

PROFITABLE PRINT RELATIONSHIPS

The Successful Print Sales Circle

Worksheet 23: Onboarding

Step 1: Plan your onboarding

Firstly, make a plan of the communications that you want to send to new subscribers that will make them feel welcome and engaged with your newsletter. This is also the time to manage their expectations. To do this, you should send out a series of e-mails before they receive your regular content. Here is an example plan:

- Thank you for signing up e-mail with link to lead magnet
- What to expect from your newsletter
- 1-3 pieces of really useful content. These should help the customer and not be salesy: the goal is to build trust
- A special offer to encourage them to buy from you or to engage directly with you

Write down your onboarding plan

You should also think about when to send these e-mails. You don't want to overwhelm new subscribers. However, they are often at their most receptive when they have just signed up. Here is an example e-mail schedule:

- Thank you e-mail: straight after signing up
- What to expect from your newsletter: one day after signing up
- 1-3 pieces of really useful content: weekly or twice weekly on specific days
- A special offer to encourage them to buy from you or to engage directly with you: two days after the final content e-mail

Add specific days and time to your onboarding plan

Step 2: Plan your e-mails

It is much easier to write an e-mail if you have created an outline before you start writing.

Here is a template for a short-form e-mail:

- Headline
- What is this e-mail about?
- 1-3 key points
- Add a call to action

Here is the template applied to a what to expect from the newsletter e-mail:

- Headline: FNAME, a little information about [newsletter title]
- What is this e-mail about?: Here's what to expect from the newsletter
- 1-3 key points: cover type of content, frequency, how to unsubscribe
- Add a call to action: hit reply and say what you'd like to see from the newsletter OR hit reply and say what challenges you are currently facing

Here is a template for an e-mail or blog post that works well for a piece of long-form content. You may choose to use only some sections of this:

- Headline
- Unusual, thought provoking or challenging introduction
- What are you talking about?
- Why is this important to the reader?
- Three points about the subject
- Manage an objection
- Give the reader an action point (this is something they can do as a result of reading this article)
- Circle back to your opening statement
- Add a call to action

Here is the template applied to an article on e-commerce:

- Headline: Three ways to increase customer lifetime value that you may not have thought of
- Unusual, thought provoking or challenging introduction: digital marketing campaigns are too complicated

- What are you talking about: simple print mechanisms are very powerful
- Why is this important to the reader: how tactile print encourages customers to act
- Three points about the subject: three ways 1. Repeat order leaflet in delivery 2. Stamped loyalty voucher 3. QR code on packaging that leads to special offer
- Manage an objection: How do you measure print? Use coupon codes
- Give the reader an action point (this is something they can do as a result of reading this article): plan a simple upsell that could be printed on a leaflet
- Circle back to your opening statement: isn't this much easier than the average e-campaign?
- Add a call to action: download case study from website

Remember, you can always outsource your e-mail writing. However, you should make sure that you approve outlines of proposed e-mail before they are fully written. I write e-mail and long-form content for clients and I always provide outlines for approval first: it stops any misunderstandings about what I am actually writing.

Outline your onboarding e-mails

Step 3: Write your e-mails

Once you have created your outlines it becomes much easier to write your e-mails. Here are some writing rules to make your e-mails read better

- Headlines should be short and punchy: use a maximum of 14 words
- Break up your main text with subheads. These are bold sentences that act like mini headlines. If your recipients are skim reading, the subhead will act like a brake, slow them down and refocus their attention on the e-mail
- Avoid using full stops at the end of headlines and subheads: a lack of punctuation helps the reading flow (note that I am doing this on these bullet points as well)
- Sentences should be a maximum of 24 words. A long sentence will be much more readable if you break it up into two sentences
- Sentences should make one point only
- Make your paragraphs two to three sentences long for short-form e-mails. This does not apply to longer content
- Break up the text and make it more readable by using bullet points

When you have finished writing an e-mail, make sure you proof read it for spelling errors and for sense.

After this, leave the e-mail for at least 24 hours. Then read it again and review whether it needs any editing. A very powerful tip is to try reading our e-mail out loud. If it flows well when you read it like this then you have a good e-mail. If you struggle to read it well, then some editing is probably needed. If you outsource your e-mail writing, the reading aloud is a good way to check if you like what you have received.

Step 4: Create an automation series

Once you have completed your writing and editing, it is time to ensure that this content is sent out automatically to your recipients. The first step is to create a series of e-mails that send automatically. In Mailchimp this is called an automation series.

The key to creating a successful automation series is to set the right trigger for each e-mail. I do this in two ways. Firstly, I set specific days when an e-mail can be sent. After the first two e-mails in my automation, subscribers only receive e-mail on a Tuesday or a Thursday. Secondly, I set the trigger for each e-mail to be a certain amount of time after the previous e-mail was sent.

One other tip is that some providers allow you to set actions after an e-mail has been sent. I use this at the end of my automation series. When subscribers have been sent the final e-mail, a tag is set automatically to label them as recipient of regular newsletter e-mails. This allows me to make sure that I only send other content to people who have this tag and are not in the middle of receiving the onboarding series.

I find it easier to set up all the rules for the automation series before loading any content. Remember that the first e-mail is usually sent straight after signing up and is often part of the sign-up process for your e-mail provider. So this first onboarding e-mail will not be part of the automation series.

Step 5: Load your e-mails

Once you have created all the automation rules, you should upload your e-mails. The way in which you do this will vary according to your e-mail provider.

If you haven't already done so, now is a good time to create a template for your e-mails. Your e-mail provider will probably have a set of ready to use templates that you can adapt with your company logo and house colours.

Some e-mail templates are far too complicated and have too many clever design elements. You want to make your content as easy as possible. Here is my recommended template outline:

- Small company logo

- Picture to illustrate your content
- Caption for picture
- Headline
- Main e-mail content

I recommend using a single column layout for text and black for the colour of the body text. In addition, I recommend creating a plain-text version of the e-mail as some people still prefer to receive content this way. Finally, if you are looking for stock photography to illustrate some of your e-mails, I use <https://www.pexels.com> and <https://unsplash.com> which both provide excellent free visuals.

If you are not already a subscriber, make sure you sign up to my “Views From The Buyer” newsletter so that you can see my e-mail design. I’m sure you can do better!

Step 6: Test

It is vital to make sure everything works! Sign up yourself to make sure that you receive everything as expected. Ask a couple of colleagues or friends to sign up as well. It is important that they give you feedback on what they liked and what they felt could be done better. Your e-mail can always be edited once you have loaded them. So be prepared to evolve and improve your onboarding process, especially in the first few weeks after you have created it.

Step 7: Share your success!

This may seem like a big task this month with a lot of new ideas to learn and put into action. The most important step is to start putting it into action. Creating an onboarding series need not take a long time if you carry it out step by step. Equally, it can be tempting to wait until everything is absolutely right before allowing people to sign up. It is far better to finish the project and have it working. You can always improve it later.

Once you have completed this task, you have the best possible opportunity to turn people who sign up to your newsletter in engaged subscribers who will want to receive more content in the future.

For this month, your goal is as follows:

- Create an onboarding plan and timetable
- Outline each of the e-mails
- Make sure your e-mails are written
- Create an automation series
- Complete your e-mail upload

Fill in the table on the next page to make sure that you complete this task successfully. You may prefer to make a copy of it or create a spreadsheet. Remember, it is important to fill this in: this is your way to check that you are on track with this exercise and are taking action. In addition, feel free to invite me to sign up to your new newsletter!

Next month we are going to look at how you can create regular, engaging content for your subscribers without it taking too much time.

How did you find this exercise? Please share your results with us at circle@ProfitablePrintRelationships.com If you come across any challenges you will be able to raise them on the monthly group call. If you are a gold member you can ask any questions privately on your exclusive e-mail address.

Onboarding plan created	
E-mails outlined	
E-mails written	
Automation series created	
E-mails uploaded	