

# Transform Business Emails Into a Branding, Marketing, Communication Powerhouse

In today's world of amazing technological developments, email can seem almost like the communication of cavemen. However, the reality is that email is still one of the most widely and most effective ways to communicate in the world and offers businesses an easy, efficient, and affordable way to reach out to customers on a regular basis.

The problem is often that email *is viewed* as a quick, easy way to tap customers. With the rush to get campaigns out the door, it can be easy to overlook the customer experience and how to optimize for it.

## Revamping Upwork's Email Program

Over the past year, a small Upwork team embarked on a complete overhaul of the company's email platform to make the final output—email communication— better for customers while enhancing our branding, marketing, and communications efforts. The team evaluated hundreds of emails sent to customers, streamlined content and design, measured effectiveness, and broadened reach.

One priority was to guide a cultural shift within the company to view email differently, not just as a quick way to send a message, but instead as an opportunity to engage with customers and help them hire or be hired and ultimately driving trust and loyalty.

We learned a lot during our journey, and many of the lessons can be applied broadly to other companies as well as to the designers who serve them. Here are some ways you can transform your own email platform.

## Start small and scale later

Like most company-wide programs, it's a good idea to start with a small sampling of emails before you try to implement changes more broadly. Our team began with triggered email streams and administrative versions, which allowed us to test in manageable quantities and learn from mistakes early on.

If you are revamping your organization's email platform, select a handful of commonly sent emails and work with those first. Understand how these common emails are created and by whom, whether any design or content standards apply, and how they are measured and evaluated. Then, create an ideal for all of these factors and document them carefully in a design playbook.

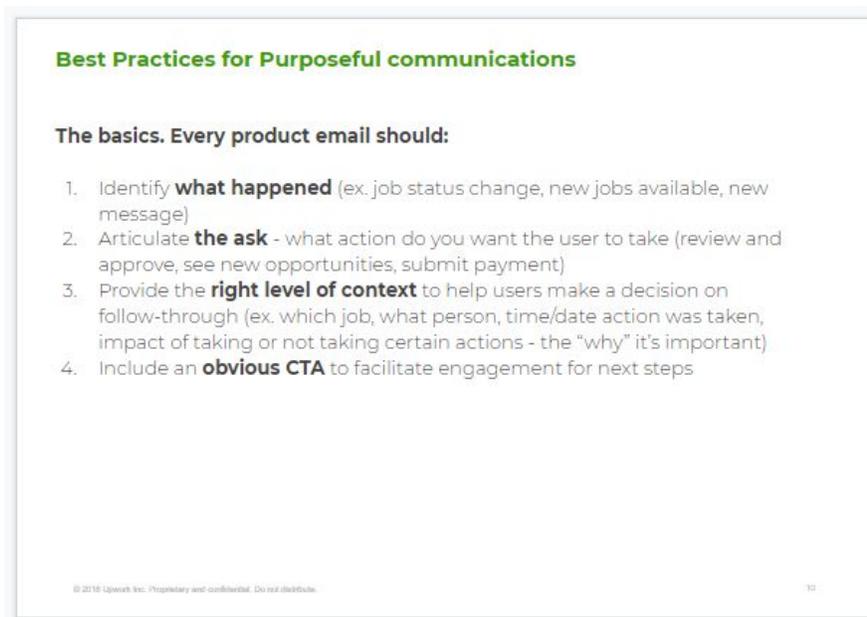
## Create a Design Playbook

If you begin revamping your email platform, you'll soon realize that the number of details involved in creating a consistent, effective set of templates for all your customer, user, or stakeholder emails can be overwhelming. It's important from the outset to create a design playbook where you can record and organize all the decisions you make about your email platform.

The design playbook becomes the focal point of your program, helping everyone involved stay on task, reminding team members of decisions made, and educating newcomers to the system. It may include templates, guidelines, spacing and font requirements, color palettes, and a host of other details organized in an easy-to-reference manner.

Once you have your design playbook in a working draft format, you can start applying the standards to high priority emails first.

Below is a section from our Email Design Playbook.



## Prioritize and test high-value emails

About one-sixth of our emails made up the majority of the overall email volume. By focusing on that top tier, we were able to maximize the time and resources spent. We took a look at both the former and revised iterations of these emails and used email analytics to measure performance. We started tracking open and click through rates and began testing different versions using A/B testing methodology. For example, for very important messages we didn't want our customers to miss, we learned that adding "critical notice" to the subject line increased open rates by 29 percent.

As you test different subject lines, placement or number of call-to-action buttons, and other such email variables, be sure to document the patterns that work most effectively for your organization. These patterns can help guide others in your organization to create more effective emails in the future.

Once you've nailed down effective design and content, you'll want to ensure that your email communications can be accessed by everyone.

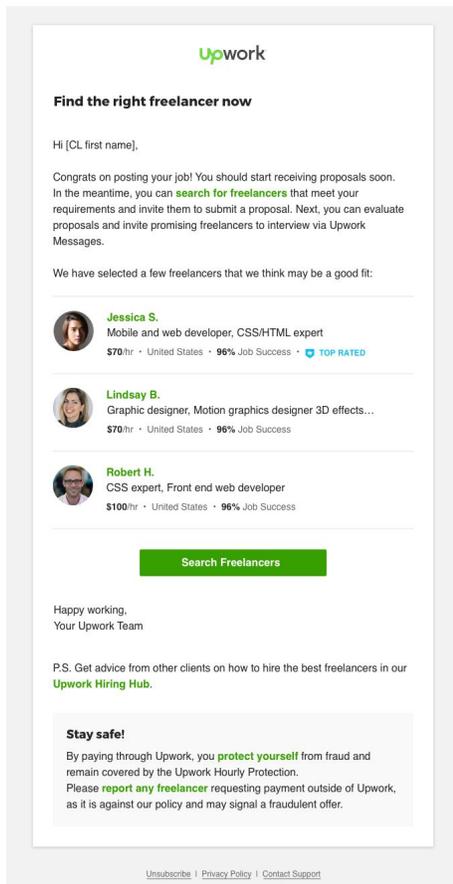
## Emails should be purposeful

The most important factor for each email is that it must have a single purpose. Fine-tune the point of every email into one concise sentence and articulate what you want the recipient to do. Having those two things clearly defined for each communication will help you reach your email goals much more effectively. Each email should contain the following information:

- Identify what happened.
- Articulate the ask - what action do you want the user to take? What is the goal and intent of the email?
- Provide the right level of context to help users make a decision on follow-through.
- Where applicable, include an obvious call to action (CTA) to facilitate engagement for next steps. We generally felt that all emails presented an opportunity for re-engagement, even those where we weren't asking the user to explicitly respond.

How email content is presented is equally important. To help reinforce the primary purpose of the email, we added only one primary user action button per email. All other actions would be included as secondary user action buttons. We also found that user action buttons perform better than links, so we replaced some links with buttons.

Below is one of the emails we configured with these goals in mind:



## Open all channels to potential recipients

Obviously email communication is no good if your recipients can't open, access, read, or receive them easily. Making sure email is optimized for mobile devices with smaller screens is a must.

Key tips:

- Use a font and size that were readable on these devices as well as potentially scaling down design and layout for viewing on mobile devices. We chose Helvetica as our base font family like many other companies because this font is easy to read and it's supported by most email clients (Gmail, Yahoo, etc). For better readability, we made our body text 16 pixels; the minimum recommended is 14 pixels. In addition, we wanted to be able to effectively reach hearing- and seeing-impaired users. We added alternative text and designs to facilitate communication with color blind users or those who use screen readers. Finally, after all these steps have been accomplished, create easy-to-use, consistent templates so that your entire organization can begin applying the email powerhouse platform in every communication.

## Design templates to foster consistency

In order for an email platform to build brand awareness, all emails should look like they come from the same company. To make it easier for all Upwork employees to maintain consistency, we created a

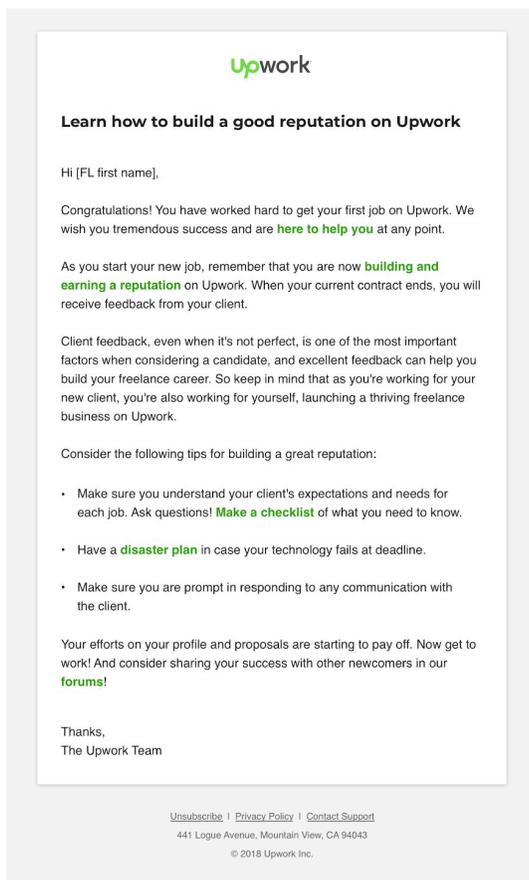
basic design template that used the same colors, fonts, and layouts while having enough flexibility to accommodate different communication needs of individual departments.

In addition, you'll want to make sure your email platform is consistent with your overall brand voice and strategy. Be sure you keep your overall company vision, mission, and value statements in mind as you are creating your email platform.

## Emails should have proper branding and tone

Our email communications should be professional and fit our branding voice, but not lose a personal and friendly feel. Our brand characteristics are empathetic, empowering, trustworthy, and innovative.

As we rewrote content for each email, we relied on these characteristics for creating more personal, accessible content. Below is an example of an email that embodies our brand characteristics while still being professional.



## Conclusion

To maximize the power of email communication, take the time to understand your customers needs and then invest carefully to ensure all aspects of your email meets those needs.

This will not only help ensure better open rates and engagement but a more thoughtful approach to how you plan out campaigns.