations, you can add a tag based on a purchase.
- You can import into a tag, so you know when you brought over certain subscribers

Within the ConvertKit app:

- Tags can be created on the Subscriber page or within an Automation.
- Tags can be added to existing subscribers on the Subscriber page via Bulk Actions, or within an individual Subscriber profile.

Watch this quick video that explains how to use forms, tags and segments effectively.

Check out this ConvertKit knowledge base article for a more complete look into the technical details of how to segment: How to Segment Subscribers in Convertkit

Figuring out the best way to segment your email marketing lists can be a huge undertaking. But the more you tag, the better you can target your emails with content that feels tailor made for each subscriber.

Types of subscriber data to collect for email segmentation

You could also think of tags in terms of data you collect about your subscribers. This data will help you get to know your subscribers better– what they're interested in, where they're from, what they want to learn from you– so that you can send them more targeted content and in turn pitch them products they actually want.
Here are some tags that we suggest our customers use for collecting data for their subscribers:

Where the subscriber is at on their customer journey

Other than the basic information, this is one of the first pieces of data email marketers use to start segmenting their list. Knowing this initial starting point will help you know what level of skill, knowledge, and engagement your subscriber has with your topic. This can give you insight on everything from what kind of product to pitch to how much teaching content you need to prepare.

How to use this tag– In your introductory email, ask your subscribers what their main struggle is by offering five different options to choose from. The reader will respond by clicking on the link they identify with which will trigger a sequence that ends by pitching a product geared toward that struggle.

Products they've bought/downloaded from you

The next thing you'll want to track is when subscribers purchase your product. It helps to create a tag called "Purchase: Product Name" for each product. Then Gumroad, Shopify, Teachable, or whatever other

e-commerce provider you are using can add customers to that tag once they make a purchase through an automation. And don't forget to include these purchase tags in your newsletter or all subscribers segments

How to use this tag– Knowing what a subscriber has already purchased helps you in a couple different ways.

- You can exclude that person (through their tag of Purchase: Product Name) from any further communication about that product. They don't need your sequences that pitch that product any more since they've already bought it, right?
- You can make an assumption on what other products they might enjoy based on their first purchase. You can set up a link trigger that sets them into a new sequence that pitches your subscriber that similar product.

Webinar attendee

People who join webinars are generally people who are excited to learn. A webinar attendee has already given you their email address so they could attend your webinar, so make sure to make the most of this list growth by adding a webinar tag to their name.

How to use this tag- You've most likely given away a free product or pitched something on a webinar, so you know that anyone with that tag already has a basic knowledge of who you are and what you do. You can parlay that knowledge by putting people with that tag through a sequence that teaches them more in depth on your webinar topic and ends with a hard pitch for one of your products for sale.

Event attendee

Don't miss the opportunity to reach out to leads and potential customers you've already made a positive connection with at a live event.

How to use this tag- Segment your email list depending on the type, topic, or theme of event or even to RSVPs who didn't make it out. You'll be able to keep inviting them to events while sharing relevant content offers based on what you learned about them from past events.

Where the subscriber's sign up form came from

Did your new subscriber sign up becuase of your podcast or video show? Did they read your guest blog post you wrote or find you through a contest you contributed a product to? Knowing the type of content your subscriber originally found you on can tell you a lot about what kind of content they like and how they like to consume it.

How to use this tag- If a subscriber found you through your podcast, you know that you can push any products you have related to creating and hosting podcasts. If a subscriber found you through a guest post, you can create content and products that relate to the core topic of the blog that hosted your guest post (or at least reach out to more blogs in that industry to expand your audience).

If they refer your products/services often

If you have customers who constantly refer you to new clients or other businesses, it's a good idea to create a tag for them. These customers are your biggest advocates and you should give them extras from time to time.

How to use this tag- You can use these advocates as beta-testers when you have a new product coming out. And to give them extra incentive to keep referring you, you could send them extras like discounts, free trials, or even set up some kind of affiliate system.

What affiliate the subscriber came from

If you already have an affiliate program setup, it's smart to keep the sign ups for each affiliate separate. Every affiliate will cover their own niche topic so knowing which affiliate a new subscriber comes from helps you craft content specifically for them.

How to use this tag- If you blog about baking cakes and you have an affiliate that blogs about wedding inspiration, you could create an eBook or another small free giveaway about popular wedding cake flavor combinations or color schemes that you can send to subscribers who came specifically from that affiliate.

♡ Interests

If you blog on different topics, it's very important to keep all your readers grouped into their correct interest so you're not talking to them about the stuff they don't need.

How to use this tag- You could run a survey asking your readers to click one of five topics you blog about. The link they click will tag them by their favorite interest, and now you know more specifically who to send content to when you deal with multiple topics.

☹ Interested in, but hasn't bought

A subscriber can go through a whole teaching sequence of yours and still not end up purchasing anything. You can create a link in the final email of that sequence that tags those subscribers as "interest in: product name"

How to use this tag- When that subscriber goes through your sequences and ends up not purchasing and being tagged as "interested", you can send them a follow up sequence with a downsell of that product they are interested in. It could be a smaller version at a lower price or just a lower priced product that you think compliments the original product you were pitching. Doing this shows that subscriber that you care about them getting a product that truly helps them reach their goals and can go a long way in building trust and authority.

🛒 Customer tag

Whenever a subscriber buys anything from you, give them a 'customer' tag. Knowing what subscribers have made a purchase from you lets you know that they might be willing to buy other products from you. The difference between the "interested in" tag and the "customer" tag here is big. It's the difference between sending a subscriber through another teaching sequence and offering free incentives or sending them through a sequence with a hard pitch that doesn't involve as much trust building.

How to use this tag- If a subscriber purchases your course on "How to use gluten-free flours in baking", you can assume that since they bought a course on this subject from you, they might also purchase another course from you in a similar topic. You could send them into a sequence

with a hard pitch on your more targeted course "Gluten-free bread baking".

Time to get tagging

It's a Type A's dream, right? Gathering all the information and putting your subscribers in their designated places will not only help you understand your audience more, it's also going to help your audience feel understood. The more you send them content that feels like you wrote it just for them, the more they'll trust you and your work– that means increased revenue numbers.

Do these data points we talked about work for your audience? What other tags would add to this list? Let's talk about it in the comments.

■ *Dani Stewart*

SMALL WAYS TO OPTIMIZE
the subscriber experience

How to Optimize Your Subscriber Experience with Redirect Pages

Many bloggers believe that once your subscriber has clicked the buy button, your job is finished. You've nurtured them from reader to subscriber and finally to customer. You've accomplished your goal to get them to buy a product and that should be it. On to the next reader, right?

The disappointing truth is that too many bloggers believe this scenario. Whether it's because they're busy and always working on the next project or they honestly don't know the benefits of following through, the truth is they're missing out on a really big opportunity to continue interacting with that new customer and creating a memorable, enjoyable, and overall engaging experience.

Creating an engaging customer experience should always be at the forefront of your mind. As much as your products help you win over customers, the experience they have with you and your brand also plays a major role in whether

or not they come back for more.

The copy you write, the value-packed sequences you create, and every social media post all add up to your customer experience. But there's one area that most bloggers completely overlook when planning out customer experience– redirect pages.

How you can use redirect pages to optimize the subscriber experience

Out of all the people who see your blog, the ones that sign up for your newsletter, attend your webinars, and buy your products are the most valuable. They're there because they want to be. They're looking for something- help, information, products, guidance- and they've come to you.

You've got a captive audience with these subscribers, and now that you have their attention you need to leverage

it. That means top to bottom, you need to find every little space for interaction you have with them and make it more readable, more exciting, more inviting, and more you. Doing this will give your subscribers more opportunity to build trust with you and see you as an authority.

This is also your chance to surprise and delight your subscribers. When they're least expecting it, your redirect pages can be the perfect place for a free download, a discount, a new way to communicate with you, or even a way to turn a not-so-happy customer back into a raving fan.

How to optimize your Thank You pages for subscriber experience

Thank You pages are typically where you send a subscriber after some kind of conversion- filling out a form, subscribing, buying a product, etc. It acts as a confirmation so your subscriber knows their request was completed and can sometimes deliver your promise of a link for an eBook download or a further link into a webinar they signed up for.

There are endless ways to optimize the subscriber experience with your Thank You pages. Here are a few:

Help them get to know you more

More than whether or not a product is good, people are always looking to relate and identify with something. They want to feel part of the bigger picture and they want to know where things are coming from. With that in mind, use your Thank You pages as a ways to inject your personality.

Give your audience a face and personality to have a human-to-human interaction with. Be funny, be sarcastic, make a joke, post a GIF-whatever it is- you do you. Keep building your relationship with your audience right then and there.

Think Creative Collective shows their personalities with cutesy language.
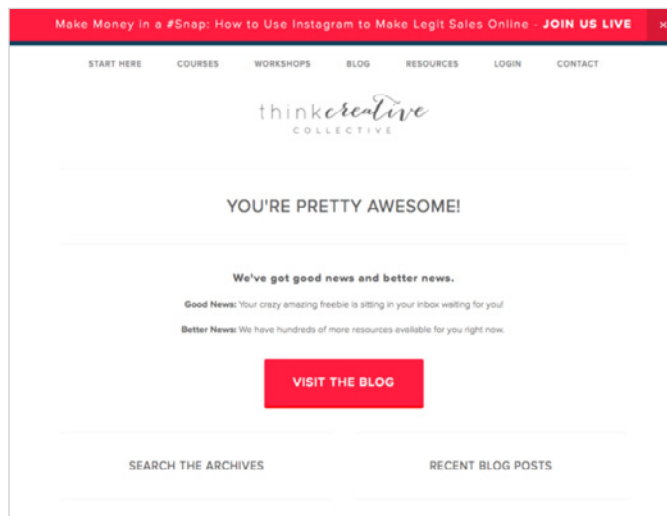
Redirect page from ThinkCreativeCollective.com

Point them in the direction of more good stuff

Make it easy on your new subscriber to love you and use your Thank You page as a way to direct them toward even more information they might want. You can make your page a directory of all your other free downloads or a table of contents to your most popular blog posts.

Elle & Co use this Thank You page as a chance to offer up a collection of tools that will help their customer take the next step in organization.
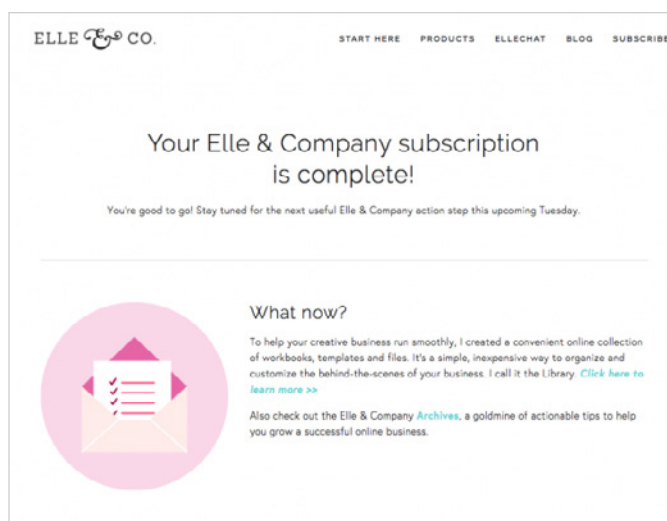

Redirect page from ElleandCompanyDesign.com

The Upsell

If a reader has just purchased something from you, it's likely they will buy even more. Give them that opportunity right out of the gate and catch their eye with an impulse buy by recommending similar products like the one they just purchased or some of your best sellers.

At AsianEfficiency, they add a countdown clock for a special offer to get customers to make another purchase.
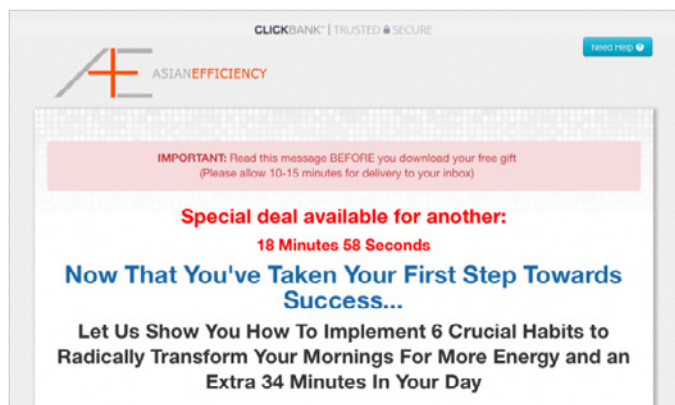
Redirect page from AsianEfficieny.com

This upsell can also happen even if the subscriber has downloaded a free incentive instead of purchasing a product. Your Thank You page for your downloads could become a sales page for your lowest priced product. If they click through this upsell, they're qualifying themselves as someone who would pay for your products and then you can feel confident in sending them through a sequence to pitch a higher priced product.

How to optimize your Unsubscribe pages for subscriber experience

Just because they've clicked your unsubscribe button doesn't mean you've totally lost them yet. There are ways to bring a customer back from the brink if you play it smart.

Did you mean it?

Unsubscribe buttons are often hit because the subscriber is bogged down by the amount of emails in their inbox. It's possible they've forgotten or aren't sure who you are or even accidentally bulked you into their list of emails they want to unsubscribe from. In those cases, it might just take a quick message to make sure they meant to unsubscribe.

You can simply ask if they meant to hit unsubscribe, write a little message reminding them about who you are, what your mission is, and then give them an option of continuing to unsubscribe or resubscribe to your list.

Feedback survey

While these unsubscribes do hurt a bit, you can make the most of it by asking for feedback. Your subscriber will appreciate that you're reaching out to find out what they didn't enjoy or were missing with your product/service and you're getting free feedback on how to improve your business for your other customers.

This can easily be done by adding a survey to your Unsubscribe page. It could be as simple as a fill in the blank where you ask for feedback on what went wrong or you could create a dropdown menu of options for the reader to choose from.

Option to re-engage

There will be some customers who choose to unsubscribe because they don't quite understand how to use your product/services or why it's so important. These are the people who need a little extra attention at the beginning.

If you feel up to it, you can offer up a 1×1 communication to help re-engage with these customers. You could simply state your email address or you could offer up your scheduling calendar to get on a call with you. This type of personal interaction can go a long way to turn an unhappy customer into a raving fan.

How to optimize your opt-in confirmation for subscriber experience

Put your best foot forward by creating an opt-in experience that your customers will love. How you use opt-ins to bring new and potential subscribers into your fold and how you continue to use them to communicate with your current subscribers says a lot about who you are as a blogger and business owner.

A simple way to optimize the customer experience with your opt-in confirmation in ConvertKit is to tailor

the content for each form and then the content for the confirmation email. By default in ConvertKit, your form will take a basic look. For the sake of example, let's me show you how to customize a Minimal form.

This is the default look of your form:
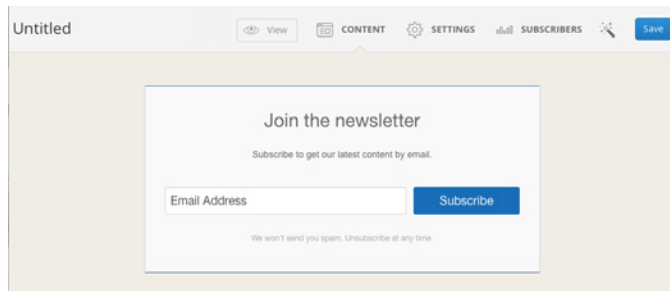
To be more eye-catching and engaging for your reader, there are a couple easy pieces you can customize. You can easily edit the title, button text, and the text, accent, and button colors
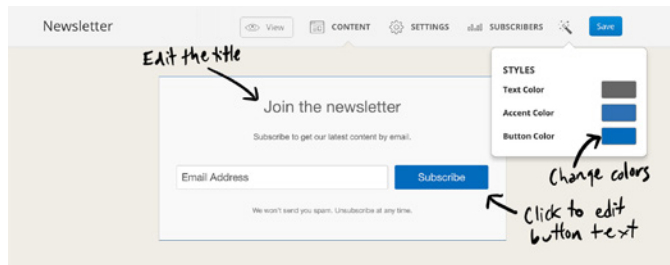
To change the confirmation message you send your reader to receive their download, go the the Incentive Email tab and make your customization there.
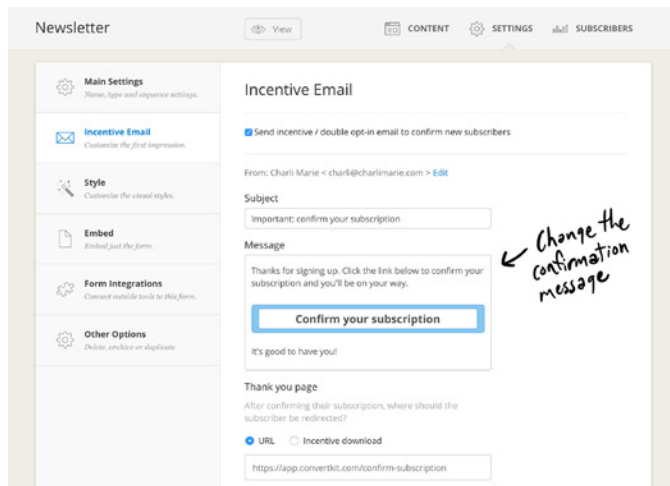
If you don't have an opt-in incentive

It seems pretty simple that the way to optimize your opt-in confirmation when you have a content upgrade or incentive is to deliver on your promises quickly and efficiently. But what if you're not offering an incentive?

If you have a newsletter opt-in form that doesn't offer any other opt-in incentive, I highly suggest creating some kind of extra information for your confirmation page.

You can make it as simple as introducing yourself more to your new subscriber like Nutrition Stripped does for their newsletter confirmation opt-in.
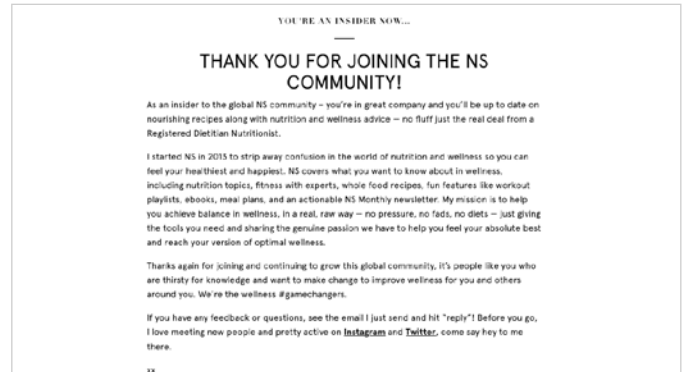
Redirect page from NutritionStripped.com

Or you could offer multiple options for the subscriber to choose from that helps you know more about them. For example, you could use the redirect page to ask the question, "What are you struggling with right now?" to find out where the reader is in their skill level and knowledge of your topic. Each option you provide is a link that triggers them into a sequence where you offer valuable, targeted information and eventually pitches your lowest entry product.

Ready to optimize your redirect pages?

Don't let your redirect pages be a dead end. There's an opportunity here to add your flair to these pages and optimize your customer's experience through pitching them a new product you think they'll love, asking a question, or even just adding a little humor to their day. Your readers are worth the extra effort, right?

What redirect pages are you going to work on first? Let's talk about it in the comments.

Dani Stewart

How to Create a Fantastic eBook in 48 hours (with Templates)

You've likely heard it before, but I'll say it again: content upgrades are a great way to give added value to a reader in exchange for their email address.

The promise of a weekly newsletter alone may be enough to get loyal fans to sign up to your email list, but offering a useful piece of extra content that will make their life easier or help them learn is how you convert a casual reader into a subscriber.

In fact, Clay Collins, co-founder of LeadPages, found that promoting upgraded content at the end of blog posts on LeadPages was the number one factor in growing their email list and one of the main reasons their company has grown so fast.

There are many types of content upgrades you could create (check out our ultimate guide to content upgrades for inspiration), but one of the most popular is a PDF eBook.

The best part about creating an eBook as your opt-in incentive? You've already done the bulk of the writing. This is where your archive of past blog posts comes into play. You can create an eBook on a certain topic by gathering together posts you've already written and repurposing them.

Here's how you can create an eBook to give away to your subscribers in four simple steps:

1. Choose five blog posts that discuss different aspects of the same topic.
2. Arrange them in a logical order so they take the reader on a journey through learning about the topic. These become your chapters.
3. Write an introduction and a conclusion to wrap it up.
4. Create a PDF with the content.

Boom! (Almost) instant eBook.

The reason we suggest five posts is that your eBook doesn't have to be long, in fact it's probably better if it's not. In his post about content upgrades, Pat Flynn has this to say about having multiple shorter eBooks available rather than one long one you promote site wide:

What's working even better today are smaller, unique, bite-sized lead magnets that directly relate to what people are already consuming.

So get specific with your topic and offer it for download on relevant posts.

Why your repurposed blog content is valuable

Just because the content already exists on your blog, it doesn't mean there isn't value in delivering it in an eBook also. Not only can you add value and insights into the introduction and conclusion you'll write for your eBook, but there is also great value in contextualising information for the reader.

Well-written posts are great on their own as standalone pieces of content, but presenting them alongside other posts on the same topic can add context and tell many sides of the story all in one handy package. You're taking a step out of the research and learning process for your reader by arranging the posts in a 'recommended reading' order and giving it to them to keep and reference.

Not only that, but you're also offering them the opportunity to read the information in a different format.

When we first launched this new issue-style blog format of ours back in January we heard from our readers that they wanted a downloadable PDF of the articles so they could refer back to the information later or read it on their iPad or tablet. That's why you now see a 'Download PDF' option for each of our Tradecraft issues!

How to create an eBook PDF

If the thought of laying out an eBook seems daunting to you, don't let that put you off. I've got some advice for you on what programs to use and how to design it yourself. There are many tools out there that will allow you to layout

a PDF, but these ones below are some of the best across a range of different effort and control levels.

Beacon

Beacon is a web-based app that's whole purpose is to help you create eBooks from your blog posts. Ideal, right? If you use WordPress or Hubspot for your blog you can even import your posts automatically. But if not, it's easy enough to copy and paste the content.

The app offers you lots of different themes you can choose from to use as a starting point and customise the colors, images, fonts and layout. It's up to you how much effort you want to put in, but it's worth taking the time to make a few tweaks to really personalise the look of your PDF eBook. Beacon makes this easy because if you change something in the settings panels, the primary color for example, it will update throughout your book, so it's easy to keep your design consistent. Watch an intro video about how that works here.
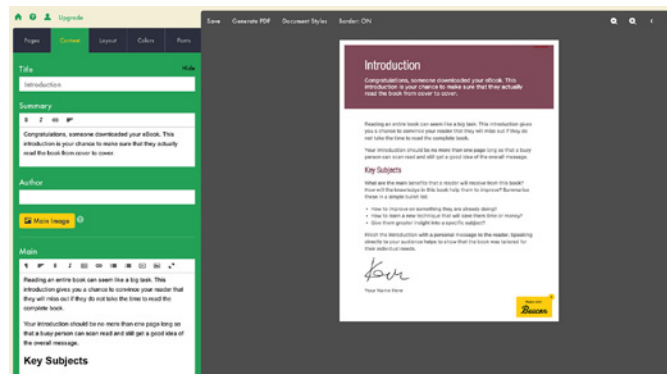
Beacon has a free plan which includes a little 'Made with Beacon' logo on your cover. You can upgrade to a paid plan to remove it and have more options like saving your own theme, which is useful if you're going to be creating multiple eBooks.

Pages

If you have a Mac computer, it's likely you might already have Pages installed (and if not, you can get it from the App Store). Pages is a word processor like Microsoft Word, but it's so much nicer to use. When you create a new document there's the option to start with the 'digital book' template in the Miscellaneous section, or you can download the eBook template we've created especially for Tradecraft readers to use as your starting point. Like the Beacon themes, you'll

want to make some tweaks to personalise your design to match your site.

[Download your pages ebook template here](#)

While you'll need to get much more hands on with the layout in Pages by copying and pasting your blog posts in and styling the text yourself, you can (and should) make use of the paragraph style options. All you have to do is highlight your text and select the style from the Format panel to the right. This way if you set all your chapter titles to the 'Heading' format they'll all match.
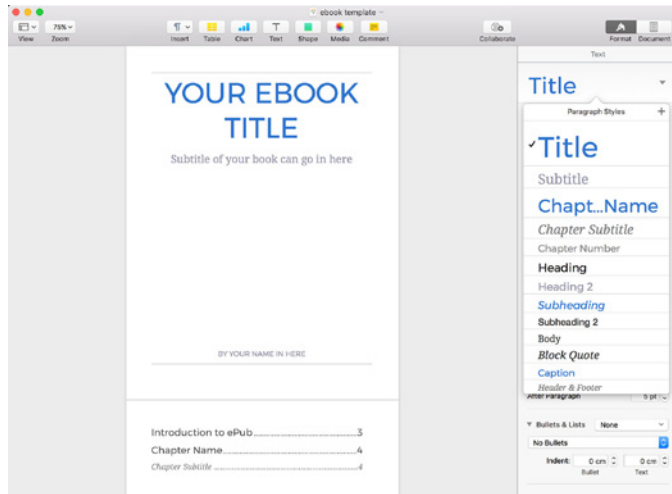

And if you want to tweak the style, just make the change and hit the 'update' button, and it will apply that change to every other heading in your book.
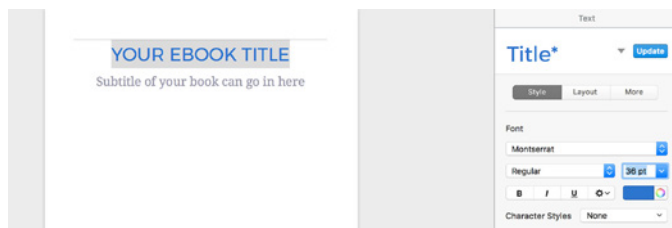
InDesign

If you have an [Adobe Creative Cloud subscription](#) then using InDesign might be a good option for you. InDesign lets you have complete control over every little aspect of your layout (you won't see text jumping about when you drop an image in for example!), but this also means you need to put in much more effort to use it. There might be a bit of a learning curve with getting used to the software, but there are plenty of tutorials online to help you get up to speed. Check out [this video for an introduction to the](#)

[basics of the software](#) and then [this one that explains how to lay out text and images.](#)
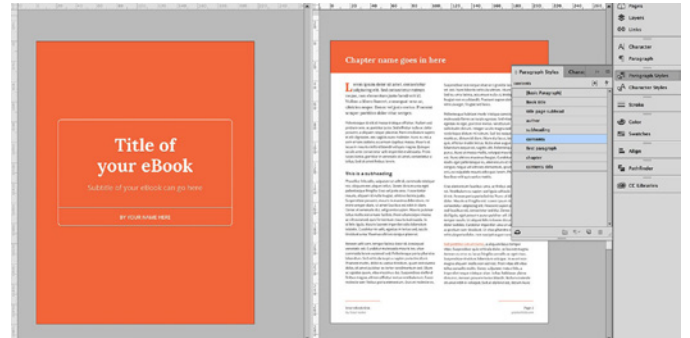
InDesign is what I use to lay out our Tradecraft PDF because of the control it gives me over the layout. You can really do as much or as little as you like though! If you're keen to start learning to use InDesign, we've created an eBook template you can use so that you're not starting with a blank page.

[Download your InDesign ebook template here](#)

Just like with Pages you'll need to manually copy and paste your content and you should use paragraph styles in InDesign to help keep your text styling consistent throughout the ebook. Learn more about them in [this video tutorial.](#) Consistency is key for making your eBook look professional and easy to read.

Designing for readability

Just because you're not a designer, it doesn't mean you shouldn't pay attention to these design details that will make reading your eBook a great experience for your subscribers. Here's what to watch out for:

Font choice

While you can get a bit fancy in the font you use for your title and headings, the font you choose for the body of your eBook should first and foremost be legible. This beautiful script font for example looks great on a cover page, but is really hard to read in a sentence.

Instead stick to plainer fonts for your main content. You can download some great open source fonts from the Google font library, which are free to use in your projects. For a modern look try a sans-serif like Open Sans, Roboto, Montserrat or Lato
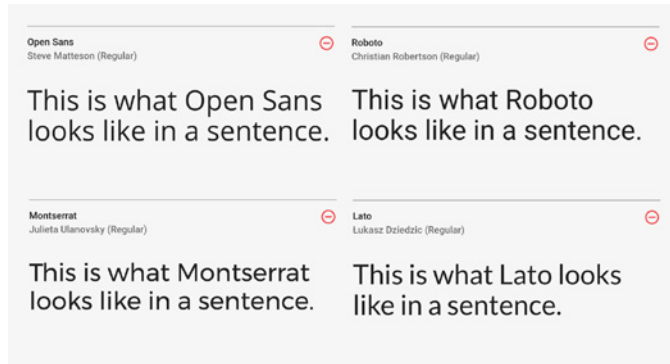
[Download these sans-serif fonts from Google fonts](#)

And for a classic look try a serif font like Merriweather, Droid Serif, Roboto Slab or Lora.
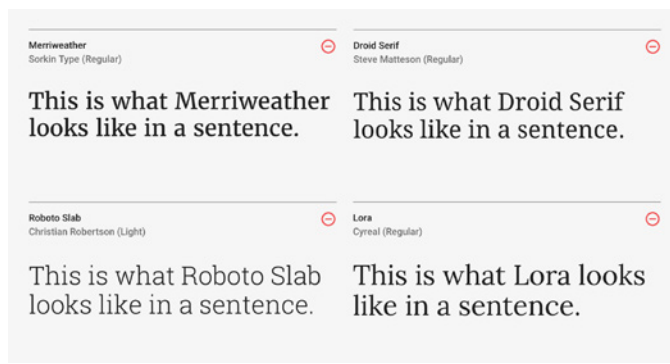
[Download these serif fonts from Google fonts](#)

Bonus tip: the Google font library is great to browse because when you view a font, it will give you suggestions of other fonts to pair it with.

Readable line lengths

The length of your lines of text and the spacing between them can have an impact on how comfortable it is for a reader's eyes to follow along. To give your subscribers a good reading experience you want to make sure the text in your eBook is optimised for readability. First, that means left aligning your text. Here's a quick design history lesson courtesy of [Smashing Magazine](#).

In 1928, [typographer] Jan Tschichold dismissed centered text and advocated for left-aligned text. He argued that this would assist readers by providing a consistent left (vertical) edge for the eye to return to after finishing each (horizontal) line.

It's true! You can also help the reader's eye easily find the start of a new line by keeping your line-length to around 45-75 characters and changing the line height so that the eye doesn't get confused and read the same line twice. Here's an example– isn't the text in the second example much easier to read than the first?
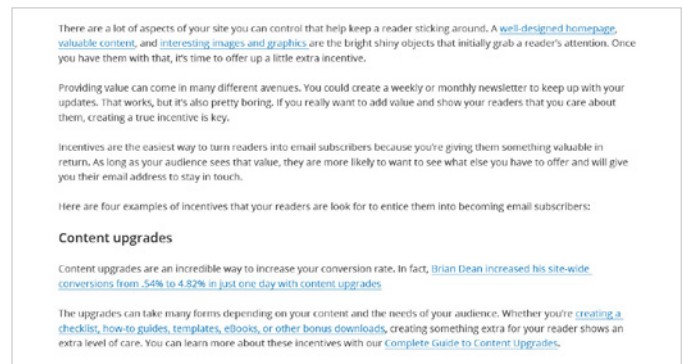
With so many words on a line, it's harder to find the start of the next one.
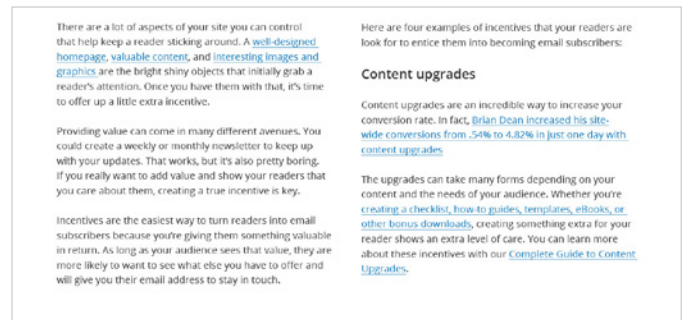
Shorter line lengths = much more readable!

That's why in our Tradecraft PDF I lay the text out in two columns rather than spanning the whole page.

Break up text-heavy pages with images

Keep your reader engaged by adding imagery throughout your eBook. Adding images lets a reader's eyes rest intermittently, and remember, the book is digital, so it won't waste paper if you decide to add a half-page image in some of your chapters!

The same goes for title pages or quote pages– changing up the way you display your content every now and then will

keep your eBook from feeling like a school textbook and make it more of an engaging publication.

Add a Contents page

Just like a website has navigation to make it easier to find your way around, you should help your readers navigate your eBook too. Add a Contents page so they can easily find the right article and re-read that inspiring snippet they remembered seeing.

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Once you nail the eBook creation process you'll be able to make multiple lead magnets about specific topics available on your site. You'll be adding lots of new subscribers to your email list in no time. The only question now is what will the topic for your first eBook giveaway be? Tell us about your ideas in the comments!

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Charli Prangley

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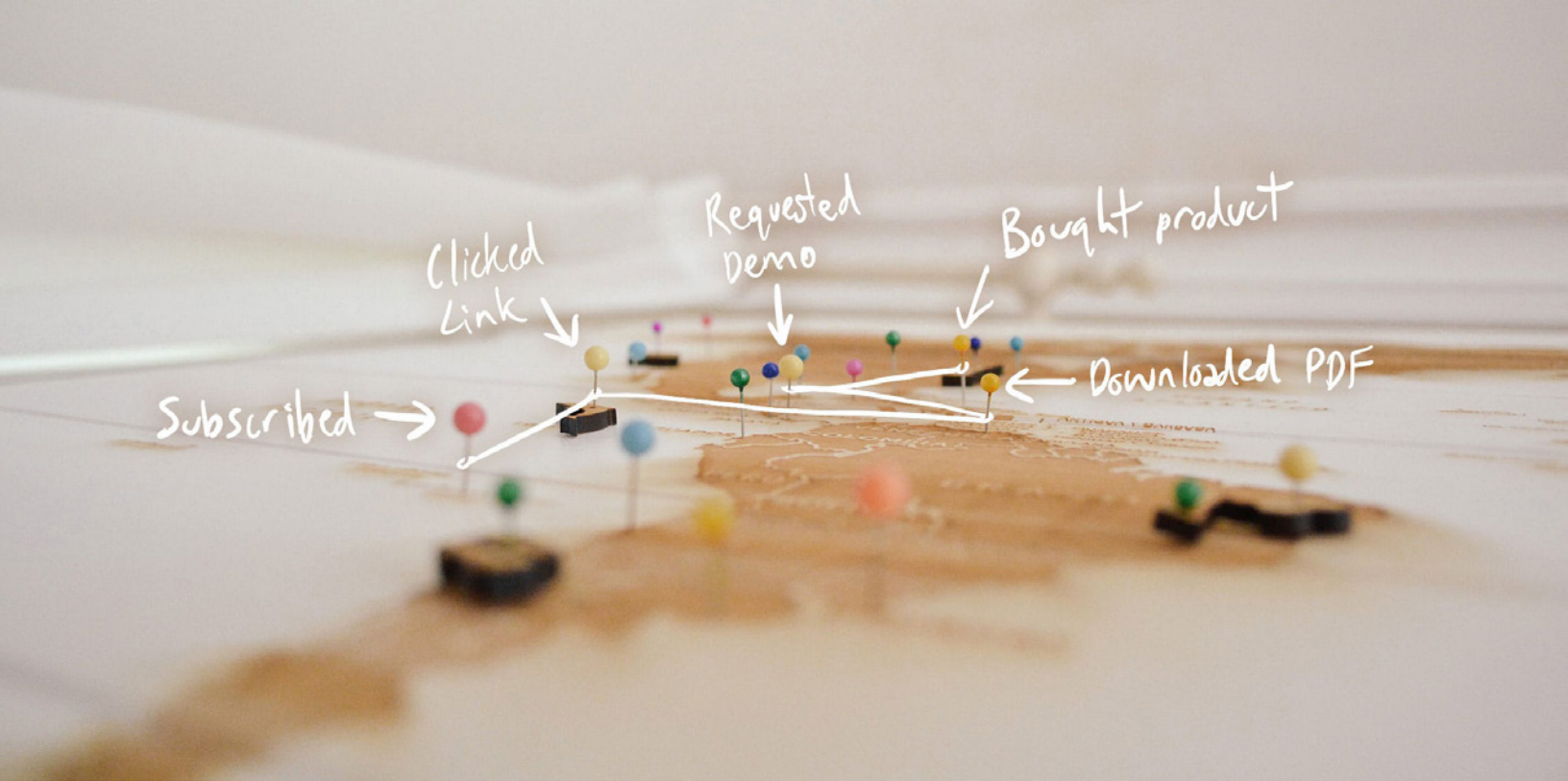
How to Measure the ROI of Your Email Marketing with Analytics

If you're a new blogger, you're most likely a one (wo)man show and need to find the most cost, work, and time efficient way to handle your business. This will involve a lot of prioritizing and constantly reviewing your data to make sure you're hitting your goals as well as creating the best processes you can. Sometimes that will mean reevaluating the tools and systems you've put in place to grow your business.

As you're working to create a living online with your products or services, you need to know the economic value of everything you do. Afterall, if you're spending your budget on a tool, you need to make sure it's performing well. If it's not, it's time to get rid of it.

Whenever you take the time to reevaluate your tools and systems, ask yourself these three questions:

- What is the mission of my business?
- How is the tool/process supposed to help me reach my goals?
- Is this tool/process doing it's job?

Jobs to be done

There's a concept called Jobs to Be Done that originated in the '90s at Harvard Business School. The basic premise of the concept is that people "hire and fire" products to do a job for them. For example, you can "hire" a new cake pan to bake your friend's birthday cake, but if the cake bakes unevenly or the batter leaks out the sides while in the oven, you're probably going to immediately "fire" that cake pan. You saw that it wasn't going to do the job you bought it for and therefore you got rid of it.

You can apply this same Jobs to Be Done principle to your reevaluation process. Today, let's apply this to email marketing. So go ahead and ask yourself those three questions:

- What is the mission of my business?
- How is email marketing supposed to help me reach my goals?
- Is my email marketing doing its job?

In general, email marketing helps you reach a bigger audience and increase your revenue. If that's true, you need a system in place to show if that's actually happening– to know if your email marketing is doing its job.

Sure you can get a decent feel of the overall effect of your emails from the amount and quality of any Reply to's you receive, but that's not helping you see the real details when it comes to ROI. To truly test, know, and understand the value your email marketing is creating for your business, you need to see how each email is performing. To do this, you need to set up email analytics.

Why email analytics are important

Analytics for your email marketing helps you track what occurs once your visitor has clicked through from your email to your blog. Also called ["beyond the click" tracking](), the data you collect with email analytics shows the journey your subscriber takes after they've clicked a link in your email.

Do they download an incentive? Do they read 10 blog posts? Do they ask for a demo? Do they buy a product? By setting up email analytics, you'll be able to answer these questions and find out if your email marketing is getting its job done. You'll also be able to:

- Justify spending money on email marketing
- Justify spending time on email marketing
- See what emails work and what emails don't

I know analytics can seem like an advanced and complicated system, but it doesn't have to be.

How to set up email analytics for your email marketing

Setting up an analytics system to measure the ROI of your email marketing should lead to a couple of key insights into your business, but the ultimate goal is to understand how many new customers you get from your email marketing efforts.

Once you learn the process for tracking ROI on your email marketing efforts, you should be able to apply a similar process to your other marketing efforts like social media, guest posting, Facebook ads, and other marketing channels you're using to grow your business.

There are five steps to measure the effectiveness of your email marketing:

1. Make a product or service available for sale
2. Install Google Analytics on your site
3. Set up a goal to track sales of your product or service
4. Use links with UTM parameters in your emails
5. Track revenue from email every month

Before we move on, if I could embed in your brain just one takeaway from this entire post, it would be this: **analytics are only as important as the decisions they allow you to make with confidence.** If your analytics aren't helping you make better decisions, then they're just wasting your time. Now let's jump in.

Have a thing for sale

First things first, before you worry at all about any kind of analytics, you need to keep one very important thing in mind: if you don't yet have a product or service for sale, then any metrics you measure are purely [vanity metrics]().

Because they can't lead to revenue of any kind, your metrics will simply give you a bunch of hypotheses before you have something for sale. There is no way to know whether your readers and subscribers are interested enough in what you do to become customers unless you give them a chance to become customers. So hold your metrics loosely before you have something for sale, will ya?

If you're deciding how to spend your time in your business and you have an option of setting up analytics or making a product for sale, hands down you should make a product. For the rest of this post, we'll assume you already have a way to make money in your business.

Set Up Google Analytics

We could have a philosophical debate over which of the many metrics tracking software options are the best or we could just be real: for at least 80% of bloggers, you'll never need anything other than Google Analytics to understand what's going on with your business.

Don't research alternatives, just use Google's free tool and learn how to use it well. If you know it so well that you find that it can't do something you need it to do some day, then go research alternatives. Until then, it works (we use it at ConvertKit!) and it's powerful.

Here are instructions on how to install Google Analytics on your site. And if you really want to nerd out on analytics, here's a link to the Google Analytics Academy. It's not the most entertaining thing you'll ever watch, but it'll help you build expertise if you want it. (Don't get lost in a rabbit hole -- remember that analytics are only as important as the decisions they allow you to make with confidence.)

Set Up a Goal in Google Analytics

In order to assign a value to your email marketing, you have to set up a goal in Google Analytics. Setting up a goal allows you to tell Google Analytics how it should know that someone has purchased a product of yours and how much they paid for that product.

Here's how you do that as of April 2017. We'll update this post regularly to make sure our tutorial is in line with Google Analytics' user interface.

Step 1: Go to the admin panel in Google Analytics

When you're logged into your Google Analytics account, navigate to the admin panel, which should be in the bottom left of your screen.

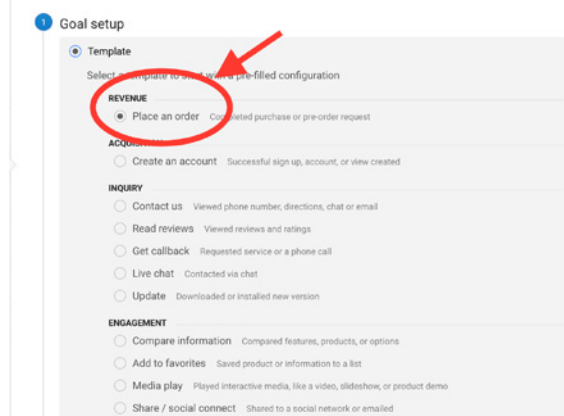**Step 2:** Go to the Goals Panel in Google Analytics
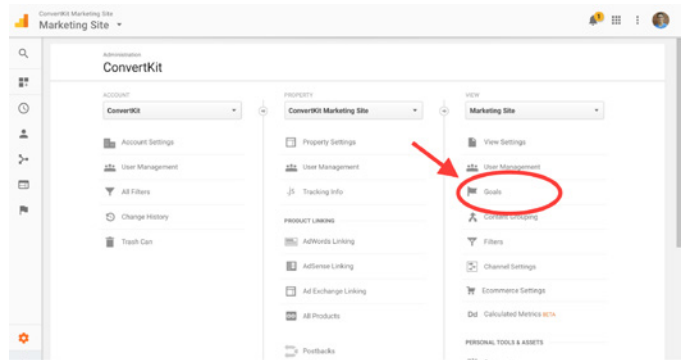
Now find the Goals Panel under the View column on the far right. Click there.

Step 3: Set Your Goal
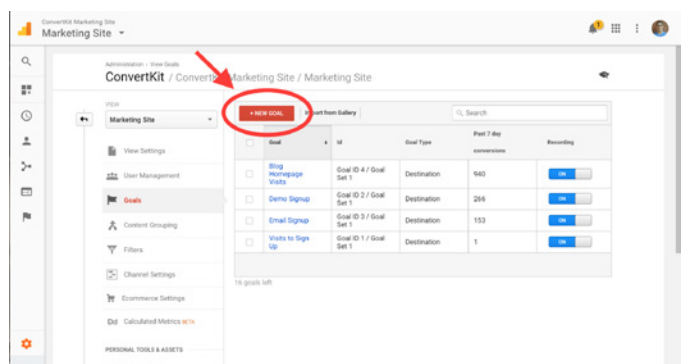
First, click on "+ New Goal." That will take you to a screen where you can tell Google Analytics what kind of goal you want to set.

Now choose the "Place an Order" pre-filled configuration. This goal will make it easy to tell Google that you're tracking a person becoming a customer by buying a product or service from you. Click continue at the bottom of the screen.

Use this step to give your goal a name. Something like "[Product Name] Purchase" is good. Then select a Goal Slot ID that has not been taken in your account. If you've never set a goal in Google Analytics before, then this should be "Goal Id 1 / Goal Set 1." And then select a goal type of "Destination."

Side note: Later on, as you become a more advanced Google Analytics user, you might decide to change this goal to an "Event" type goal for accuracy. For now, the "Destination" type goal will work just fine.

Click continue.

Now we'll establish the details for how we want Google Analytics to track our goal. First off, we need to tell Google what page our customers will land on when they buy your product. Your e-commerce tool should allow a person to purchase a product from you and then automatically redirect that person to a page of your choosing.

Notice that the link you fill in is not a full URL. It's just the part of the URL that comes after your main site URL. So in the screenshot above, there is no "https://convertkit.com." Make sure that this page only gets visited when a person buys a product and that the link is not indexed in search

engines. That way you won't accidentally double count revenue from one customer.

Then give the purchase a default value. This should be the amount paid by your customer for the product purchased. If you're selling a physical product, you might make this value the amount paid by your customer minus your cost of goods sold. It's really up to you. Just use a consistent number that you understand and that accurately reflects the value of that purchase to your business.

Step 4: Verify Your Goal

Google has a handy little link right under the goal you just set that says "Verify This Goal." When you click that link, Google will tell you how many times this goal would have been accomplished in the last seven days if you had already set it in your account. If you know you have no sales in the last week, then skip this step.

Then click save on your goal. You've just set your first Google Analytics goal. Good work! You can now do the same for all of your products or services, or for your new email subscribers if you set redirect pages on your forms in ConvertKit.

Next, you'll need to learn how to use UTM parameters on the links in all of your emails.

Use UTM Parameters on All of Your Links in Your Emails

UTM parameters sounds like something a NASA scientist would ask for from an astronaut on a spaceship. They're not. Let me save you a bunch of time and research by making this as simple as possible: **UTM parameters tell Google Analytics where visitors to your site came from with absolute accuracy**.

Google likes to think they know everything, but in the end their analytics tool can mess things up when you leave it up to them to put your site visitors into buckets. Instead, UTM parameters give you control over how you track your analytics.

In order to to use UTM paramaters effectively, you need to understand a couple of terms:

• **Campaign Source:** the entity that's sending the visitor

to your site. I think of this as the name of a business or person -- the name of your business if you're writing an email to your audience, the name of the business or blog where you're guest posting, the name of the social network or the name of the search engine are all examples

- **Campaign Medium:** the marketing channel represented by the campaign source. If your campaign source is Facebook, then the medium would be Social Media. If the campaign source is Four Hour Work Week, then the medium would be blog or podcast, depending on where Tim Ferriss mentioned you. Here are the most common Campaign Mediums we use:
  - Affiliate
  - Blog
  - Display Ad
  - Email
  - Paid search
  - Podcast
  - Referral
  - Search
  - Social
  - Video
- **Campaign Name:** the specific thing that led to a visitor landing on your site. This could be the subject line from an email, name of a specific blog post or podcast episode, an ad campaign you ran, or an affiliate promotion you created. Medium and Source are more important than Name, but a Name can help you understand how well a specific project or piece of work performed.

UTM links use a standard format and it looks like this:

https://convertkit.com/?utm_source=ConvertKit&utm_medium=Email&utm_campaign=Tradecraft_April_2017

We can break it down to its component parts:

- The normal URL we're linking to: **https://convertkit.com/**
- The Campaign Source: **?utm_source=ConvertKit**
- The Campaign Medium: **&utm_medium=Email**
- The Campaign Name: **&utm_campaign=Tradecraft_April_2017**

This particular link would tell our ConvertKit Google Analytics account that a site visitor who clicked on the link came from an email we sent to our list about our April 2017

issue of Tradecraft, which is our monthly blog publication (of which this post is a part).

Now that you're stressed out about how you're going to remember all of this, I'm going to relieve that stress for you: bookmark this link to the Google URL Builder. That tool will help you build UTM links without having to remember the details of how they're structured.



The Google Campaign URL Builder

Here's the key: every time you add a link to one of your ConvertKit emails -- broadcast or sequence -- you need to add UTM parameters to be able to accurately track the ROI of your email efforts. K? K. Glad we got that ironed out.

It's time to track the results.

Track revenue from email every month

Now that you've setup Google Analytics, set your goal for product sales, and you're using UTM parameters in your links, we can measure the value of your email marketing efforts each month.
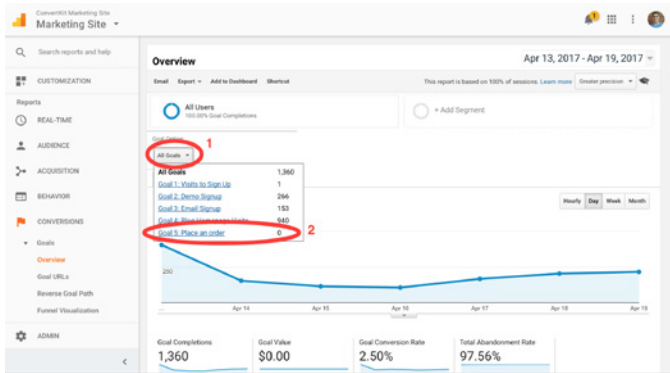
To do that, login to your Google Analytics account and navigate to the Conversions panel:
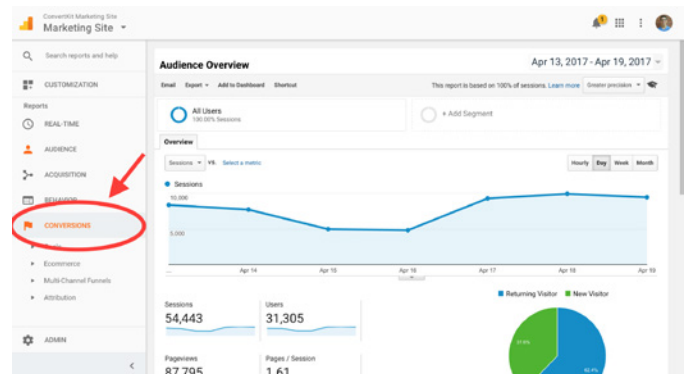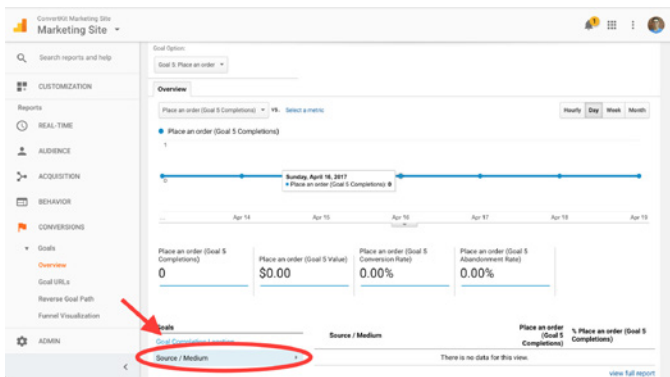
Then navigate to the Goals Overview:
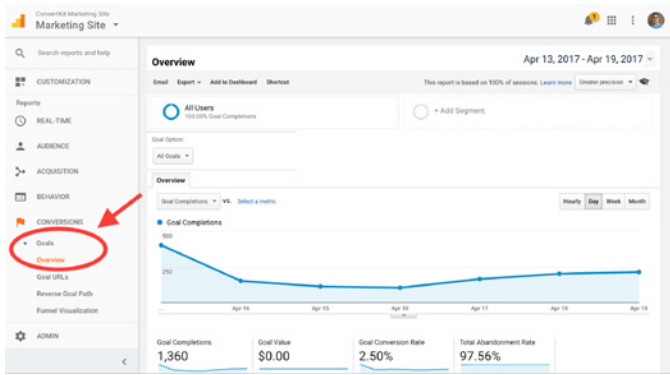
Then select the goal you set for your product sales:

Then click on the Source/Medium view:

Then click on "View Full Report" in the screen above, which should take you to a report that looks like this:

This report will use the UTM parameters you set in each of the links in your emails from your ConvertKit account to show you a few key metrics:

- How many sessions came from your emails, which are basically separate website visits
- How many new users visited your site, which excludes anyone who has visited before -- this is a good proxy for new prospective customers
- Your conversion rate from # of sessions to product purchases (seen as Goal 5 conversion rate above)
- The total number of product sales for the product you used for your goal (seen as Goal 5 completions above)
- The total value of all product sales (seen as Goal 5 value)

To get your total ROI from your email marketing efforts, simple add up all of the values from your product sales in Google Analytics. Then use this equation:

ROI on email marketing = (Total value from product sales from email - (Total monthly cost of my email marketing tool + total cost of any employee or contractor time to manage my email marketing)) / (Total monthly cost of my email marketing tool + total cost of any employee or contractor time to manage my email marketing)

What's your ROI on email marketing?

There you have it. A method for measuring the impact of email marketing on your business revenue. You can track all of the metrics you want, but at the end of the day, what matters most is how much money your business makes. Evaluating each of your marketing channels in this same way will give you a great feel for what's worth your time and what's not.

It's important to remember that different marketing channels have different goals, but one of email marketing's main goals is to turn email subscribers into customers. Now you have a way to prove that that's true in your business.

Take the time to implement email marketing analytics tracking this month. Then come back here and let us know: what ROI did you get on your email marketing this month?

Barrett Brooks

See ConvertKit in action.

Join one of our experts on a live tour and get the answers you need.

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