



EMAIL MARKETING & CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

WWW.JUSTSUECREATIVE.COM



ABOUT ME



Sue has over 20 years of experience working with the Small Business Development Center (SBDC), where she helped countless businesses with their business strategy and digital marketing needs. Now, she has embarked on her own venture with *Just Sue Creative*, a business that focuses on **website design, SEO services, branding, content creation, and comprehensive marketing solutions.**



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Just Sue

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GOALS AND OBJECTIVES

Build a Strong, Permission - Based Email List

Create an audience that wants to hear from you — ethically and effectively.

Write Emails that Drive Engagement & Sales

Learn how to create content that educates, builds trust, and converts.

Use Automation to Save Time & Stay Consistent

Set up email sequences that work for you behind the scenes.

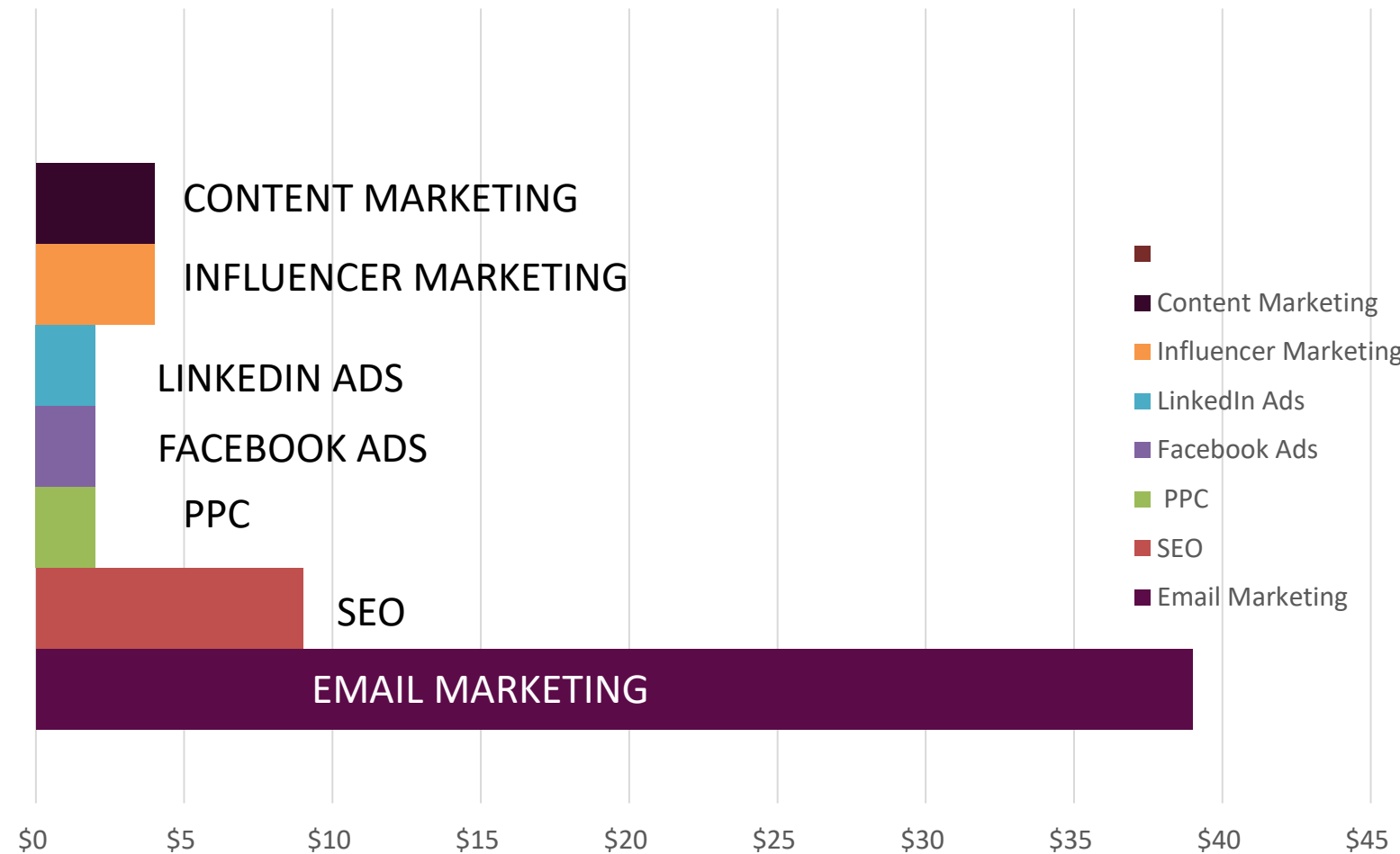
Understand CRM Tools for Customer Retention

Apply AI to build, automate, and optimize a tailored marketing strategy.

Track Results and Improve Over Time

Measure what's working and use data to make your marketing better.

WHY EMAIL STILL MATTERS



Email Marketing has an average ROI of \$36.00 for every \$1 spent
-Source: Litmus 2023

- **You own the list**
 - Direct access to customers
 - No Algorithms
 - Business Asset
- **High ROI**
- **Ideal for nurturing over time**
 - Automation
 - Building trust and education
 - Customer Journey
- **Scalable yet personal**
 - Send one or one thousand
 - Personalization
 - Interest segmentation

WHAT MAKES A GREATER SMALL BUSINESS EMAIL STRATEGY

- Consistency builds trust – Inconsistency = Unsubscribes
 - Consistent can be once or twice per month
 - Demonstrates reliability and professionalism
- Aligns with customer journey
 - Different customers – different messages
- Combines value + sales
 - Sell AND Serve
 - 80/20 rule – 80% helpful or interesting – 20% promotional
- Personalization + segmentation are key
 - Use first names, reference past purchases or highly relevant content
 - Targeted emails perform better than mass sends



BUILDING AND SEGMENTING YOUR EMAIL LIST

LIST BUILDING TECHNIQUES

Opt-in Forms

- The simplest and most essential tool.
- Should be placed on high-traffic areas: homepage, blog, footer, and as a popup or slide-in.
- Keep it clear — what's the benefit of signing up?

Lead Magnets

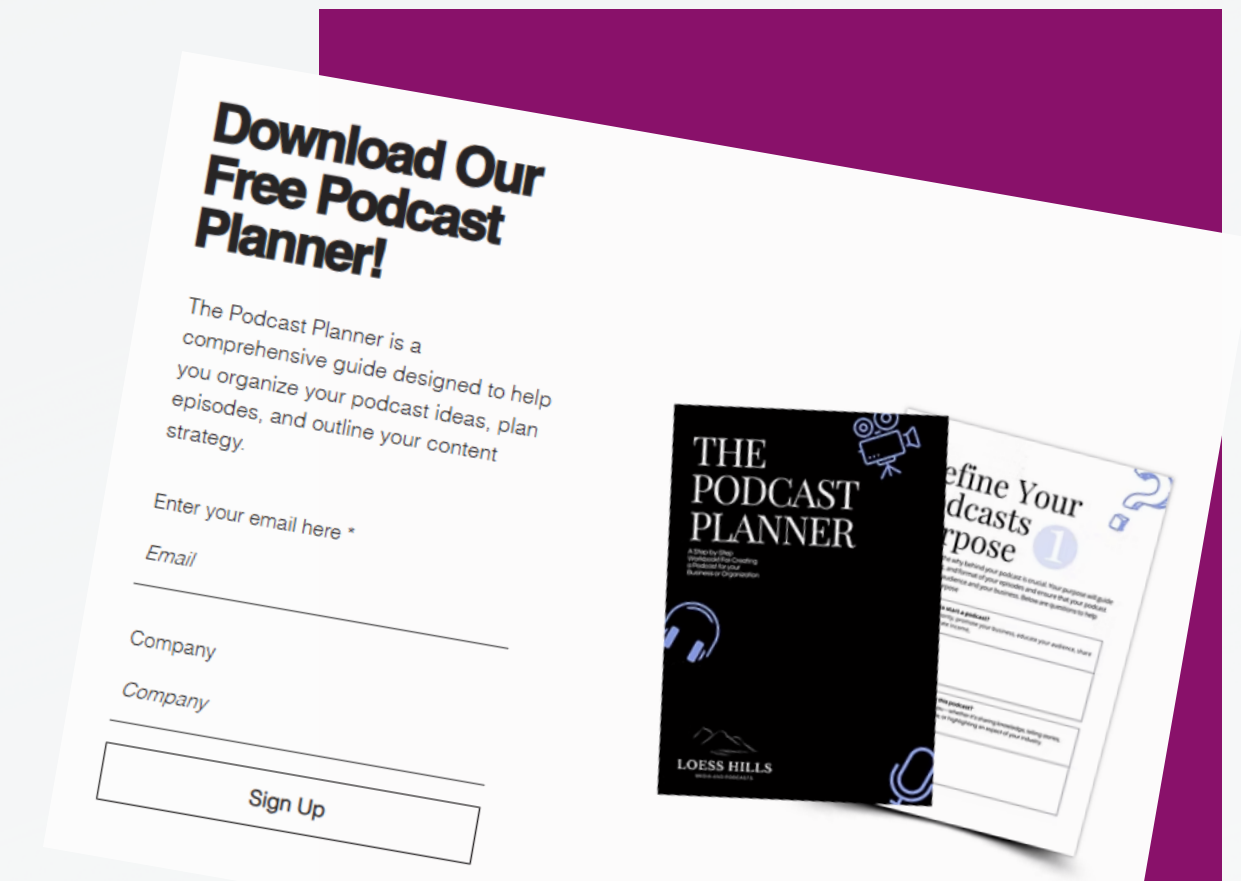
- Give people a *reason* to join your list.
- Examples: free guides, checklists, exclusive discounts, templates, early access.
- Must be valuable and relevant to your audience.

Social Media Forms

- Platforms like Facebook and Instagram now support direct email capture.
- Add a signup link in bios, stories, and posts.
- Promote lead magnets in reels or live video.

In-Store Sign-Ups (if applicable)

- Use physical locations to collect emails with a tablet, paper form, or QR code.
- Offer an instant incentive (e.g., 10% off today's purchase) to boost conversions.
- Make sure staff knows how to explain the benefit of joining the list.



EMAIL LAW / REGULATIONS



Requirement	GDPR (EU)	CAN-SPAM (U.S.)
Consent to Send Emails	Explicit Opt-In Required	Can email without consent, but must offer opt-out
Proof of Consent	Must record how/when consent was given	Not required
Honest 'From' Name & Email	Required — No impersonation	Required — Sender must be accurate and identifiable
Honest Subject Line	Required	Required — Must reflect content
Identify as Advertisement	No requirement	Required — Must clearly state marketing purpose
Privacy Policy / Data Use Notice	Required	Not required, but best practice
Physical Mailing Address	Not required by law — but commonly included	Required in every email — street address, PO Box, or mailbox
Unsubscribe Option	Required — Clear & easy	Required — Clear, easy, visible
Honor Opt-Out Requests	Must delete data if requested	Must honor within 10 business days — no charge, no extra steps
Data Protection Standards	Required — Must safeguard personal data	Not specified, but best practice
Right to Be Forgotten	Required — User can request data deletion	Not required
Double Opt-In	Recommended but not mandatory	Not required
Monitor Vendors/Sending Partners	Required — Responsible for third parties	Required — Sender is legally responsible for vendors
No Reselling of Opt-Out Emails	Required	Required — Cannot sell unsubscribed emails
Applies To	Anyone marketing to EU residents	Anyone sending marketing emails in the U.S.
Penalties for Violation	Up to €20M or 4% of annual global revenue	Up to \$50,000 per violation

AUDIENCE SEGMENTATION

Segment By

Demographics

- Age, gender, location, industry
- Useful for geographic offers, local events, or niche services

Behaviors

- Open/click history, browsing behavior, cart abandonment, past engagement
- Example: send reminders to people who clicked but didn't buy

Purchase History

- Repeat buyers vs. first-time customers
- Product type or service category
- Example: send complementary product recommendations or loyalty rewards

Tailored Content = Better Results

- Personalized emails generate 6x higher transaction rates
- Click-through rates improve significantly with relevant content
- Reduces unsubscribes because your emails feel useful – not random

“Segmentation is the art of sending the right message to the right person at the right time.” Instead of blasting one email to your whole list, you divide it into smaller groups based on shared traits or actions. This improves relevance, engagement, and conversions.



ENGAGEMENT TACTICS

Welcome sequences

- Set expectations, introduce your brand and guide subscribers toward their first action

Purchase-triggered emails

- Includes confirmations, thank-yous, review requests, and product education.
- High open rates and strong for loyalty.

Special occasion or milestone emails

- Celebrate birthdays, anniversaries, or seasonal events
- shows customers they matter.

Re-engagement campaigns

- Target inactive subscribers with friendly reminders, exclusive offers, or preference updates.

Personal greetings

- Use names, location, or product history to add warmth and relevance to emails.

Loyalty rewards & VIP offers

- Send exclusive perks to repeat customers — early access, bonuses, or special discounts.

Educational or helpful content

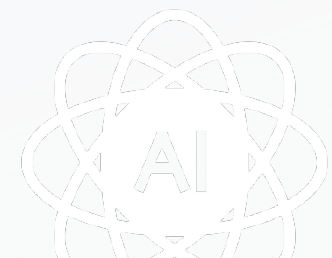
- Non-sales content that provides value: tips, how-to guides, curated resources.

Feedback or survey emails

- Ask for reviews, send simple polls, or gather ideas — boosts engagement and insight.

Event or community highlights

- Great for local businesses — promote events, workshops, or spotlight your community.





EMAIL CAMPAIGN STRATEGY & AUTOMATION

WHAT DO YOU WRITE ABOUT

Two Main Content Categories

1. Promotional:

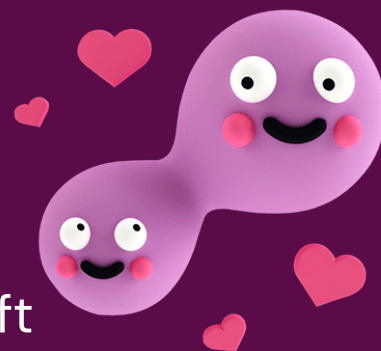
- a) Limited-time sale or special
- b) New product or service announcement
- c) Seasonal package or bundle
- d) Event invite (workshop, webinar, in-store event)
- e) "Low in stock" or "Last chance" notice
- f) Customer loyalty reward

1. Educational/Relational (Build Connection)

- a) How-to tip related to your product/service
- b) Behind-the-scenes process or workspace
- c) Owner story or origin story
- d) Customer spotlight or testimonial
- e) Staff favorites or product recommendations
- f) Resource list (local guide, helpful links)Common FAQs answered
- g) Seasonal advice or checklist
- h) Holiday message or personal note

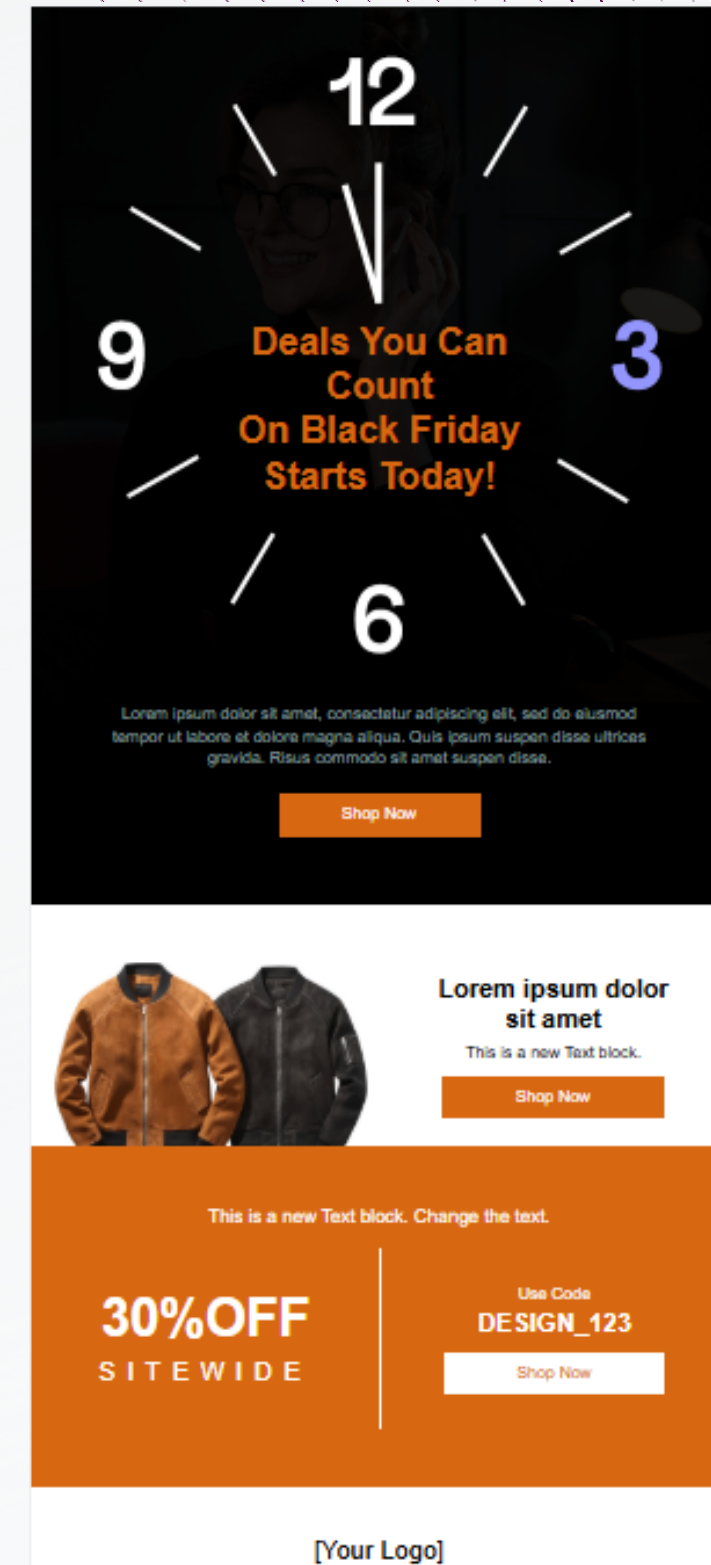
Better Together

Your emails don't have to be all-or-nothing. Some of the best-performing emails mix a useful tip or story and a soft call-to-action (CTA) to buy.



SMALL BUSINESS EMAIL CONTENT BEST PRACTICES

- 80/20 value-to-sales ratio
- Clear call to action (CTA)
 - Buy Now, Read More, Schedule a Call...
- Human, conversational tone
 - Avoid jargon. Use contractions, speak directly and Let your VOICE show
- Skimmable formatting
 - Short Paragraphs, Bullet Points, Bold Text, Sub Headings
- Visual hierarchy (headlines, buttons)
 - Large Bold headlines Contrasting CTA, Space around elements (white space)
- Mobile-first design -60% of emails opened on Mobile
 - Large fonts (14pt), buttons instead of links, single column layout
- Alt text for images
 - IF the image doesn't load – don't lose the impact of the image.



WRITING ENGAGING EMAILS

1. Compelling subject lines
 - 40 to 60 characters
 - Use urgency *sparingly*
 - A/B Tests
2. Concise, value-driven copy
 - Get to the point IMMEDIATELY
 - Focus on benefits
 - Conversational – not brochure like
3. Clear call to action (CTA)
 - Every email should have a main goal
4. Personalization elements
5. Alignment between subject, content, and CTA (



Just
Sue
Creative

Let's Make Your Marketing Easier

3 QUICK IDEAS TO START

Hi there —

Running a small business means wearing all the hats... but marketing doesn't have to be so hard (or time-consuming).

Here are 3 quick ideas you can try this week to boost engagement with your customers:

1. Use Names When You Can — People notice when an email feels personal. Add their first name in the subject line or greeting.
2. Ask a Simple Question — Ending a post or email with “What’s your favorite?” or “Need help with this?” encourages replies and engagement.
3. Be Consistent — Not Perfect — Showing up regularly builds trust faster than waiting for the “perfect” thing to say or post.

These small tweaks can create big results over time.

If you're feeling stuck or need fresh ideas for your business — I'd love to chat. I offer a free 30-minute consultation where we'll talk through your goals, challenges, and where marketing can work harder for you.

No pressure. Just real conversation to see if I can help.

Talk soon,

Sue

Just Sue Creative

Helping Small Businesses Show Up Better

SCHEDULE TODAY

DRIP CAMPAIGNS & AUTOMATION

Welcome flows

- Welcome/what to expect
- Brand Story or your why
- Best Resources/Popular products/freebies
- CTA

Abandonment series

Triggered when:

- Someone adds to cart but doesn't buy (ecommerce)
- Someone starts a booking form but doesn't finish (services)
- Someone clicks on a product/service page but takes no action
- Typical sequence:Reminder EmailHighlight Benefits or FAQsIncentive (if appropriate)

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- Reminder Ema
- Highlight Benefits or FAQs
- Incentive (if appropriate)

A drip campaign is a series of pre-written, automated emails sent over time — triggered by an action or event.

DRIP CAMPAIGNS & AUTOMATION

Follow-ups Based on Behavior

- Smart emails based on what people actually do.

Examples:

- Downloaded a guide → Send related tips
- Purchased a product → Send a care guide or upsell
- No activity for 60+ days → Re-engagement email



Timing & Cadence Tips

Don't send too many too fast.

- Best Practices:
 - Welcome series: 2-5 emails over 1-2 weeks
 - Abandonment: 1-3 emails within 24-72 hours
 - Behavior-based: Space them out naturally
 - Always allow opt-out or email preference center



CUSTOMER RELATION MANAGEMENT SYSTEMS

WHAT IS CRM AND WHY IT MATTERS

CRM = A tool for managing customer relationships from leads to existing customers

- Helps small businesses stay organized, personal, and consistent
- Tracks interactions, conversations, purchases, and next steps
- Builds trust, loyalty, and repeat business

Without a CRM:

- Leads slip through the cracks
- Customers feel forgotten
- Opportunities are lost

With a CRM:

- You look polished, responsive, and professional
- Everyone gets a better experience
- You can follow up like a pro — even months later
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CRM TOOLS

- HubSpot (Free tier available — user-friendly for beginners)
- Zoho CRM (Affordable & customizable)
- Streak CRM (CRM that works directly inside Gmail — great for solopreneurs)
- Non dedicated CRM (but do some of the job – Wix, Shopify, Mailchimp, Quickbooks, etc)

When do you need a dedicated CRM? If you want to

- Manage leads before they become customers
- Track sales pipelines or deal stages
- Automate complex follow-up sequences
- Store detailed customer notes, tasks, reminders

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The background features abstract teal line art. On the left, a series of overlapping, curved lines form a fan-like shape that tapers towards the top. On the right, several vertical, wavy lines create a sense of depth and movement. The overall aesthetic is modern and minimalist.

EMAIL METRICS

EMAIL METRICS THAT MATTER

- **Open Rate** – Measures subject line effectiveness & sender reputation
- **Click-Through Rate (CTR)** – Shows how engaging your content and CTAs are
- **Unsubscribe Rate** – Tells you when content is missing the mark
- **Conversion Rate** – Tracks the ultimate action: purchases, bookings, downloads
- **Bounce Rate** (optional) – Identifies bad email addresses or deliverability issues

Benchmarks:

Open Rate: 20–35% is healthy

CTR: 2–5% is a strong average

Unsubscribe Rate: Under 0.5% is ideal

Conversion Rate: Varies — measure by your business goal

TESTING: FEEDBACK & ADJUSTMENT

- **A/B Testing:** Subject lines, CTAs, design, send times
- **Behavioral Triggers:** Who clicked, who ignored, who converted
- **Using Surveys** or Reply Prompts
- **Look for patterns,** not one-off reactions

Using Feedback to Guide Strategy

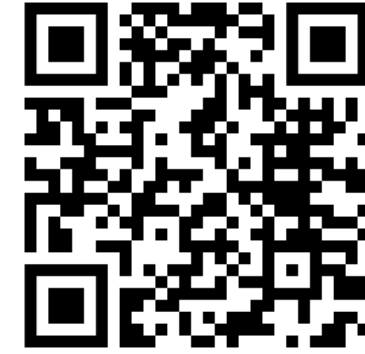
The best data sometimes comes from just asking.

End an email with: “Was this helpful?” or “What do you want to hear more about?”

Use 1-question polls, NPS scores, or link clicks as feedback

Watch behavior: what people open, click, ignore, or delete

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