

Vertical Use Cases & Best Practices Guide

FOR CONSTANT CONTACT'S
EMAIL & EMAIL PLUS PLANS

CONTENT IS KING.

It's what people consume, share, and what can get your clients' small businesses found by potential new customers—and keep their current customers coming back. We know that coming up with content ideas for your client's next email can be a challenge; and it can be especially challenging when you take on a new client who works in a vertical (or industry) that you don't have a lot of experience in.

The good news is that this guide is full of inspirational content examples, broken down by industry that you can use to get your client's next campaign up and running!



Campaign ideas are also color coded—those on pages with the **blue** header bars correspond to the campaign types found in our **Email** plan. Those on pages with the **yellow** header bars correspond to the additional campaign types found in our **Email Plus** plan.

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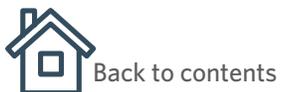
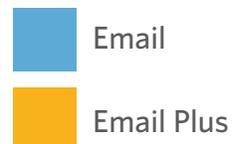
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ACCOMMODATIONS

VERTICAL USE CASES & BEST PRACTICES

- Bed and Breakfasts
- Inns
- Hotels



WAYS TO GET INVOLVED

Content: What to say	Share remaining availability (consider including an offer)
Call-to-action	<ul style="list-style-type: none"> • Book Now • Check Availability • Share with friends and family
Business result	Get openings booked.
How you do it	<p>Be sure to include photos of your establishment, rooms, and surroundings to entice potential customers to book with you. Consider offering an enticing discount or package (i.e., spa treatment or restaurant discount).</p> <p>Suggested Mailing Schedule: Send a month in advance of predicted/known vacancy to take advantage of flexible vacationers.</p>

SEASONAL BOOKING REMINDERS

Content: What to say	Inform customers about events and upcoming busy seasons like summer vacation, ski season, etc.
Call-to-action	<ul style="list-style-type: none"> • See more details • Book now • Share with friends and family
Business result	Encourage bookings and email sharing. Be seen as a valuable resource.
How you do it	<p>Create a seasonal calendar of events (summer vacations, school vacations, ski season, special events in area like festivals, fairs, etc.) and reminder people to book rooms now.</p> <p>Suggested Mailing Schedule: Send two to three months in advance of seasonal events with a few reminder emails as events get closer.</p>

REQUEST A REVIEW

Content: What to say	Thank your guests for staying with you and ask them for a review
Call-to-action	<ul style="list-style-type: none"> • Tell us what you think • How was your stay?
Business result	Use reviews to help you promote your establishment in future emails to increase bookings.
How you do it	<p>Include photos of your establishment and a simple message of “thanks,” and “hope to see you again soon,” when asking for a review. Link to a site where you have a listing like Facebook or TripAdvisor.</p> <p>Suggested Mailing Schedule: Send a weekly email to customers who have stayed with you in the last week.</p>

RUN A SPECIAL OFFER DESIGNED TO BE SHARED & TRACKED

Content: What to say	Offer your customers a special discount and provide even more savings when they share your offer on social media. Example: 20% off a weekend package or \$20 off \$100 in spa or banquet services. Have them automatically receive an additional 5% off coupon when they share your offer on Facebook, Twitter or by email.
Call-to-action	<ul style="list-style-type: none"> Claim this great deal Share this great offer See more details
Business result	<ul style="list-style-type: none"> Increase bookings Increase revenue Increase reach and visibility Grow your list
How you do it	Create a simple email that boldly showcases your great offer. Also showcase the additional savings for people who share it. Consider including an expiration date within 48 -72 hours to encourage usage and create urgency. For maximum exposure email your coupon to your customer list, post it on your social channels and your website.

GET FEEDBACK FROM YOUR GUESTS

Content: What to say	Use a short online survey to get feedback from your customers about your accommodations, such as their experience with your staff, quality of the room and amenities, or why they stayed with you. Be sure to ask for permission to use their feedback in marketing as you'll likely gain some valuable quotes.
Call-to-action	<ul style="list-style-type: none"> Share your feedback
Business result	<ul style="list-style-type: none"> Build guest loyalty Gather valuable insight to improve your accommodations
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

SEND CUSTOMERS A BIRTHDAY GREETING

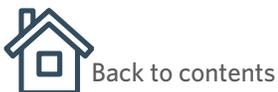
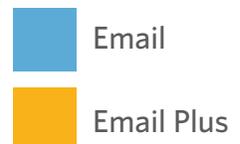
Content: What to say	Send your customers an automated email to wish them a happy birthday. Consider also including a gift like a favorite recipe from your kitchen staff, a free travel guide, or discount for a future stay, your café or gift shop.
Call-to-action	<ul style="list-style-type: none"> Print this email and bring in to redeem your gift Use promo code [birthday] at checkout Click for your special gift
Business result	<ul style="list-style-type: none"> Strengthen guest loyalty Get more repeat and referral business Increase revenue
How you do it	<p>Use our Birthday Autoresponder templates that have a birthday greeting and theme. Feature the gift, if you're offering one, and include a signature from the owner or manager to give a more personalized feel.</p> <p>Suggested Mailing Schedule: Set this email up to automatically send on the day of or the month of a guest's birthday.</p>



ACCOUNTANTS / FINANCIAL ADVISORS

VERTICAL USE CASES & BEST PRACTICES

- Accounting Offices
- Tax Preparation
- Financial Investment



WAYS TO GET INVOLVED

Content: What to say	Share remaining availability (consider including an offer)
Call-to-action	<ul style="list-style-type: none"> • Book Now • Check Availability • Share with friends and family
Business result	Get openings booked.
How you do it	<p>Be sure to include photos of your establishment, rooms, and surroundings to entice potential customers to book with you. Consider offering an enticing discount or package (i.e., spa treatment or restaurant discount).</p> <p>Suggested Mailing Schedule: Send a month in advance of predicted/known vacancy to take advantage of flexible vacationers.</p>

SEASONAL BOOKING REMINDERS

Content: What to say	Inform customers about events and upcoming busy seasons like summer vacation, ski season, etc.
Call-to-action	<ul style="list-style-type: none"> • See more details • Book now • Share with friends and family
Business result	Encourage bookings and email sharing. Be seen as a valuable resource.
How you do it	<p>Create a seasonal calendar of events (summer vacations, school vacations, ski season, special events in area like festivals, fairs, etc.) and reminder people to book rooms now.</p> <p>Suggested Mailing Schedule: Send two to three months in advance of seasonal events with a few reminder emails as events get closer.</p>

REQUEST A REVIEW

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Call-to-action	<ul style="list-style-type: none"> • Tell us what you think • How was your stay?
Business result	Use reviews to help you promote your establishment in future emails to increase bookings.
How you do it	<p>Include photos of your establishment and a simple message of "thanks," and "hope to see you again soon," when asking for a review. Link to a site where you have a listing like Facebook or TripAdvisor.</p> <p>Suggested Mailing Schedule: Send a weekly email to customers who have stayed with you in the last week.</p>

GAIN VALUABLE FEEDBACK FROM CLIENTS

Content: What to say	Send out an online survey to ask your new clients for feedback about things such as their experience so far, team members that stand out, and recommended improvements for new client onboarding. Ask your existing clients for feedback on their satisfaction with your services, their advisor, communications they receive, or how you can best serve them.
Call-to-action	<ul style="list-style-type: none"> Share your feedback
Business result	<ul style="list-style-type: none"> Build stronger client relationships Know your clients better Strengthen your offerings Set yourself apart from competitors
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

HOST A WORKSHOP OR SEMINAR

Content: What to say	Offer prospective or existing clients the opportunity to sign-up for a workshop or seminar on topics such as retirement planning, how to create a budget or savings plan for college. Also consider events like a meet and greet with a respected local leader, an open house at your office, or a holiday party.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register now Learn more Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> Increase client loyalty Capture new leads Revenue (if charging for the event)
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 week before - Reminder to non-registrants 1 day before - Reminder to registrants</p>

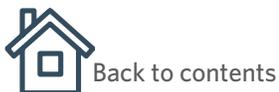
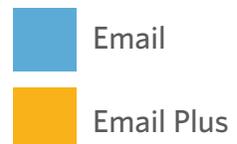
SEND CLIENTS A BIRTHDAY GIFT

Content: What to say	Wish your clients a happy birthday. Consider offering a gift like a free consultation, discount on a service, or a free guide on investment strategy.
Call-to-action	<ul style="list-style-type: none"> • Click to download your gift • Call to make an appointment
Business result	<ul style="list-style-type: none"> • Strengthen client loyalty • Increase appointments • Increase revenue
How you do it	<p>Create a simple email that has a birthday greeting and theme like a cake, candles or confetti. Feature your gift if you're offering one and include your signature to give a more personalized feel.</p> <p>Suggested Mailing Schedule: Set this email up to automatically send on the day of or the month of a client's birthday.</p>

ART / CULTURE / ENTERTAINMENT

VERTICAL USE CASES & BEST PRACTICES

- Humanities and Historical Societies
- Performing Arts
- Art Gallery
- Museums



UPCOMING EVENTS ANNOUNCEMENT

HIGHLIGHT SLOW SELLING EVENTS

Content: What to say	Showcase upcoming events, exhibits or performances.
Call-to-action	<ul style="list-style-type: none"> ▪ Buy tickets/ Book now ▪ See more event details ▪ See full calendar ▪ Share with friends and family
Business result	Drive ticket sales, traffic to your website and email sharing.
How you do it	<p>Showcase your upcoming events with brief descriptions and images of artists or exhibits that bring readers into the experience. Highlight fast selling events with a “book now” button.</p> <p>Suggested Mailing Schedule: Monthly or bi-monthly depending on number of events you host.</p>

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WAYS TO GET INVOLVED

Content: What to say	Showcase upcoming events, exhibits or performances.
Call-to-action	<ul style="list-style-type: none"> ▪ Buy tickets/ Book now ▪ See more event details ▪ See full calendar ▪ Share with friends and family
Business result	Drive ticket sales, traffic to your website and email sharing.
How you do it	<p>Showcase your upcoming events with brief descriptions and images of artists or exhibits that bring readers into the experience. Highlight fast selling events with a “book now” button.</p> <p>Suggested Mailing Schedule: Monthly or bi-monthly depending on number of events you host.</p>

OFFER A DISCOUNT AND TRACK RESULTS

Content: What to say	Offer customers a special discount and provide even more savings when they share the offer on social media. Examples: \$10 off a performance ticket, or \$20 off \$100+ in merchandise. Take an additional \$5 off when you share the offer on Facebook, Twitter or by email.
Call-to-action	<ul style="list-style-type: none"> ▪ Claim the offer ▪ Share the offer
Business result	<ul style="list-style-type: none"> ▪ Increase revenue & repeat business ▪ Increase reach and visibility ▪ Grow your list
How you do it	For maximum exposure email your coupon to your customer list, make visible on your social channels and your website. Offer an additional savings for people that share it on social media, tracking results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

EMAIL SERIES TO ENCOURAGE NON-MEMBERS TO JOIN (If non-profit)

Content: What to say	Create a series of emails that encourage non-members to join your organization. Remember these sure be enduring topics not things like events coming up. Some ideas for the series include: Explanation of your mission, the importance of community involvement, benefits of becoming a member, or a message from your executive director or an artist encouraging membership.
Call-to-action	<ul style="list-style-type: none"> ▪ Learn more ▪ Become a member
Business result	<ul style="list-style-type: none"> ▪ Increase membership/donations ▪ Grow your list
How you do it	<p>Set up a series of emails that share helpful information with the subscriber. The number of emails in a series and length of time between emails varies depending on what you're trying to accomplish. Short, engaging content with links to "become a member" or "learn more" work best.</p> <p>Suggested Mailing Schedule: Here are a few suggestions to help you with timing and frequency:</p> <p>Let's say you're trying to convert non-members into members. If a patron has recently had an interaction with your organization, perhaps they signed up for your email list at an event, consider sending them an email once every-other week for 2 months talking about your mission, why your organization needs support, and the benefits of becoming a member - all with the call-to-action of "become a member."</p>

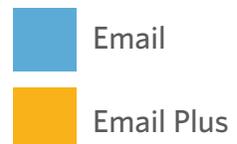
HOST A WORKSHOP OR OPEN HOUSE

Content: What to say	Send out invitations to an event you are hosting and make it easy for people to sign up. Examples: A workshop, seminar, open house at your venue, or a holiday party.
Call-to-action	<ul style="list-style-type: none"> ▪ RSVP/Register now ▪ Learn more ▪ Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> ▪ Increase attendance and visibility ▪ Engage more with your clients ▪ Meet prospective patrons
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or remaining availability to non-registrants 1 week before - Reminder to non-registrants 1 day before - Reminder to registrants</p>

CIVIC / SOCIAL / MEMBER ORGS

VERTICAL USE CASES & BEST PRACTICES

- Alumni Associations
- Parent Teacher Association
- Scouting Organization
- Ethnic Association
- Business Associations
- Chambers of Commerce
- Social Clubs
- Sports Clubs



UPCOMING EVENTS ANNOUNCEMENT

Content: What to say	Highlight upcoming member events and their value or uniqueness.
Call-to-action	<ul style="list-style-type: none"> Register now Share with colleagues, friends and family
Business result	Drive attendance and member engagement.
How you do it	<p>Include a picture of the key speaker(s), and highlight the benefits of attending.</p> <p>Suggested Mailing Schedule - Several events/month: Mid month highlight the following month's events</p> <p>Suggested Mailing Schedule - One event/month: 4 weeks before - Announce event 2 week before - Announce to non-registrants 1 day before - Reminder to registrants</p>

WAYS TO GET INVOLVED

Content: What to say	Encourage your patrons to get involved with your organization by becoming a member, donor or volunteer.
Call-to-action	<ul style="list-style-type: none"> Become a Volunteer/Member Donate Now See more details Share with friends and family
Business result	Engage patrons participation, increase donations and membership
How you do it	<p>Create a series of emails highlighting your mission, key events and other important reasons why patron involvement is needed.</p> <p>Suggested Mailing Schedule: Monthly</p>

NEW MEMBER WELCOME

Content: What to say	Welcome new members to your organization, remind them of member benefits and what to expect in terms of communications from you.
Call-to-action	<ul style="list-style-type: none"> Add your "From Address" to their email address book
Business result	Increased member interaction By adding your "from address" to their email address book you're
How you do it	<p>Send to all new members with a warm welcome, remind them what to expect from you in terms of email frequency (i.e., monthly event updates, etc.)</p> <p>Send monthly to all new member who signed up in the last month or daily if automation feature is being used.</p>

HOST A LECTURE OR SPECIAL PERFORMANCE

Content: What to say	Invite members to an event like a fundraiser, a volunteer meeting, a lecture, performance or holiday gathering. Send invitations by email and manage registrations online.
Call-to-action	<ul style="list-style-type: none"> • RSVP/Register To Attend • Invite others (Forward to a Friend) • Learn more about the event
Business result	<ul style="list-style-type: none"> • Nurture relationships with your members • Increase attendance/participation • Gain visibility in the community you serve • Grow your list when new people register
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required.</p> <p>Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule:</p> <ul style="list-style-type: none"> • 4 weeks before - Announce event • 2 week before - Reminder to registrants or Remaining availability to non-registrants • 1 week before - reminder to non-registrants • 1 day before - Reminder to registrants

GATHER VALUABLE FEEDBACK FROM MEMBERS

Content: What to say	Survey your members and event participants to get feedback on things like their experience at your event, impression of your organization, what topics they care about, what they would like to see changed, or why they participate with you.
Call-to-action	<ul style="list-style-type: none"> • Take our survey • Share our survey link with others
Business result	<ul style="list-style-type: none"> • Build a stronger sense of community • Gather valuable insight • Give your members and others a voice
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule:</p> <p>The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

Request Donations & Track Results

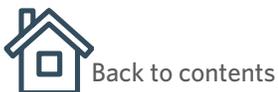
<p>Content: What to say</p>	<p>Request donations for special project or year-end appeal. Remind members about your mission and why you need their support. Let them know how much you're trying to raise and by when to create a sense of urgency.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Donate Now ▪ Forward to a friend ▪ Share on Social Media ▪ Learn more/See progress
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Increase donation dollars ▪ Increase member participation ▪ Grow your list
<p>How you do it</p>	<p>Create a donation landing page that features your fundraising goal, clear benefits of donating and the deadline of when these funds are needed.</p> <p>The duration of a donation campaign will largely depend on the amount of money needed and size of your audience; however one approach we like is the short-term campaign for maximum impact. A short-term campaign is typically 30 days or less. Make your campaign as visible as possible sending emails, posting regularly on your Web site and social media pages.</p> <p>Suggested Mailing Schedule: Over the period of 30 days, we recommend one to two emails a week reminding people to donate and keeping those who have donated up-to-date on your progress.</p> <p>For example: Week 1 - we're trying to raise \$100K. Week 2 - We're at \$20K in just 7 days. Week 3 - More than halfway there, we still need your help, etc.</p>



CONSULTING / TRAINING

VERTICAL USE CASES & BEST PRACTICES

- Marketing Consulting Services
- Management Consulting



SHARE HELPFUL TIPS

Content: What to say	Share helpful tips related to your expertise and how you can help.
Call-to-action	<ul style="list-style-type: none"> • See all tips • Share with colleagues • Book appointment • Learn more
Business result	Generate new leads Re-engage former clients
How you do it	<p>State the topic at hand and two to three bullet points of advice to your audience. For example, how to handle difficult customers, signs of inefficient management, etc.</p> <p>Suggested Mailing Schedule: Week 1: Highlight a specific tip with advice Week 3: Follow-up advice or coaching related to that tip</p>

PROJECT HIGHLIGHT

Content: What to say	Highlight a recent project including results.
Call-to-action	<ul style="list-style-type: none"> • Call for a consultation • Share with colleagues
Business result	Generate new leads Re-engage former clients
How you do it	<p>Use a simple mobile friendly template with an image representing the project and a few key learnings. Keep copy short and if you have more details to share, link to your website where you can host the full story.</p> <p>Suggested Mailing Schedule: Quarterly</p>

SHARE YOUR THOUGHT LEADERSHIP

Content: What to say	Share content you created in the form of a white paper, article, eBook, etc., that highlights your latest thinking
Call-to-action	<ul style="list-style-type: none"> • Download now • Request an appointment to learn more • Share with friend or colleagues
Business result	Generate new leads Re-engage former clients
How you do it	<p>Write an abstract of your content - keep and short and remember to use images of graphs, charts, stats or picture relevant to your content to make the email more engaging.</p> <p>Suggested Mailing Schedule: Send monthly or bi-monthly</p>

GET VALUABLE FEEDBACK FROM CLIENTS

Content: What to say	Send out a short online survey to your clients letting them know you want to exceed their expectations and ask them for feedback. Examples: What matters most to them, what kind of events or topics they would like to participate in, what they like most about your services, or what they would like to see changed?
Call-to-action	<ul style="list-style-type: none"> Share your feedback
Business result	<ul style="list-style-type: none"> Increase client loyalty Increase referrals Gather valuable insight to improve your business
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

HOST A WORKSHOP, SEMINAR OR WEBINAR

Content: What to say	Offer your audiences the opportunity to sign-up to attend a seminar, webinar or workshop where they will gain valuable expertise.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register now Learn more Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> Increase attendance Engage more with your clients Meet prospective clients Increase revenue (if applicable)
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule:</p> <ul style="list-style-type: none"> 4 weeks before - Announce event 2 week before - Reminder to registrants and, if applicable, announce remaining availability to non-registrants 1 week before - Encourage non-registrants to attend. 1 day before - Reminder to registrants

NURTURE NEW LEADS WITH AUTOMATED EMAILS

<p>Content: What to say</p>	<p>Provide new leads a series of emails that share valuable information that demonstrates your expertise and encourage them to work with you. Examples: How to grow your business in seven steps, ways to save time in your day, five effective and easy ways to boost your business, etc. Be sure to include a consistent call-to-action in every email.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Click to download ▪ Read more ▪ Watch the video ▪ Share this valuable information with others
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Immediately engage new leads ▪ Build relationships ▪ Increase engagement with future emails ▪ Grow your list
<p>How you do it</p>	<p>Create short, simple emails that are timeless. Use a captivating image and 20 lines of text or fewer. Include a link to “read more” - this will allow you to keep the email short (which increases engagement) and the link will allow you to track engagement. Every email should have a consistent call-to-action with the final email in the series dedicated to that call-to-action.</p> <p>Suggested Mailing Schedule:</p> <p>The number of emails in a series and length of time between emails varies based on how much information and time it take for lead to become a client (i.e., the length of your “sales cycle”)</p> <ul style="list-style-type: none"> ▪ Let’s say you’re trying to nurture a lead to become a client and your typical sales cycle is nine months long. You may want to set up a series of nine emails with useful information about your company to be triggered off every month for nine months - all should have the call-to-action of “schedule and appointment” or “learn more.”



EDUCATION - HIGHER

VERTICAL USE CASES & BEST PRACTICES

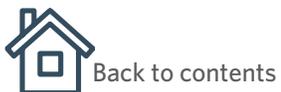
- Universities
- Colleges
- Private Colleges
- Technical Career Colleges



- Alumni
- Students
- Parents
- Prospective Students

 Email

 Email Plus



ALUMNI UPDATE

Content: What to say	Share updates about alumni achievements, awarded grants and prizes, major donations/gifts, newly published research, etc.
Call-to-action	<ul style="list-style-type: none"> • See full details • Watch video/see photos • Share with friends
Business result	Stay connected and top of mind. Increase alumni donations.
How you do it	Keep your email to 2 – 5 short updates with abstracts of stories and photos. Be sure to link back to a web site for the full story or more photos/videos. Always consider having a “make a donation” link. Suggested Mailing Schedule: Bi-monthly or Quarterly

RECRUITMENT AND AWARENESS CAMPAIGN

Content: What to say	Highlight what makes you unique to prospects or recently accepted students (e.g., available majors, student associations, study abroad)
Call-to-action	<ul style="list-style-type: none"> • Apply Now • See full details/ Learn more • Share with friends and family
Business result	Increase applications Improve decision making time
How you do it	Send to prospective students (and parents). Be sure to personalize (e.g., Dear Anna) to help make a connection with the student. Suggested Mailing Schedule: Bi-weekly during key decision making times: Week 1: Majors Offered Week 2: Student Perks and Programs Week 3: Student testimonials Week 4: Highlight successful alum

SEASONAL TIPS FOR STUDENTS

Content: What to say	Share articles and tips with students relevant to important seasonal events such as welcoming students back to school, preparing for exams, job fairs, etc.
Call-to-action	<ul style="list-style-type: none"> • See all tips • Share with friends and family
Business result	Increase student engagement
How you do it	Use a simple mobile friendly template with images and a short abstract (you can link to the full article to keep your content short.) Potential topics include Welcome to campus, guides to student living, preparing for exams, job fair information, etc. Suggested Mailing Schedule: Send monthly

GATHER VALUABLE FEEDBACK FROM STUDENTS, FACULTY OR ALUMNI

Content: What to say	Survey students, faculty, or alumni to get feedback on programs, campus changes or other topics. Examples: ask about interest in volunteering, let people prioritize special projects, have them tell you what is working and what kinds of changes they want for the school.
Call-to-action	<ul style="list-style-type: none"> Take our survey Share our survey link with others
Business result	<ul style="list-style-type: none"> Gather valuable insight Strengthen programs and processes Give students, staff and the community a voice
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Helpful Note: It can be a good idea to start with a qualifying question that helps you sort responses by contact type i.e. student, faculty, parent, local leader.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

OFFER AN EMAIL SERIES FOR NEW STUDENTS OR STAFF TO LEARN ABOUT CAMPUS AND SERVICES

Content: What to say	Create a series of emails that will go out automatically to new students or faculty. Examples: Create a new student/staff orientation series with tips about campus, campus resources, student safety policies, campus activities, social media links, move-in process and more.
Call-to-action	<ul style="list-style-type: none"> Click to download the guide Share this with others
Business result	<ul style="list-style-type: none"> Develop relationships with new students/faculty Grow your list as people opt-in to the series Improve engagement with helpful content
How you do it	<p>Set up a series of emails that share helpful information with the subscriber. The most effective tactic is to create short, engaging emails, with clear calls to action that allow subscribers to quickly access resources. Examples: Click for campus map, download top dorm tips, upcoming events calendar, etc. The last email in the series could include a quick survey, simply asking if the email series was helpful and what other information would have been helpful to receive.</p> <p>Suggested Mailing Schedule:</p> <p>Here are a few suggestions to help you with timing and frequency:</p> <p>For New Students/Faculty: Set up email series to deliver 1 email a week for 8 weeks. This will keep new students engaged but not overwhelmed and will end after they have had enough time to become acclimated with their surroundings.</p>

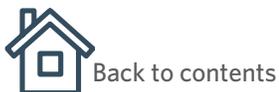
HOST A SPECIAL PERFORMANCE OR WORKSHOP

<p>Content: What to say</p>	<p>Invite students and/or faculty to an event that is on campus. Examples: A special concert or performance, Orientation workshops, a lecture, or student mixer. Send invitations by email and manage registrations/tickets online and</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ RSVP/Register To Attend/Get Your Ticket ▪ Invite others (Forward to a Friend) ▪ Learn more about the event
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Nurture relationships with your students/faculty ▪ Increase attendance/participation ▪ Streamline ticketing/registration/payment ▪ Grow your list as guests register
<p>How you do it</p>	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. (i.e. Name, Class Status or Faculty, Gender, Email, Phone, Age, etc.) Be sure to only ask for necessary info and anything that could help you segment more effectively for future events.</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule:</p> <ul style="list-style-type: none"> ▪ 4 weeks before - Announce event ▪ 2 week before - Reminder to registrants or Remaining availability to non-registrants ▪ 1 week before - Availability to non-registrants ▪ 1 day before - Reminder to registrants

EDUCATION - PRIMARY / SECONDARY

VERTICAL USE CASES & BEST PRACTICES

- Public K-12
- Private K-12
- Charter Schools



SCHOOL NEWS

Content: What to say	Share school news with parents including events, renovations, new technology or recent achievements
Call-to-action	<ul style="list-style-type: none"> • See full details • View Photos/Watch Video • Share with friends and family
Business result	Build connection with parents.
How you do it	Share updates, important dates and policy changes, include photos of special events and keep it simple. Suggested Mailing Schedule: Weekly or Monthly

SCHOOL CALENDAR

Content: What to say	Inform parents of important dates and events coming up in the near future and encourage involvement
Call-to-action	<ul style="list-style-type: none"> • See all tip • Share with friends and family • Become a volunteer
Business result	Informed and engaged parents Increase attendance at events Reduce phone calls to administration
How you do it	Highlight important dates and events coming up such as back to school dates, half days, school vacations, field trips, sporting events, plays and concerts. Suggested Mailing Schedule :Bi-monthly

EVENT OR FUNDRAISER PROMOTION

Content: What to say	Share information about upcoming events like a PTA booster, fundraising, sporting event, or volunteer opportunities.
Call-to-action	<ul style="list-style-type: none"> • Mark Your Calendar • See full event details • Share with friends and family
Business result	Increase attendance and participation
How you do it	Send basic event information; why you're having the event, where, when, how to sign up and how to volunteer. Suggested Mailing Schedule: <ul style="list-style-type: none"> • 4 weeks before - Announce event • 2 week before - Reminder to registrants or Announce to non-registrants • 1 day before - Reminder to registrants

GATHER VALUABLE FEEDBACK FROM PARENT, STAFF AND LOCAL LEADERS

Content: What to say	Engage the community by surveying parents, local leaders and staff members to get feedback on what programs are most important for the students. Ask if they would like to participate or volunteer and let them prioritize or rank some of your programs planned for the future.
Call-to-action	<ul style="list-style-type: none"> Take our survey Share our survey link with others
Business result	<ul style="list-style-type: none"> Build a stronger sense of community Gather valuable insight/strengthen programs Give parents and staff a voice
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

HOST AN OPEN HOUSE OR SCHOOL EVENT

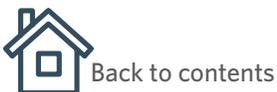
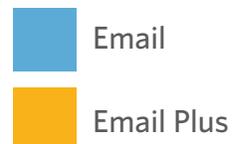
Content: What to say	Invite parents and local leaders to an event such as a volunteer meeting, an open house, a special performance, school sponsored book fairs, or carnivals and auctions.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register To Attend Invite others (Forward to a Friend) Learn more about the event
Business result	<ul style="list-style-type: none"> Nurture relationships with your members Increase attendance/participation Gain visibility in the community Grow your list when new people register
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule:</p> <ul style="list-style-type: none"> 4 weeks before - Announce event 2 week before - Reminder to registrants or remaining availability to non-registrants 1 day before - Reminder to registrants



FITNESS AND NUTRITION SERVICES

VERTICAL USE CASES & BEST PRACTICES

- Wellness/Life coaches
- Nutritionist
- Physical Trainers
- Physical Therapists



SERVICE OFFERINGS UPDATE / REMINDER

Content: What to say	Inform clients of existing service or make them aware of a new service offering.
Call-to-action	<ul style="list-style-type: none"> ▪ Schedule an appointment ▪ Call to learn more ▪ Share with friends and family
Business result	Increase appointment bookings
How you do it	<p>Send a description of a new or existing service your clients might not know about. You can include a testimonial and be sure to encourage clients to schedule an appointment</p> <p>Suggested Mailing Schedule: Monthly or semi-monthly</p>

HEALTHY LIFESTYLE TIPS

Content: What to say	Provide clients with fitness or nutrition tips (e.g., work out ideas, how to prevent common injuries, best low-calorie food during the holidays.)
Call-to-action	<ul style="list-style-type: none"> ▪ See more tips ▪ Learn more ▪ Share with friends and family
Business result	Helps clients see you as the expert and reminds them of your services.
How you do it	<p>Send out simple, helpful tips with 1-3 suggestions and make sure to include links to your website for more information or let them download a guide.</p> <p>Suggested Mailing Schedule: Monthly</p>

REQUEST A REFERRAL

Content: What to say	Request a referral from your clients (and offer an incentive for those that do, such as a discount off one of your services)
Call-to-action	<ul style="list-style-type: none"> ▪ Refer a friend, colleague or family member ▪ Schedule an appointment
Business result	Increase client base
How you do it	<p>Keep the content to simple, be sure to thank them for being a customer and remind them that recommendations are key to helping a small business like yours grow.</p> <p>Suggested Mailing Schedule: Quarterly</p>

OFFER A DISCOUNT AND TRACK RESULTS EASILY

Content: What to say	Offer your clients a special discount and provide even more savings when they share your offer on social media. Examples: 20% off of a personal training package or \$20 off \$100 in meal plan services. Take an additional 5% off when clients share your coupon on Facebook, Twitter or via email.
Call-to-action	<ul style="list-style-type: none"> • Claim your discount • Share this offer • Learn more
Business result	<ul style="list-style-type: none"> • Because the customer has to enter their email address to receive the discount, you will grow your email list while you drive more business. • Increase revenue • Increase reach and visibility • Grow your list
How you do it	For maximum exposure email your coupon to your customer list, make visible on your social media channels and your website. Offer an additional savings for people that share the coupon on social media. Don't forget to track your results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

GET TO KNOW YOUR CLIENTS

Content: What to say	Use a short online survey to understand the goals of your clients, such as their health goals, fitness interests, etc. Be sure to tell them this will help drive the content you will create and share in the future to increase their engagement and support of your practice.
Call-to-action	<ul style="list-style-type: none"> • Share your feedback • Take our survey
Business result	<ul style="list-style-type: none"> • Build guest loyalty • Gather valuable insight to help drive the content creation for material moving forward
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, on your social medial pages, or make the survey standout by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

SEND YOUR CLIENTS A BIRTHDAY GIFT

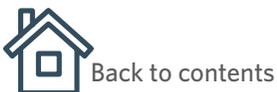
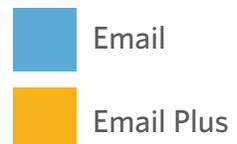
Content: What to say	Send your clients an automated email on their birthday and include a special gift. Examples: Include a certificate for a free personal training session, free "14 Day Meal Plan", or discount off any supplements you may offer.
Call-to-action	<ul style="list-style-type: none"> ▪ Schedule your training session ▪ Bring in your certificate/click to shop online ▪ Download content
Business result	<ul style="list-style-type: none"> ▪ Strengthen client relationships ▪ Get more repeat and referral business ▪ Increase revenue
How you do it	<p>From the "Create" button on the home screen, click "Automate Your Emails" and then click "Create" under Anniversary Email or Birthday email- simply follow the instructions from there to create your email.</p> <p>Load client birth dates into your account by updating your list from a file or by entering them manually. You can ask clients for their birthdate at the register, online or have them fill out a card with the promise of a gift.</p> <p>Suggested Mailing Schedule: You can schedule birthday emails to go out on the actual date or a few days before. You don't have to schedule each one individually; the system will do that for you.</p>



FITNESS AND RECREATION CENTERS

VERTICAL USE CASES & BEST PRACTICES

- Dance Studios
- Schools and Halls
- Fitness and Health Clubs
- Bowling Centers
- Kayak Rentals
- Ski Facilities
- Yoga Studios



SCHEDULE UPDATE / REMINDER

Content: What to say	List class schedule for the upcoming week(s).
Call-to-action	<ul style="list-style-type: none"> ▪ Sign up for a class ▪ See more details ▪ Join the fun ▪ Share with friends and family
Business result	Increase visitor traffic and email sharing
How you do it	<p>Share the schedule and more – it’s the perfect opportunity to let people know if there are subs for classes, a change in hours, or space available in classes.</p> <p>Suggested Mailing Schedule: Monthly or weekly depending on how many classes you have</p>

EVENT PROMOTION

Content: What to say	Promote upcoming events.
Call-to-action	<ul style="list-style-type: none"> ▪ Mark your calendar ▪ Register now ▪ Buy now ▪ Share with friends and family
Business result	Drive participation and email sharing
How you do it	<p>Share the basic information – what, where, when – about your event, use photos from a past event or that reflect your theme. Be mindful of trying to share too much, keep your email simple and entice them to click for more details.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Announce to non-registrants 1 day before - Reminder to registrants.</p>

SPECIAL OFFER ANNOUNCEMENT

Content: What to say	Announce upcoming sales or promotions.
Call-to-action	<ul style="list-style-type: none"> ▪ Visit us today ▪ Buy Membership/Pass ▪ Share with friends and family
Business result	<ul style="list-style-type: none"> ▪ Increase visits ▪ Increase revenue ▪ Increase email sharing
How you do it	<p>Tell people about your offer in simple terms, make the value clear and show them not just the product or service, but the benefit of taking advantage of your offer. Do not offer too many options, just provide one or two choices, at most.</p> <p>Suggested Mailing Schedule: Quarterly (or as needed if you’re having a slow period and want to increase revenue)</p>

GATHER VALUABLE FEEDBACK FROM MEMBERS

Content: What to say	Send out a survey to members via email and post a link on your website and social media. Examples: Ask members why they joined or what motivates them, what kind of events or services they want, what is their number one reason for joining, what is going right, or what changes they would like to see in the facility.
Call-to-action	<ul style="list-style-type: none"> Take our survey Share our survey link with others
Business result	<ul style="list-style-type: none"> Build stronger relationship with members Gather valuable insight so you can make informed business decisions Give your members and others a voice
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates. You can also make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

OFFER A DISCOUNT AND TRACK RESULTS EASILY

Content: What to say	Offer members and potential members a special discount with the promise of even more savings when they share your offer on social media. Examples: 20% off of a personal training package or class series or \$10 off \$50 in merchandise. Take an additional 5% off when they share your coupon on Facebook, Twitter, or via email.
Call-to-action	<ul style="list-style-type: none"> Claim your discount Share this offer Learn more
Business result	<ul style="list-style-type: none"> Because a new member has to enter his or her email address to receive the discount, you will grow your email list while you drive more business. Increase revenue Increase reach and visibility Grow your list
How you do it	For maximum exposure, email your coupon to your customer list, and make it visible on your social media channels and on your website. Offer an additional savings for people that share it on social media. Don't forget to track your results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

SEND MEMBERS A BIRTHDAY GIFT

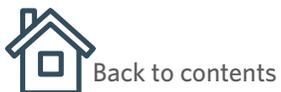
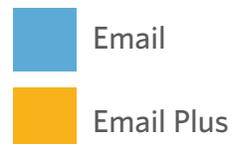
Content: What to say	Send your members an automated email on their birthday and include a special gift. Examples: Include a certificate for a free personal training session, a free protein shake on their next visit, or drop in a coupon for a "Buy One Get one Free" discount on merchandise or any special services you offer.
Call-to-action	<ul style="list-style-type: none"> ▪ Schedule your session ▪ Bring in your certificate/click to shop online
Business result	<ul style="list-style-type: none"> ▪ Strengthen member relationships ▪ Get more referral business ▪ Increase revenue
How you do it	<p>From the "Create" button on the home screen, click "Automate Your Emails" and then click "Create" under Anniversary Email or Birthday email- simply follow the instructions from there to create your email.</p> <p>Load member birth dates into your account by updating your list from a file or by entering them manually. You can ask people for their birthdate at the register, online, or have them fill out a card with the promise of a gift.</p> <p>Suggested Mailing Schedule: You can schedule birthday emails to go out on the actual date or a few days before. You don't have to schedule each one individually; the system will do that for you.</p>



HEALTH PROFESSIONALS

VERTICAL USE CASES & BEST PRACTICES

- Dentist
- Physicians
- Chiropractor



EXPERT COMMENTARY

Content: What to say	Share the latest health or local community news and your commentary or advice
Call-to-action	<ul style="list-style-type: none"> • See the full story • Make an appointment • Share with friends and family
Business result	Stay connected with your patients and drive email sharing.
How you do it	<p>Write an abstract of a recent news story related to your industry. Keep your content short and create a link to the full article. Provide commentary and encourage your clients to book an appointment to learn more or share with their friends.</p> <p>Suggested Mailing Schedule: Send monthly</p>

REQUEST A REFERRAL

Content: What to say	Request referrals from your clients/ patients (and offer an incentive for those that do.)
Call-to-action	<ul style="list-style-type: none"> • Refer a friend
Business result	Gain new clients and increase your revenue.
How you do it	<p>Send to clients you've recently provided services to, asking them to refer you to a friend. Remember to thank them for their business too, and consider offering an incentive; like a gift certificate to a favorite local restaurant for a referral that becomes a client</p> <p>Suggested Mailing Schedule: Quarterly</p>

SERVICE REMINDER / ANNOUNCEMENT

Content: What to say	Remind patients of your existing services and announce new ones.
Call-to-action	<ul style="list-style-type: none"> • Make an appointment • Call to learn more
Business result	<ul style="list-style-type: none"> • Drive appointment bookings.
How you do it	<p>Write a brief description of an existing or new service or services, include a photo or testimonial if available. Keep it short, and link back to your website for more details.</p> <p>Suggested Mailing Schedule: Monthly or semi-monthly</p>

GATHER VALUABLE FEEDBACK FROM PATIENTS

Content: What to say	Send out an online survey to your patients to ask for feedback. Examples: Ask your new patients about their experience so far, team members that stand out and recommended improvements for new patient onboarding. Be sure to ask them if you can use their testimonial for marketing use. You will be sure to get some great quotes from your patients.
Call-to-action	<ul style="list-style-type: none"> Share your feedback Take this survey
Business result	<ul style="list-style-type: none"> Build stronger patient relationships Know your patients better Strengthen your offerings Set yourself apart from competitors
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

**GROW YOUR REPUTATION AS A LEADER IN YOUR FIELD AND A RESOURCE OF INFORMATION
(Host A Workshop or Seminar)**

Content: What to say	Offer prospective and existing patients a valuable event. Examples: A seminar on a topic in your field, a meet and greet with a respected local leader, an open house at your office or a holiday party.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register now Learn more Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> Increase attendance Increase patient loyalty Meet prospective patients Revenue (if charging for the seminar)
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>

SEND PATIENTS A BIRTHDAY EMAIL

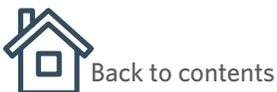
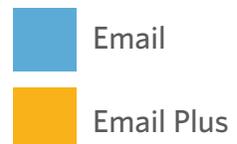
Content: What to say	Wish your patients a happy birthday and offer them a special gift like a free teeth cleaning on their next visit, or schedule your appointment and get a free guide on boosting immunity for cold/flu season.
Call-to-action	<ul style="list-style-type: none"> ▪ Click To Download Your Gift ▪ Make an appointment
Business result	<ul style="list-style-type: none"> ▪ Strengthen patient relationships ▪ Encourage appointments ▪ Grow your list (promise of free guide)
How you do it	<p>Set up a series of emails that share helpful information with the subscriber. The number of emails in a series and length of time between emails varies depending on what you're trying to accomplish. Short, engaging content with links to "read complete article," simple calls-to-action like "make an appointment" work best.</p> <p>Suggested Mailing Schedule: Let's say a new patient just made their first appointment. Consider sending them a welcome series that triggers off one email every other week for 2 months that encourages them to schedule an appointment – week 1 could be sharing links to your social media pages to find helpful articles on wellness, week 3 could be refer a friend get a discount, week 5 could be schedule a family member for an appointment and get a free gift, etc. Each should have a similar call-to-action – "make an appointment" or "refer a friend".</p>



HEALTH AND SOCIAL SERVICES

VERTICAL USE CASES & BEST PRACTICES

- Women's Crisis Centers
- Boys and Girls Club
- Elderly Services
- Adoption Centers
- Housing Support Services
- Family Planning Center
- Social Services
- Hospitals
- Professional Counseling



AVAILABLE SERVICES ANNOUNCEMENT

Content: What to say	Share an overview of your services.
Call-to-action	<ul style="list-style-type: none"> • See full description • Share with friends and family • Watch now/view now • Make an appointment
Business result	Remind the community of your offerings Increase participation
How you do it	<p>Introduce the email with “we wanted to remind you” of our available services so you and your family can take advantage of them. For each offering include the name of the offering, 3-4 bullets of the benefit or positive impact for participants and a link to learn more. Include a video if you have one to make the story more impactful.</p> <p>Suggested Mailing Schedule: Quarterly</p>

WAYS TO GET INVOLVED

Content: What to say	Encourage your patrons to get involved with your organization by becoming a member, donor or volunteer.
Call-to-action	<ul style="list-style-type: none"> • Become a Volunteer/Member • Donate Now • See more details • Share with friends and family
Business result	Engage patrons participation, increase donations and membership
How you do it	<p>Create a series of emails highlighting your mission, key events and other important reasons why patron involvement is needed.</p> <p>Suggested Mailing Schedule: Monthly</p>

EVENTS ANNOUNCEMENT

Content: What to say	Share upcoming organization or community events.
Call-to-action	<ul style="list-style-type: none"> • See full event details • Share with friends and family
Business result	<ul style="list-style-type: none"> • Increase awareness & participation • Get volunteers
How you do it	<p>Include the name and short description of each event with date and time and a link to register if applicable.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Announce to non-registrants 1 day before - Reminder to registrants.</p>

HOST AN EVENT TO ENGAGE THE COMMUNITY

<p>Content: What to say</p>	<p>Send out invitations to an event you are hosting and make it easy for people to sign up. Examples: A workshop or seminar, an open house at your venue or a holiday party.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ RSVP/Register now ▪ Learn more ▪ Share this with others/Invite a friend
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Increase attendance and visibility ▪ Engage more with your clients ▪ Meet prospective clients (guests)
<p>How you do it</p>	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>

AUTOMATED EMAIL SERIES

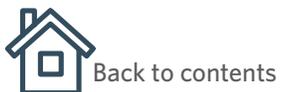
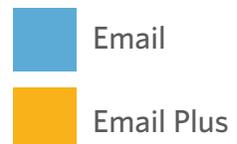
<p>Content: What to say</p>	<p>Offer a series of emails around a particular topic. Use this series to keep your audience informed of your mission and showcase stories regarding your organization Examples: a 3-email series highlighting a special employee or volunteer or even a success story you want to share. A quarterly series highlighting your top employees and the impact they have on your organization.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Read more ▪ Forward to a friend ▪ Share on Social Media
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Strengthen audience engagement and their relationship ▪ Encourage people to join ▪ Grow your list
<p>How you do it</p>	<p>From the “Create” button on the home screen, click “Automate Your Emails” and then click “Create a Series” - simply follow the instructions from there to create a series of emails to be delivered in sequence. You can determine the timing of delivery yourself (daily, weekly, every two weeks, etc)</p> <p>Suggested Mailing Schedule: Specifically for showcasing your quarterly employee all-stars, it works well to send 1 email every month, with a kickoff email the first week. Day 1: Welcome Note from a leader in the organization with a short article, image or a downloadable brochure Day 4: Employee Highlight including a bio, photo and a story to showcase their impact.</p> <p>Following the same outline, send another employee highlight email on Month 2 and 3 each quarter.</p>



LEGAL SERVICES

VERTICAL USE CASES & BEST PRACTICES

- Attorneys Office
- Family Law Offices



PROVIDE YOUR EXPERT COMMENTARY

Content: What to say	Comment on legal news related to your area of expertise with a link to the full article.
Call-to-action	<ul style="list-style-type: none"> Request appointment to learn more See the full story Share with friends and family
Business result	Showcase your expertise, stay connected with clients and drive email sharing.
How you do it	<p>Write an abstract of a story to keep your content short (you can always link to the full article). Provide commentary and encourage your clients to book an appointment to learn more or share with their friends.</p> <p>Suggested Mailing Schedule: Send monthly</p>

REQUEST A REFERRAL

Content: What to say	Request referrals from your clients (and offer an incentive for those that do.)
Call-to-action	<ul style="list-style-type: none"> Refer a friend, family member or colleague
Business result	Gain new clients and increase your revenue.
How you do it	<p>Send to clients you've recently done business with asking them to refer you to a friend. Remember to thank them for their business too, and consider offering an incentive; like a gift certificate to a favorite local restaurant for a referral that becomes a client</p> <p>Suggested Mailing Schedule: Quarterly</p>

SHARE ANSWER TO COMMON QUESTIONS

Content: What to say	Share answers to common questions you get from prospective and current clients.
Call-to-action	<ul style="list-style-type: none"> Share with friends and family Submit a question
Business result	<ul style="list-style-type: none"> Remind clients of your expertise, drive loyalty and referrals.
How you do it	<p>Keep the list short, three to five questions and answers.</p> <p>Suggested Mailing Schedule: Send monthly</p>

GATHER VALUABLE FEEDBACK FROM CLIENTS

Content: What to say	Send out a survey to your clients to ask for feedback about your services or their experience. Examples: Ask clients what they like most about working with your firm or what specifically they would like to see changed.
Call-to-action	<ul style="list-style-type: none"> Take our survey Share our survey link with others
Business result	<ul style="list-style-type: none"> Build stronger client relationships Gather valuable insight Give your clients a voice
How you do it	<p>Create a short online survey with 3 – 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

HOST A WORKSHOP OR AN OPEN HOUSE

Content: What to say	Send out invitations to an event you are hosting and make it easy for people to sign up. Examples: Host a workshop on a service you specialize in or a workshop to educate on preparedness like pre/post marital agreements, adoption, living will, etc.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register now Learn more Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> Increase attendance Engage more with your clients Meet prospective clients (guests)
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>

OFFER AN EMAIL SERIES ON COPYRIGHT LAW OR SOME OTHER TOPIC IN YOUR FIELD

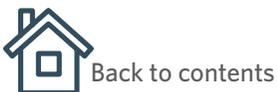
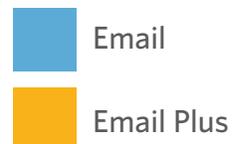
<p>Content: What to say</p>	<p>Offer clients a series of emails around a topic in your field.</p> <p>Examples: <i>The Top Five Questions Every Client Asks or Is This Legal? Copyright Law 101. "How To" topics are very popular, like How To Know When You Really Need a Lawyer (and when you don't).</i></p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Strengthen client relationships ▪ Gain new clients (they provide email to sign up) ▪ Grow your list
<p>Business result</p>	<p>Set up a series of emails that share helpful information with the subscriber. The number of emails in a series and length of time between emails varies depending on what you're trying to accomplish. Short, engaging content with links to "read complete article," "buy now," or other calls-to-action like "become a member." work best.</p> <p>Suggested Mailing Schedule: (B2B) Let's say you're trying to nurture a prospect to become a client and your typical conversion cycle is 9 months long. You may want to set up a series of 9 emails with useful information about your company to be triggered off every month for nine months - all should have the call-to-action of "schedule and appointment" or "learn more."</p>



PUBLISHERS AND AUTHORS

VERTICAL USE CASES & BEST PRACTICES

- Newspapers
- Magazines
- Book Publishers
- Bloggers



PROMOTE YOUR WORK

Content: What to say	Promote recently published articles, stories, research or books
Call-to-action	<ul style="list-style-type: none"> ▪ Read excerpt ▪ Listen to a audio clip ▪ Buy now ▪ Share with friends and family
Business result	Increase website visits, purchases and email sharing.
How you do it	<p>Keep your content short and link back to your website for more information. Consider including past articles, stories, research that may now be relevant and remember to include images.</p> <p>Suggested Mailing Schedule: Week, bi-weekly or monthly depending on your cadence of publications</p>

SHARE COMMENTARY

Content: What to say	Share commentary (e.g., letters to the editor, reviews)
Call-to-action	<ul style="list-style-type: none"> ▪ Learn More ▪ Comment ▪ Continue the conversation ▪ Share on social media
Business result	Stay in your follower's minds, raise your profile as an expert in your industry and increase visibility/reach through forwards and social media shares
How you do it	<p>Choose the hottest topic from the past week, rounding up follow's comments and provide a summary of your own.</p> <p>Suggested Mailing Schedule: Monthly</p>

EVENT PROMOTION

Content: What to say	Announce local events such as book signings, author readings, community discussions.
Call-to-action	<ul style="list-style-type: none"> ▪ See full event details ▪ Register now ▪ Share with friends and family
Business result	Drive attendance, pre-registration, early book sales (for signing) and increased reach through forwards/sharing
How you do it	<p>Create a series of email sent far enough in advance to allow followers to make plans.</p> <p>Suggested Mailing Schedule: 3 weeks before event 2 weeks before event 1 week before event Day before event</p>

SEND AN EMAIL SERIES TO WARM-UP NEW SUBSCRIBERS

Content: What to say	Provide your new readers a series of emails that share some of your most popular content like top places to dine in your town, a chapter of your book, how to get over writer's block, etc. If you're selling something, end the series with an option to buy your content..
Call-to-action	<ul style="list-style-type: none"> • Read the full article • Watch the video • Buy now (if applicable) • Share this valuable information with others • Sign-up for our emails
Business result	<ul style="list-style-type: none"> • New sign-ups can quickly see the value of your emails • Increase engagement of your future emails • Grow your list
How you do it	<p>Create short emails that include a teaser of the content you're sharing and a link to the rest of it.</p> <p>Suggested Mailing Schedule:</p> <p>The number of emails in your series depends on the amount of fresh content you have to share and the frequency you plan to send emails.</p> <p>If you have a lot of fresh content and plan to send weekly to monthly – send one to two automated emails. Send one email 2 days after sign-up and one email 4 days after sign-up.</p> <p>If you plan to send emails bi-monthly or less, send four to six automated emails – one every week after sign-up.</p>

OFFER A DISCOUNT TO INCREASE DOWNLOADS/PURCHASE OF YOUR PUBLICATION

Content: What to say	Offer a discount to increase purchases or downloads of your publication. You will also get email addresses of new contacts to continue engagement with your audience. . Examples: \$X off of your book when purchased by a specific date.
Call-to-action	<ul style="list-style-type: none"> • Claim this offer • Share this offer
Business result	<ul style="list-style-type: none"> • Grow your list • Increase revenue (if applicable) • Expand your reach
How you do it	Include a link to your coupon in your email newsletter and encourage subscribers to share it. Promote the offer at all of your communications platforms - social media sites, blogs, tradeshow, etc.

CAPTURE YOUR MOST ENGAGED READERS AND PROSPECTIVE NEW ONES WITH EVENT REGISTRATION

<p>Content: What to say</p>	<p>Send out an email invitation where readers can sign-up to be a part of an upcoming event like a workshop, seminar or a meet and greet with an author.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ RSVP/Register now ▪ Learn more ▪ Share this with others/Invite a friend
<p>Business result</p>	<p>Grow your list Know your most engaged readers Build relationship with existing and new readers</p>
<p>How you do it</p>	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>



REAL ESTATE

VERTICAL USE CASES & BEST PRACTICES

- Real Estate Brokers
- Residential Property Managers
- Non Residential Lessors



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SEND OUT HOMEOWNER TIPS

Content: What to say	Share useful home advice (i.e. maintaining gutters, refinancing).
Call-to-action	<ul style="list-style-type: none"> See all tips
Business result	Stay connected to clients Increase email sharing (for improved word-of-mouth)
How you do it	<p>You can share seasonal how-to ideas like how to winterize for a possible freeze, include a list of local family-friendly events, provide recommendations for plumbers, lawn service, insurance, etc.. Be a resource to the neighborhood and they will want to read your email.</p> <p>Suggested Mailing Schedule:Monthly Month 1: prepare your home for Winter Month 2: Renovation tips and recommended contractors Month 3: Landscaping tips and recommendations</p>

SHARE YOUR LISTINGS

Content: What to say	Share your latest properties available to current property seekers and highlight any open houses coming up.
Call-to-action	<ul style="list-style-type: none"> See full details Share with friends and family
Business result	Drive client calls and property showings.
How you do it	<p>Resist the urge to send out every new listing every time you get one. Highlight a special property or share a group of new listings, and make sure you note upcoming open houses.</p> <p>Suggested Mailing Schedule: As needed, no more twice a month is recommended.</p>

EVENT PROMOTION

Content: What to say	Request referrals from your clients (and offer an incentive for those that do.)
Call-to-action	<ul style="list-style-type: none"> Refer a friend, family member or colleague
Business result	Gain new clients and increase your revenue.
How you do it	<p>Send to clients you've recently done business with asking them to refer you to a friend. Remember to thank them for their business too, and consider offering an incentive; like a gift certificate to a favorite local restaurant for a referral that becomes a client</p> <p>Suggested Mailing Schedule: Quarterly</p>

HOST A SEMINAR OR HOME SHOWCASE

Content: What to say	Invite your clients and local contacts to an event like a seminar on home staging or to showcase a special property in the area. Manage RSVPs online and send invitations by email.
Call-to-action	<ul style="list-style-type: none"> • Register Now / RSVP • Invite others (Forward to a Friend) • Learn more about the event
Business result	<ul style="list-style-type: none"> • Nurture relationships • Increase referrals • Grow your list
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>

OFFER AN EMAIL SERIES ON HOME STAGING, GUIDELINES FOR NEW HOME BUYERS, OR INDUSTRY TRENDS

Content: What to say	Offer your clients and potential clients a series of emails around a particular topic. Examples: A series with guidelines for new home buyers, or a to-do-list when someone has their house on the market with tips on how to declutter and deep clean or even a quarterly trend report keeping your clients up to date with how the market is performing.
Call-to-action	<ul style="list-style-type: none"> • Click to download the guide • Share this with others • Learn More
Business result	<ul style="list-style-type: none"> • Strengthen client relationships • Engage people in the buying /selling process • Grow your list • Increase referrals
How you do it	<p>Create short, simple emails that are timeless. Use a captivating image and 20 lines of text or fewer. Include a link to “read more” - this will allow you to keep the email short (which increases engagement) and the link will allow you to track engagement. Every email should have a consistent call-to-action with the final email in the series dedicated to that call-to-action.</p> <p>Suggested Mailing Schedule:</p> <p>The number of emails in a series and length of time between emails varies based on how much information and time it take for lead to become a client (i.e., the length of your “sales cycle”)</p>

SEND CLIENTS A GIFT FOR THEIR BIRTHDAY OR SAY HAPPY ANNIVERSARY IN YOUR NEW HOME

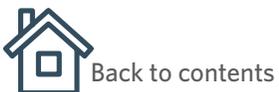
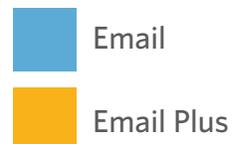
Content: What to say	Send your clients an automated email on their birthday or to celebrate the anniversary of buying their home. Examples: Share a special family recipe that you love, send a free download on home maintenance tips or arrange for a discount at a favorite local restaurant or home store.
Call-to-action	<ul style="list-style-type: none"> ▪ Click to download ▪ Forward to a friend ▪ Share on social media
Business result	<ul style="list-style-type: none"> ▪ Strengthen client relationships ▪ Get more repeat and referral business ▪ Build partnership with other local businesses
How you do it	<p>From the “Create” button on the home screen, click “Automate Your Emails” and then click “Create” under Anniversary Email or Birthday email- simply follow the instructions from there to create your email.</p> <p>You can load your client’s purchase anniversary or birth date to your contact list easily, either by updating your contact list from a file or by entering them manually.</p> <p>Suggested Mailing Schedule: You can schedule anniversary/birthday emails to go out on the actual date or a few days before. You don’t have to schedule each one individually; the system will do that for you.</p>



RELIGIOUS ORGANIZATIONS

VERTICAL USE CASES & BEST PRACTICES

- Mega Churches
- Humanitarian Churches
- Temples



CALENDAR OF EVENTS/ACTIVITIES/SERVICES

Content: What to say	Share the schedule of classes, services, events etc., for the week or month
Call-to-action	<ul style="list-style-type: none"> Visit Website for more details Share with friends and family
Business result	<ul style="list-style-type: none"> Increase attendance Increase email sharing for improved word-of-mouth
How you do it	<p>Give people an idea of what sessions are coming up, try to keep details to a minimum, send them to website for details Remind your readers that guests are welcome with a link to forward your email to a friend.</p> <p>Suggested Mailing Schedule: Weekly or bi-weekly</p>

RECRUIT VOLUNTEERS

Content: What to say	Share upcoming volunteer opportunities
Call-to-action	<ul style="list-style-type: none"> See more event details Volunteer Share with friends and family
Business result	Increase volunteers
How you do it	<p>Highlight the event, why you need volunteers and what you need them to do. Consider including a quotes from volunteers that enjoyed past volunteer experiences.</p> <p>Suggested Mailing Schedule: 2 -3 email starting at least 4 week before an event</p> <p>(Bonus: send a "thank you" email the day after to all volunteers)</p>

INSPIRATIONAL STORIES

Content: What to say	Share inspirational quotes or versus - can even set this up under our automation services
Call-to-action	<ul style="list-style-type: none"> Share with friends and family
Business result	Inspire members, strengthen their connection to your organization and drive email sharing.
How you do it	<p>These can be very short, and are great for sharing on social media. Include an inspirational photo, ask your readers to share with others. When your readers share your quotes and stories, their friends may be inspired to sign up, so be sure to include a link to join your list.</p> <p>Suggested Mailing Schedule: Weekly or bi-weekly</p>

GATHER FEEDBACK FROM YOUR MEMBERS

Content: What to say	Use a short online survey to get feedback from your members about your organization. Ask them things like why they joined or what matters most to them, what kind of events/topics they would like to participate or volunteer in, what is going right as well as changes they would like to see in the organization.
Call-to-action	<ul style="list-style-type: none"> Take our survey Share our survey link with others
Business result	<ul style="list-style-type: none"> Build a stronger sense of community Gather valuable insight Give your members and others a voice
How you do it	<p>Create a short online survey with 3 - 5 questions to gain the most responses. Feature the survey in one of your regular emails, especially if that email gets high open rates, or make the survey stand out by sending in a dedicated email.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>

HOST A CONCERT OR SPECIAL FUNDRAISER

Content: What to say	Send out invitations to an event you are hosting and make it easy for people to sign up. Examples: A concert or performance, a special event or fundraiser, or even a holiday event.
Call-to-action	<ul style="list-style-type: none"> RSVP/Register now Learn more Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> Increase attendance Build community with your members Meet prospective members
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or Remaining availability to non-registrants 1 day before - Reminder to registrants</p>

OFFER AN EMAIL SERIES ON RELATIONSHIPS

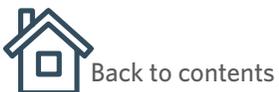
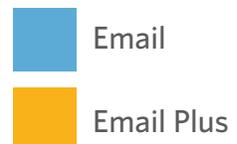
<p>Content: What to say</p>	<p>Offer members a series of emails around a particular topic. Examples: a daily devotional, weekly series about building relationships, the value of volunteering or any other topic that you have content for. Consider a special series just for new members, to provide orientation for the types of programs and services you provide, links to your social media profiles, important contact information to save, etc.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Click to download ▪ Share this with others
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Strengthen member relationships ▪ Increase attendance ▪ Grow your list
<p>How you do it</p>	<p>Set up a series of emails that share helpful information with the subscriber. The number of emails in a series and length of time between emails varies depending on what you're trying to accomplish. Short, engaging content with links to "read complete article," "become a member", etc. work best.</p> <p>Suggested Mailing Schedule: Here are a few suggestions to help you with timing and frequency:</p> <p>Let's say you're trying to convert non-members into members. If someone has recently had an interaction with your organization, perhaps they signed up for your email list at an event, consider sending them an email once every-other week for 2 months talking about your mission, why your organization needs support, and the benefits of becoming a member - all with the call-to-action of "become a member."</p>



RESTAURANTS

VERTICAL USE CASES & BEST PRACTICES

- Full Service Restaurants
- Limited Service Restaurants
- Food Trucks/Stands



SEASONAL MENU CHANGE ANNOUNCEMENT

Content: What to say	Announce changes to your menu on a seasonal basis (e.g. Spring, Summer, Fall, Winter)
Call-to-action	<ul style="list-style-type: none"> See full menu Make a reservation
Business result	<ul style="list-style-type: none"> Give your existing customers a reason to come back & easily share your new menu with friends Book more reservations
How you do it	<p>Use a simple template to showcase beautiful photos of your new menu items with mouth-watering descriptions</p> <p>Suggested Mailing Schedule: Week 1: Announce the start of the new menu availability Week 2: Highlight a special appetizer or signature dish Week 3: Offer a special on one of your signature dishes or appetizers</p>

FILL SLOW NIGHTS

Content: What to say	Encourage customers to come by on nights you know typically to be slow by proving a special offer like half off appetizers or a free appetizer with purchase of entrée.
Call-to-action	<ul style="list-style-type: none"> Make Reservations Come on in
Business result	<ul style="list-style-type: none"> Increase reservations Fill empty seats Increase revenue
How you do it	<p>Consider sending a series of emails with 2 - 3 images of your food, or customers enjoying your restaurant along with mouth-watering description of new menu items and also consider include recent reviews.</p> <p>Suggested Mailing Schedule: (Consider sending one or all three) Send one week before slow night Send night before Send reminder on day of</p>

SEASONAL / HOLIDAY

Content: What to say	Remind customers of upcoming holidays Mother's Day, Easter, graduation season, Thanksgiving - offer advanced reservations, gift certificate ordering, special offers and/or remind them of your holiday hours.
Call-to-action	<ul style="list-style-type: none"> Make Reservation See Holiday Hours View Menu Order a Gift Certificate
Business result	<ul style="list-style-type: none"> Increase reservations Fill empty seats Increase revenue
How you do it	<p>Suggested Mailing Schedule:</p> <p>Send 2 to 3 weeks in-advance of holiday. Send week of if reservations are not full or to remind patrons of hours, if changed.</p>

PROMOTE A SPECIAL OFFER & TRACK RESULTS

Content: What to say	Offer your email list discounts like \$10 off entire meal or \$20 off \$100 meal. Then provide them an additional discount to share the coupon with their friends, such as, get an additional \$5 off when you share this coupon on Facebook, Twitter or via email.
Call-to-action	<ul style="list-style-type: none"> • Claim your coupon • Share this offer • Learn more
Business result	<ul style="list-style-type: none"> • Because the customer has to enter their email address to receive the coupon, you will drive more business and grow your email list. • Increase revenue • Increase reach and visibility • Grow your list
How you do it	For maximum exposure email your coupon to your customer list, make visible on your social channels and your Web site. Offer an additional savings for people that share it on social media, tracking results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

HOST AN EXCLUSIVE EVENT - INVITATION ONLY

Content: What to say	Send out invitations to an event you are hosting and make it easy for people to sign up. Examples: A new chef tasting night, seasonal menu change tasting event, or a wine and food paring event.
Call-to-action	<ul style="list-style-type: none"> • RSVP/Register now • Learn more • Share this with others/Invite a friend
Business result	<ul style="list-style-type: none"> • Increase attendance and visibility • Engage more with your clients • Meet prospective patrons
How you do it	<p>Start by setting up the basic details for your event: title, location, date, and time. Consider adding additional information such as a cap on registration or date by when all responses are required. Next create a sign-up form to include all the information you want to capture from registrants. Beyond name, do you want to allow them to bring a guest or guests, is there a fee for the event, is there a discount code, or the ability to make a donation?</p> <p>When you are ready to promote your event, create email invitations with a link to your registration form. If you have more information than what will fit in a short email, create a landing page with all of your event details and include a link to that page in your invitation email. Boost your response by also posting your event on social media.</p> <p>Suggested Mailing Schedule: 4 weeks before - Announce event 2 week before - Reminder to registrants or remaining availability to non-registrants 1 week before - Reminder to non-registrants 1 day before - Reminder to registrants</p>

SEND CUSTOMERS A BIRTHDAY GIFT

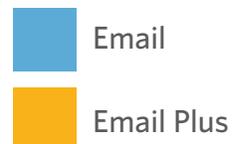
Content: What to say	Wish your customers a happy birthday and offer them a discount or special gift like \$10 off your next meal, come in during your birthday month and get a free dessert or appetizer.
Call-to-action	<ul style="list-style-type: none"> ▪ Click for your gift ▪ Make a reservation
Business result	<ul style="list-style-type: none"> ▪ Strengthen customer loyalty ▪ Increase reach and visibility ▪ Grow your list
How you do it	<p>From the “Create” button on the home screen, click “Automate Your Emails” and then click “Create” under Birthday Email - simply follow the instructions from there to create your email.</p> <p>If you don’t have birthdays, the promise of a birthday gift gives people a reason to join your list. Put a post card in with the check letting customer know they’ll receive a special birthday gift when they provide their email address and birthday. Constant Contact’s list growth tools also make it easy to collect birthdates.</p> <p>Suggested Mailing Schedule: You can schedule birthday emails to go out on the actual date or a few days before. You don’t have to schedule each one individually; the system will do that for you.</p>



RETAIL

VERTICAL USE CASES & BEST PRACTICES

- Clothing Stores
- Direct Sellers (Mary Kay, Avon)
- Florist
- Car Dealerships
- Bike Shops
- (Can be ecommerce or brick & mortar)



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HOLIDAY / SEASONAL SALE

Content: What to say	Announce a special holiday sale (e.g., reduced prices on spring merchandise for Mother’s Day)
Call-to-action	<ul style="list-style-type: none"> Buy now Come on in See product details
Business result	<ul style="list-style-type: none"> Increase online traffic Increase store traffic Increase sales Stay top-of-mind
How you do it	<p>Consider a simple template showcasing an item or items on sale. Highlight discount(s), and let them know when the sales ends (ideally not too far off in the future to create urgency)</p> <p>Suggested Mailing Schedule: 2-days before: Announce sale, highlight key specials 1-day before or day of: Sale starts tomorrow/today, Limited time only, Limited selection</p>

NEW INVENTORY ANNOUNCEMENT

Content: What to say	Announce new inventory before it hits the shelves to build excitement
Call-to-action	<ul style="list-style-type: none"> Shop Now/Buy Now Presale See more details Share with friends and family
Business result	<ul style="list-style-type: none"> Increase sale Increase email sharing to grow list and drive word-of-mouth
How you do it	<p>Use a simple mobile friendly template; include 2 - 3 images and descriptions of your inventory with a link to your website to purchase, if online shopping is available, or include store hours for physical retail locations.</p> <p>Suggested Mailing Schedule: Send weekly for up to 3 weeks. Week 1: Highlight staff favorites Week 2: Showcase a theme, e.g., “trends for Spring” Week 3: Highlight inventory that you want to sell with customer reviews</p>

SALE OR PROMOTION ANNOUNCEMENT

Content: What to say	Announce a sale or promotion you have running.
Call-to-action	<ul style="list-style-type: none"> Shop now/Buy now See customer reviews Share with friends and family
Business result	<ul style="list-style-type: none"> Increase sale Increase email sharing to grow list and drive word-of-mouth
How you do it	<p>Use a simple mobile friendly template and showcase 2 -3 items you are promoting or have on sale with an image and price. Include a link to your website to purchase, if online shopping is available, or include store hours for physical retail locations.</p> <p>Suggested Mailing Schedule: Send 1 - 4 emails depending on length of your sale. Email 1: Sale starts today Email 2: Get it while it last Email 3: Sale inventory further reduced Email 4: Sale ends tomorrow</p>

PROMOTE A SPECIAL OFFER AND TRACK RESULTS EASILY

Content: What to say	Offer your email list discounts like 20% off entire purchase or \$20 off \$100 purchase or more. Then provide them an additional discount to share the coupon with their friends, such as, get an additional 5% off when you share this coupon on Facebook, Twitter or via email.
Call-to-action	<ul style="list-style-type: none"> • Claim your coupon • Share this offer • Learn more
Business result	<ul style="list-style-type: none"> • Because the customer has to enter their email address to receive the coupon, you will drive more business and grow your email list. • Increase revenue • Increase reach and visibility • Grow your list
How you do it	For maximum exposure email your coupon to your customer list, make visible on your social channels and your Web site. Offer an additional savings for people that share it on social media, tracking results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

SEND CUSTOMERS A BIRTHDAY GIFT

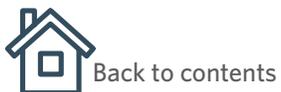
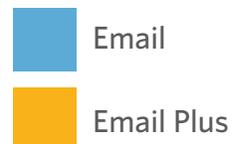
Content: What to say	Wish your customers a happy birthday and offer them a discount or special gift such as, \$10 off your next purchase, shop during your birthday month and get 10% off, or receive a free [gift] when you shop with us during your birthday month. Make available when they buy online or at a physical store location.
Call-to-action	<ul style="list-style-type: none"> • Click for your gift • Shop now • Enter promo code at checkout • Stop by to shop
Business result	<ul style="list-style-type: none"> • Strengthen customer loyalty • Increase reach and visibility • Grow your list
How you do it	<p>If you don't have birthday, the promise of a birthday gift gives people a reason to join your list. Put a sign at the register or note on your web site that you'll receive a special birthday gift when you provide your email address and birthday. Constant Contact's list growth tools make it easy to collect birthdates.</p> <p>Suggested Mailing Schedule: You can schedule birthday emails to go out on the actual date or a few days before. You don't have to schedule each one individually; the system will do that for you.</p> <p>W</p>



SALON / SPA / BARBER SERVICES

VERTICAL USE CASES & BEST PRACTICES

- Day Spas
- Hair salons
- Laser Spas
- Barber Shops



APPOINTMENT REMINDERS

Content: What to say	Send updates for services relevant to the upcoming season, such as get ready for...graduation, wedding season, summer, etc. Consider including option to order a gift certificates.
Call-to-action	<ul style="list-style-type: none"> • Schedule an appointment • Share with friends and family • Order a gift certificate
Business result	<ul style="list-style-type: none"> • Fill open appointment • Increase email sharing to drive word-of-mouth
How you do it	<p>Use a simple mobile friendly email with a description of the services you offer relevant to that season and be sure to include photos (ideally of happy customers looking their best.)</p> <p>Suggested Mailing Schedule: Send seasonally</p>

APPOINTMENT AVAILABILITY

Content: What to say	Send out a weekly email to announce your open appointments and who the stylist is (consider offering a discount for slow days)
Call-to-action	<ul style="list-style-type: none"> • Schedule an appointment • Share with friends and family
Business result	<ul style="list-style-type: none"> • Fill open appointment • Increase email sharing to drive word-of-mouth
How you do it	<p>Use a simple mobile friendly email with the week's open appointments and the stylist they are with. Include a link to book from the email or a number to call to book that time. You can re-use the template weekly to save you time.</p> <p>Suggested Mailing Schedule: Weekly Email</p>

REQUEST REFERRAL

Content: What to say	Request referrals from your clients (and offer an incentive for those that do.)
Call-to-action	<ul style="list-style-type: none"> • Refer a friend, family member or colleague
Business result	<ul style="list-style-type: none"> • Gain new clients and increase your revenue
How you do it	<p>Send to clients you've recently done business with asking them to refer you to a friend. Remember to thank them for their business too, and consider offering an incentive; like a gift certificate to a favorite local restaurant for a referral that becomes a client</p> <p>Suggested Mailing Schedule: Quarterly</p>

OFFER A DISCOUNT AND TRACK RESULTS EASILY

Content: What to say	Offer your customers a special discount and provide even more savings when they share the offer on social media. Examples: 20% off a haircut or \$20 off \$100 in spa services. Take an additional 5% off when a client shares your coupon on Facebook, Twitter or by email.
Call-to-action	<ul style="list-style-type: none"> • Claim your coupon • Share this offer • Learn more
Business result	<ul style="list-style-type: none"> • Because the customer has to enter their email address to receive the coupon, you will grow your email list in addition to driving more business. • Increase revenue • Increase reach and visibility • Grow your list
How you do it	For maximum exposure, email your coupon to your customer list make it visible on your social media channels and your website. Offer an additional savings for people that share the coupon on social media. Don't forget to track your results along the way. Consider having an expiration date within 48 -72 hours to encourage usage.

SEND YOUR CLIENTS A BIRTHDAY GIFT

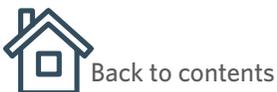
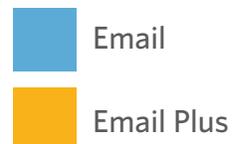
Content: What to say	Send your clients an automated email on their birthday and include a special gift. Examples: Include a certificate for a free blow dry or other add-on services, a coupon for \$10 off their next visit, or add a "Buy One Get one Free" discount on your retail merchandise.
Call-to-action	<ul style="list-style-type: none"> • Make an appointment
Business result	<ul style="list-style-type: none"> • Strengthen client relationships • Get more repeat and referral business • Increase revenue
How you do it	<p>From the "Create" button on the home screen, click "Automate Your Emails" and then click "Create" under Anniversary Email or Birthday email- simply follow the instructions from there to create your email.</p> <p>Load client birth dates into your account by updating your list from a file or by entering them manually. You can ask clients for their birthdate at the register, online or have them fill out a card with the promise of a gift.</p> <p>Suggested Mailing Schedule: You can schedule birthday emails to go out on the actual date or a few days before. You don't have to schedule each one individually; the system will do that for you.</p>



TRAVEL / TOURISM SERVICES

VERTICAL USE CASES & BEST PRACTICES

- Travel Agencies
- Tourism Services
- Tour Guides
- Bike Tours



SEASONAL DESTINATION HIGHLIGHTS

Content: What to say	Send seasonal announcements for the best places to visit.
Call-to-action	<ul style="list-style-type: none"> See full details Book now Share with friends and family
Business result	<ul style="list-style-type: none"> Drive bookings, boost sales and email sharing and social network growth.
How you do it	<p>Highlight at least a place, destination or theme that would include a few different places together, such as beach favorites, nightlife favorites, favorite places for families or foodies, etc.</p> <p>Suggested Mailing Schedule: Seasonally</p>

SHARE REVIEWS

Content: What to say	Testimonials and Customer statements on their vacations and your service
Call-to-action	<ul style="list-style-type: none"> See full details Book now Share with friends and family
Business result	<ul style="list-style-type: none"> Drive bookings, gain new clients, boost sales and email sharing
How you do it	<p>Share quotes, photos, links to learn more, give your reader a chance to imagine themselves having a similar experience.</p> <p>Suggested Mailing Schedule: Monthly</p>

TRAVEL TIPS

Content: What to say	Share travel tips (i.e. checklist to prepare for your trips, things to pack and know, etc.)
Call-to-action	<ul style="list-style-type: none"> See all tips Share with friends and family
Business result	<ul style="list-style-type: none"> Stay connected with clients
How you do it	<p>Send easy-to-read lists with suggestions, reminders or insider information. Example: Top Ten Items People Forget To Pack, What Not To Bring To The Beach</p> <p>Suggested Mailing Schedule: Send travel tips out monthly and if you have groups traveling together, time them to arrive a few days before the trip.</p>

OFFER A DISCOUNT OR DEAL AND TRACK RESULTS EASILY

<p>Content: What to say</p>	<p>Offer your clients a special discount and provide even more savings when they share your offer on social media. Examples: 20% off a cruise package or \$20 off \$100 on destination activities. Take an additional 5% off when they share your coupon on Facebook, Twitter or by email.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Claim your coupon ▪ Save Now ▪ Share this offer ▪ Learn more
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Because the client has to enter their email address to receive the coupon, you will drive more business and grow your email list. ▪ Increase revenue ▪ Increase reach and visibility ▪ Grow your list
<p>How you do it</p>	<p>For maximum exposure email your coupon to your existing customer list and make visible on your social channels and website. Offer an additional savings for people that share it via email or on social media, tracking results along the way.</p> <p>For best results, include an expiration date and send reminders out to those who haven't redeemed it that time is running out.</p> <p>Example: This week and this week only, we are offering 20% off a cruise to the Caribbean. Share this email with a friend and receive an additional 5% off! Don't wait, this offer expires Sunday [DATE].</p>

GET VALUABLE FEEDBACK FROM YOUR CLIENTS

<p>Content: What to say</p>	<p>Survey your clients to get feedback on things like their top destination choices, their experience with your staff, what activities they care about most when traveling, what they would like to see changed about your services/offerings and why they booked with you.</p>
<p>Call-to-action</p>	<ul style="list-style-type: none"> ▪ Take our survey ▪ Share our survey link with others
<p>Business result</p>	<ul style="list-style-type: none"> ▪ Build a stronger sense of community ▪ Gather valuable insight ▪ Give your clients and potential clients a voice
<p>How you do it</p>	<p>Create a short online survey with 3 - 5 questions to gain the most responses.</p> <p>Regular emails to all clients: Include a short survey or quick poll in regular emails to find out what your clients interests are.</p> <p>Dedicated Email: To those who just traveled, send an email with a short 3-5 question survey to gain insights on satisfaction, interaction with staff, etc.</p> <p>Suggested Mailing Schedule: The majority of responses to an online survey will come in within the first couple of days. We recommend running a survey for up to 7 days, and sending a reminder email to those who have not yet participated on day 5 to boost response.</p>