



STRATEGIC FRAMEWORK FOR **EMAIL MARKETING**

7 Steps to
Success
Guide

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INTRODUCTION

Email marketing remains one of the most powerful communications channels used for gaining new customers, for building relationships and up-selling to existing customers. Our focus will be on using email as a customer acquisition and communication tool.

Email marketing tends to work best as a tool to improve contact conversion, customer retention and growth. This is where email marketing gives the biggest commercial contribution and can integrate well with all of your marketing efforts.

OUR OBJECTIVES:

1. Define Your Goals and Wins
2. Incite Client Acquisition
3. Provoke Customer Retention and Growth
4. Lead Qualifying & Nurturing

OUR STRATEGIC APPROACH:

We will develop an email communications strategy that is tailored to your needs and the current state of your business. We will plan and integrate with the resources available for complete alignment and pull-thru, rather than simply as a low-level tactic with no engagement or optimization.

Strategy 1: Assess Your C.R.I.T.I.C.A.L Success Factors

Assessing the CRITICAL success factors for email marketing is a useful starting point in your journey to effective email marketing to your email marketing success.

OUR EIGHT CRITICAL SUCCESS FACTORS:

1. Conversation

Q : Is our email marketing two-way – are we engaging visitors in a dialogue or just pushing content?

Floible Answer: **Cultivate Conversation**

Email works well when it's part of a wider dialogue encouraging user participation and engaging them with a brand.

Here are some examples:

- Polls or surveys (for an e-newsletter).
- Reviews and ratings on products (for an e-retailer).
- Competitions which are announced in several emails.
- Sharing of what's hot on (your) social channels like Facebook and Twitter.

2. Relevance

Q : Is our email marketing targeted? Are we segmenting sufficiently?

Flobile Answer: **Remain Relevant**

We will utilize targeting methods to deliver contextual emails through 'Sense and Respond communications'.

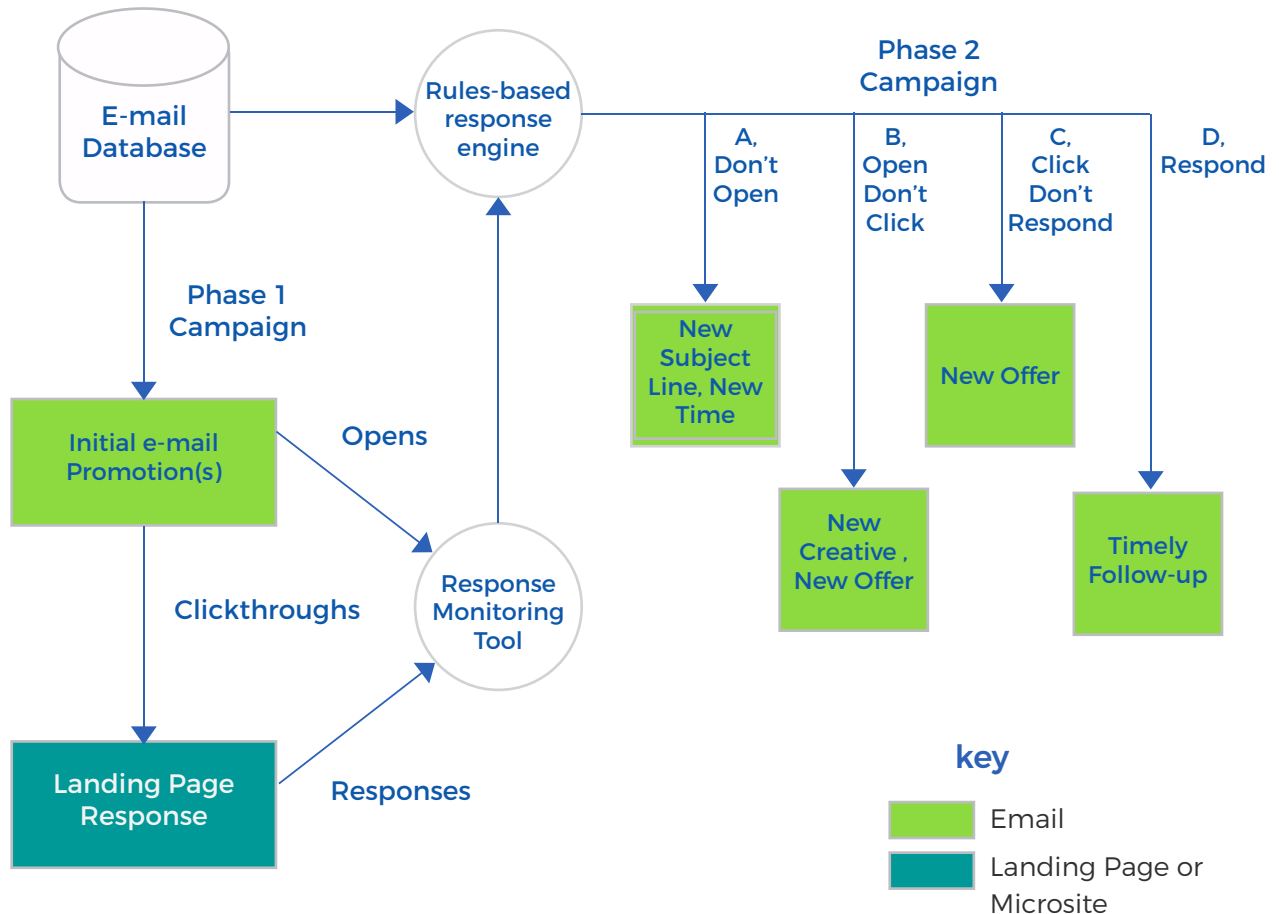
What is it? Sense and Respond Communications

Delivering timely, relevant communications to customers as part of a contact strategy through monitoring and following up automatically based on specific interactions with a company's website, emails and staff.

Our Six Targeting Methods Include:

1. Customer profile characteristics (demographics and customer set preferences).
2. Customer lifecycle groups, Grouped in categories like new subscribers or prospects, active customers and lapsed or no longer engaging in email.
3. Customer behaviour in response (observed and predicted).
4. Customer multi-channel behaviour (channel preference).
5. Customer value (current and future).
6. Customer personas providing a helpful way to simultaneously target on multiple dimensions.

Example of Sense and Respond Email Marketing:



3. Incentives (or offers)

Q : Are our incentives or content offers effective?
Flobile Answer: Entice and reward your audience
<ul style="list-style-type: none"> We will consider the following criteria: What benefit does the recipient gain from staying subscribed, reading the email, participating or clicking on the links? We will consider the following criteria: Highlight your incentives in headlines, image text and call to action to make the benefit for the recipient as clear as possible.

4. Timing

Q : Are we sending our emails at the right time?

Flobile Answer: **Meet your audience where they are**

Timing refers to when the email is sent and received; the time of day, day of the week, point in the month and even time of year. The theoretical best time to send is when the recipient is active in their inbox and your email pops in at the top. The massive move to reading emails on mobile devices has changed email consumption habits. Increasing numbers of subscribers check their emails somewhere between waking up, having breakfast and arriving at work and later into the evening. Your message determines whether that makes it a good time to send. The truth is, there are no generic perfect times to send. Only testing can show the right times.

5. Integration

Q : Are our emails integrated with other channels?

Flobile Answer: **Build a cohesive customer/prospect journey**

We will look at email as part of your integrated marketing communications rather than just the aspect of technical integration of systems. As always clarity in cross-channel marketing communication strategy should precede consideration of technical integration. We will work with other channels where applicable.

Questions we will answer include:

- Are the creative and copy consistent with my brand?
- Does the message reinforce other brand communications?

- Does the timing of the email campaign fit with offline communications?
- Do we encourage interactions in other channels, such as social?

Email channel integration will help gain new subscribers.

6. Creative and copy

Q ; Is our creative and copy engaging enough?

Flobile Answer: [Win them over](#)

Creative refers to the overall design of the email including layout, use of colour, images and copy.

Email is an impulsive medium where visitors will scan it quickly, so if the recipient likes your offer from the subject line and the opening paragraph, then they should be able to click through immediately. So in general, emails should always have a call to action and link in the first three or four lines and then repeat the call to action throughout the message three or four times, such as in the middle of the message and at the close.

Key creative issues we will resolve :

- How is the email structured? Is the layout commonly used appropriate and effective for this type of email?
- Where are the calls to action? What are the best positions for calls to action and how can click-throughs be encouraged?
- How is the email branded? How should email campaigns and newsletters support the established brand and when should brand variants be used?
- Is the tone of voice right for the email? Tone of voice and message should be in the context of the subscriber and their current relationship. A highly engaged subscriber who doesn't need much encouragement will be fine with a strong and simple buy now message, whereas a new subscriber might need more trust and relationship building before going with a hard sell.

7. Attributes

Q : Is the header content engaging?

Flobile Answer: **Tie It All Together**

The attributes of the email header that can determine campaign success include

- subject line name.
- address timing and format.

Deliverability may be impacted by copy and creative.

8. Landing page (or microsite)

Q : Do we send readers to the right pages after the click?

Flobile Answer: **Give Them a Home**

We will develop landing pages focused on achieving action and a tailored consistent experience . 'Landing page' is the term given for the page(s) reached after the recipient clicks on a link in the email. Typically, with a B2B email aimed at registration, or downloads, the recipient will be presented with an online form after click-through, Landing page conversion rates can have a dramatic influence on the success of an email campaign. Testing and improving landing pages therefore pays dividends,

OUR COMPREHENSIVE METHODOLOGY

Step 1: Define your goals and build a quality list for email marketing

Flobile will define the following:

1. **Business metrics**

These could also be called output metrics. They measure the contribution the channel has to the business goals. Particularly, conversions and revenues .

2. **Process metrics**

These are the **metrics we will use for email marketing performance and diagnostic purposes**. We will monitor click rates to understand how well we are doing with an offer, content and targeting.

Step 2: Define current value of your email marketing to customers

We will assess how valuable our email communications are to your customers by measuring the quality of their engagement - how engaged are they? How engaged do they need to be?

We will consistently review and optimize the following:

1. **Click to open rates (CTOR)** - these will enable you to see how engaging your creative and offer is.
2. **Open and click-through rates by segment** - engagement will vary by segment depending upon the targeting and relevance of your content or offers.

3. **Open and click-through rates based on delivery time** – time of day and day of the week or time in month may make a difference.
4. **Unsubscribe rate** – check that particular messages or offers aren't causing peaks in unsubscribe rates.
5. **Complaint rate** – as with unsubscribe, do particular messages cause a high number of complaints?
6. **Engagement at different points in the customer lifecycle** – it is natural that engagement will decline through time and some subscribers will become inactive. We will engage visitors through time, for example starting with a welcome series or, when necessary, emails geared towards reactivation. Reviewing hurdle rates at different lengths of time from original subscription can help assess the success of these strategies.
7. **Engagement with different types of offers and messaging – different types of promotions or messages will also vary in popularity.** We will analyse what is effective. Sometimes we will tag specific types of links in different positions in the template to know which part of their template is most effective. For example, there could be a big difference between the link for hero product or featured category in an email.
8. **Hurdle rates of engagement over a longer period** – this assesses engagement over a six-or nine-month period to set goals to review how active your subscribers are measured through open, click or purchase. Hurdle rates measure customers not campaigns and do so across your contactable customer base. Thus they provide a vital view.

Step 3: Define value of email marketing activity to your company

We will assess the marketing outcomes generated and the influence on conversions.

We will measure the value generated in the following ways:

- Size of contactable email database.
- Growth of contactable database per month.
- Outcomes (goals) per 1000 emails sent.
- Revenue (profit) per 1000 emails sent.
- When looking at outcomes and revenue per email sent, dividing by 1000 (or per 100) will normalize value and make it easier to interpret, but it's not essential.
- Outcomes (goals) from email marketing per website visit from email.
- Revenue (profit) from email marketing per website visit from email.

These performance indicators will be tracked on an ongoing basis . We will create a simple conversion model for your email campaigns in order to set realistic goals for your email marketing.

Here is an example of the conversion funnel model:

	Best Case	Worst Case
Number of E-mails send from list	100,000	100,000
↓ Deliverability (%)	99.0 %	95.0 %
Number E-mails DELIVERED	99,000	95,000
↓ Open Rate (%)	30.00 %	20.00 %
Number E-mails OPENED	29,700	19,000
↓ Clickthrough Rate % (CTR)	10.0 %	6.0 %
Number recipients who CLICK THROUGH to landing page	2,970	1,140
↓ Form Completion %	20.0 %	10.0 %

Step 4: Derive a structured process for growing your email distribution list

We will use various growth strategies across a variety of channels.

A simple baseline for list growth is the number and percentage of current customers for which you have email addresses. We will set targets for this metric and devise techniques to increase it.

When devising these techniques, we consider quantity and quality. Here are some examples of list-building strategies we may consider:

List size - Aim to increase the size of your list over a particular time period, e.g. add 5,000 subscribers to an e-newsletter in a year.

Email address coverage - Aim to increase coverage of email addresses in your customer base – you may have 15 percent of customers opted into an e-newsletter, but you want to increase this to 35 percent over the next year.

Email address quality – Aim to increase the proportion of valid or active email addresses on your list (i.e. those that don't bounce back or the percentage of customers who are 'email active' i.e. they open or click through on emails within a defined period).

- **List value** – Aim to increase the value generated in total or per 1000 list members in terms of sales/leads in a time period.
- **Targeting quality** – Increase proportion of qualified subscribers.
- **Data quality** – Increasing the proportion of specific, valuable, up to date and accurate profile fields held about individuals.

Step 5: Thorough review of touchpoints

It is important to have a structured approach to collecting and maintaining customer data.

We will capture email addresses through some of the following:

- Digital channels, websites, social channels, mobile apps, blogs, SMS.
- Offline, events, in-store, customer service, all paper responses.
- Existing customers.
- New customers.

Chart below offers a good representation of all the possible methods of capturing email addresses and other profile information.

Online Touch Points	<ul style="list-style-type: none"> • Online incentive such as prize-draw (B2C) or white paper download (B2B) • Viral Marketing • E-newsletter opt-in on site • Registration to view content or submit content to a community forum • Renting list, co-branded e-mail or advertising in third-party e-newsletter to encourage opt-in. • Co-registration with third party sites 	<ul style="list-style-type: none"> • Capture e-mail when customer first registers or purchases online • E-newsletter and other methods given on left
	Offline Touch Points	<ul style="list-style-type: none"> • Direct mail offer perhaps driving visitors to web • Trade shows or conference • Paper response to traditional direct mail communication • Phone response to direct mail or ad
	New Customer	Existing Customer

A COMPELLING EMAIL STRATEGY & MARKETING PROPOSITION

STRATEGY 1: POINT OF DIFFERENCE & KEY MESSAGE

We will define how your email communications will offer differential value and curate a distinctive online value proposition (OVP).

One of email's distinctive values is the ability to be timely and relevant. Unlike blog posts, website offers, tweets and other social media are more broadcast in nature and timing isn't tied to individual customer activity, behaviour, demographic or lifecycle stage.

If your brand offering is wide then this may include different email streams each with their own value proposition.

STRATEGY 2: ENGAGEMENT

We will engage subscribers through methods such as:

- Engaging text content that makes the subscriber feel happy, angry or as if they are learning.
- Engaging non-text or rich media content such as videos, podcasts, presentations, blog posts, photos, etc.
- More in-depth content or alternately a summary of content.
- Exclusive offers and incentives only available through the channel.

We will solve the following questions:

What is the focus of each campaign?

Does brand awareness and trust need to be built?

Is the focus on ensuring customers are getting the most value from your service so that they are retained?

To achieve engagement, we will review how the email should deliver value and translate it into the content and topics.

STRATEGY 3: VALUE PROPOSITION

Our goal is to communicate your value effectively. The promise of this value can bolster email engagement and adoption. We will deliver information-based value that is up-to-date, relevant, accurate, concise and clearly presented.

Possible propositions could be:

- **Saving time** - By providing a single, up-to-date source.
- **Learning** - Increasing knowledge and solving day-to-day problems.
- **Saving money** - For instance through exclusive offers, discounts or offering new ways of working through a company's products.
- **Sharing** - Sharing information about your organization or facilitating sharing of content from customers.

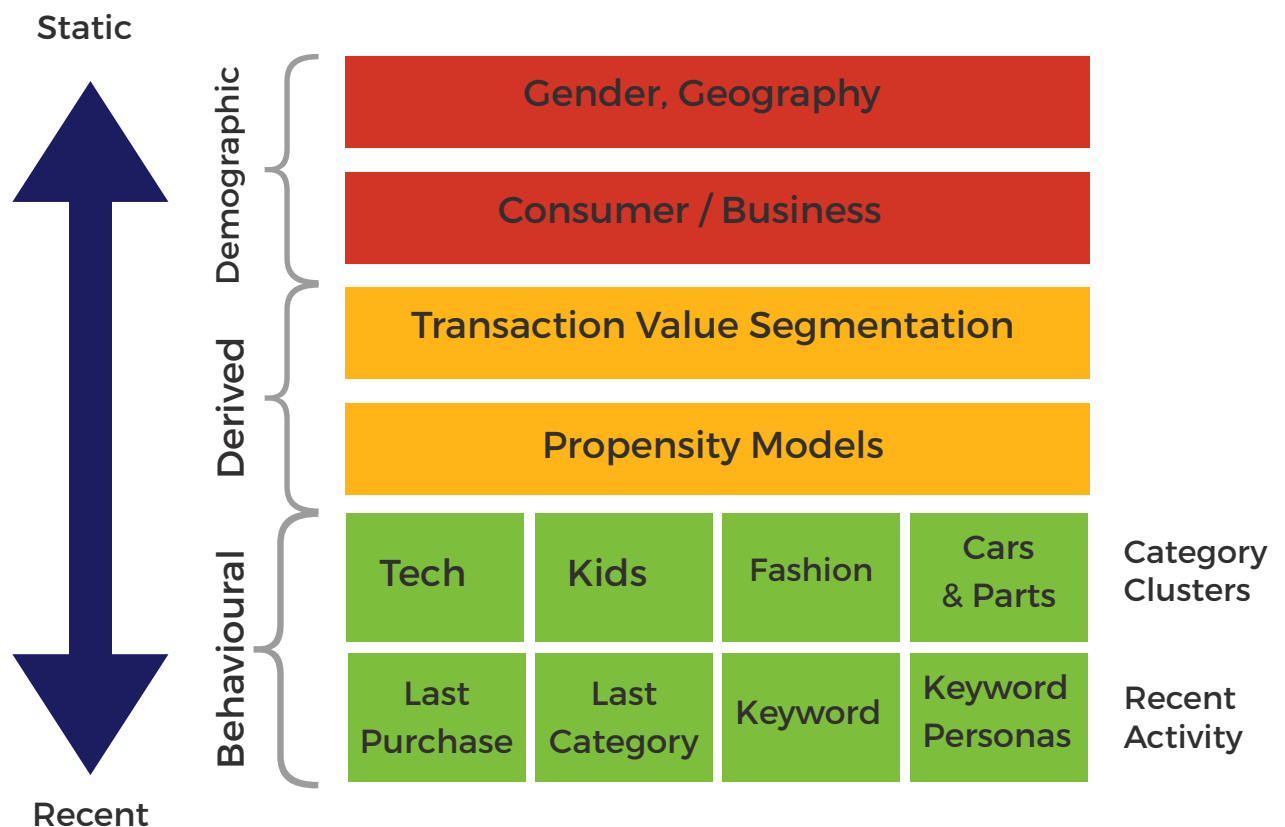
ADVANCED SEGMENTATION AND TARGETING OPTIMIZATION

There are many different levels of targeting.

We use six segmentation categories:

1. **Customer profile characteristics** - Demographics, geographics and customer set preferences.
2. **Customer lifecycle groups** - Most commonly grouped in categories like new subscribers or prospects, active customers and lapsed or no longer engaging in email.
3. **Customer behaviour in response and purchase (observed and predicted)** - This is the most powerful method, though also requires more technology to deliver it.
4. **Customer multi-channel behaviour** - Targeting based on channel preference.
5. **Customer value** - The value a recipient represents at this moment and future expected value.
6. **Customer personas** - Personas provide a helpful way to target based on multiple dimensions.

Here is an example of how we would track and manage audience behavior within each segment:



We use four core targeting methods:

Targeting option 1. Customer profile characteristics (demographics)

For B2B companies, this will include size of company, job role and the industry sector or application they operate in. We will test multiple targeting methods and increase relevance of your emails for your audience as well as conversion rates. Different messages will be developed for people with more strategic interest. We may also test messaging both regionally and nationally if applicable.

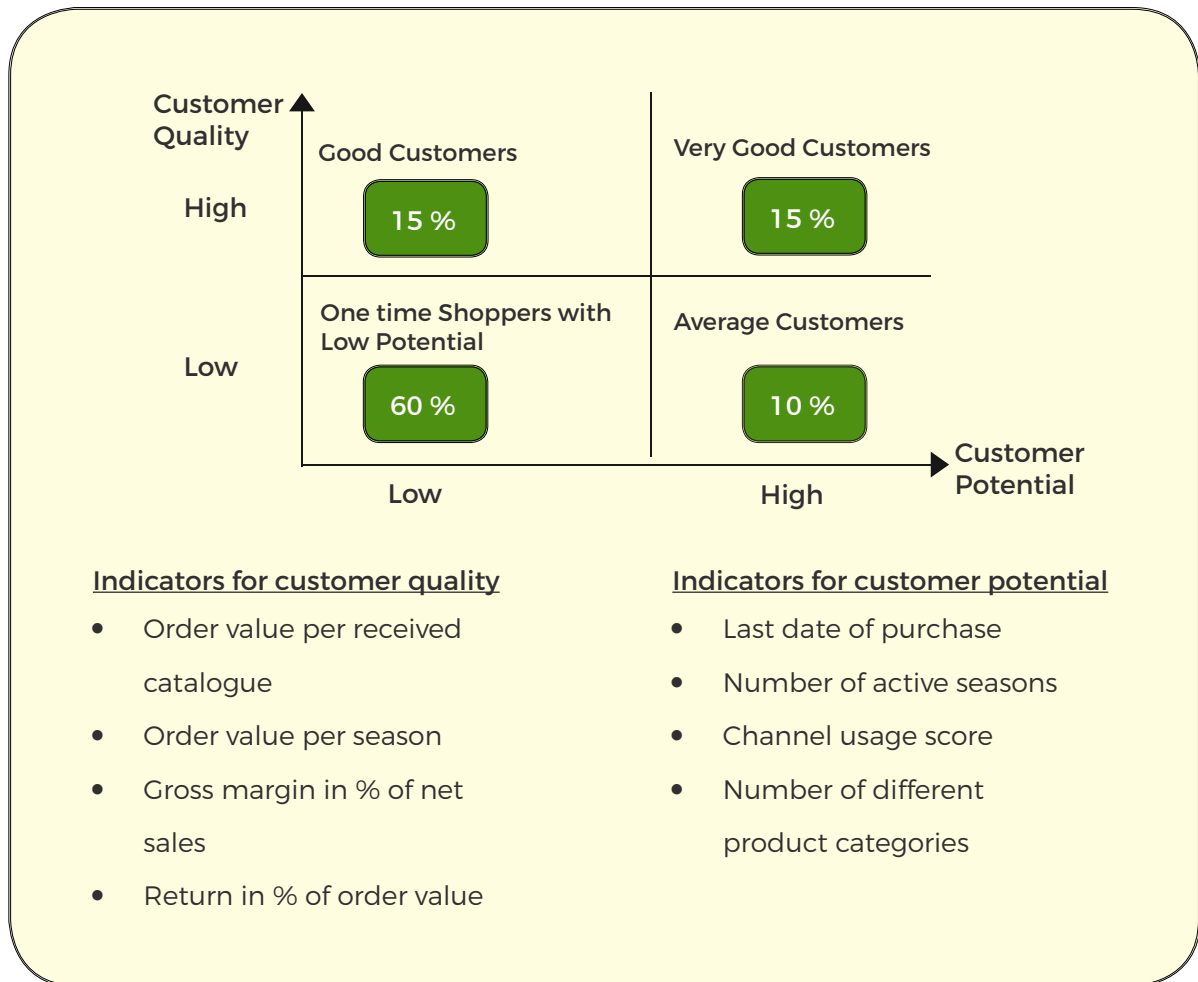
Some demographics will naturally have heightened response to a certain type of message. Some prospects may like a more rational appeal in which case a detailed email explaining the benefits of the offer may work best. Others will prefer an emotional appeal based on images and with warmer, less formal copy. We will execute a variety of targeted messaging strategies.

Targeting option 2. Current and predicted value

We understand that you work hard to gain loyalty and retain current customers. We will target the following groups in our efforts:

- 1. Most-valuable customers (MVCs)** - These are the customers who contribute the most profit and are typically a small proportion of the total customer base. The strategy for these customers focuses on retention rather than extension. Often this strategy will work best using direct personal contact as the primary communication channel, but using online marketing for support where the customer has a propensity to use online channels.
- 2. Most-growable customers (MGCs)** - Customers who show potential to become more valuable customers. They are profitable when assessed in terms of lifetime value, but the number of product holdings or current value is relatively low compared with the MVCs. Strategies for these customers center on extension, through making recommendations about relevant products or services based on previous behaviors or interests. When considering loyalty-based segmentation, it's useful to compare current against future value.

Here is an example of a matrix depicting value:



Once we have defined these groups and set up the customer relationship management infrastructure to categorize customers in this way, we can then deliver targeted messages.

Targeting option 3. Current and predicted behaviour

On an ongoing basis, each customer or prospect is scored according to their response whether it is the number of opens or clicks, . Different communications can then be sent to list members depending on their historical level of activity. We will analyze your email distribution via an **Email Activity Segmentation Evaluation**.

The E.A.S.E analysis first breaks down the email file into two categories: New and Mature. New represents addresses that have been on a marketer's file for less than three months. Mature are those addresses that have been on a marketer's file for over three months. Each category is then further segmented based on customer email activity.

The New segment is broken into two categories:

- **Rising Stars:** Subscribers who have both opened and/or clicked on an email.
- **Question Marks:** Subscribers who have been inactive for the previous three months.

The Mature segment is broken into three categories:

- **Superstars:** Subscribers who have opened or clicked within the most recent three months.
- **Nappers:** Subscribers who have opened or clicked emails more than three months ago.
- **Dormants:** Subscribers who have been inactive for the past 12 months. Rising Stars, Superstars and Nappers are considered active segments. Question Marks and Dormants are considered inactive segments.

The new segment will have other communication needs and therefore should be handled differently than the mature segment. This split can also give an indication of the effectiveness of your email communication during the 'honeymoon period' of the email relationship.

A more sophisticated method of understanding behaviour is to categorise customers according to the details of their recency, frequency, monetary value and category of products purchased (RFM analysis). With the right system of tracking and web analytics, it should be possible to see not only which types of links in an email a customer has clicked upon, but also which types of web pages they have visited as a result of that communication. We will help you determine **Multi-channel behaviour (channel preference)**.

Targeting option 4. Customer personas including psychographics

Personas are a powerful technique increasingly used to improve the usability and customer centricity of a website and other communications. Digital customer personas are a summary of the characteristics, needs, motivations and access platform preferences of different groups of users.

Personas are essentially a 'thumbnail' description of a type of person. These have the benefit that they characterize segment types in the context of the targeting options mentioned above such as stage in lifecycle, demographics and style preferences. We can also include psychographics which summarise the mental attitudes and motivations.

Here is a summary of some guidelines and ideas on what can be included when developing a persona:

- Demographic: age, gender, education, occupation and for B2B, company size, position in buying unit.
- Psychographic: goals, tasks, motivation.
- Webographics: web experience (months), typical usage location (home, work, while on the run), usage platform (broadband, mobile), usage frequency, favorite sites and online.

EXECUTION : INTEGRATION AND ENGAGEMENT OPTIMIZATION

One of the major strategic concerns in email involves selecting the best frequency and types of touches for your business. We will develop adoptive tactics for engagement.

Strategy 1: Set best email frequency

Is there an optimal email frequency? Is it one email a quarter, week, month or day even? Is less more or is more more?! This is a basic question every digital marketer has to try to answer to maximise profit of email activity.

We are looking to achieve the right balance between email overexposure and underexposure. With overexposure, the recipient receives email from the same company so frequently that they don't have the time to read it or feel their email is being flooded. They become 'emotionally unsubscribed'. Worse than this is if they hit the report as spam or junk button, as this has deliverability implications.

On the other hand with underexposure, opportunities and sales are lost since the customer does not receive emails frequent enough.

We will conduct tests to determine the best email frequency.

An example may include:

- Defining a random control group to test frequency changes against. Here you continue with current mailing frequency for the control group and then vary the frequency for other groups and review changes in response per 1000 subscribers. We can try frequencies of 1,2,3,4 times per month and calibrate the right frequency for your audiences.

Strategy 2: Creating effective email templates and creative

Effective email templates should balance the need for visual prominence of.

- A main text headline.
- Copy to engage (where relevant, like an editorial on an e-newsletter).
- Sub-headings.
- Different blocks of content and offers.
- The call(s) to action.

Strategy 3: Assess headlines

Since most of the readers of your email will only scan them, it's important to offer clear messages in the header and within the sub-headlines or section.

The best barometer is to ensure that all headings and text are clear if images are blocked.

Strategy 4: Visual focus or priority on a limited number of areas

Although readers can scan quickly, a page will be much more effective if there are clear visual priorities on a limited number of areas.

Strategy 5: Use pyramid style copywriting

Sometimes we will only browse the first part of the email above the fold, so you need to make sure the first part of your email engages. It is worth testing if a call to action should be visible above the fold. The top of the email becomes the preview pane before the user scrolls down.

Strategy 6: Clear calls to action

Your call to action should describe what happens or which action is needed from the recipient. This tells the reader what to expect.

Strategy 7: Ensure images are effective

Some of the image considerations are:

- Relevant to product or offer.
- Quality effective to support message and offer.
- Images linked rather than embedded to reduce weight of email.
- Alt-text tag used to explain message when images are blocked by the email client.

Strategy 8: Crafting effective copy

To write successful email copy, you need to start by thinking about how readers interact with email. When running win-back and welcome campaigns consider also the stage of the relationship. For example a more conciliatory tone with softer sell may work better in win-back.

Effective subject lines

The reality of email subject lines is that your readers aren't waiting to lavish their eyes on your email, rather their fingers are hovering over the delete button waiting to assign it to trash. Readers use the subject line to self-qualify the email to themselves. The subject line is not just about getting the email opened by the maximum number of people, it's about getting the people most fitted to the offer or message to open the email.

Whilst intrigue and ambiguity may increase open rates, it may not always translate to click rate increase. Clarity and specificity in the subject line can often be the most powerful approach to getting good click rates.

We all know that subject lines are important, but do you know the part which is most important? For us it's the first two words. By using a technique called 'frontloading', you try and craft subject lines that have the most important or most compelling words at the front of the subject line. Characters also matter. Comma's, slashes, lines, stars, capitals can have an impact on open rates. Also appropriate symbols like a heart (♥) can make you stand out in the inbox, so should be tested. Email clients like Gmail and Outlook.com and diverse on mobile devices display sender name, subject and the first line of the email in the inbox. This first line is called the Pre-header or "snippet" and can also influence your open rates and the user experience.

Make copy scannable

Since we tend to read 25 percent slower from a computer screen,

We should write less copy when writing for the web or email. Nielsen suggests 50 percent of the original for web copy. We can suggest that for email, which tends to be read in a smaller window, and in a different context, this should be even shorter.

These are some approaches to build credibility through email.

- Try to achieve 'connection' with the reader to show that you understand them by using their language and buzzwords.
- Spell out the benefit the feature gives. For example a bulleted list could use different fonts or formats to emphasise benefits.
- Backup with facts and numbers.
- Build testimonial elements into your emails such as customer quotes, number of customers, client names and independent reviews and awards.
- Customer-centric copy.

EFFECTIVE WEB PAGE COPY SHOULD FOLLOW THESE GUIDELINES:

Relevance - With limited space, we have no room for fillers. Stick with what matters-the details of the offer and how to receive it. Personalise the email where possible. Remove content or offers that do not fit with the recipient.

Accuracy – Don't get carried away with your copy; don't set expectations so high that you overpromise and can't deliver what you promised.

Brevity – Brevity goes with chunking and scannability. Write your copy, reduce the word count and then reduce it again. Give yourself targets and beat them without sacrificing good English and understanding.

Scannability – This is reading without reading every word, just picking up the sense of each paragraph from the keywords. The eye will pick out words at the start of paragraphs and those emphasized in bold.

THE FIRST PARAGRAPH OF AN EMAIL MUST:

Engage – when reading this, perhaps in the preview pane, recipients are deciding whether to delete or read (scan) further. So as for any creative, the opening needs to be powerful.

Add detail to the subject line or the headline – the recipient will remember the gist of the subject line, and it is always there at the head of the email, so reinforcement is the main objective of the message here.

SUMMARIZE THE WHOLE

The opening of an email is often compared to the opening of a press release which typically uses an 'inverse pyramid' structure to summarise the main points of the email message in decreasing order of importance, as briefly as possible.

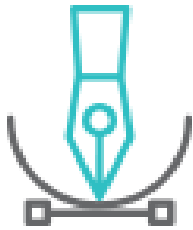
Include a call to action - if the reader likes the offer or wants to know more, we shouldn't make them scroll down to find an elusive hyperlink - it should be there in the first paragraph. This is a mistake often made by email 'newbies' - leaving the best until last. As different people will be ready to leap off the email at different points through the copy or offers, then repeating the call to action in different ways throughout the email is advisable. It is often more effective to make the call to action about the value and purpose of clicking rather than emphasising the actual action of clicking. For example 'start free trial' rather than 'click here'.

Making copy engaging - We will connect with your audiences using the following email campaign checklist.

Eight key copy questions:

- **Question 1** - Does your copy excite?
- **Question 2** - Does your copy convince?
- **Question 3** - Is your copy natural?
- **Question 4** - Is the copy length right?
- **Question 5** - Did you repeat yourself?
- **Question 6** - Which copy stands out?
- **Question 7** - Do we have a powerful headline?
- **Question 8** - Will our copy achieve action?

SUBJECT MATTER EXPERTS



Brand
Development
& Design



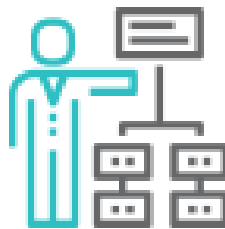
Web
Development &
Design



Communication
&
PR



Market Research
& Analytics



Strategic
Planning



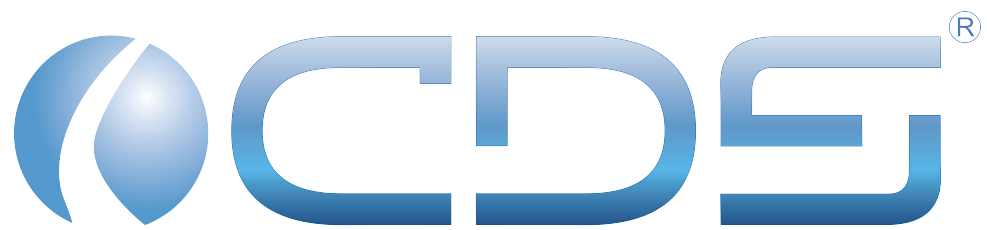
Customer
Relationship
Management



Data
Management
Services



Technology
Integration



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