

THE EMAIL MARKETER'S PRIMER DIGEST

A CRM field manual for the music industry, covering
relevance, data, design, delivery, reporting and not fucking up.

FOR NEW CRM COORDINATORS, CAMPAIGN MANAGERS, EMAIL PRODUCERS, AND ANYONE WHO HAS JUST BEEN HANDED THE
LOGIN TO THE CRM SYSTEM.

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THE PRIME DIRECTIVE

Send the right message, to the right person, at the right time, in the right channel, for a reason they understand.

At RBNR, we call this Audience Relationship Management (ARM): building direct relationships with an audience rather than simply broadcasting at them. In most organisations, this work sits under Customer Relationship Management (CRM), so for simplicity we'll call it CRM throughout this guide. Everything in this guide comes back to one thing: relevance. Better data gives you context. Better segmentation helps you choose the right people. Better timing makes the message more useful. Better creative makes your message easier to understand. Testing makes the next send better than the last one. The point here is not to send more marketing on broadcast mode. The point is to make marketing more relevant.

HOW TO USE THIS GUIDE

This guide has two speeds. START HERE is the first 30 to 45 minutes: the operating knowledge you need to brief, target, approve, quality assurance (QA), send and learn safely. Read that first.

UNDER THE BONNET is reference material. You do not need to become a developer. You do need to know enough to build confidently, understand what you are looking at, brief specialists, QA intelligently and ask the right questions when something breaks.

WHO THIS IS FOR You might be a CRM assistant, coordinator, campaign manager, email producer, digital marketer, artist marketer or simply the person who has just been handed the login to the CRM system This is an operational primer, not a copywriting course, advanced deliverability manual or substitute for legal advice.

THE OPERATING RULE Know what you know. Check what you can check. Do not guess. When the consequences are bigger than your competence, stop and escalate.

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1. START HERE

The first 30 to 45 minutes. This is the operating core: relevance, permission, audience, suppression, personalisation, channels, briefing, QA, measurement and what to do when something goes wrong.

01 ERGH THIS IS DUMB. WHY DO WE EVEN DO THIS?

Social media boasts enormous numbers. It is loud, brash and ubiquitous, and apparently everyone on Earth is there. So why bother with CRM? Because having 500,000 followers does not mean you can actually speak to 500,000 people.

Social platforms are enormous public spaces with equally enormous advertising businesses attached to them. You publish something and the platform decides how widely it travels. Want more reach? Pay. Want a more specific audience? Pay. Want richer information about the audience? There is usually another advertising, analytics or data product or third party agency waiting to take your money.

Social media can still be incredibly powerful. Artists break through on it. Songs go viral. Careers are launched. Millions of streams, ticket sales and purchases can follow. Naturally you might think, "Hey, I can do that too." Maybe you can. Well, good luck, buddy. The house makes the rules and the house always wins. Algorithms change, features disappear, APIs switch off or become too expensive to access, advertising costs ramp up and platforms fall out of fashion. Occasionally, entire platforms disappear - remember MySpace? ("what's a MySpace?" says every Gen Z reading this).

CRM gives you something different: a direct relationship. Somebody gives you permission to contact them, their email address enters your database, and perhaps later they share a mobile number or enable app notifications. There are still costs, but you are no longer entirely dependent on a social feed deciding whether somebody who already asked to hear from you gets to see the message.

You do not own your fans and you do not own their personal data. What you can build is a direct relationship with people who have given you permission to communicate with them. Treat that permission like it matters, treat that relationship like royalty. It is a privilege for any company to be in that inbox. Send interesting things, give people access and useful information, and do not hammer them with rubbish simply because there is a hole in the marketing calendar.

One day you are going to need that relationship. Maybe an album has just been released, tickets have gone on sale, or there are twenty four hours left in a chart battle and another few hundred sales could make a meaningful difference. That is a terrible moment to discover that your whole audience sits behind somebody else's algorithm.

CRM does not replace social media. It makes social media better. Where appropriate and permitted, your first-party audience can help you coordinate email, SMS, push, paid social, organic social and the website around the same campaign. Social media can help you find an audience. CRM helps you keep a relationship with them.

02 YOUR FIRST WEEK IN THE HOLE. I MEAN ROLE

Before you send anything, learn how the organisation operates. Every company has its own platforms, permissions, naming conventions, approval routes and historical quirks. Your first job is not to change them. Your first job is to understand what the hell is going on, who owns what and who to call when something looks wrong.

You should be able to answer the questions below before you are trusted with a live send. If nobody can answer one of them, that is useful information too. Write the answer down and make it part of the operating process.

FIND OUT	WHY IT MATTERS
Who owns the CRM platform?	You need to know who controls access, configuration and platform decisions.
Who owns the sending domain?	Authentication, reputation and major deliverability issues need a clear owner.
Where does consent evidence live?	You must be able to explain why a person is contactable and where that permission came from.
What are the standard suppressions?	Know who should never receive a normal marketing campaign by default.
Which audiences and segments are safe to use?	Do not build a send from a mystery list simply because it exists.
Where do campaign briefs live?	Everyone needs one source of truth for objective, audience, timings and content.
Who approves what, and by when?	Know the approval gates before work begins, not five minutes before launch.
Where does feedback happen?	Avoid contradictory notes spread across email, Slack, WhatsApp and somebody's memory.
Which inboxes, devices and email clients do we test?	Testing should reflect the audience and the organisation's agreed QA standard.
Where is reporting stored?	Know the source of truth for campaign performance and historical benchmarks.
Who handles privacy or data incidents?	If personal data is exposed or the wrong audience is contacted, know who to escalate to immediately.
What wins when systems disagree?	Every team needs a defined source of truth when numbers, dates or audience definitions conflict.

The goal is not bureaucracy. It is confidence. Once you know the operating system of the team, you can move quickly without guessing.

03 LOBSTER TRAPS

Every touchpoint where somebody interacts with your artist, brand or organisation is a possible opportunity to build a direct relationship. Think of those touchpoints as lobster traps - you throw your traps overboard into the sea and passively catch wandering, curious lobsters... I mean fans... I'm lost in my own analogy. The website, store, ticketing, presale, competitions, events, QR codes, social media, livestreams, apps, customer service and downloads can all contribute useful data to CRM when there is a sensible reason to capture it. This is classic organic data capture. Now you can run campaigns that supercharge data capture too - in my experience, ticket pre-sale registration and competitions with amazing prizes drive the most data in one go, especially when you promote across your other channels.

Nobody wakes up thinking, “HELL YES! Another marketing database. My favourite!” People provide information because there is value on the other side. Presale access can be valuable. A genuinely great competition can be valuable. Exclusive content, early access, useful tools and meaningful benefits can all create a fair value exchange. “Sign up for news and updates” is considerably less exciting.

OPT-IN IS A CHOICE

Having somebody's email address does not automatically mean you have permission to send marketing or push targeted advertising to them. In the UK, where you rely on consent for marketing, that consent should be freely given, specific, informed and unambiguous. People need to make a genuine choice to opt in. Pre-ticked boxes, buried consent, or making marketing consent a condition of something unrelated are not a

genuine choice. An email address might be required to administer a competition or fulfil an order while marketing permission remains a separate decision. Caveat - there are serious legal consequences tied to this, depending on where you are on planet earth. Make sure you're at least *vaguely* aware of the data laws in your country.

SINGLE OPT-IN AND DOUBLE OPT-IN

With single opt-in, the person signs up and enters the database immediately. It creates less friction and generally maximises completion, but it is more exposed to typos, bots and somebody entering an address they do not control. With double opt-in, the person signs up, receives a confirmation message and confirms control of the address. That adds friction but provides stronger evidence of the signup.

Do not reduce this to a simplistic country rule. Requirements, regulator expectations, organisational policy and the evidential standard you need can vary by territory and use case. Confirm current authoritative guidance from your organisation's legal team or data privacy officer.

NEVER LOSE THE SOURCE

Five years later somebody will ask where those 84,000 people came from. LIST_37_FINAL_IMPORT is not an acceptable answer. Preserve the original acquisition source, subsequent interaction sources and consent history. Do not overwrite the beginning of the relationship every time a fan comes back into your CRM system.

BEFORE YOU DO THIS *If you are importing data, changing suppressions, re-permissioning contacts or working from an unfamiliar source, read Chapter 31, Database Hygiene, before proceeding.*

PROGRESSIVE PROFILING

Do not ask fourteen questions because the answers might be useful one day. Start with what you genuinely need, perhaps an email address and country, then build the profile over time as the relationship develops. You can do this by asking questions in surveys, capturing user data through automated journeys, or driving subscribers to your preference centre to fill in more information. If you incentivise that data enrichment with discount codes, exclusive content, early access, or something your audience will genuinely value, it can be even more effective. The exchange should feel fair. If you want more data, give people a good reason to provide it. If you do not know why you are asking for a field, do not ask for it. The fancy-pants term for this is "Data Minimisation". If you do not know where the data came from, do not import it. If you do not know whether you can market to it, do not send to it.

04 LEGAL SURVIVAL GUIDE

This section tells you what the words broadly mean. It does not tell you whether your specific campaign is lawful. Laws change, territories differ and context matters. When the answer matters, go to the regulator, your privacy team or seek proper legal advice.

TERM / ABBR.	PLAIN ENGLISH
UK GDPR / GDPR	General Data Protection Regulation. Data protection frameworks governing how personal information is collected, used, stored and shared.

TERM / ABBR.	PLAIN ENGLISH
PECR ... (lol)	Privacy and Electronic Communications Regulations. UK rules particularly relevant to electronic marketing such as email and SMS, alongside data protection law.
CAN-SPAM	US federal rules for commercial email, including sender transparency and opt-out requirements.
CCPA / CPRA	California privacy law giving residents rights over certain uses of their personal information.
CASL	Canadian anti spam legislation covering commercial electronic messages and consent requirements.
Data Controller	The organisation deciding why and how personal information is processed.
Data Processor	An organisation processing information on a controller's behalf.
Lawful basis	The legal justification for processing personal information under data protection law.
Soft opt-in	A specific electronic marketing mechanism that may allow certain marketing to existing customers where the legal conditions are met.
Suppression list	Information retained so people who have opted out are not accidentally mailed again.
DPA	Data Processing Agreement.
DPIA	Data Protection Impact Assessment.
DPO	Data Protection Officer.
SCCs	Standard Contractual Clauses used in certain international transfer arrangements.
IDTA	The UK International Data Transfer Agreement.
SAR / DSAR	Subject Access Request. A request by a person to access personal information an organisation holds about them.

A TINY HISTORY OF INTERNATIONAL DATA TRANSFERS

If you have been around CRM for a while, you may hear old terms that are no longer current. Safe Harbour was an earlier EU to US transfer mechanism and was invalidated in 2015. Privacy Shield followed and was invalidated in 2020. The EU US Data Privacy Framework arrived in 2023, with a UK Extension for relevant UK to US transfers. The lesson is simple: international transfer rules change, so do not rely on a privacy deck somebody made in 2017.

05 KNOW YOUR AUDIENCE

Everyone on your list is rarely the best choice of audience for a given marketing message, but you're likely to see this being used most commonly. Segmentation is the practice of identifying groups that have a meaningful reason to receive different messaging. You might move from everyone, to customers, to recent customers, to recent customers of a specific product, to those customers who have not yet bought the complementary product you are promoting.

If you cannot explain why the message should be different, you probably do not need the segment.

More specific is not automatically better. More relevant is better. Segmentation is useful when it changes the message, the offer, the timing or the channel in a way that makes sense for the recipient. I'm leaving it up to you to segment your data.

What's that? You don't know where to start? *sigh* ok fine... I'll help you out just this once:

First, look at how your business thinks about its target audience. There may already be useful segmentation work you can adapt for CRM. Next, look at the types of data in your database. Much of it may be demographic data, such as name, email, city, country or age. If you're lucky enough to have commercial data alongside your CRM data, you may also be able to use RFM segmentation - recency, frequency and monetary value - and blend that into the mix. But every filter should have a reason to be there. For example, if you are announcing a Glasgow show, you might target subscribers in Scotland who bought the latest album but have not yet bought a ticket. Geography, purchase history and ticket status all have a job: each one makes the audience more relevant to the campaign.

Oh... you meant literally how do you segment data in your CRM platform? Most CRM platforms have proprietary data segmentation tools built in. These tools are typically WYSIWYG and fairly user friendly. In fact, the more difficult thing is often selecting the right data rather than connecting it all together. Some platforms may require you to write SQL to manipulate data into the segments that you want. SQL is incredibly flexible, but it also gives you plenty of opportunity to write a query that does something you did not intend. Test carefully, understand what your query is selecting, and get technical support if you need it. The deeper mechanics of SQL are beyond the scope of this manual.

06 SUPPRESSION

Marketers spend a lot of time asking who should receive a campaign. Build the habit of also asking who absolutely should not receive it. That might include people who unsubscribed, hard bounces, customers who already purchased the thing you are promoting, people in the wrong territory, competition entrants who never consented to marketing, complaints, employees or customers already holding the ticket you are trying to sell them.

Suppression is as important as targeting. Good CRM is not merely the ability to include the right people. It is the ability to reliably exclude the wrong people.

RESPECT PREFERENCES

Subscribed does not always mean "send everything". Your organisation may record topic, artist, product, channel or frequency preferences that narrow what somebody has asked to receive. A valid marketing permission does not make every marketing message relevant. Before targeting a campaign, check whether those preferences exist and respect them.

07 PERSONALISATION

Personalisation is one to one messaging at scale. You are trying to make a communication feel more useful, familiar and relevant to the individual receiving it, using information you genuinely know or can responsibly infer.

Writing “Hi Josh” at the top of an email is personalisation, and there is nothing wrong with that. If the data is reliable, using somebody’s first name can make a mass communication feel more like an individual conversation. The mistake is thinking that first name is where personalisation ends.

THE PRINCIPLE

Every additional piece of personalisation creates both an opportunity and a failure state. Use it because it makes the experience better, not because the platform lets you.

THE PERSONALISATION LADDER

Think of personalisation as increasing contextual intelligence rather than a weak to strong scale. Basic personalisation can be excellent. More sophisticated personalisation simply uses more context. As you move from facts the customer explicitly gave you towards behaviour and prediction, the potential value increases, but so does the responsibility to use that information carefully.

LEVEL	WHAT YOU KNOW	EXAMPLE	WATCH OUT FOR
IDENTITY	Who they are.	Hi Josh.	Missing, malformed or inappropriate name data.
PREFERENCE	What they have explicitly told you they like or how they want to interact.	Spotify is their preferred streaming service.	Do not remove useful choices simply because a preference exists.
CONTEXT	Something about their situation that changes relevance.	A London show is announced to somebody in or near London.	Location can be stale, approximate or inferred incorrectly.
BEHAVIOUR	What they actually did.	They viewed a product or left something in their basket.	Do not expose a level of surveillance that feels unnecessary.
TRANSACTION	What they bought or paid for.	You bought Album 2. Album 3 is now available.	Refunds, gifts, shared accounts and old purchases can distort the story.
LIFECYCLE	Where they are in the relationship.	Your membership expires next month.	Triggers need accurate dates, status and suppression logic.
PREDICTION	What the data suggests they may want or do next.	We think this product is likely to interest you.	Inference can be wrong, sensitive or incredibly creepy.

I KNOW IT’S TOUGH FOR YOU, BUT DON’T BE CREEPY

There is a line between useful recognition and making somebody think, “Why the fuck do you know that?” Information can be legitimate to use and still create a terrible customer experience if you reveal more knowledge than the situation requires.

INTERNET LORE

TARGET KNEW BEFORE DAD DID

A widely reported 2012 Target story became one of the classic warnings about predictive personalisation. Target had developed a model that used shopping patterns to estimate whether a customer might be pregnant and roughly when the baby was due. In the famous anecdote, a father complained that his teenage daughter had received maternity and baby related mailings. He later discovered that she was pregnant. The lesson is not that prediction is bad. The lesson is that technically impressive targeting can become deeply uncomfortable when the communication exposes something the customer did not knowingly tell you in that form.

“Tickets are now available near you” can feel useful. “We noticed you visited the Manchester ticket page three times late last night” feels like somebody is standing outside the window with binoculars. Use the minimum amount of customer knowledge required to make the message useful.

FALLBACKS AND UGLY DATA

Personalisation is only as good as the data underneath it. Missing values, broken merge tags, stale information, unexpected capitalisation and malformed fields can produce spectacularly bad customer experiences.

Old CRM platforms often encouraged marketers to set a default first name value such as “Customer”, “Friend” or “Valued Customer”. Do not do this. “Hello Customer” does not hide the missing data. It announces that you tried to personalise the message and your data failed.

PERSONALISED VERSION	BAD FALLBACK	NATURAL FALLBACK
Hi Josh, your presale starts tomorrow.	Hi Friend, your presale starts tomorrow.	Your presale starts tomorrow.
Your nearest show is London.	Your nearest show is UNKNOWN.	See all tour dates.
Listen on Spotify.	Listen on DEFAULT_PLATFORM.	Choose where to listen.
Because you bought Album 2, you might like Album 3.	Because you bought NULL, you might like Album 3.	Explore the new release.

Design the experience for imperfect data, not just the beautiful test record in your own account. Test missing values, all caps names, unexpected characters, shared email addresses, refunded purchases, old preferences and anything else that could make the logic look stupid.

REMOVE IRRELEVANT CHOICES, NOT USEFUL CHOICES

Personalisation can reduce friction, but more personalisation is not automatically better UX. If somebody explicitly tells you that Spotify is their preferred streaming service, you could hide Apple Music and Deezer and send them directly to Spotify. That might be useful. Or it might remove a choice they still wanted that day.

A smart link or link tree can sometimes be the better answer. The customer gets one clear “Listen” action from the email, then chooses the platform that suits them. People do not always consume music in exactly the same way every time.

THE RULE OF CHOICE

Personalisation should remove irrelevant choices, not useful choices.

WHERE PERSONALISATION BECOMES REALLY USEFUL

Commercial personalisation becomes powerful when it saves the customer effort or surfaces something genuinely relevant. Product recommendations can use previous purchases, browsing behaviour or basket activity to help somebody discover the next sensible thing rather than showing the same store window to everybody.

EXAMPLE *You bought the first two records in this series. The third is now available. That is useful context. An abandoned basket reminder can also be useful because it clearly follows an action the customer understands they took.*

The objective is not to demonstrate the sophistication of your CRM platform. It is to make the customer experience feel more inviting, intelligent and relevant while supporting engagement and commercial performance.

PERSONALISATION NEEDS A REASON

Every dynamic field, conditional module and recommendation creates additional build, QA and failure risk. If changing the content does not meaningfully improve relevance, leave it static. A simple message that works for everybody is better than a complicated personalised message that fails for ten percent of the audience.

RELATED *Chapter 34, Preference Centres, shows another way customer data can make messaging more relevant without simply adding merge fields.*

THE RULE

Use what you know to make the experience better. Do not use what you know simply to prove that you know it.

08 CAMPAIGN VS LIFECYCLE

Campaign marketing starts with the organisation: we have something to say, so we send a message. Lifecycle marketing starts with the customer: the customer does something, so CRM responds. Both are useful, but lifecycle is where CRM begins to behave like a system rather than a calendar.

CAMPAIGN	LIFECYCLE
Album announcement sent on launch day	Welcome message triggered by sign-up
Tour email sent to selected markets	Abandoned basket message triggered by behaviour
Merch campaign sent to purchasers	Post-purchase journey triggered by an order
Chart push sent during campaign week	Winback triggered by a period of inactivity

Common lifecycle journeys include welcome, abandoned basket, post-purchase, birthday, presale registration, renewal, lapsed customer and winback programmes. The opportunity is to respond to what people actually do, rather than relying only on what the marketing calendar says today.

09 CHOOSING THE RIGHT CHANNEL

Do not begin with “shall we send an email, an SMS or a push?” Begin with what the customer needs from you, how much information they need, how quickly it matters and what behaviour you want to make easy. In this guide, Short Message Service (SMS) means the standard text message channel, while push means a notification sent to a device from an app or supported web experience. The channel is part of the relevance.

CHANNEL	BEST AT	GOOD EXAMPLES	THINK
Email	Depth, creative, explanation and content somebody may return to	Editorial, launches, detailed lifecycle, product information	DEPTH
SMS	Short, valuable and time-sensitive messages	Presales, onsales, deadlines, VIP access, reminders	IMMEDIACY
Push	Relevant events happening now inside an app or digital experience	Status changes, releases, live updates, behavioural triggers	CONTEXT

Channels can work together. An album campaign might use email to tell the story, push when the album becomes available, SMS when tickets go on sale and paid social to reinforce the campaign with known audiences. That does not mean blasting everybody through every channel at once. It means giving each channel a job.

10 THE CAMPAIGN BRIEF

Do not start with “we need an email”. Start with the job the communication has to do. A good brief gives the delivery team enough information to make decisions without turning the form itself into a project. At minimum, everyone should understand who the communication is for, what you want them to do, why they should care, when it needs to happen, which channel is appropriate, how success will be measured and who has authority to approve it.

BETTER STARTING POINT

We need this audience to do this thing, at this time, for this reason. The email comes afterwards.

A brief should be complete enough to prevent ambiguity, but not so exhaustive that nobody uses it. Most fields below need only a sentence or a link. If something genuinely does not apply, leave it blank. The point is to create one shared source of truth, not to manufacture paperwork.

A REUSABLE CAMPAIGN BRIEF

SECTION	FIELD	WHAT TO CAPTURE
Campaign details	Campaign name	A clear internal name everyone will recognise.
Campaign details	Owner	The person responsible for moving the campaign through the process.
Campaign details	Channel(s)	Email, SMS, push, paid social or a coordinated combination.
Campaign details	Send date, time and time zone	Be explicit, especially for global campaigns.
Campaign details	Final approval deadline	The point after which the campaign should not proceed without approval.
Campaign details	Sender details, if non standard	From name, from address or SMS sender identity where it differs from the usual setup.
Purpose	Objective	One clear outcome the campaign exists to achieve.
Purpose	Primary action or call to action (CTA)	What should the recipient do?
Purpose	Why now?	Why does this communication matter at this moment?
Audience	Who is this for?	Relevant segment, lifecycle stage, market or eligibility criteria.
Audience	Who should be excluded?	Only exclusions that differ from normal CRM suppression rules.
Message	Single most important message	What must the recipient understand if they remember only one thing?
Message	Why should they care?	The customer value or reason to act.
Content	Subject line and preheader direction	Direction or final copy, depending on your organisation.
Content	Primary CTA and destination	The action and the exact page, app location or destination.
Content	Required details, offer or terms	Dates, prices, deadlines, eligibility and anything that must be accurate.

SECTION	FIELD	WHAT TO CAPTURE
Creative	Template, assets and references	Existing format, asset links and creative direction.
Targeting	Segments or variations	Content or audience variations that genuinely change the campaign.
Targeting	Personalisation and fallback	Which fields are used and what appears when the data is missing.
Measurement	Primary success metric	The metric that decides whether the campaign achieved its objective.
Measurement	Target or benchmark	Optional, but useful where a sensible benchmark exists.
Testing	Hypothesis	What are you trying to learn, if this campaign contains a test?
Tracking	Tracking requirements	UTM convention, campaign naming or non standard tracking requirements.
Dependencies	Dependencies or blockers	Assets, stock, legal terms, landing pages, data feeds or external approvals.
Approvals	Required approvers	Name the people or roles who must approve before launch.
Anything else	Delivery notes	Anything genuinely useful that does not fit above.

ONE PLATFORM. ONE PROCESS.

You may have one stakeholder or twenty. The principle is the same: define clear stages, owners, deadlines and approval gates before the marketing activity begins. Everyone involved should understand what they are approving, when they are expected to review it and what happens once that stage is closed.

The platform itself is not sacred. A well-maintained spreadsheet can work. So can Asana, Monday.com or another project management system. The critical thing is that everybody uses the same platform in the same way. Approval hidden in a Slack message, feedback buried in email and a different version sitting in somebody's Downloads folder is how campaigns become unmanageable.

Without clear gates you get design feedback in the middle of rendering QA, somebody rewriting approved copy while the build is being tested, or a stakeholder appearing after send to say they never saw the draft and the campaign contained incorrect information. Marketing has to operate as a unit, so if in doubt, over-communicate.

IDEAL BRIEFING, BUILD AND APPROVAL FLOW

#	STAGE	OUTPUT	GATE
1	Brief	Objective, audience, channel, timing, CTA, dependencies, owners and approvers agreed.	BRIEF APPROVED
2	Copy & content	Copy, offer, dates, prices, terms and destination information are accurate.	CONTENT APPROVED
3	Design	Creative direction and mobile behaviour are agreed before build.	DESIGN APPROVED
4	Build	The actual email, SMS or push is built in the delivery platform.	BUILD COMPLETE
5	QA & testing	Copy, links, rendering, accessibility, personalisation, tracking and targeting are checked.	QA PASSED

#	STAGE	OUTPUT	GATE
6	Final approval	Approvers review the actual final version and final audience/send settings.	WRITTEN APPROVAL
7	Schedule & send	The approved campaign is scheduled or launched with no unapproved changes.	SEND
8	Report & learn	Results, test outcomes and useful learning are recorded for the next campaign.	LEARNING LOGGED

A gate is meaningful only if people respect it. If important new information appears after approval, reopen the relevant stage deliberately and make the change visible. Do not silently edit the campaign underneath everybody and hope for the best.

11 THE SEND CHECK

Once an email goes, it goes. The best defence against avoidable mistakes is a **repeatable checking method that you use every single time**, including when the campaign is late and everybody is shouting. Use the process in this guide, or change it into something that works for you, but have a process and stick to it. This is one thing that all the email marketing professionals I've worked with do in their own way. One former colleague used to have a little song to check everything, which wasn't annoying at all 😊. Anyway, this is mine:

COPY

Check spelling, grammar, tone of voice, clarity, names, dates, prices and product information. Read it naturally rather than merely scanning for red lines. Does the copy sound like the brand and does it make sense to somebody who was not in the meeting? Read Aloud or text-to-speech software can be useful here when it's Friday evening and your brain is fried from a heavy week.

LINKS

Check every link, every time. Confirm that it works, reaches the expected destination and contains the intended tracking. Do not assume that because the button says "Buy tickets" it actually goes to tickets. For a static campaign, you normally only need to validate each unique destination once. If links vary by audience, territory, personalisation or dynamic content, you'll need to check every variant.

RENDER

Test the email across the devices and email clients that matter to your audience. Use previous campaign data where possible to understand where people actually read your messages. You are looking for design integrity, accessibility and usability, not a forensic pixel match against one desktop artboard. Email is not print.

When something breaks, judge the severity, the affected audience, the time available and the risk of the fix. A slightly wonky call to action (CTA) in an obscure client is not the same as a broken primary action for half your audience.

GO DEEPER Chapter 24, *Why Does My Email Look All Fucked Up?*, covers rendering triage. Chapter 27, *Accessibility*, covers deeper implementation checks.

DYNAMIC CONTENT *If the campaign uses merge fields, conditional modules, product recommendations or other personalised content, test missing, unusual and stale-data cases before approving the send.*

LAUNCH

Make the final operational checks: from name, from address, subject line, preheader, audience, suppressions, send date, send time, time zone, expected completion time, tracking, campaign name and the correct final creative. Then ask the question that saves careers: am I looking at the actual final version? Thoroughly QA'ing FINAL_V7 is useless if somebody schedules FINAL_V6.

STATUS

Once COPY, LINKS, RENDER and LAUNCH are complete, you are clear for takeoff.

12 REPORTING: KNOW YOUR NUMBERS

Do not blindly trust a dashboard. Understand the maths underneath it so you can sense check a platform, build your own spreadsheet and explain what a metric actually means. The most important habit is knowing the denominator.

METRIC	BY HAND	SPREADSHEET
Delivery rate	Delivered / Sent	=Delivered/Sent
Bounce rate	Bounces / Sent	=Bounces/Sent
Open rate	Unique Opens / Delivered	=UniqueOpens/Delivered
Click rate	Unique Clickers / Delivered	=UniqueClickers/Delivered
Click to open rate	Unique Clickers / Unique Opens	=UniqueClickers/UniqueOpens
Unsubscribe rate	Unsubscribes / Delivered	=Unsubscribes/Delivered
Conversion rate	Conversions / Delivered	=Conversions/Delivered
Click conversion rate	Conversions / Unique Clickers	=Conversions/UniqueClickers
Average order value	Revenue / Orders	=Revenue/Orders
Revenue per recipient	Revenue / Delivered	=Revenue/Delivered
Revenue per 1,000	(Revenue / Delivered) × 1,000	=(Revenue/Delivered)*1000

A NOTE ON ATTRIBUTION IN MUSIC CRM

Most of the time in music industry CRM, we are driving fans to stream music on platforms or buy tickets on platforms we do not own. That means commercial attribution data is often very limited. You may know that somebody clicked, but not whether they streamed the track, bought the ticket or completed the purchase. Official artist and label stores are different. If you own the ecommerce environment, you can often connect campaign activity much more directly to orders and revenue.

MAKE SURE YOU KNOW WHAT THE MONEY WORDS MEAN

TERM	PLAIN ENGLISH
Gross revenue	The total value of sales before deductions.
Net revenue	Revenue remaining after relevant deductions. Exactly what is deducted can vary by business, so understand how your organisation defines “net”.
Revenue	Money generated from sales.
Profit	What remains after the relevant costs have been deducted from revenue.
NAR / Net After Returns	Revenue after returned or refunded orders have been removed. Useful in ecommerce reporting where initial sales can overstate the final commercial result.

If a spreadsheet cell is formatted as a percentage, you do not need to multiply the formula by 100. The display format does that for you. If you are calculating by hand, multiply the resulting decimal by 100 to express it as a percentage.

KNOW YOUR DENOMINATOR

Never report a percentage unless you understand what sits underneath the line. Sent, delivered, opens, clickers and customers all answer different questions. Two platforms can use similar metric names but different denominators, so always check the definition.

UNIQUE VS TOTAL

If Josh opens the same email eleven times, that is one unique open and eleven total opens. The same principle applies to clicks. Unique metrics are usually better for understanding how many people performed an action, while totals can tell you something about repeated activity.

OPEN RATE NEEDS CONTEXT

Privacy features and automated image loading mean an open is not always the same thing as a confirmed human reading the message. Treat open rate as a useful directional signal, not perfect evidence of attention. Clicks, conversions and revenue can often tell you more about what people actually did.

USE THE METRIC CLOSEST TO THE BEHAVIOUR YOU WANTED

There is no universal ladder where one metric is always “better” than another. Start with the campaign objective. Opens can be a useful directional signal, but privacy features and automated image loading make them imperfect evidence of human attention. If the objective was traffic, clicks are closer to the behaviour you wanted. If it was sales, conversion and revenue are closer again. If the job was simply to communicate important information, a lack of clicks does not automatically mean failure.

The brief should tell you what success means before the send. Reporting then answers that question rather than searching afterwards for a number that looks good.

BENCHMARKS

Oh also, you may be asked to benchmark performance, which just means express what normally happens when a marketing email is sent. If you want a volume-weighted benchmark across campaigns, do not simply average the percentages, especially when the campaigns have very different send sizes. Sum the numerators and denominators, then calculate the rate from those totals.

13 TEST. LEARN. KEEP THE WINNERS.

The job is not simply to send campaigns. The job is to improve them. Use a simple framework: start with an idea, turn it into a hypothesis, run a controlled test, measure the result, write down the learning and decide what happens next.



A useful test changes what you do next. If a new approach wins, bring it forward and make it the new control. Then test against that. If it loses, record the result so somebody does not suggest the same idea six weeks later and call it innovation.

Test one meaningful thing at a time where possible. If you change the subject line, hero, CTA, offer, copy and layout simultaneously, you cannot confidently say which change caused the result. Decide the primary success metric before you look at the numbers, otherwise it is very easy to choose whichever metric makes your preferred version look good.

14 I'M YOUR DELIVERABILITY-BUDDY

Deliverability is not “the CRM platform said SENT”. You should care about whether messages reach their intended destinations. The broad ingredients include permission, engagement, sender reputation, authentication, database hygiene and consistent sending behaviour.

You will regularly hear Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM) and Domain-based Message Authentication, Reporting and Conformance (DMARC). At beginner level, understand the purpose rather than trying to become a Domain Name System (DNS) engineer. SPF helps identify which systems are authorised to send. DKIM helps verify that a message is genuinely associated with the sending domain and has not been altered in transit. DMARC tells receivers how the domain owner wants failed authentication handled and provides reporting.

WHEN TO PAUSE AND ASK FOR HELP

Most campaigns fluctuate. A disappointing result is not automatically a deliverability incident. What matters is an unusual change that suggests messages are no longer reaching recipients normally.

Bounce rates suddenly jump without an obvious audience or data-quality explanation.

- Spam complaints increase materially.
- A major mailbox provider starts blocking or deferring an unusual volume of mail.
- Your sending domain or platform reports an SPF, DKIM or DMARC authentication failure.
- A normally healthy audience suddenly shows an unusual drop in delivery, particularly at a major mailbox provider.
- Your email service provider shows a reputation, blocklist or deliverability warning.
- If something looks materially wrong, pause unnecessary sends and involve the platform or deliverability owner. Do not try to solve a serious deliverability problem by sending more email.

GO DEEPER *Chapter 31, Database Hygiene, covers the list-quality and suppression practices that support healthy sending.*

15 OH FUCK

You sent the email and there is a mistake. First, do not panic. Work out what kind of mistake you actually have. A typo, broken link, wrong date, wrong price, incorrect information, wrong audience, broken personalisation and exposed personal data are not the same problem and should not receive the same response.

Sometimes the correct response is to do nothing.

INTERNET LORE

THE STREISAND EFFECT

In 2003, Barbra Streisand tried to suppress an aerial photograph of her Malibu home. The attempt to remove it attracted far more public attention to the image than it had received before. A couple of years later, the phenomenon acquired a name: the Streisand effect. The lesson is that trying to suppress or loudly correct something can accidentally amplify it.

THE EMAIL MARKETING LESSON

Email marketers should remember this before firing out a mass correction. Imagine a tiny spelling mistake buried in paragraph four of an email sent to 500,000 people. Most recipients did not notice it and do not care. If you immediately send another 500,000 emails with “CORRECTION: WE MADE A MISTAKE” in the subject line, you may simply ensure that vastly more people notice the original error.

BEFORE YOU CORRECT SOMETHING

How serious is the mistake?

- How many people are likely to notice it?
- Does it materially change the meaning?
- Could somebody lose money or make the wrong decision because of it?
- Is there a legal, regulatory, privacy or safety issue?
- Can the problem be fixed somewhere else?
- Would a correction help the customer, or mostly make the marketing team feel better?
- Could talking about it make the problem bigger?

WHEN YOU PROBABLY DO NOT NEED A CORRECTION

Minor typos, harmless but frustrating grammatical mistakes, tiny rendering differences and cosmetic image problems usually do not justify another mass send if they do not alter the meaning or prevent the intended action. Record the issue, fix the process and move on. Nobody died.

WHEN YOU MAY NEED TO CORRECT IT

Incorrect event dates, ticket information, prices, eligibility rules, deadlines, material product information or a broken primary destination can justify a correction because the customer may make a decision using information you know is wrong. The more material the consequence, the stronger the case for correcting it.

THE APOLOGY EMAIL

If a correction is necessary, do not turn it into a Shakespearean tragedy. Say what was wrong, give the correct information, explain what the recipient needs to do, apologise appropriately and stop. “We gave you the wrong presale time in our previous email. Presale opens at 10am BST tomorrow, not 9am. We’re sorry for the confusion.” That is useful. A three paragraph grovelling corporate act of mourning is not.

CORRECT THE INFORMATION, NOT YOUR EGO

The purpose of a correction is to help the recipient. It is not to make the marketing team feel emotionally cleansed after making a mistake.

CAN YOU FIX IT SOMEWHERE ELSE?

An email already delivered to somebody's inbox is largely outside your control, but the thing it points to may not be. If a redirect, landing page, product page or destination copy can be corrected, fix it there first and reassess whether another send is still necessary.

SOME PROBLEMS ARE BIGGER THAN MARKETING

Wrong audience, confidential information or personal data exposure can move beyond normal campaign QA very quickly. Stop improvising and involve the appropriate privacy, security, legal or senior operational people. At that point, this is no longer an email marketing problem.

Good judgement means assessing severity, impact, visibility, remedy, amplification and urgency, then responding proportionately. Not every mistake deserves another email and not every mistake should be ignored.

THE RULE

Fix the problem. Do not accidentally advertise it.

2. UNDER THE BONNET

Reference material for when you need it. Know enough to build, brief, QA and communicate with developers. You do not need to memorise it before your first send.

16 EVERYTHING IS A HACK OR A BODGE

Email is ancient by internet standards. Long before the modern web, people were already sending messages between computers. By the 1990s, home PCs, dial up internet and mass market inbox services helped turn email into an everyday consumer behaviour. By 1998 it was culturally mainstream enough for Tom Hanks and Meg Ryan to star in a film called You've Got Mail. Email had never been cooler 😎.

INTERNET LORE

THE @ SIGN

Ray Tomlinson is widely credited with sending networked email in 1971 and choosing the @ symbol to separate the user name from the destination computer. A tiny piece of punctuation became one of the defining symbols of the internet.

INTERNET LORE

THE FIRST NOTORIOUS MARKETING EMAIL

In 1978, Gary Thuerk sent a promotional message for Digital Equipment Corporation to hundreds of ARPANET users. It is often described as the first mass commercial email. The complaints started almost immediately. Some things never change.

Meanwhile, web developers went through the browser wars. Internet Explorer, Netscape and others interpreted code differently, so developers routinely built around competing implementations. There was a period when you would visit a website and be prompted to view the normal or flash version. Crazy, I know. Over time, web standards improved and modern websites became far more predictable.

Email never enjoyed the same clean evolution. Email developers still accommodate different rendering engines, legacy behaviour and client specific quirks. Some versions of Microsoft Outlook have historically relied on Word based rendering behaviour, with technologies such as Vector Markup Language (VML) used for things like certain background images and buttons. Let me be clear, it is dreadful.

In fact, email coding can become so strange that we often treat layout like an Excel spreadsheet. I shit you not. HTML tables remain one of the most dependable ways of structuring marketing email. Which brings us to lesson one.

THE FIRST RULE OF FIGHT CLUB

Everything in email is a hack or a bodge.

17 WHAT IS AN EMAIL CLIENT?

Before we start talking about emails rendering differently in different places, we need to define the thing displaying our emails to our audience, or doing the “rendering”. An email client is the application or service somebody uses to read their email. Common examples include Apple Mail, Gmail, Microsoft Outlook, outlook.com, and Yahoo Mail, but many more exist.

An email client might be an app on a phone, software installed on a desktop computer, or a web application running inside a browser. An email address is not the same thing as an email client. Somebody can have a Gmail address and read that inbox inside Apple Mail on an iPhone.

This matters because different email clients can interpret the same HTML and CSS differently. The exact same email can therefore look slightly different depending on where somebody opens it. Sometimes very fucking different.

SIMPLE DEFINITION

The address tells you where the mailbox lives. The client tells you what software is displaying the message.

18 HTML WITHOUT THE COMPUTER SCIENCE DEGREE

HyperText Markup Language (HTML) gives content structure. Cascading Style Sheets (CSS) controls presentation. You do not need to memorise the full HTML specification, but you should recognise the basic grammar of the code you will see every day. Think of it like building a house - HTML is the structure; bricks, mortar, roof etc. CSS is the decoration; the flooring, the wallpaper, the flowers in the vase. HTML creates structure using tags. These are often bookended by closing tags, indicated by a forward slash. Sometimes they are not 🙄. Here's a common example of a paragraph tag in action:

CODE / FIELD EXAMPLE

```
<p style="color:#000000;">
Hello world
</p>
```

THING	MEANING
<p>	A paragraph element or tag.
style=""	An attribute attached to the element.
color	A CSS property.
#000000	The value assigned to that property.

THING	MEANING
Hello world	The content.
</p>	The closing tag.

Other common tags include div, span, headings such as h1, links using a, images using img, tables, table rows, table cells and line breaks. You only need enough vocabulary to inspect an email, understand a developer's explanation and make basic edits with confidence.

LINKS

CODE / FIELD EXAMPLE

```
<a href="https://example.com" target="_blank">
Buy tickets
</a>
```

The href attribute tells the link where to go. The target attribute can influence how the destination opens. This is also why link checking is never optional: the visible words and the actual destination are separate things.

IMAGES

CODE / FIELD EXAMPLE

```

```

The src attribute tells the email where the image is located. The alt attribute provides alternative text. Alt text is not decoration. It helps somebody understand an image when they cannot see it or when the image does not load. Notice on tags, there is no closing tag! 🙄

19 TABLES: WHASSUP 🤪?! IT'S 1999 AGAIN

A table is exactly what it sounds like. Think of it as a spreadsheet. A tr is a table row. A td is a table cell. Email developers use invisible tables to create dependable layout structures because support for more modern layout techniques is inconsistent across clients.

CODE / FIELD EXAMPLE

```
<table role="presentation" width="100%" cellpadding="0" cellspacing="0">
  <tr>
    <td>Left column</td>
    <td>Right column</td>
  </tr>
</table>
```

THING

The role="presentation" attribute is important when a table exists purely for layout. It tells assistive technology that the table is not meaningful tabular data. In other words: this is not really a spreadsheet, some email developer is just using it to make their content line up.

A good way to think of your email framework is like Lego. You stack tables on top of each other to create structure. If you need two items side by side, you use a td (table cell). Now, as with Lego, if you build a flimsy tower, or something overly complicated, it may start to fall apart under testing. So remember to KISS (keep it simple, stupid).

20 CSS AND INLINE STYLING

HTML describes the structure. CSS describes how it looks. Colour, font size, weight, spacing and many other visual properties are CSS.

CODE / FIELD EXAMPLE

```
color: #000000;
font-size: 16px;
font-weight: bold;
```

On modern websites, styling is usually separated neatly from the content. Email frequently says, "Nope. Put it directly on the element." Critical styles are often placed inline because they tend to survive a broad range of clients more reliably.

CODE / FIELD EXAMPLE

```
<p style="color:#000000; font-size:16px; font-weight:bold;">
Hello world
</p>
```

You will also encounter CSS inside style blocks in the head of the email. Those blocks are useful for responsive media queries, classes, dark mode rules and client specific fixes. The rule is not that email only uses inline CSS. The rule is that support is inconsistent, so we choose techniques according to the clients we need to support.

21 EMAIL IS NOT PRINT

This might be one of the most important design lessons in the entire guide. Email is fluid. It is not a poster, a magazine advert, a PDF or the beautiful static rectangle somebody just handed you from Figma.

Sometimes you will work with a designer who creates a lovely picture of an email in Figma, Photoshop or even PowerPoint **shudders**. It may be perfectly aligned and every image may have precisely the intended amount of space around it. There is only one problem: that is not an email. It is a picture of an email. And not even a realistic one.

A real email has to survive different screen sizes, email clients, operating systems, font availability, accessibility settings, zoom levels, dark mode, images being disabled, mobile devices, desktop computers and whatever Microsoft has decided Outlook should do today. A static design represents one possible interpretation of the email, not an immutable specification.

REMEMBER!

There is no single pixel perfect version of an email.

The goal is design integrity. Does the hierarchy remain intact? Does the brand still feel right? Can a recipient understand the message? Can they use the email and find the CTA? If yes, the email is doing its job. Email is not print, so judge the experience, not a forensic pixel match against one artboard.

22 DESIGN MOBILE FIRST

For many consumer audiences, mobile is the dominant reading environment, and clicks often happen on phones too. Yet email is still routinely designed on enormous desktop monitors because that is where designers work. The result is a desktop composition that gets treated as the “real” email, with mobile considered later.

That is backwards. The small version is not secondary. For a large part of your audience, that is the email. When you receive a desktop design, ask what happens on mobile. What stacks? What disappears? What gets larger or smaller? What becomes full width? What happens to the navigation? What happens to that clever four column module? Most importantly, does the message still make sense?

USE YOUR OWN DATA

Generic benchmarks are useful, but your audience wins. Where possible, look at your own previous sends to understand which devices and clients matter most.

23 RESPONSIVE DESIGN

Responsive design means adapting the layout to the available space rather than simply shrinking the desktop design until it fits. A common pattern is to take a two column desktop module and stack it into a single column on a phone.

CODE / FIELD EXAMPLE

```
@media screen and (max-width: 600px) {  
  .mobile-full {  
    width: 100% !important;  
  }  
}
```

In plain English, the media query says: if the screen is smaller than this width, apply these rules. Responsive changes can include stacking columns, making images fluid, reducing padding, increasing button size, simplifying navigation, changing typography or hiding and revealing alternate content. Responsive does not mean make everything smaller. It means make the design appropriate for the space.

BTW, `!important` gives a CSS declaration unusually high priority over ordinary competing declarations. Web developers generally try not to rely on it unnecessarily. Email developers use it rather more often because, as we have established, email is a giant hack/bodge.

24 WHY DOES MY EMAIL LOOK ALL FUCKED UP?

I don't know! You built it, butt head.

Look, there can be myriad reasons why your email has broken. In my experience, though, it tends to be structural. Maybe you've accidentally nested a <tr> inside a <td>, or closed a tag in the wrong place.

Now your email is sprawling across the screen like Picasso designed it, and you need to fix this shit ASAP.

The key thing is not to panic and start randomly changing things. Email code is fragile, but it is usually fragile for a reason. Work methodically, find the point where the structure stops making sense, and fix that first.

Now we understand email clients and the fluid nature of the medium, rendering problems make more sense. Clients can interpret code differently, so background images disappear, fonts change, spacing moves, buttons become wonky, columns refuse to stack, long URLs explode layouts and dark mode can turn a carefully designed campaign into a crime scene.

Rendering problems exist on a scale. A CTA that sits three pixels too far left is not the same problem as a hero disappearing, columns collapsing and the primary action becoming unusable. Your job is to judge severity, the size of the affected audience, the time available, whether the issue can be fixed and whether the fix risks breaking something more important.

BREAK	HOW TO THINK ABOUT IT
Padding is slightly different	Cosmetic. Usually survivable.
CTA is a little wonky	Annoying. Assess whether it affects usability.
Columns have collapsed	Material problem. Investigate.
Hero gone, fonts feral, CTA floating near Belgium	Congratulations, you may have met Outlook. Maybe Gmail.

25 DARK MODE: HERE BE DRAGONS

Dark mode is not one thing. Different email clients apply it differently. Some leave your colours largely alone. Some selectively invert light backgrounds and dark text. Some make much more aggressive changes. That means the same email can behave differently depending on the email client, operating system and user settings.

The problem is not that dark mode exists. The problem is that you do not fully control what happens when it does.

WHAT USUALLY BREAKS

- Dark logos on transparent backgrounds can disappear against a darkened canvas.
- White logos can vanish when the client keeps a light background.
- Brand colours may shift enough to damage contrast.
- Background colours can invert while embedded images do not.
- Transparent PNGs can suddenly reveal ugly halos, boxes or edges that were invisible on the original background.
- Buttons can change colour while the text inside them does not behave the way you expected.

THE INVISIBLE OUTLINE TRICK

If an important image, logo or icon disappears when dark mode changes the surrounding background, one useful technique is to add an outline, stroke or glow in the same colour as the normal light mode background.

On the normal version, the outline effectively disappears because it matches the background. When dark mode changes the surrounding colour, the outline becomes visible and helps separate the asset from the new background. This is particularly useful for transparent logos and icons that need to survive both light and dark environments.

YOU PROBABLY DO NOT KNOW HOW MANY PEOPLE USE IT

It is very difficult to know exactly how much of your own audience reads email in dark mode. Industry estimates suggest that usage can be substantial, but honestly we just do not know because dark mode preference is not a clean data point that email marketers can reliably capture at contact level.

So avoid pretending you know that a precise percentage of your database uses dark mode because somebody published a benchmark. Your actual audience may behave differently and, unlike device or email client data, dark mode preference is generally not something you can confidently segment against.

The practical answer is simpler: assume enough people use it that important campaigns should be checked.

DO NOT DESIGN AROUND ONE DARK MODE SCREENSHOT

Dark mode support is inconsistent, so the goal is not to make every client reproduce one perfect dark version of the design. The goal is to preserve hierarchy, readability, brand recognition and the primary action.

Where client support allows, you can provide dark mode styles with CSS such as `prefers-color-scheme`, but treat those rules as progressive enhancement rather than absolute control.

PRACTICAL QA

- Check the logo.
- Check text contrast.
- Check buttons and CTA labels.
- Check transparent images.
- Check icons and social marks.
- Check anything where meaning depends on a specific foreground and background colour combination.

If an image has to work on both light and dark backgrounds, consider giving it a deliberate background, keyline, outline or container rather than hoping transparency behaves nicely everywhere.

BEST PRACTICE *Design important assets so they survive both light and dark environments. Do not rely on a single background colour to make a logo readable. Do not communicate meaning through colour alone. And do not spend three hours fixing a tiny dark mode difference in a client used by twelve people if the email remains readable and usable.*

26 WHY JAVASCRIPT DOES NOT WORK IN EMAIL

Going back to my house analogy: HTML = structure, CSS = decoration. Well, JavaScript would be the plumbing and electrics; the things that make the house dynamic and work as a liveable space. Websites can execute JavaScript. Marketing emails generally cannot rely on unrestricted JavaScript because an email is foreign code arriving inside somebody else's application. The email client has to prioritise the security and integrity of the inbox over your incredibly sick interactive carousel.

Email clients do not trust you. Frankly, looking at the state of you, they're right not to 😊. Advanced interaction therefore relies on carefully supported HTML and CSS techniques, or standards such as AMP for Email where supported, rather than assuming arbitrary scripts can execute.

Interactive email can still do clever things, including hover states, menus, accordions, image changes, forms and experimental interface techniques. Treat interactivity as an enhancement, never a dependency. If the clever bit fails, the customer must still understand the message and complete the intended action.

27 ACCESSIBILITY: THEY DO NOT ALL SEE WHAT YOU SEE

You built the email using your eyes, your hands, your brain, your device and your email client(s). Your audience did not. A significant proportion of any large audience will experience disability, impairment, neurodivergence, age related limitations or situational barriers that change how they perceive and interact with your message.

Somebody may use a screen reader, have low vision or colour blindness, have dyslexia, need larger text, have limited dexterity or restricted use of their hands, navigate with assistive technology, read one handed, view the email in bright sunlight, have images disabled or use dark mode. Accessibility is simply designing so those differences do not stop somebody understanding the message or acting on it.

PRACTICAL RULES

Do not rely on colour alone to communicate meaning. Add words, symbols or labels.

- Use readable text sizes, clear hierarchy and sensible spacing. Clear writing is an accessibility feature.
- Give meaningful images useful alt text. Use empty alt text for genuinely decorative imagery where appropriate.
- Turn images off during QA. Can you still understand the message?
- Use descriptive link text instead of filling the email with "click here".
- Make buttons large enough to press comfortably and make the useful area genuinely clickable.
- Use sensible semantic headings and paragraphs where client support allows.
- Avoid dangerous flashing or relying on rapidly changing content to communicate something essential.
- Use role="presentation" on layout tables so screen readers do not interpret your layout scaffolding as real data.

BEFORE YOU SEND

Can I read it? Can I understand it without images? Can I understand it without colour? Can I tell what every link does? Can I comfortably press the buttons? Would the email still make sense if a computer read it aloud?

28 “SMSSSSSH” - SEAN CONNERY, PROBABLY

SMS stands for Short Message Service. Unlike email, which arrives in an inbox, SMS is delivered to a mobile number through telecommunications networks. Your CRM or messaging platform normally hands the message to an SMS provider, which routes it through the relevant mobile network to the recipient.

INTERNET LORE

MERRY CHRISTMAS

On 3 December 1992, software engineer Neil Papworth sent the first widely recognised SMS message over Vodafone's network. It simply said “Merry Christmas”. The 160 character heritage of SMS still matters because long messages can be split into multiple segments, and some characters can change how many characters fit in each segment.

SMS is powerful because it is immediate and personal. It arrives in the same part of the phone as messages from friends, family, banks and delivery companies, so it should be used with more restraint than email. It is especially good for moments where receiving the information later would reduce its usefulness: a presale opening, tickets going on sale, an important deadline, a genuinely useful reminder or a high value lifecycle trigger.

Write like it costs money, because it usually does. Keep the message focused on one idea and one clear action. Identify the sender, make the destination trustworthy, test the link, and do not turn a long email into a cramped text message. Permission matters too: possessing a phone number does not automatically give you permission to send marketing SMS. Requirements vary by territory, so keep consent records and make opt-out straightforward.

Common pitfalls are over messaging, fake urgency, unclear sender identity, broken or suspicious looking links, unexpected message segmentation costs and trying to say too much. SMS earns its place when the moment itself deserves immediacy.

SMS = IMMEDIACY

29 PUSH (ME TILL I CAN GET MY SATISFACTION)

A push notification is a short message sent from an application or supported web experience to somebody's device. It can appear on a lock screen, as a banner, inside a notification centre or as a badge. Unlike email, the message is designed to be understood quickly and usually becomes most useful when tapping it takes the customer directly to the relevant place.

APPS LEARNED TO SHOUT

Apple introduced its Push Notification service with iPhone OS 3.0 in 2009. The clever idea was that an app did not need to run constantly in the background just to know that something had happened. A remote service could alert the device instead.

Very broadly, the customer installs or uses an app, allows notifications, the app receives a token that identifies that installation, and your systems use a push service such as Apple Push Notification service or Firebase Cloud Messaging to request delivery to that device. The customer remains in control: permissions can be denied, notifications can be silenced, focus modes can suppress interruptions and the app can be removed entirely.



Push is excellent for relevant moments happening now: a release going live, an order status changing, a show starting, a basket being abandoned, a ticket window opening or new content becoming available. Deep link to the thing you just mentioned. A push that says “Your presale is open” and then dumps somebody on the app homepage has made the customer do the work.

The biggest danger is notification fatigue. Push interrupts what somebody is already doing, so every message should earn the interruption. Do not cry wolf with fake urgency, do not expose sensitive information on a lock screen, and do not send irrelevant messages simply because the permission exists.

PUSH = CONTEXT

30 UTMS

UTM parameters are small pieces of tracking information added to the end of a URL so analytics platforms can identify where a visit came from, which campaign drove it and which specific link somebody clicked.

CODE / FIELD EXAMPLE

```
utm_source=newsletter
utm_medium=email
utm_campaign=album_launch
utm_content=hero_cta
```

WHY ARE THEY CALLED UTMS?

UTM comes from Urchin, an early web analytics company. Google acquired Urchin in 2005 and its technology became foundational to Google Analytics. Every time you type `utm_source` or `utm_campaign`, you are using terminology inherited from an earlier era of web analytics.

Choose a naming convention, document it and use it consistently. Analytics becomes painful very quickly when one person uses Email, another uses email, a third uses CRM and somebody else improvises AlbumLaunchFINAL2 on a Thursday afternoon.

31 DATABASE HYGIENE

Databases collect duplicates, hard bounces, invalid addresses, fake competition entries, malformed mobile numbers, broken fields, stale information and mystery imports. Good CRM requires maintenance because every campaign inherits the quality of the data underneath it.

A database filled with garbage does not just make reporting ugly. It wastes money, damages targeting, creates broken personalisation, inflates audience counts and can hurt sender reputation. If your database says Josh lives in London, bought a ticket in Manchester in 2021 and has three duplicate profiles with different consent states, your marketing decisions are now being made on unreliable evidence.

WHAT GOOD HYGIENE ACTUALLY MEANS

- Remove or suppress hard bounces and known invalid addresses according to your platform and organisational rules.
- Identify duplicate profiles and define which record, identifier or system wins when they disagree.
- Standardise important fields such as country ISO code, date formats, phone numbers and source names.
- Preserve consent, acquisition source and suppression history when records are merged or migrated.
- Quarantine mystery imports. If nobody can explain where a list came from, do not casually add it to the live marketing audience.
- Review stale automations, dead segments and obsolete fields. I can't tell you how many times these have cropped up in my career and the person who set this up either has left the business or there's no documentation to help work out what this stuff was for.

Also understand that this can become a technical and legal job very quickly. You may need support with the data handling, automation, platform logic and the legal basis for what you are doing.

DELETE IS NOT THE SAME AS SUPPRESS

Understand the difference between delete and suppress. Sometimes you need to retain enough information to ensure that somebody who opted out is not accidentally imported again and mailed. "Delete everything" can be exactly the wrong answer if it destroys the record of the preference you were supposed to respect.

EXAMPLE

A promoter exports an old customer list and imports it into a new CRM. If your unsubscribe records were deleted rather than preserved as suppressions, people who already said “do not email me” may quietly reappear as marketable contacts. Congratulations, you have invented time travel for consent and you’re going to piss some people off if you send to them.

BUILD A HYGIENE ROUTINE

The best database hygiene is boring because it happens routinely, not in a panic before a migration. Build recurring checks around bounce rates, duplicate creation, malformed fields, consent exceptions, acquisition source, inactive records and unexplained audience growth. Give somebody ownership. Document what each cleanup rule does before you automate it.

Treat bulk changes like production changes. Preview the affected records, take a recoverable export where appropriate, test on a small sample, record what changed and have a rollback plan. Never run a giant “cleanup” query against a live customer database because the spreadsheet looked annoying.

DEVELOPMENT IDEA *Create a small data quality dashboard with counts for duplicates, hard bounces, records without source, invalid country values, missing consent evidence and profiles untouched for a defined period. The goal is not a perfect score. The goal is to see deterioration before it becomes a campaign problem.*

32 HANDLING AND MOVING PERSONAL DATA

Personal data does not stop being sensitive because it is sitting in a spreadsheet on your computer.

At some point in your CRM career, somebody is going to ask you to move data from one place to another. A ticketing partner sends customer records. An agency needs a campaign audience. A migration needs a historical export. Somebody wants to reconcile purchasers against a marketing database. This is normal operational work.

The dangerous bit is when “can you send me the data?” gets treated like “can you send me the logo PNG?”

Treat personal data like toxic waste coming out of a nuclear reactor. Handled properly, stored correctly and moved through the right systems, it can be perfectly safe. Spill it somewhere it should not be and suddenly you have an ecological disaster on your hands.

USE THE LEAST TERRIBLE/MOST PRACTICAL OPTION

In a lot of organisations, the lowest cost, lowest friction option is still a protected spreadsheet transferred through the internal email system, with the password sent separately by SMS or another channel.

It is not glamorous, but it creates useful separation. Somebody intercepting one message does not automatically receive both the file and the password.

For routine, relatively small transfers inside a controlled organisation, this can be a sensible practical compromise when more sophisticated infrastructure is unavailable.

Do not send the password in the same email as the attachment. That is not two layers of security. That is one layer wearing a funny hat. Once you're done with the data file, delete it fully.

SFTP AND OTHER MANAGED TRANSFERS

Secure File Transfer Protocol, usually shortened to SFTP, is common when data needs to move repeatedly between organisations or systems.

Rather than attaching a file to an email, one party places it in a controlled location and the other retrieves it using authenticated access.

This can be faster, more repeatable and more appropriate for large or regular transfers. It can also support automation, access controls, logging and predictable file delivery.

The trade off is setup. Somebody needs to configure the accounts, credentials, folders, permissions, retention rules and often the automation around it. For a one off file involving twelve records, that may be excessive. For a nightly feed containing hundreds of thousands of records, emailing spreadsheets around is ridiculous.

THINGS I HAVE ACTUALLY SEEN

- I have received completely unprotected spreadsheets containing personally identifiable information by email.
- I have been handed USB drives containing customer data with no meaningful protection.
- I have seen personal information pasted into Slack messages because somebody wanted an answer quickly.
- I have seen files copied into places where nobody could later explain who still had access to them.
- I have been given handwritten lists of personal data collected outside a nightclub for an event.

These things happen because moving data feels mundane. It becomes a task to complete rather than a risk to manage.

That is exactly when mistakes happen.

BEFORE YOU MOVE ANYTHING

- Who actually needs this data?
- Do they need every column?
- Could you remove fields that are irrelevant to the task?
- Does the recipient have permission to access it?
- Where is the file going to live once they receive it?
- How will access be controlled?
- How will the password or credential be shared?
- How long will the recipient keep the data?

- Who is responsible for deleting or archiving it afterwards?
- Is this a one off transfer, or should somebody build a proper recurring process?

If you cannot answer those questions, do not just press send because somebody senior asked for the spreadsheet.

DATA MINIMISATION APPLIES TO TRANSFERS TOO

If somebody needs email address and ticket status, they probably do not need date of birth, postcode, mobile number, purchase history and every preference field you have collected since 2014.

Export the smallest useful dataset.

Every additional column creates another piece of information that can be leaked, copied, misunderstood or retained somewhere you did not intend.

DO NOT USE CONVENIENCE AS A SECURITY MODEL

Slack is excellent for conversation. It is not automatically the right place to paste customer records.

A USB drive is excellent for moving files. An unencrypted USB drive left in somebody's backpack is not a secure data transfer process.

Email is useful. A wide open spreadsheet of customer information attached to an external email is not suddenly safe because Outlook successfully delivered it.

The tool is not the security model. The process around the tool is.

BUILD REPEATABLE TRANSFER RULES

A mature organisation should define approved ways to move personal data.

- Protected spreadsheets for approved internal or low volume transfers.
- SFTP or another managed transfer method for recurring feeds.
- Restricted cloud storage with named access and expiry.
- Approved encryption requirements.
- Separate channels for passwords or credentials.
- Rules for removing local copies after use.
- A named owner for recurring integrations.
- Logging for important transfers.

The exact technology will differ between organisations. What matters is that employees do not have to invent a security process every time somebody asks for a customer list.

THE RULE

Personal data should only move when there is a clear reason, to people who genuinely need it, through a method appropriate to the risk.

If your transfer process is basically “fuck it, attach the spreadsheet”, stop.

33 FREQUENCY AND FATIGUE

Just because you can send does not mean you should. Individual campaigns can look healthy while the overall programme slowly exhausts the audience. The customer experiences the total relationship, not your internal campaign calendar.

This is why frequency is a programme problem rather than an individual email problem. The merch team may send on Monday, touring on Tuesday, editorial on Wednesday and the label on Thursday. Every team can honestly say “we only sent once this week” while the customer has been hit four times.

THE SLOW, CREEPING DEATH OF AUDIENCE FATIGUE

It normally appears gradually: engagement softens, complaints creep up, unsubscribe rate increases, more people ignore messages, and your best customers begin receiving communications that feel repetitive rather than useful. Sometimes the content is fine. There is simply too much of it, and now you’re killing your engagement, like overwatering a house plant.

WATCH PRESSURE, NOT JUST SEND COUNT

- How many messages has this person received across email, SMS and push in the last 7, 14 and 30 days?
- Are multiple teams targeting the same high-value audience at the same time?
- Is the next message genuinely more important than the one already scheduled?
- Are lifecycle messages competing with campaign sends?
- Do highly engaged customers receive more because it is useful, or simply because they qualify for more segments?

EXAMPLE

A fan receives an album announcement, a signed format reminder, a tour announcement, a presale reminder and an SMS in four days. Each message makes sense in isolation. Together they may feel like being followed around the internet by somebody holding a clipboard in the street.

FREQUENCY CAPS AND PRIORITY

A mature programme usually needs rules for what happens when messages collide. That can mean frequency caps, campaign priority, exclusions for recent purchasers, or simply a shared calendar where somebody has authority to say “not today”. The exact number is not universal. A daily deals product and a heritage artist fan club have very different customer expectations.

The useful question is not “what is the industry benchmark?” It is “what frequency produces value for this audience before incremental messages start producing more irritation than return?” Test it. Compare cohorts. Look at long-term behaviour, not just the revenue from the final email in the sequence.

BEST PRACTICE *Measure pressure at person level where your systems allow it. A calendar tells you what the organisation sent. A contact-level frequency view tells you what the customer actually experienced.*

34 PREFERENCE CENTRES

Unsubscribe does not always need to mean goodbye forever. Some people may want tour announcements but not merchandise, major announcements but not weekly updates, or simply less frequent communication. A useful preference centre can preserve a relationship by giving people more control.

Mailing lists have always had the same basic problem: people rarely have one single binary level of interest. So a preference centre allows audience members to manage their own subscription, tailoring their own communications from a business.

They can be fiddly to build properly. The preference centre itself needs good UX, but the communication programme behind it also needs enough meaningful variation for those controls to matter. For example, if you only send one tour email campaign every couple of years, setting this up in a preference centre might not be worth the hassle.

WHAT SHOULD PEOPLE BE ABLE TO CONTROL?

Only offer preferences that you can genuinely honour. Useful controls might include topic, artist, product category, territory, channel or frequency. Do not create twelve beautiful toggles if your campaign process ignores nine of them.

PREFERENCE	USEFUL WHEN	EXAMPLE
Topic	Your programme covers clearly different interests.	Music releases / tickets / merch.
Artist or brand	One database serves multiple properties.	Follow Artist A but not Artist B.
Channel	Permissions are managed independently.	Email yes, SMS no.
Frequency	You can reliably deliver different cadences.	Everything / major updates only.
Territory	Location materially changes relevance.	UK shows rather than global touring news.

DO NOT BUILD AN ESCAPE ROOM

A preference centre should not be like The Crystal Maze. If somebody wants to stop marketing, respect it quickly and clearly. The unsubscribe route should not require a password, an account recovery flow, six checkboxes and an emotional support call with your retention team.

GOOD UX

Show the current state clearly. Use plain language. Make save actions obvious. Confirm that changes were recorded. Keep a clear “unsubscribe from all marketing” option. If a preference takes time to propagate through connected systems, tell the customer.

THE BACK END MATTERS MORE THAN THE FRONT END

The prettiest preference centre in the world is useless if the data does not flow into segmentation and suppression logic. Define where the preference is stored, which system is authoritative, how quickly it updates, how historical values are retained and what happens when another system sends conflicting information.

DEVELOPMENT IDEA

Treat preference changes as events, not just field edits. Record when the customer changed something, what the previous value was, where the change happened and which downstream systems received it. That gives you a much better audit trail and makes debugging considerably less horrible.

35 TRANSACTIONAL VS MARKETING

A password reset is not the same thing as “BUY OUR NEW ALBUM”. Receipts, order confirmations, shipping updates, password resets and account alerts serve administrative or service purposes. Promotional campaigns serve marketing purposes. The legal treatment and customer expectation can differ, so understand what kind of message you are sending before applying marketing logic to it.

START WITH THE JOB OF THE MESSAGE

Do not classify a message by the template it uses or the platform that sends it. Ask why the communication exists. If somebody needs the message to complete, confirm or understand a transaction they already initiated, that is very different from a message whose primary purpose is to persuade them to buy something else.

MESSAGE	PRIMARY JOB	THINK
Password reset	Allow the customer to regain account access.	Transactional / service.
Order confirmation	Confirm a purchase already made.	Transactional / service.
Shipping update	Explain the status of an existing order.	Transactional / service.
New album announcement	Promote a new commercial release.	Marketing.
“You bought the vinyl, now buy the T-shirt”	Generate an additional sale.	Marketing.

DO NOT HIDE MARKETING INSIDE SERVICE MESSAGES

Transactional messages often achieve extremely high attention because the customer is waiting for them. That makes them tempting places to add promotional content. Be careful. A receipt should still behave like a receipt. A password reset should not become a newsletter with a reset link hidden halfway down.

THE SNIFF TEST

If you removed the promotional content, would the message still need to exist? If yes, you probably have a genuine service message with optional secondary content. If removing the promotion removes the reason for sending the message at all, you are probably looking at marketing.

DESIGN THEM DIFFERENTLY

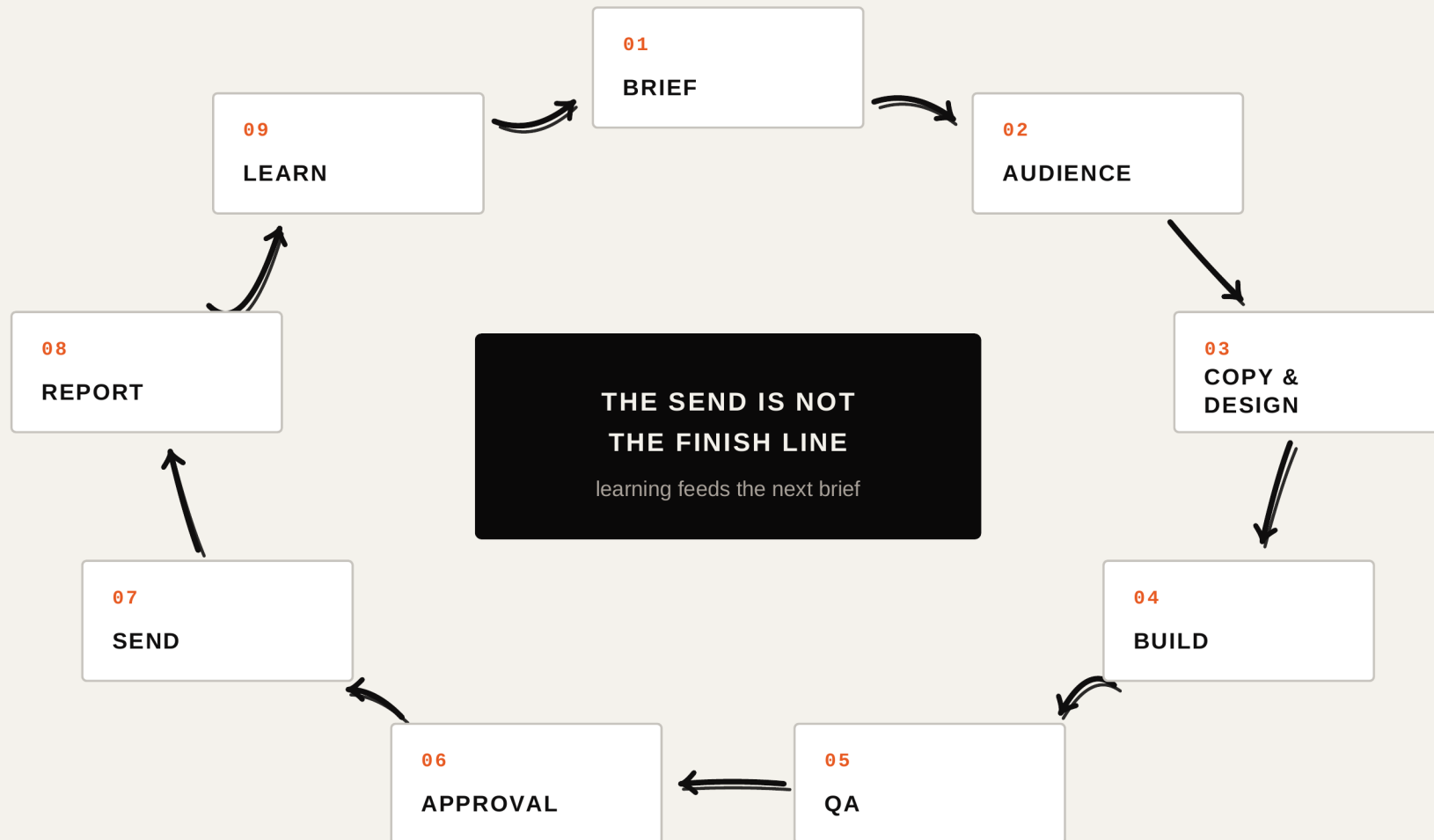
Best-in-class transactional communication is boring in the good way. It is immediate, recognisable, accurate and easy to act on. Put the essential information first. Use a sender identity the customer recognises. Make order numbers, dates, amounts, status and next steps obvious. Do not make somebody hunt through campaign creative to discover whether their payment worked.

Operationally, transactional and marketing traffic may also deserve different journeys, templates, priorities, suppression rules and sometimes different sending infrastructure. A promotional campaign being paused should not prevent somebody receiving a password reset or an important order update.

DEVELOPMENT IDEA *Map every automated message in your organisation and label its purpose, trigger, owner, data source, required fields, expected delivery time and whether promotional content is allowed. You will usually discover forgotten automations nobody has reviewed in years.*

36 THE CRM PRODUCTION LOOP

The detailed approval gates above protect the individual campaign. At programme level, the wider loop continues after send: brief, audience, creative, build, QA, approval, send, reporting and learning. The send is not the finish line. What you learn should feed the next brief.



Whether you run this in a spreadsheet or specialist software, use one shared source of truth. The process only works when the whole team understands it and follows it.

37 THE GOLDEN RULES

- 01 If you did not test the link, assume it is broken.
- 02 If something can be personalised, it can be personalised incorrectly.
- 03 Never trust a test send you did not actually open.
- 04 Email is not print. Design for fluidity, not pixel perfection.
- 05 Never approve a desktop design without understanding what happens on mobile.
- 06 Do not optimise for a tiny client audience at the expense of everybody else.
- 07 A bigger database is not automatically a better database.
- 08 Your customer does not care how difficult the email was to build.
- 09 One clear CTA usually beats six competing ones.
- 10 Do not ask for data you do not need.
- 11 Do not send simply because you have a slot in the calendar.
- 12 A dashboard is not insight.
- 13 A test without a hypothesis is just two versions of something.
- 14 Record what did not work.
- 15 Protect your audience's trust.
- 16 Once an email has gone, it has gone.
- 17 Everything in email is a hack or a bodge.

3. CLEARANCE

Test what you have learned, check the answers, then keep this guide nearby and come back to the reference sections when the job demands it.

38 FINAL CHECK QUIZ: ARE YOU CLEARED FOR SEND?

Choose one answer for each question. Do not peek at the answer key until you are finished. You need 17 out of 20 to earn operational clearance. Clearance means you can safely participate in a normal campaign, recognise when you do not know enough, and know when to stop, look something up or escalate.

1. What is an email client?

- A. The CRM platform used to schedule campaigns
- B. The application or service used to read email
- C. The company that owns the email address
- D. The server hosting the landing page

2. Why is pixel perfect parity against one static Figma design the wrong goal for email?

- A. Figma does not use pixels
- B. Email is a fluid medium rendered across different clients, devices and settings
- C. Email designers are not allowed to specify spacing
- D. Email clients ignore every CSS property

3. What should you assume about mobile design?

- A. It can always be solved by shrinking desktop
- B. It matters only for SMS
- C. It should be treated as a first-class experience and checked against your audience data
- D. It is unnecessary when an email is under 600 pixels wide

4. Why might a layout table use `role="presentation"`?

- A. To tell assistive technology the table is visual scaffolding rather than meaningful data
- B. To turn the table into a slideshow
- C. To hide the table on mobile
- D. To enable JavaScript

5. Why might important CSS be written inline in an email?

- A. Inline CSS makes JavaScript execute
- B. It tends to survive more email clients reliably
- C. It automatically creates dark mode

D. It prevents all rendering differences

6. What is the key difference between having somebody's email address and having marketing permission?

- A. There is no difference
- B. An address is contact data; permission determines whether you may use it for that marketing purpose
- C. Permission matters only for .com addresses
- D. Buying something always creates permanent marketing permission

7. Why should you preserve the original acquisition source?

- A. So the database file becomes larger
- B. So you can understand where the relationship began and evidence provenance later
- C. Because UTMs stop working after one year
- D. Because Outlook requires it

8. What is suppression?

- A. Deleting every inactive record
- B. Deliberately excluding people who should not receive a communication
- C. Sending twice to increase reach
- D. Reducing content on mobile

9. You send 100,000 emails and 98,000 are delivered. What is the delivery rate?

- A. 98%
- B. 2%
- C. 102%
- D. 0.98%

10. A campaign generates £20,000 from 400 orders. What is the average order value?

- A. £20
- B. £40
- C. £50
- D. £80

11. What do UTM parameters primarily help analytics understand?

- A. Which client rendered the email
- B. Where visits and campaign traffic came from
- C. Whether the subscriber gave consent

D. How quickly a message was delivered

12. What should happen when a test produces a meaningful winner?

- A. Stop testing permanently
- B. Bring the learning forward and use the winner as the new baseline where appropriate
- C. Ignore it because generic best practice is stronger
- D. Change several more variables before recording it

13. A presale opens in fifteen minutes. The message is one sentence and one link, and the audience has valid permission for every channel. Which channel is especially suited to the job?

- A. SMS, because the message is short and time-sensitive
- B. A long editorial email because more copy is always better
- C. A PDF attachment
- D. A monthly newsletter sent next week

14. What is a common SMS mistake?

- A. Keeping one clear action
- B. Identifying the sender
- C. Treating SMS like a compressed long email and over messaging the audience
- D. Testing the destination link

15. A customer taps a push notification saying “Your presale is open” and lands on the app homepage. What is the main problem?

- A. Push cannot contain destinations
- B. It should deep link to the relevant presale location
- C. The push needs a longer paragraph
- D. The app should send the same notification repeatedly

16. When is push usually strongest?

- A. When the message is relevant to something happening now in the customer’s app or digital context
- B. When you need to send a five page explanation
- C. When the customer has disabled notifications
- D. Whenever email performance is disappointing

17. What makes an approval gate useful?

- A. Everyone knows what is being approved, by whom and by when, and the team does not silently change it afterwards
- B. Feedback can arrive through any channel at any stage

- C. Nobody owns the campaign
- D. The final approver only sees it after send

18. Why should the whole team use one campaign management platform in the same way?

- A. Because every organisation must buy project management software
- B. To keep one shared source of truth for versions, feedback, deadlines and approval
- C. Because spreadsheets are illegal for marketing
- D. To prevent reporting after send

19. A tiny harmless typo appears deep in an email. What should you consider before sending a mass correction?

- A. Whether the correction could amplify a minor problem that most people never noticed
- B. Whether the logo can be made larger
- C. Whether the email should be converted into a PDF
- D. Whether every recipient should receive an SMS as well

20. You have completed COPY, LINKS, RENDER and LAUNCH. What are you?

- A. Ready for another design review
- B. Probably fine
- C. Clear for takeoff
- D. Required to add another CTA

39 ANSWER KEY

Q	A	WHY
1	B	An email client is the application or service that displays the message.
2	B	Email is fluid and different environments render it differently, so design integrity matters more than identical pixels.
3	C	Mobile should be designed deliberately and informed by your own audience behaviour where possible.
4	A	The role tells assistive technology that the table is layout scaffolding rather than real tabular data.
5	B	Inline styling is often used for important presentation because support for other CSS techniques varies between clients.
6	B	Contact data and permission are different things; permission determines the marketing use you may make of that data.
7	B	Source data preserves provenance and helps you understand how the relationship started.
8	B	Suppression deliberately keeps inappropriate recipients out of a send.
9	A	98,000 divided by 100,000 equals 0.98, or 98%.

Q	A	WHY
10	C	£20,000 divided by 400 orders equals £50.
11	B	UTMs help analytics attribute traffic to source, medium, campaign and often the specific link or creative.
12	B	Useful learning should change the next campaign, with the winner becoming a new baseline where appropriate.
13	A	SMS is well suited to concise, time-sensitive messages when the recipient has appropriate permission.
14	C	SMS loses its advantage when it becomes overlong, overfrequent or needlessly intrusive.
15	B	A useful push should take the customer directly to the thing the notification describes where possible.
16	A	Push is strongest when the context is timely and relevant to something happening now.
17	A	A gate creates accountability only when the team agrees what is approved and respects the approval state.
18	B	One shared system prevents fragmented versions, approvals and feedback from creating avoidable mistakes.
19	A	The Streisand effect reminds us that a loud correction can draw more attention to a small problem than the original mistake did.
20	C	COPY, LINKS, RENDER and LAUNCH complete means you are clear for takeoff.

40 GOOD LUCK, INTREPID EXPLORER

You now know enough to be dangerous. You know why email is weird, why tables still exist, why Outlook occasionally behaves like it has been personally offended by your campaign, and why the internet is full of ancient terminology that everybody continues to use because changing it would somehow be even worse.

You know how to capture data responsibly, build an audience, segment it, design for different people and devices, test ideas, understand the numbers, check your work and make the next campaign better than the last one. You will still make mistakes. Everyone does.

You will send yourself a test email and immediately spot the typo you somehow missed six times. You will spend forty minutes fixing something that breaks in one obscure email client. You will discover strange acronyms, ancient technologies and inexplicable workarounds left behind by generations of developers before you. That is part of it.

The internet is full of history. Email might contain more of it than most. Keep asking questions. Keep testing. Keep learning. Keep a record of what worked and what did not. Above all, keep trying to make every message a little more relevant than the one before it.

Send the right message, to the right person, at the right time, in the right channel, for a reason they understand.

You can do this. I believe in you! Don't fuck this up 🤞

41 RESOURCES AND FURTHER READING

When a rule, platform or technical detail matters, use current primary sources. Regulations and client support change. This list is a starting point, not a substitute for checking the latest guidance.

ICO: Direct marketing and electronic communications	OPEN RESOURCE ↗	UK data protection and PECR guidance.
ICO: Guidance on direct marketing using electronic mail	OPEN RESOURCE ↗	Current UK guidance for email and related electronic marketing.
FTC: CAN-SPAM compliance guide	OPEN RESOURCE ↗	US federal commercial email guidance.
California Attorney General: CCPA	OPEN RESOURCE ↗	California privacy rights and official guidance.
California Privacy Protection Agency	OPEN RESOURCE ↗	California privacy regulator.
CRTC: CASL	OPEN RESOURCE ↗	Canadian anti spam guidance.
European Commission: EU US Data Privacy Framework	OPEN RESOURCE ↗	International transfer framework information.
GOV.UK: UK US data bridge	OPEN RESOURCE ↗	UK Extension and data bridge materials.
Can I Email	OPEN RESOURCE ↗	HTML and CSS support across email clients.
W3C Web Accessibility Initiative	OPEN RESOURCE ↗	Accessibility standards and guidance.
Google Analytics history: Urchin acquisition	OPEN RESOURCE ↗	Background on the company behind UTM terminology.

INDUSTRY RESOURCES

Check out Litmus, Email On Acid, Campaign Monitor, Action Rocket, All Things Email, Really Good Emails and Beyond The Envelope for some seriously incredible resources on email marketing and CRM.

For specific legal or compliance decisions, speak to the appropriate privacy, legal or regulatory experts. BIAS can explain the words. It should not pretend to be your lawyer.