



# B2B Email Marketing Guide

Complete a copy of this plan for each audience segment you plan to target.

Remember, the information in your emails should go from general to more specific, as someone moves through the email marketing funnel.



# Your audience segment

What are the key traits of this audience segment?

What role will they play in the purchasing decision?

What are the needs of this audience segment?

What questions does this segment have that you're equipped to answer?

What obstacles might stand in their way of purchasing?

# Step 1: Lead generation

How will you encourage leads to sign up for your email list? (This is your lead magnet. It could be an ebook, whitepaper, template, downloadable guide, webinar, etc.)

What other personal information do you want from the lead form to help you better meet their needs through your emails?

Will you offer any value in the first email you send to a new lead (aside from the lead magnet)?

What are the next steps you want a lead to take? How will you make this clear to the lead in your first email?



# Step 2: Awareness

**Trust-building email content:** Links to blog posts that meet general buyer needs

Approximately how many emails do you plan to send at this stage?

How will you educate leads through emails at this stage?

How will you use emails to build trust and relationships?

What do you want leads to know about your company at this stage?

How will the emails communicate the value of your company to a lead?

How will these emails encourage a lead to move further along the buyer's journey?

How will you know when someone has moved to the next stage, and should start receiving "consideration" emails?



# Step 3: Consideration

**Trust-building email content:** Links to blog posts that meet specific customer needs, guides, tutorials (how-tos), testimonials, video content, competitor comparisons, company/product information that answers common questions.

Approximately how many emails do you plan to send at this stage?

How will you educate leads through emails at this stage?

What information do you want leads to know about your company at this stage?  
(more specific than in the awareness stage)

How will you use emails to address specific lead concerns?



# Step 3: Consideration (cont'd.)

How will you use emails to answer common lead questions?

How will the emails communicate the value of your company to a lead?

How will these emails encourage a lead to move further along the buyer's journey?

How will you know when someone has moved to the next stage, and should start receiving "conversion" emails?



# Step 4: Conversion

**Trust-building email content:** Relevant and high-performance case studies, highly specific education/templates (as personalized as possible), valuable offers/sales on your product or service.

Approximately how many emails do you plan to send at this stage?

How will you personalize each email for each individual lead?

How will you educate leads through emails at this stage?

How will you use emails to address or answer specific lead concerns?



# Step 4: Conversion (cont'd.)

What information do you want leads to know about your company at this stage?  
(Highly specific)

How will the emails communicate the value of your company to a lead?

How will these emails encourage a lead to purchase your product/service?

What types of lead-nurturing emails will you send to convince a lead who's still  
"on the fence"?

What information can you give leads to help overcome any obstacles or objections  
they have?





# Step 5: Customer retention

**Trust-building email content:** Onboarding, product/service information, business or product updates, new blog content, relevant education (how-tos for using the product, best practices for using the product/service, etc.), customer care info.

What information do customers need to onboard, which you can send through email?

How can you use emails to help someone get the most out of your product/service?

How can you use emails to strengthen the relationships you've built with customers?

How can you use emails to offer value to current customers so they'll stick with you?



# Individual B2B email plan

Complete a copy of this for every email you send.

Audience segment you're targeting

Stage of buyer's journey

Email type

Main email purpose

Behavior that triggers sending

Subject line

Summary of email content

Links to include

Company information to include

Information to address customer needs

Images

Timing for sending (day of week, time of day, where in a sequence it falls)

