

Email Marketing Planning Template



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Instructions

The Email Planning Template (Email Planning Template tab) is divided into three sections: Email Planning, Email Results Tracking, and A/B Testing Planning & Results. Each section contains a column for various components you should plan for or keep track of, as well as a description or example to help you understand what each column label means.

If your company sends more emails than outlined in this template 3, you can insert additional rows as needed. You'll also notice columns M through O (and columns L through P in the "Total" row) autopopulate based on the numbers you enter to generate the Delivery, Open, and Clickthrough Rates for your emails. The "Total" row shows the overall data for your email efforts – just be sure to double check your formulas if you add any rows.

Not every company will send email the same way. We encourage you to customize this Email Planning Template however you see fit to better suit your organization's needs and goals to make it most useful for you. Since frequency, timing, messaging, content, design, and other elements of email marketing will all vary, feel free to adjust the template by hiding certain columns you don't need them, or by adding in new ones we didn't account for. Once a new month starts, you can duplicate the "Email Planning Template" tab by right clicking on it, selecting "Move or Copy", selecting the "Make Copy" checkmark, and then renaming the tab for the current month.

Email Planning								Email Results Tracking						A/B Test Planning & Results		
Email Topic	Owner	Status	Subject Line	Email Link	Send List	Suppression List (s)	Total Emails Sent	Total Emails Delivered	Total Emails Opened	Total Clicks	Deliverability	Open Rate	Clickthrough Rate	Leads Generated	A/B Test Description	Summary of A/B Test Results
Ex. New Road or Monthly Email Newsletter	What are your team's goals for this email?	Choose from the dropdown or select "Not Started", "In Progress", "Ready to Test", or "Completed".	What subject line are you going to use to entice recipients to open your email?	Link to your email or email ID link from your email software for you to track links of any other team to track.	Name of your email list with an opt-in or opt-out preference. Please use the "Make Ready" button.	Are you going to exclude from your send list any of the following? (Check all that apply.) - Unengaged Email - Bounced - Previous to Opt-In - Make Ready	How many email addresses did you send your email to?	Of the email addresses you sent your email to, how many actually landed in an inbox?	Of the email addresses you sent your email to, how many were opened?	How many unique individuals clicked a link in your email?	Automatically calculates Total Emails Delivered / Total Emails Sent	Automatically calculates Total Emails Opened / Total Emails Delivered	Automatically calculates the percent of recipients who clicked through from your email out of total emails opened.	How many new contacts did you get from email recipients filling out the form on your landing page?	Describe any A/B test you're conducting with this email send.	What were the results? Which variation won?
Email Send Date											#DIV/0!	#DIV/0!	#DIV/0!			
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