Send A Marketing Email

USER JOURNEY

USER & SCENARIO

A marketing coordinator at a B2B SAAS company needs to email current customers an update on the business' COVID plan and potential customer impact. They received the assignment a few minutes ago and need to send the email ASAP.

USER GOALS & EXPECTATIONS

- I can draft & send a test message to my team within 5 minutes for review/approval
- I can save my campaign as a draft and edit until approved, then send out
- I can see which customers received/opened the email and when
- I can send followup campaigns based on email delivery status (opened, clicked, etc)

	PLAN	PREP & DRAFT	APPROVE	SEND	WRAP UP
USER ACTIONS	A) Meet with manager to discuss email requirements and messaging goals	A) Export current customer list from CRM B) Import current customer list into email marketing program C) Select template D) Write email content E) Preview for mobile/desktop F) Email draft to manager/myself	A) Review/QA draft in my inbox B) Receive feedback from manager C) Incorporate feedback D) Send 2nd draft for approval E) Receive approval	A) Schedule/send email	A) Review campaign reporting B) Respond to customers who reply with questions/comments C) Update customer list for recipients whose email has changed
CHANNELS	• In Person	• CRM • Email marketing program • Gmail	• Email marketing program • Gmail	• Email marketing program • Gmail	• Email marketing program • Gmail
PAIN POINTS	• This was a last-minute request from my manager: not a lot of time to get this campaign right	• Customer mailing list isn't current • Merging mailing lists takes awhile • Email feature takes too long to load • Multiple steps on different screens make it easy to miss things when editing a draft	• It's easy to miss formatting/spelling issues until after the email is sent so I send a lot of drafts for review • Getting feedback on drafts takes awhile. It comes in different emails from different people and may require several revisions before approved	• Our customer-facing team isn't aware of what's in the email that just went out	• Figuring out what to do with bounced emails is a pain - do we resend? Call them by phone? How do we clean up our mailing list for next time?
OPPORTUNITIES	• Provide pre-written content templates based on most common email types/messages • Add customer logo & brand colors to their account as part of onboarding. Automatically add to all templates in customer library.	• Integrate better or sync with CRM to make mailing list updates easy or automatic • Refactor feature for load time • Review the UI and workflow to see if we can simplify into fewer screens/steps	• Automatically check spelling/formatting and flag customer if there are issues before they proceed • Include approval workflow in the app	• Alert the user 10 minutes before the email goes out • Automatically BCC the email campaign to the sender (user who drafted campaign) when it goes out • Allow user to save a list of internal staff to receive who should receive any emails that go out	• Refactor bounce reporting within the app to add clarity • Send bounce report along with suggestions on how to handle • Create a support article to clarify common questions about email statuses delivered/bounced etc)

MARTHA BOULIANNE

linkedin.com/in/boulianne
boulianne.net/design