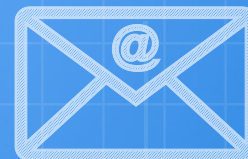




salesforce

# 5 BLUEPRINTS *for* CREATING EMAIL MOMENTS



# TODAY'S EMAIL SUBSCRIBERS *require* RELEVANCE.

They want unique marketing moments and experiences tailored to their needs. To deliver this, brands need to move beyond one-size-fits-all messaging. It's time to start making personal connections powered by smarter email.

Transforming a general email message into a relevant moment of connection may seem daunting, but most marketers already have the tools they need to achieve this. With a few simple steps, you can evolve your email strategy to create moments that really matter to your subscribers.

**In this guide, we'll walk you through steps for boosting the effectiveness of five different kinds of emails:**

- ① Welcome Emails
- ② Promotional Emails
- ③ Company Communication Emails
- ④ Transactional Emails
- ⑤ Behavior-Triggered Emails

Soon, you'll be ready to create emails that connect with subscribers like never before.



①

# WELCOME EMAILS

These emails are triggered when a subscriber signs up to receive emails from your brand. Usually, these emails form your subscribers' first impression of your email program – and sometimes their first impression of your brand.



## **THE TYPICAL WELCOME EMAIL**

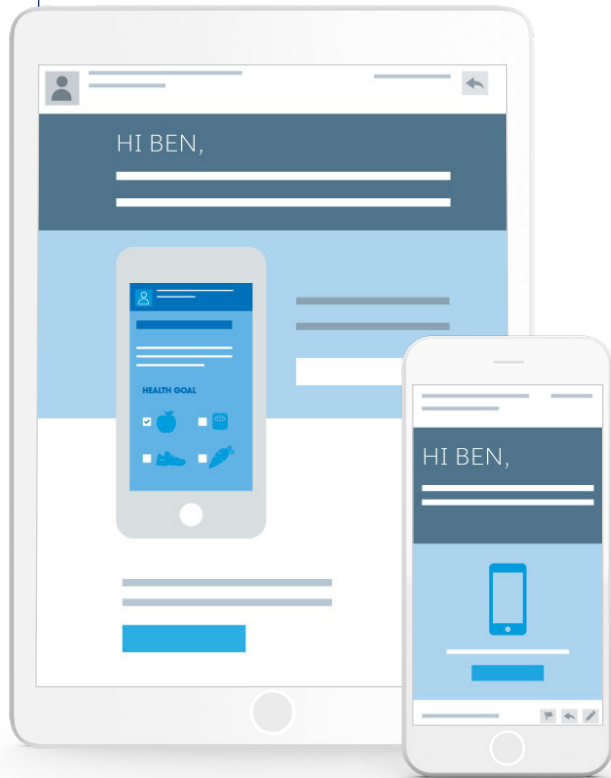
This basic, image-heavy welcome email confirms the sign-up, sets expectations for the content of future emails, and thanks the subscriber for subscribing. It offers no clear call to action beyond waiting for the next email to arrive.

## **MOMENT-MAKING OPPORTUNITIES**

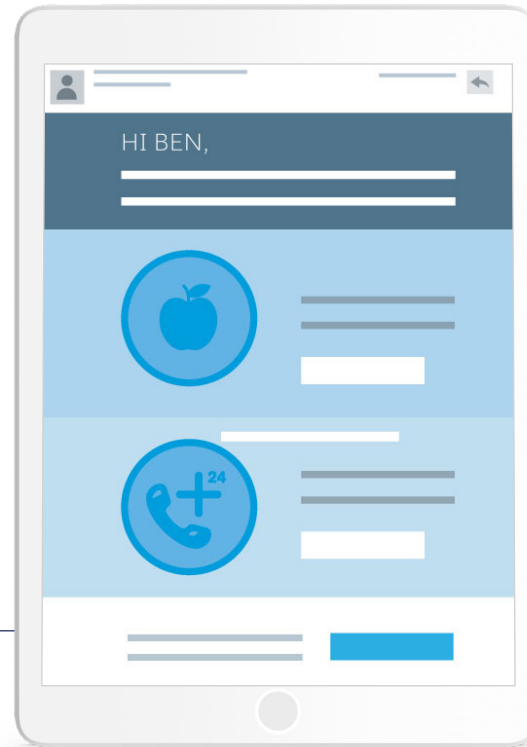
- Expand into a welcome email series
- Use alt text
- Drive high-value actions that improve subscriber lifetime value, such as incentivizing the first purchase or collecting additional profile information
- If you have a mobile app or an SMS program, educate subscribers about engaging through these channels
- Use an interactive email form to collect information about customer preferences
- Send your welcome message in real time the moment new subscribers sign up
- Set the tone by sharing your company values from the beginning

## IF YOU'RE A **HEALTHCARE AND LIFE SCIENCES** COMPANY, YOUR **WELCOME EMAIL SERIES** COULD LOOK LIKE THIS

- 1 The first email welcomes new subscribers and asks them about their health goals.



- 2 The second email promotes your mobile app if the subscriber signed up through your website, or promotes your social media if they signed up through your mobile app.



- 3 The third email promotes your services based on the subscriber's shared information and click behavior.

- 4 The fourth email offers the opportunity to chat with an advisor and asks again about health goals if the subscriber has not already shared that information.

②

# PROMOTIONAL EMAILS

Touting great deals, great products, and great content, these emails represent the vast majority of emails marketers send – especially B2C marketers.



## **THE TYPICAL PROMOTIONAL EMAIL**

This broadcast promotional email uses desktop-centric design and presents the same content to every subscriber.

## **MOMENT-MAKING OPPORTUNITIES**

- To cut through the noise and earn your spot in subscribers' inboxes, make sure your promotional emails feature human-first content – not brand-first content
- Migrate to a mobile-first email template so content is easy to read and interact with on smartphones, desktops, and everything in between
- Use AI tools like send time optimization and content selection to help share the right messages at the right time
- Include product and content recommendations personalized by AI
- Use dynamic content to include relevant information

## IF YOU'RE A **FINANCIAL SERVICES COMPANY**, YOUR **PROMOTIONAL EMAIL** COULD LOOK LIKE THIS



- It uses mobile-first design to share simple, digestible messages with subscribers banking on the go.
- It highlights ways for subscribers to get more from the products and programs they use.
- It includes personalized recommendations based on similar subscribers' financial goals and recent engagement.
- It uses dynamic content to share a link to the subscriber's local branch advisor, or a CTA to connect with a company representative.

3

# COMPANY COMMUNICATION EMAILS

These emails provide critical updates to subscribers or employees in times of celebration or significant change.



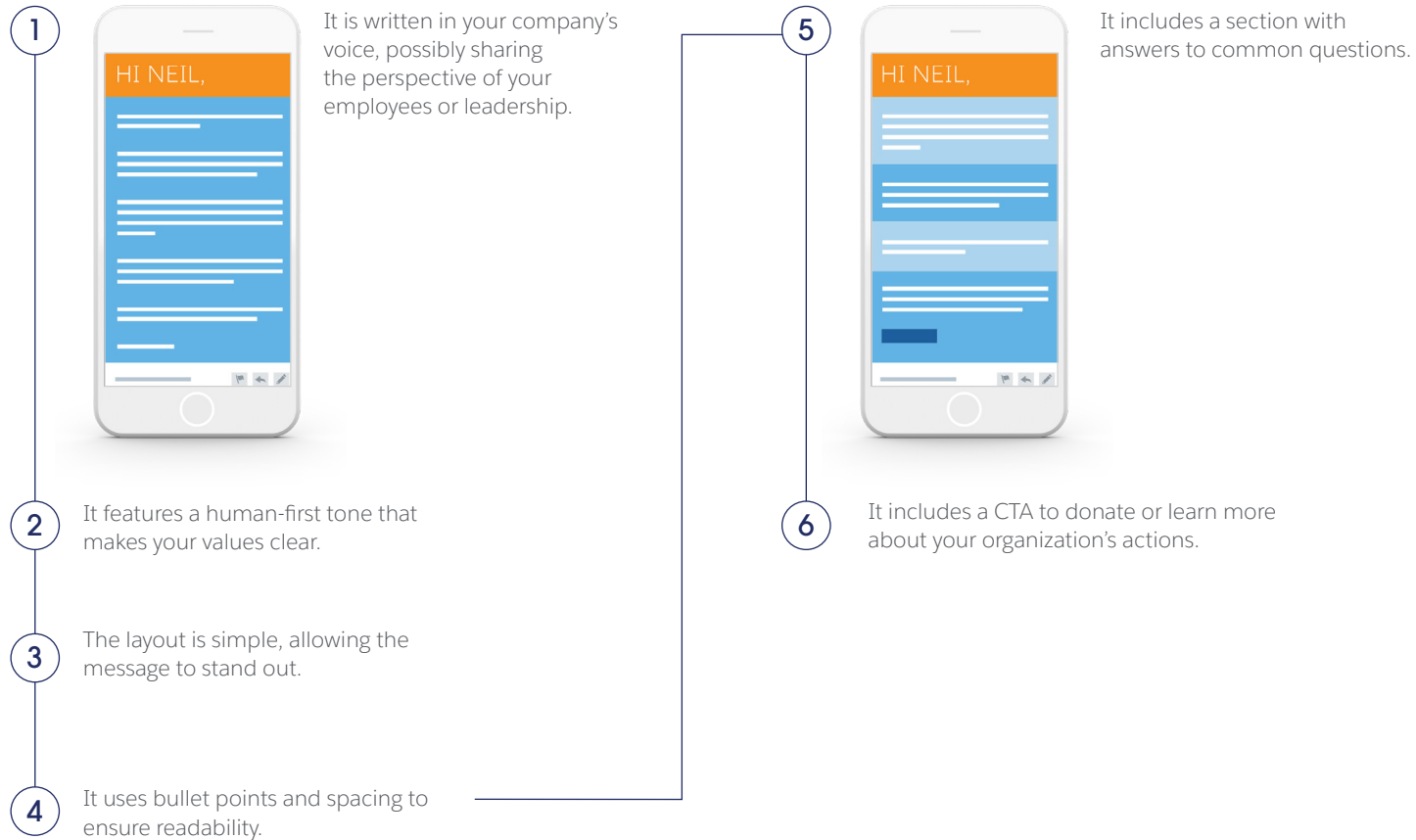
### **THE TYPICAL COMPANY COMMUNICATION EMAIL**

This email shares a generic message with basic information, and is sent within a broad window of time after a major event.

### **MOMENT-MAKING OPPORTUNITIES**

- To ensure timely responses, create a template specifically for this email type
- Send proactively in anticipation of customers' and employees' needs
- Include helpful, human answers to common questions and share links to relevant resources
- Send follow-up messages to discuss changes you've made and opportunities for the audience to engage with you

## YOUR **COMPANY COMMUNICATION EMAIL SERIES** COULD LOOK LIKE THIS



4

# TRANSACTIONAL EMAILS

This email shares a summary or receipt  
from a transaction.



### **THE TYPICAL TRANSACTIONAL EMAIL**

This simple email is largely text-based and contains little information beyond purchase and delivery details. The e-receipt is a scan or copy of the in-store paper receipt.

### **MOMENT-MAKING OPPORTUNITIES**

- Add images of products, services, or content purchased
- Include AI-powered recommendations for related products or services
- Include seasonal messaging and imagery
- Add a post-purchase email with an interactive feedback form
- Add social sharing calls to action

## IF YOU'RE A **RETAILER**, YOUR **TRANSACTIONAL EMAIL SERIES** COULD LOOK LIKE THIS



5

# BEHAVIOR- TRIGGERED EMAILS

Online shoppers and browsers abandoning their activities is a natural part of the buying process, but it's also a high-value behavior worthy of a response.

Some people are just researching and using their cart to hold merchandise for later, but others abandon carts because of concerns about the product, price, or other issues. Behavior-triggered emails are your opportunity to address these concerns.



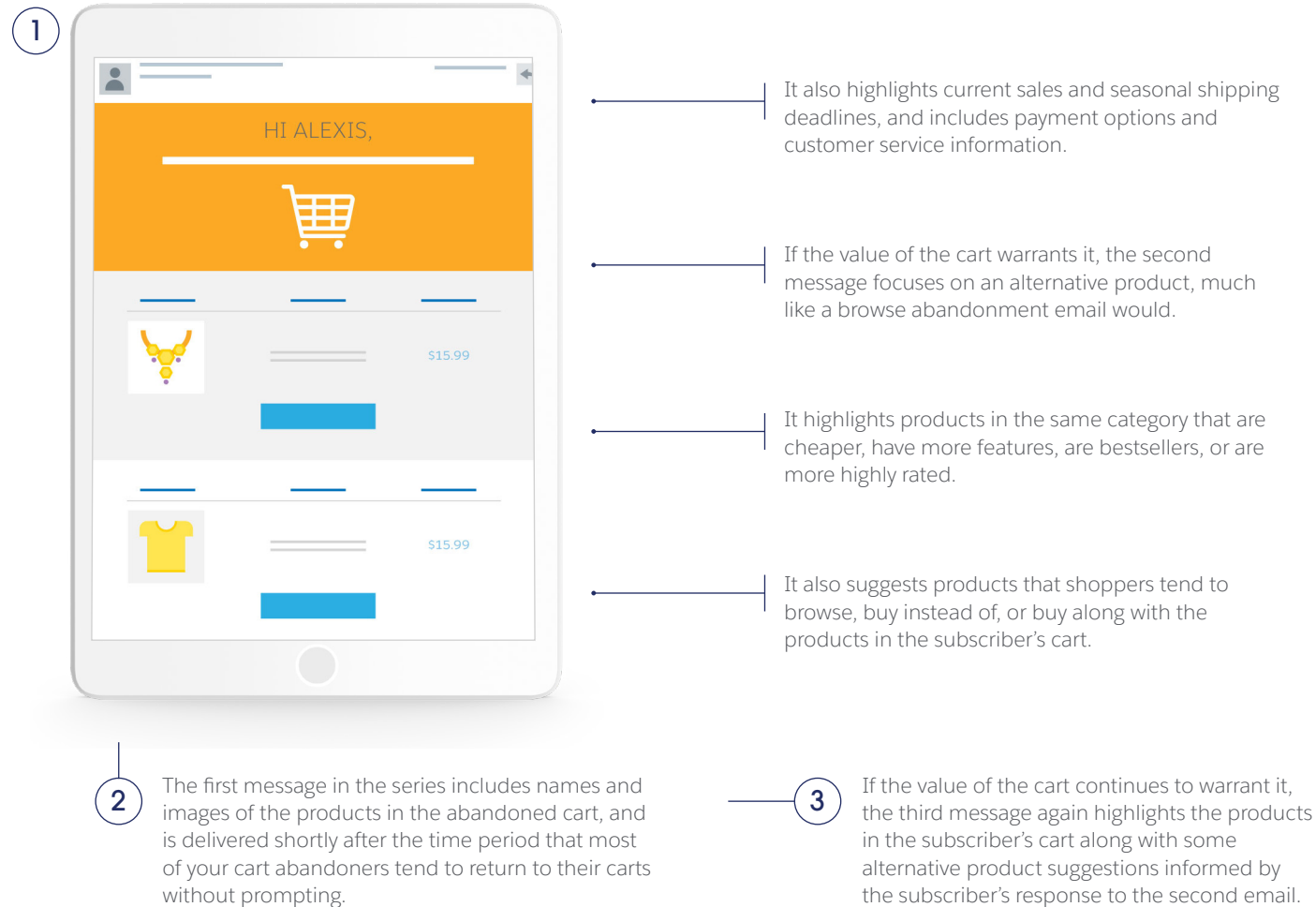
## THE TYPICAL BEHAVIOR-TRIGGERED EMAIL

This basic email arrives a few days after a subscriber abandons an activity and notifies them that they've left an uncompleted transaction behind, without sharing details.

## MOMENT-MAKING OPPORTUNITIES

- Determine the natural rate of return to abandoned activities and send your email in real time
- Include names and images of specific products left in the cart, or the transactional step the subscriber abandoned
- Include AI-powered recommendations for alternative products and services
- Promote current sales, free shipping offers, and seasonal information
- Highlight your payment options, return policies, and price-matching guarantee
- Include your customer service phone number and live chat service, if offered
- Highlight reviews of the product
- Send a series of cart abandonment emails, if the value of the cart justifies it

## IF YOU'RE A **RETAILER**, YOUR **BEHAVIOR-TRIGGERED EMAIL SERIES** COULD LOOK LIKE THIS



# CONCLUSION

We've focused on five common types of emails in this report, but this simple and strategic approach can be used to improve any set of emails you send. Salesforce Marketing Cloud can help you identify opportunities for enhancements, come up with a plan of action, and create moments of relevant connection for your subscribers.

Start crafting your own blueprints for smarter emails.

[VIEW A DEMO](#)





*We* **BRING COMPANIES**  
*and* **CUSTOMERS TOGETHER**