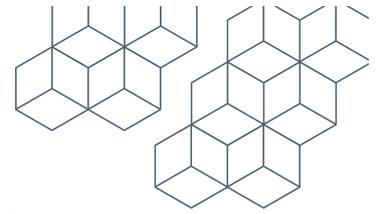


# Email Goal Setting Planning Workbook



Use this workbook to help take inventory of the performance data you want to track including engagement and conversion metrics. Once you've taken inventory, you will use these metrics to establish benchmarks and goals.



## Section 1: Define Your Objectives or Outcomes

In this section, summarize your overall email goals and desired outcome

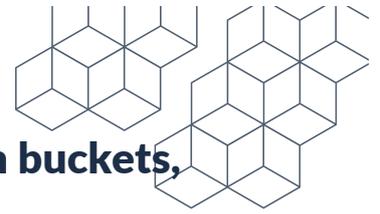
- Deliver great content that elicits more opens and clicks
- Drive traffic off the email to my website to drive awareness
- Funnel traffic into journeys for a conversion like a registration or purchase
- Other (Please list any additional goals or notes below.)

## Section 2: Take Inventory of Your Current Program Metrics

In this section, answer the following questions to outline your analytics data

### Establish your overall email engagement metrics

Metric	
Open Rate	
Click to Open	
Clickthrough	
Delivery Rate	
Unsubscribes	
Bounce Rate	



## List out top email groups for additional analysis (subscription buckets, high priority email sends)

Email Buckets	Description
Events & Training (EXAMPLE)	All emails in the subscription bucket "events & training"

## Section 3: Compare Current Program Metrics to Industry Standards

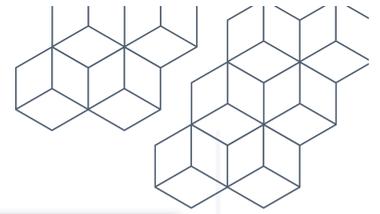
### Benchmark Comparison Formula\*:

$(\text{Your Metric} - \text{Industry Metric}) / \text{Industry Metric} \times 100 = \% \text{ to Industry Benchmark}$

#### Example:

$(18\% \text{ (My Open Rate)} - 20\% \text{ (Industry Open Rate)}) / 20\% \text{ (Industry Open Rate)}$   
 $= (-0.11) \times 100 = -11\% \text{ Below Industry Benchmark}$

*\*This formula is built into the KPI Dashboard Template which you can download to track your quarterly metrics.*



#### Association Industry Metrics:



#### For Profit Industry Metrics:



## Section 4: Define & Track Conversion Goals

First, determine the method you'd like to track your conversions. Check out "[Tracking Your Conversions](#)" section of the toolkit for more details

- UTM Codes     Conversion Tracker     Conversion Capture

Do you have tracking scripts established between your conversion platform and email platform?

- Yes     No

## Section 5: Breakdown Your Metrics by Email Type

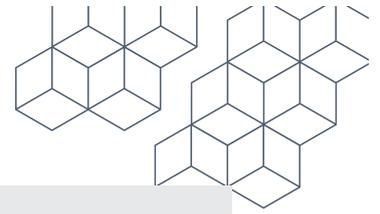
Using the List from Step 2, pull metrics for each of the identified email buckets and establish baselines and goals based on desired outcomes and industry benchmarks.

### Email Group A:

Category or Email Type:

### Define Conversion Type:

- Download                       Page View  
 Registration/Form Completion     Renewal  
 Product Purchase  
 Other



## Calculate Average Conversion Rate:

### Event Email Example:

(10 Total Registrations/100 Total Emails Sent) x 100 = 10% Conversion Rate

(\_\_\_\_\_ Total Conversions/\_\_\_\_\_ Total Emails Sent) x 100 = \_\_\_\_\_Average Conversion

## Determine Goal Metric

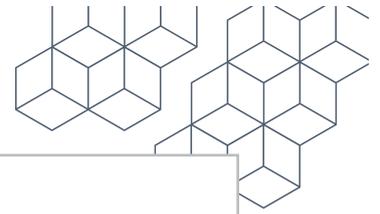
Drive \_\_\_\_\_ Percent Lift

Maintain Baseline

## Establish Baseline Metrics by Email Type:

Metric Name	Baseline Metric	Goal Metric
Open Rate		
Clickthrough		
Click to Open		
Conversion Rate		
Total Revenue		
Revenue per Email Send		

## Capture key findings or insights for this email group:



## Email Group B:

Category or Email Type:

### Define Conversion Type:

Download

Page View

Registration/Form Completion

Renewal

Product Purchase

Other

### Calculate Average Conversion Rate:

#### Event Email Example:

$(10 \text{ Total Registrations} / 100 \text{ Total Emails Sent}) \times 100 = 10\% \text{ Conversion Rate}$

$(\text{_____ Total Conversions} / \text{_____ Total Emails Sent}) \times 100 = \text{_____ Average Conversion}$

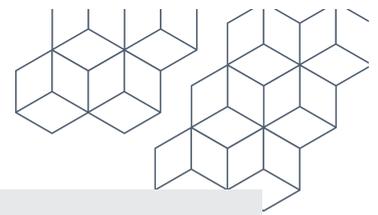
### Determine Goal Metric

Drive \_\_\_\_\_ Percent Lift

Maintain Baseline

### Establish Baseline Metrics by Email Type:

Metric Name	Baseline Metric	Goal Metric
Open Rate		
Clickthrough		
Click to Open		
Conversion Rate		
Total Revenue		
Revenue per Email Send		



## Capture key findings or insights for this email group:

### Email Group C:

Category or Email Type:

### Define Conversion Type:

Download

Page View

Registration/Form Completion

Renewal

Product Purchase

Other

### Calculate Average Conversion Rate:

#### Event Email Example:

$(10 \text{ Total Registrations} / 100 \text{ Total Emails Sent}) \times 100 = 10\% \text{ Conversion Rate}$

$(\text{_____ Total Conversions} / \text{_____ Total Emails Sent}) \times 100 = \text{_____ Average Conversion}$

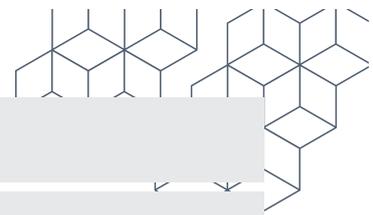
### Determine Goal Metric

Drive \_\_\_\_\_ Percent Lift

Maintain Baseline

### Establish Baseline Metrics by Email Type:

Metric Name	Baseline Metric	Goal Metric
Open Rate		
Clickthrough		
Click to Open		



Conversion Rate		
Total Revenue		
Revenue per Email Send		

### Capture key findings or insights for this email group:

[Grab your reader's attention with a great quote from the document or use this space to emphasize a key point. To place this text box anywhere on the page, just drag it.]

#### Email Group D:

Category or Email Type:

#### Define Conversion Type:

- Download
- Page View
- Registration/Form Completion
- Renewal
- Product Purchase
- Other

### Calculate Average Conversion Rate:

#### Event Email Example:

(10 Total Registrations/100 Total Emails Sent) x 100 = 10% Conversion Rate

(\_\_\_\_\_ Total Conversions/\_\_\_\_\_ Total Emails Sent) x 100 = \_\_\_\_\_ Average Conversion

### Determine Goal Metric

- Drive \_\_\_\_\_ Percent Lift
- Maintain Baseline



## Establish Baseline Metrics by Email Type:

Metric Name	Baseline Metric	Goal Metric
Open Rate		
Clickthrough		
Click to Open		
Conversion Rate		
Total Revenue		
Revenue per Email Send		

## Capture key findings or insights for this email group: