

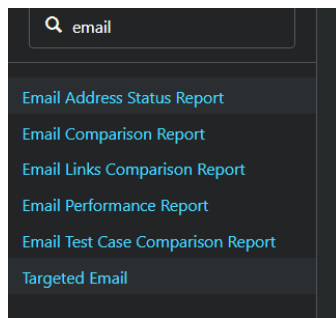
EveryAction Email Basics

Intro

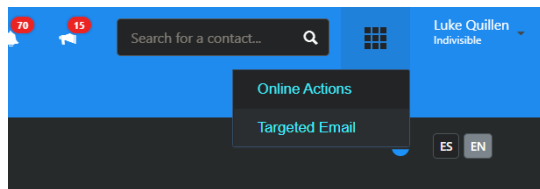
Everyaction's Targeted Email Tool is a powerful and useful asset for many local Indivisible groups. It allows them to both reach out to their members to share information about upcoming events and volunteer opportunities, as well as serve as another data point when assessing members' activity within a group. The step below will show you how to access the Targeted Email Tool and how to draft and send your emails.

Navigating to EveryAction Email

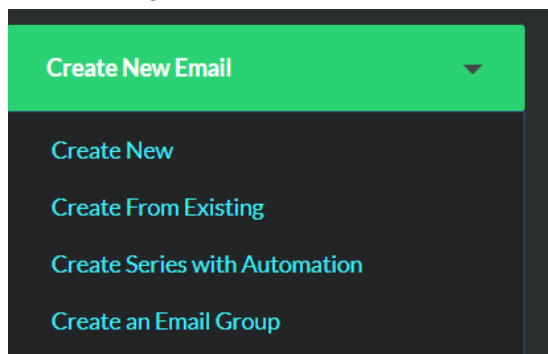
Option 1: Using the sidebar on the left. Search "email" and choose the link at the bottom.



Option 2: Click the rubix-cube at the top right and choose the second option on the drop-down.



Once you are in the EveryAction "Targeted Email" portal, you will have the 4 options once you click the green "Create New Email" button. We are only using the first two right now ("Create New" and "Create From Existing"). Here's some [info](#) on the new "automation" option (EA will be transitioning all "series" emails to this option in the near future).



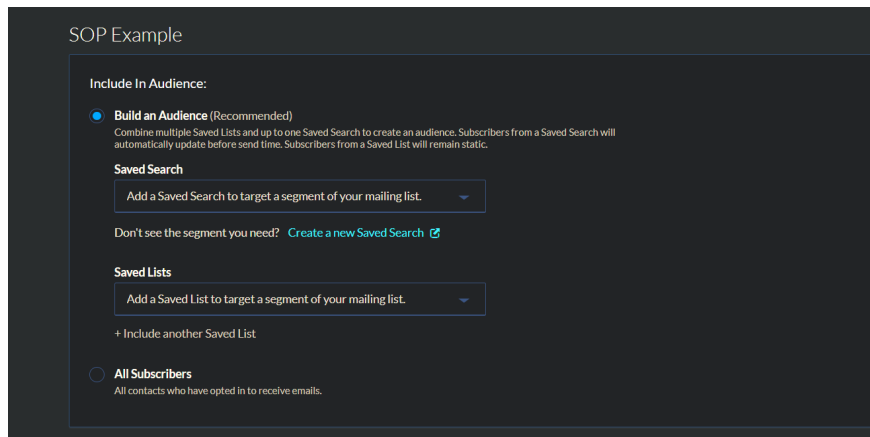
Once you've decided whether your email will be a totally new creation or based on an existing email (as a template), your next decision will be which contacts you'd like this email to go to.

Choosing Your Audience

You have 3 main options when building an audience for your email. You can either choose a saved search, a saved list, or send it to "all subscribers." Never send to all subscribers.

If you have a search or list already saved (the only difference between the two is that searches are dynamic and lists are not), simply choose that option and begin typing in the name of your search or list in the drop-down and choose it. If you're not seeing the search or list in the drop down then you should check the sharing options of the folder you saved your search or list into.

If you do not have a search or list built yet, simply click the "create a new saved search" and create one in the window that pops up and save it.



The screenshot shows a dark-themed interface titled "SOP Example". Under the heading "Include In Audience:", there are three main options, each with a radio button. The first option, "Build an Audience (Recommended)", is selected and includes a sub-description: "Combine multiple Saved Lists and up to one Saved Search to create an audience. Subscribers from a Saved Search will automatically update before send time. Subscribers from a Saved List will remain static." Below this, there are two sections: "Saved Search" with a dropdown menu labeled "Add a Saved Search to target a segment of your mailing list.", and "Saved Lists" with a dropdown menu labeled "Add a Saved List to target a segment of your mailing list.". A link "Don't see the segment you need? Create a new Saved Search" is also present. Below the "Saved Lists" section is a link "+ Include another Saved List". The third option, "All Subscribers", is unselected and includes the sub-description "All contacts who have opted in to receive emails."

Once you've chosen your audience, you should click "Calculate Recipients" on the right side of the screen to check that your audience is generally the correct size. For example, if you intend to send this email to group leaders in Michigan and know there are about 100 of them, and the recipient number shows as 2,000 - you know there's an issue with your search/list. That said, the calculated recipients number will always be a little higher than the number of contacts in the search - because some contacts have subscribed to emails from more than one email address.

Include In Audience:

- Build an Audience (Recommended)**
 Combine multiple Saved Lists and up to one Saved Search to create an audience. Subscribers from a Saved Search will automatically update before send time. Subscribers from a Saved List will remain static.

Saved Search

All Tennessee

[Edit Search](#)

Don't see the segment you need? [Create a new Saved Search](#)

Saved Lists

Add a Saved List to target a segment of your mailing list.

+ Include another Saved List

☐ **All Subscribers**
All contacts who have opted in to receive emails.

Recipient Summary

Calculate the number of email addresses that are subscribed to receive emails in your audience

Calculate Recipients

Why use segments?

Exclusions

Once you've chosen your audience, you'll then scroll down to the exclusions section of the page. From there, you're going to click the small link towards the bottom that says "Show Additional Exclusions," and you're going to choose the "Exclude low-performing email addresses with a score of.." option and then select 1. This will exclude email addresses that have almost never opened an email from us (which improves our open rate and thus inbox placement from email providers). As you move forward in your email program, I encourage you to move that number up to 2 and then 3 slowly. Doing so will improve your inbox placement and open and click rates in the long term.

[Edit Search](#)

Don't see the segment you need? [Create a new Saved Search](#)

Saved Lists

Add a Saved List to target a segment of your mailing list.

+ Exclude another Saved List

[- Hide Additional Exclusions](#)

Email Address Performance

Excluding the lowest performing email addresses improves your deliverability and helps ensure your email lands in the Inbox and not the SPAM folder

[Learn More](#)

☒ Exclude low performing email addresses with a score of

1

Email Type

Exclude a specific email type from your recipient list. Select a maximum of 2.

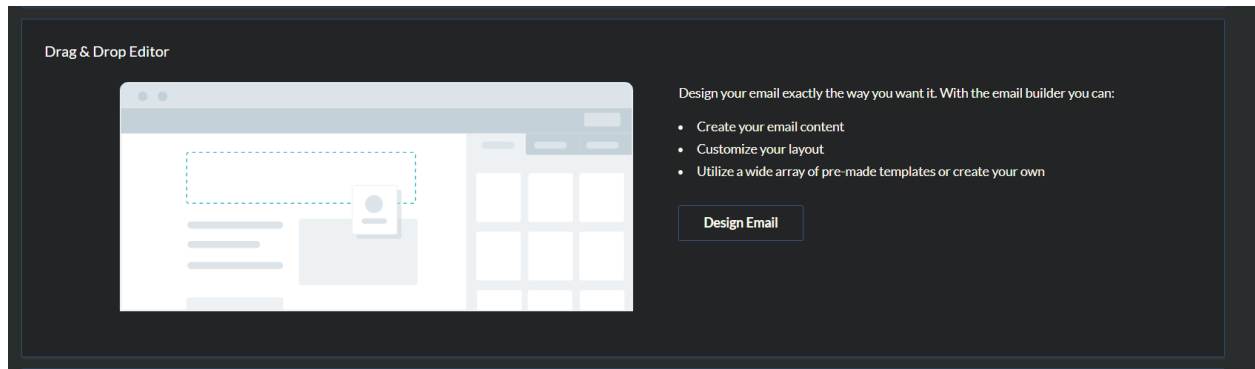
☐ Exclude Personal
 ☐ Exclude Work
 ☐ Exclude Other

Email Series and Workflows

☒ Exclude contacts in Email Series or Workflows

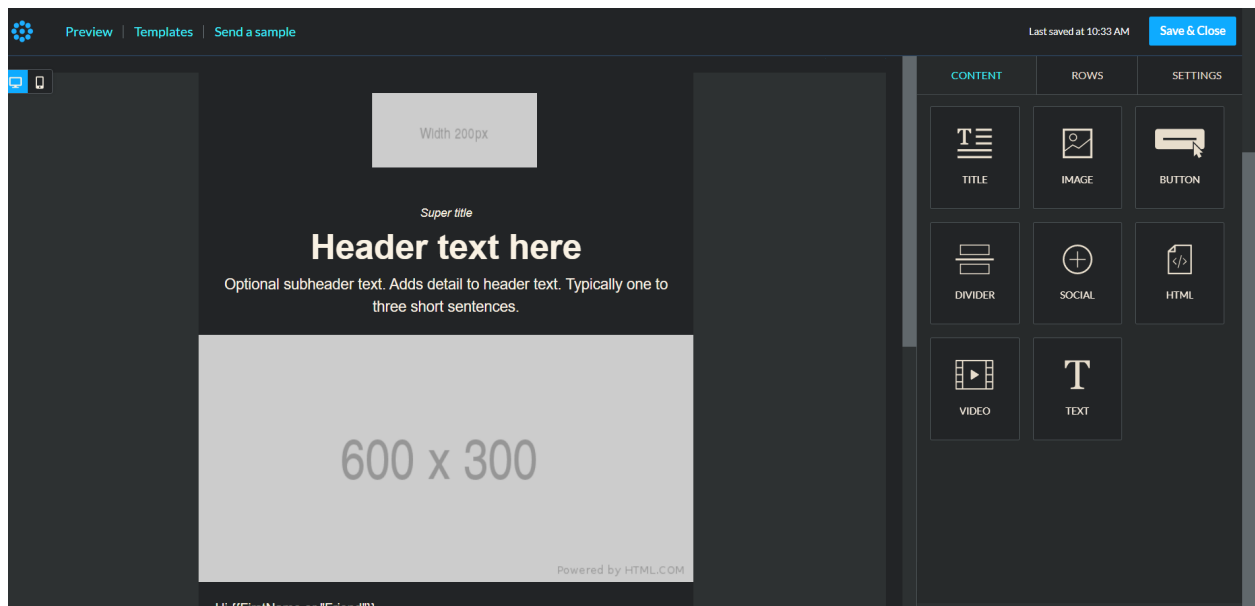
Designing Your Email

After you've filled in your "Message Info" with the applicable information, scroll down and click "Design Email" and then choose the "Drag and Drop" editor.

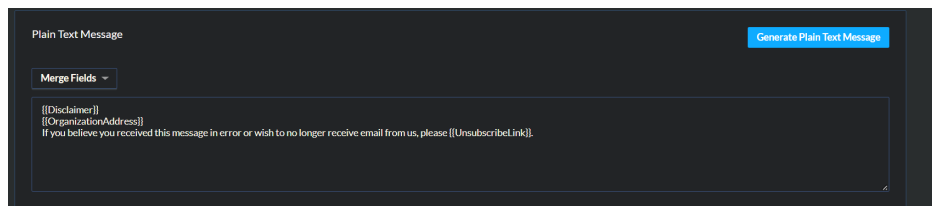


From here, you'll have the option to choose a template - choose the template that best applies to the email you're sending and click "Use this Template".

Once inside the email design editor, simply insert any text, links, and images you'd like! You're also encouraged to preview your email and send yourself a sample for general proofing.



Once you're satisfied with your email, click "Generate Plain Message" (for email subscribers who are not able to receive HTML based emails for some reason). And edit the plain text email accordingly.



Then scroll down and click "save" and then once refreshed, scroll down and click "continue."

Reviewing and Sending Your Email

Once you've reached the "Review and Deliver Your Message" page, congrats you're almost at the end! The only things you have left to do are to correct any errors that EA has flagged (error shown on screenshot is due to me not actually designing an email in this example, so the url included is not a real URL). Errors that are colored red will stop your email from being sent, and errors colored in yellow are recommendations for you to change something, but won't stop you from sending the email.

Draft saved on 7/14/2022 at 10:38:43 AM

SOP Example

Review Message Info

Audience 1175	Subject Line Test Email	From Luke Quillen (luke@indivisible.org)	Reply To luke@indivisible.org
Footer Required Footer Content is Present	Drag & Drop Content Message contains at least one invalid URL. Please review invalid URL here and fix before sending.	Plain Text Required Content is Present	Saved Searches & Lists 0 distinct Saved Lists in use 2 distinct Saved Searches in use

Recipient Summary

Last updated Jul 14, 2022 10:38 AM

1,175

Subscribed Emails In Your Audience

Opted Out	694
Duplicates	100
Excludes	1,454
Bounced	136

Included

All Tennessee

Select a Campaign

Specify a Campaign that will get associated with recipients who receive this email. Changing the Campaign for a series that has already launched will impact existing data.

Associate a Campaign to your email message

For Staff Only: After all of you have resolved any errors, please post a link to your email draft in the Slack channel for someone to review. Once someone has responded to your post and cleared it, feel free to either schedule your email to send in the future or send it immediately!

Schedule Message

☐ Send email immediately

☒ Send email at scheduled time: July 14, 2022 at 11:38 AM (ET)

Date and Time

07/14/2022

11 : 38 AM

Confirm and Deliver

By sending or scheduling an email, you agree to our [Terms of Service](#) and [Acceptable Use Policy](#). If you have any questions please [email support](#).

☐ I have reviewed my message for errors or issues, and agree to the Terms of Service.

Cancel

Back

Send Sample Email

Save

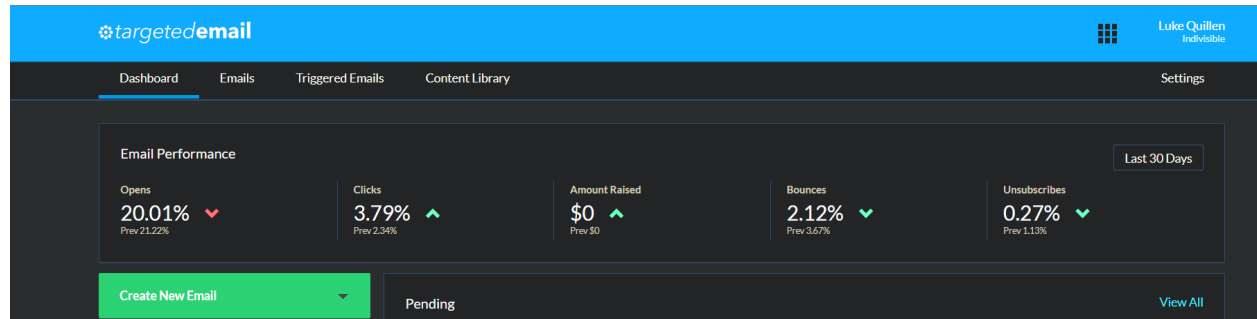
Schedule

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Excluded

- Combined Exclusions
- Contacts In Email Series
- Email Address Performance

One of the most important aspects of a successful targeted email program is analyzing data from emails that have been sent, and using that data to inform how you send future emails (whether that's audience building, added exclusions, content design, or the timing of the email). To review data, navigate to the “Emails” section of the main targeted emails dashboard and click it.



Once there, find the email whose data you'd like to review and click towards the right on the dropdown and choose to view the “results”

The screenshot shows the 'Emails' section of the dashboard. On the left, there's a sidebar with a 'Create New Email' button and a list of email statuses: Sent (1187), Pending (0), Drafts (198), Series (2), and Emails in Series (1). The main area shows a table of sent emails. The table has columns: Name, Recipients, Opens, Clicks, Conv. Rate, Amt. Raised, Bounce, and Unsub. The first email is 'GL Group Map Update' sent by Jesse Bacon on Jul 13, 2022, 7:28 PM. The second email is 'GA Lets Go Joe Window Email' sent by Abby Tennenbaum on Jul 13, 2022, 5:46 PM. A red circle highlights the dropdown menu for the first email, which shows options: 'GL Group Map Update Results' and 'Edit Email Name'.

Name	Recipients	Opens	Clicks	Conv. Rate	Amt. Raised	Bounce	Unsub.
GL Group Map Update Sent by Jesse Bacon Jul 13, 2022 7:28 PM	9,979	17.44%	3.72%	0.00%	\$0.00	1.42%	0.09%
GA Lets Go Joe Window Email Sent by Abby Tennenbaum Jul 13, 2022 5:46 PM	84	20.24%	0.00%	0.00%	\$0.00		

The following page is where you'll be able to gain insight to inform future emails!

	Email Details		
	Email Name	GL Group Map Update	Email Subject
			The Group Map Relaunch is Coming!
	Date Sent	Jul 13, 2022 7:28 PM	Included In Audience
			 Group Leadership for Emails
	Sender	Jesse Bacon	Excluded From Audience
			Contacts In Email Series
	Detailed Results		
	All metrics below are available for export in the Email Comparison and Email Test Case Comparison Reports located in the Report Manager.		
	Statistics	This Email	Historical Stats
	Recipients	9,979	2,078,861
	Opens	17.45%	22.55%
	Total Opens 	37.31%	22.55%
	Clicks	3.74%	2.66%
	Clicks Per Open	21.42%	11.79%
	Amount Raised	\$0	\$0

Have fun emailing!