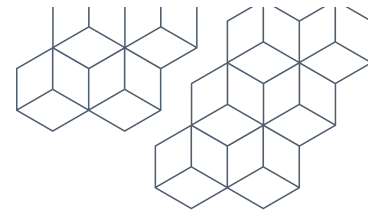


Email Goal Setting Planning Workbook



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



Section 1: Define Your Objectives or Outcomes

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

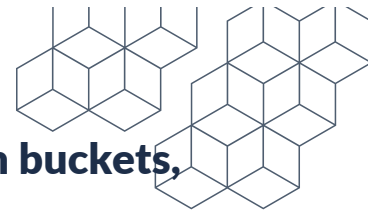
- ☐ Deliver great content that elicits more opens and clicks
- ☐ Drive traffic off the email to my website to drive awareness
- ☐ Funnel traffic into journeys for a conversion like a registration or purchase
- ☐ Other (Please list any additional goals or notes below.)

Section 2: Take Inventory of Your Current Program Metrics

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

Establish your overall email engagement metrics

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



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

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

Section 3: Compare Current Program Metrics to Industry Standards

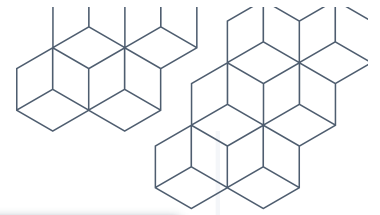
Benchmark Comparison Formula*:

(Your Metric – Industry Metric)/Industry Metric) x 100 = % to Industry Benchmark)

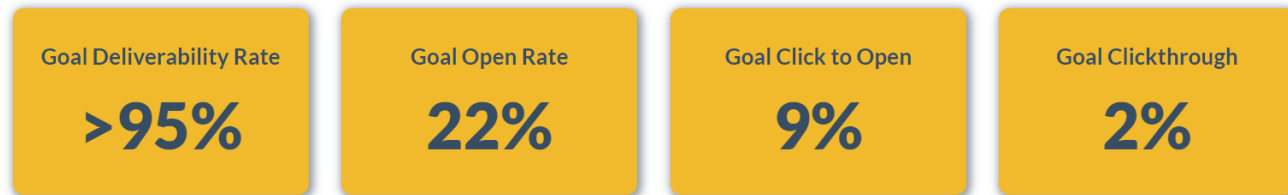
Example:

(18% (My Open Rate) – 20% (Industry Open Rate)/20% (Industry Open Rate)
= (-0.11)x100 = -11% Below Industry Benchmark

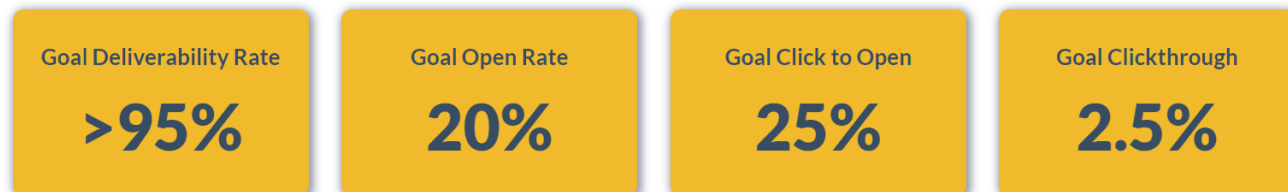
**This formula is built into the KPI Dashboard Template which you can download to track your quarterly metrics.*



Association Industry Metrics:



For Profit Industry Metrics:



Section 4: Define & Track Conversion Goals

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

☐ UTM Codes ☐ Conversion Tracker ☐ Conversion Capture

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

☐ Yes ☐ No

Section 5: Breakdown Your Metrics by Email Type

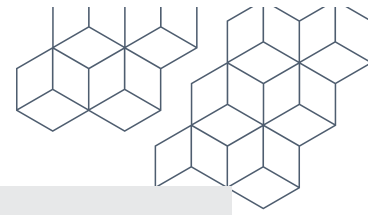
Using the List from Step 2, pull metrics for each of the identified email buckets and establish baselines and goals based on desired outcomes and industry benchmarks.

Email Group A:

Category or Email Type:

Define Conversion Type:

- | | |
|---|------------------------------------|
| <input type="checkbox"/> Download | <input type="checkbox"/> Page View |
| <input type="checkbox"/> Registration/Form Completion | <input type="checkbox"/> Renewal |
| <input type="checkbox"/> Product Purchase | |
| <input type="checkbox"/> Other | <input type="text"/> |



Calculate Average Conversion Rate:

Event Email Example:

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

(_____ Total Conversions/_____ Total Emails Sent) x 100 = _____Average Conversion

Determine Goal Metric

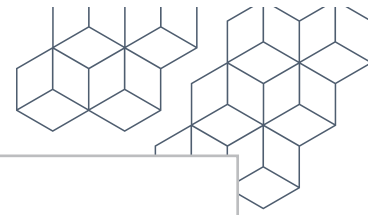
☐ Drive _____ Percent Lift

☐ Maintain Baseline

Establish Baseline Metrics by Email Type:

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

Capture key findings or insights for this email group:



Email Group B:

Category or Email Type:

Define Conversion Type:

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

Calculate Average Conversion Rate:

Event Email Example:

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

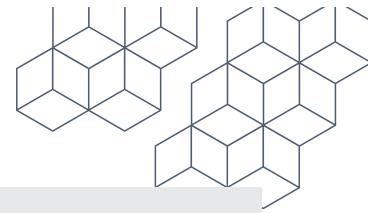
$(\text{Total Conversions} / \text{Total Emails Sent}) \times 100 = \text{Average Conversion}$

Determine Goal Metric

- ☐ Drive _____ Percent Lift ☐ Maintain Baseline

Establish Baseline Metrics by Email Type:

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



Capture key findings or insights for this email group:

Email Group C:

Category or Email Type:

Define Conversion Type:

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

Calculate Average Conversion Rate:

Event Email Example:

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

(_____ Total Conversions/_____ Total Emails Sent) x 100 = _____Average Conversion

Determine Goal Metric

- ☐ Drive _____ Percent Lift
- ☐ Maintain Baseline

Establish Baseline Metrics by Email Type:

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



Conversion Rate		
Total Revenue		
Revenue per Email Send		

Capture key findings or insights for this email group:

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

Email Group D:

Category or Email Type:

Define Conversion Type:

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

Calculate Average Conversion Rate:

Event Email Example:

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

(_____ Total Conversions/_____ Total Emails Sent) x 100 = _____Average Conversion

Determine Goal Metric

- ☐ Drive _____ Percent Lift
 ☐ Maintain Baseline



Establish Baseline Metrics by Email Type:

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

Capture key findings or insights for this email group: