



# Simplifying Email Creation One Step at a Time

**A how-to on auditing  
your email process for  
any sized team**





**When an email program is just starting, you can afford to be inefficient. As everyone is finding their footing or growing the team incrementally, you may develop habits that work for your current demand, but simply won't scale.**

For example, playing email tag for campaign feedback may work when you're an email party of two, but the practice is unsustainable as you add in more stakeholders and departments. If you want to scale your email program in the future, it's helpful to audit your processes now to prepare for growth. Even if your email team will remain the same or temporarily reduce in size, developing a more efficient campaign process can save you precious time and resources.

Experts from Litmus and Salesforce sat down to discuss the three elements of a scalable email program: people, processes, and tools. We'll focus on the best tips for scaling your email team process in what follows.

# What's in an email process?

There are a lot of steps to get an email ready to send, and then you have to analyze results once the campaign has gone live. The major phases include:

- Campaign planning
- Campaign development
- Quality assurance and approvals
- Campaign reporting



Within each of these categories, there are a number of steps to be completed, and an email will change hands a few times before it's ready to send. Our [2019 State of Email Workflows report](#) found that 53% of brands take 2 weeks or more to produce a single email. Plus, the survey revealed that the larger the team, the more emails in production at once.

Smaller email teams (1-3 full-time employees) typically have between 1-5 emails in production, while larger groups with 11 or more email employees have between 21-25 emails in production at any given time.

With so many steps required to prepare and analyze email campaigns, there's plenty of opportunities to audit and improve your process. Not only can reworking your email procedures for scalability help your team work more efficiently, but it can also ensure everyone is on the same page at all times and reduce errors.

## How to improve each step in your email process

Here's the thing about improving your email process—it's good for everybody. Your email team benefits because they can get their work done with less stress and more time to work on strategy, analysis, or learning new skills. Your company also reaps the rewards of a more efficient process, since insights gleaned from effective campaigns can [influence other marketing channels](#). Finally, your email subscribers will enjoy error-free emails that just keep getting better over time.

Sound good? Let's help you achieve that reality by improving each step in your email process.



### 1. Campaign planning

A little planning up front can save a lot of back and forth or scrapped work in the long run. Plus, you won't have (as many) unpleasant surprises or last-minute changes if you can see everything coming.

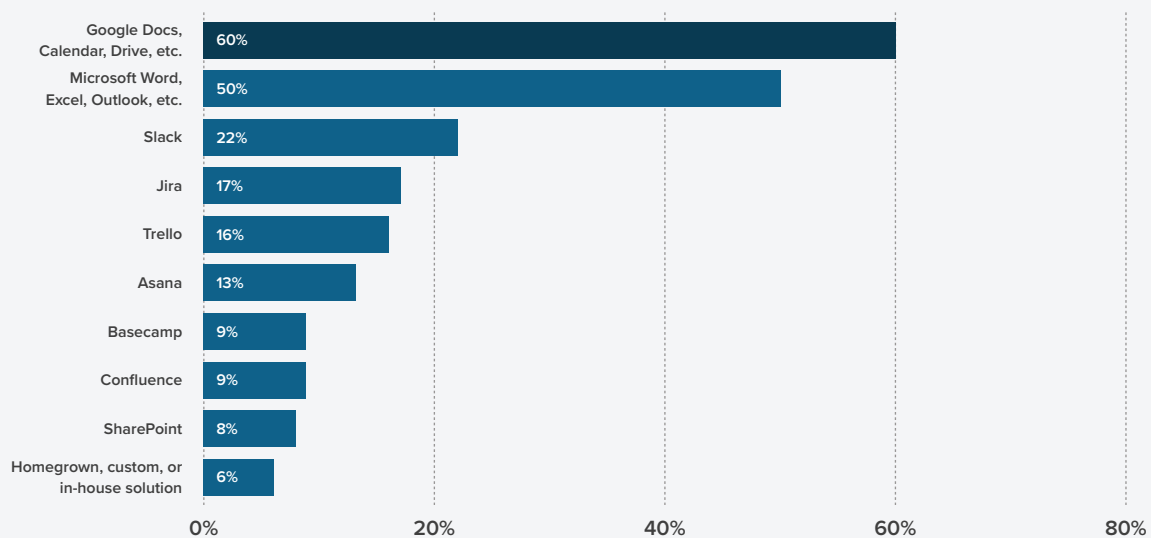
## Choose campaign planning tools that fit your needs

Planning your campaigns ensures that everyone agrees on strategy and goals, which in turn makes creating individual emails easier. Taking time to document your plans also makes it easy to deliver a clear list of your team's efforts to your boss at the end of the year.

### Majority of Marketers Use Google and Microsoft Office Tools for Email Content Planning

What software does your company use for email content planning?

1,668 respondents



Source: Litmus' 2019 State of Email Survey

When it comes to [campaign planning tools](#), it's great to start simply. [60% of email teams](#) use Google Drive to plan campaigns, followed closely by Microsoft Word and Excel. If you find that these simple tools are getting unorganized or hard to manage as your team grows, you may augment with project planning tools such as Trello or Asana.

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## Use an email brief for every campaign

One of the best boosts you can give to the early phases of your pre-send process is using an email brief for every campaign. Email briefs are useful for getting approvals from stakeholders before you spend hours or days creating an email. Your email brief needs to include the email's purpose and goal, how you plan to earn an open, draft content, and choosing visuals. New to email briefs, or want a little extra guidance? Download our [Email Brief & Planning Workbook](#) for step-by-step instructions.

## Review your content calendar

58% of email marketers [use a content calendar year-round](#), which is fantastic. Not only do content calendars minimize the chances of a last-minute scramble to create a campaign, but they also help you check priorities and identify opportunities. If you're a small team with ever-changing needs, then a simple spreadsheet with plans a month or two in advance is a great place to start.

Your content calendar is also useful for making sure your strategy aligns with company-wide goals or plans in other departments, such as sales. Having a rock-solid email strategy is good, but syncing priorities and insights across marketing channels is a game-changer.



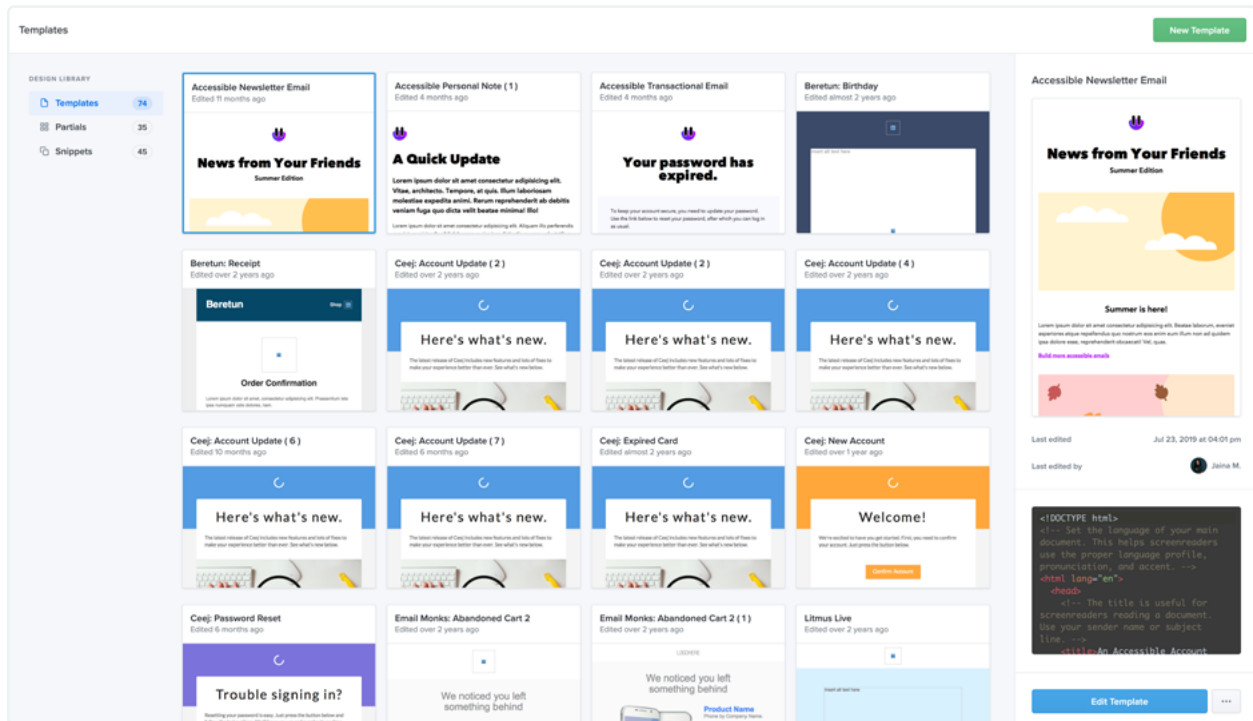
## 2. Campaign development

Developing a campaign takes a long time. On average, teams spend [3.4 hours on copywriting](#), 4.1 hours on graphics and design, and 3.8 hours on coding and development. Luckily, there are tools that can make your campaign development workflow easier.

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## Create a design system

Maintaining brand standards or preferences is easy when one person is creating emails, but what about when you hire additional help? If you want to scale your email program while delivering a consistent brand experience, you should create a design system that gets everyone up to speed. The [Design Library in Litmus](#) is a single source of truth about templates, look and feel, copy, and tone that you can create and share with everyone in your organization.



## Automate wherever possible

[Having a heart](#) and remembering the humans on the other end of your email are valuable additions to your email program. However, there's one tricky detail about creating emails by hand—human error. While copy and pasting is a step up from manually transferring information, it still opens up the potential for mistakes.

Tools such as [snippets and partials in Litmus Builder](#) are your key to automating the coding process to save time and reduce small typos that lead to big breaks. You can also link your assets between [Litmus Builder](#) and Salesforce to eliminate the need to switch back and forth. Curious about how Litmus uses Litmus? [Here are some of our pro tips](#) for building emails.

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## Embrace AI

After you've streamlined the other parts of your campaign development process, there's one more tool you can try—AI. Salesforce's [Einstein AI](#) can help with automatic content tagging, predictive send-time optimization, understand optimal send frequency, and more.



### 3. Quality assurance and approvals

After you've put in the hours to create a beautiful campaign, it's time to put the finishing touches and tests in place. Here's how to reduce errors in less time.

## Use a pre-send checklist

We keep mental checklists all the time, from grocery lists and birthdays to remember, to those emails we need to respond to. Some lists are simply too long (and important) to keep in our heads, though.

The simple act of documenting your pre-send review process ensures you don't miss a step, and that you can easily teach new hires. 46% of marketers have a simple checklist, and 27% use an extensive pre-send review process, while an additional 27% of marketers don't use a pre-send list at all. If you want to take even more work off your plate, you can use [Litmus Checklist](#) to automatically check for broken links, ALT text, deliverability, and more.

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## Create clear feedback workflows

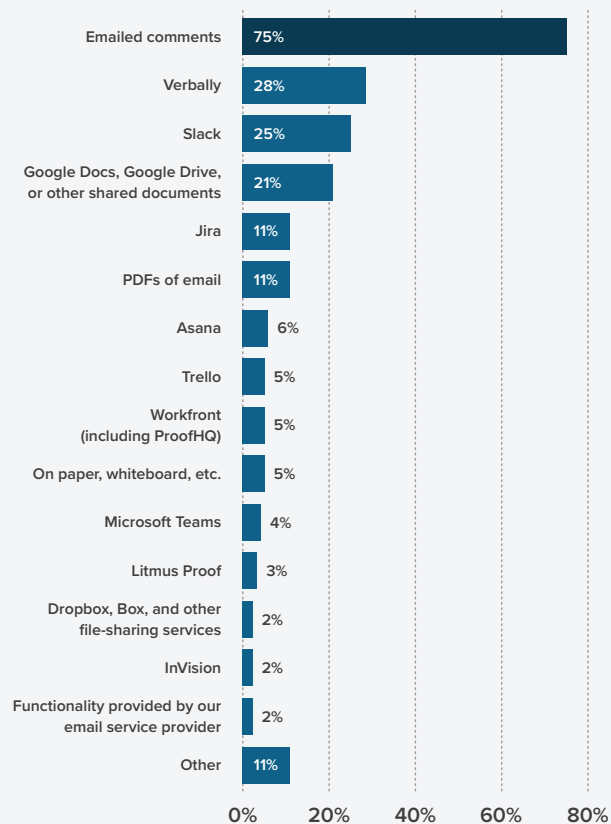
Feedback helps you see new perspectives, correct edits, and perfect your message. If not handled correctly, though, it can be a frustratingly complicated process. If you want to [make collecting feedback easier](#), there are a few parameters to have in place.

First, limit the number of involved opinions to two or three. Then, agree on timelines and structure for the review process, so that everyone can meet expectations. Finally, choose one tool for collecting feedback. Having comments spread across email, a Google Doc, and a Slack message thread isn't scalable. A majority of marketers rely on email or verbal notes to review emails, but it's easy for essential feedback to slip through the cracks with these methods.

## Majority of Marketers Still Receive Feedback Verbally or By Email

What tool(s) do you use to manage reviews and approvals for emails at your company? (Those used by 1%+ shown.)

1,929 respondents



Source: Litmus' 2019 State of Email Survey



## 4. Campaign reporting

The pre-send process gets a lot of attention because it's important and involved. However, your work doesn't end when you hit send. Here's how to optimize your post-send analysis to make your email efforts go further.

### Review email health

[Cleaning up your email list](#) is a good habit to keep engagement and deliverability high. Taking time to review your email health can also help you prioritize your efforts, too. For example, you may review your email list and find a segment of unengaged subscribers.

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Based on the other projects coming up on your content calendar, do you want to create a [re-engagement campaign](#)? Or do you want to let lapsed subscribers go? When you get a high-level picture of what's happening and what aligns with your goals, you can avoid wasting time on low priority efforts.

### Scale what's working, delete what's not

The concept "scale what's working, delete what's not" sounds simple enough, but how do you put it in practice? First, pick out your top five campaigns and journeys, and then drill down to what makes them successful. Do they have a unique cadence or copy style? Are the contents, send times, or CTAs different? Use campaigns that are already performing well to model future emails.

Another factor you can use to audit your email performance is to identify your fastest-growing lists. Are certain acquisition channels working best? Do subscribers care more about certain offers or messaging? Focusing future efforts on proven strategies helps you get more results with the same time invested.

All these tips to improve the scalability of your email processes can be summed up in a few words—planning, consolidation, and analysis. Spending time to align your plans to company-wide efforts and agree on campaigns early helps email creation go smoothly. Plus, consolidating feedback and integrating tools reduces redundancies that can increase errors and work times. Finally, constant analysis of what's working and what's not helps you focus on high-impact tasks for maximum return.

Ready to make your email process more scalable, and in turn, more impactful? See how Litmus can help you [every step of the way](#).