

# Plan > Send > Convert

## Master the Art of B2B Email Marketing

The Who, What, Where, When, Why & How





## Email marketing stands as the number one channel for converting prospects into customers.

For business-to-business (B2B) in particular, research shows that open rates have doubled compared to pre-pandemic levels and over 75% of people are more likely to engage with personalised messaging. This is why it's imperative you get your email marketing strategy nailed, so you can optimise engagement with your prospects and win more work.

In this playbook, we delve into what has the greatest impact in your email marketing strategy – the measurable specifics that are catered to B2B communications and build the strongest foundations for success with your emails.

From the first touch right through to close, we show you how to:

- Measure and track your campaigns
- How to add personalisation
- Structure your emails to boost engagement
- Deliver your communications efficiently

Let's sharpen your strategy and start driving conversions.

*Heather*

Heather Cameron, Marketing Manager



# The WHY

When it comes to sales and marketing tactics, we should all be aligned on the **why**. For most businesses it'll probably help to have these core goals in mind:

- Winning more work
- Maintaining loyal customers
- Building a steady revenue stream

But to track success and **truly understand why** you're doing what you're doing, you need to have clear measurables before you start.

There will be varied metrics you want to use that measure the outcomes of your sales and marketing efforts. These can include:

- Number of prospects converted
- Volume of customers
- Average order value
- Level of "ideal customer" engagement

The key metrics you should be tracking within email marketing specifically are the Open Rate and Click Rate.

## Make it Happen

Use email software or a **Customer Relationship Management (CRM) system** that has integrated analytics, so you can manage and track your activity all in one place. Use tracking links for hyperlinks and buttons to get granular insight for your engagement tracking.

## What 'good' looks like...

The key performance indicators (KPIs) you'll be aiming for will vary between sectors, the demographics of the recipients, how familiar you are with the recipient, and so on. That said, generally you'll want to aim for **20% open rate** and **2-3% click rate** as those are average, baseline metrics within B2B email marketing.

Don't get too caught up in the exact figures though, as open and click rates can be misleading due to spam filters that can register as false engagement. Instead, focus on overall upward trends, as this is an accurate indicator of improved performance.



### Open Rate

the level of clicks to open your email

#### You could look at:

the number of unique opens  
(individuals opening your emails)

the total number of opens  
(each email open, even if it's multiple times by one individual)

the percentage of opens compared to recipients  
(this allows you to compare campaigns, even if the audience volume varies)

### Click Rate

the volume of engagement with the clickable elements within your email

#### You could look at:

the number of unique clicks  
(the number of individuals who have clicked on something)

the total number of clicks  
(each click, even if it is multiple times by one individual)

the percentage of clicks from those who have opened the email  
(this allows you to compare campaigns, even if the audience and click volumes vary)

# The WHO

## Speak to the individual, not the company

Consumers are more discerning than ever before - you know when you receive an email whether it's been designed with you in mind or not. Research shows **84% of email recipients appreciate when companies treat them like an individual**, so understanding **who** you're communicating with makes all the difference when creating content, including emails.

For outbound marketing, especially when reaching out to prospects, personalising your emails goes a long way to building rapport and engaging with your recipients on a more emotional and personal level.

If you have enterprise or key level clients, this can be achieved by sending genuinely bespoke and individual emails to them. This will let you be completely specific about the content you include for these important clients.

Most email platforms will allow you to use dynamic fields in your emails (e.g adding a "first name" to your email so each recipient is greeted by name). For larger campaigns with a wider reach, this is a great way to keep your emails feeling personal.

## Personalisation matters

As a baseline, start with a personal greeting that addresses the recipient by name. This shows you know at least a little about who they are and starts the tone of the email in the right way.

Make sure you're speaking in language that your recipient recognises, as well as keeping on-brand with your messaging. If you feel like your brand tone can't speak well to your prospects, then you may need to work on tightening up exactly how you want to speak to your clients.

Demonstrate the value you can provide the recipient by ensuring any offers or insights you include in the email are relevant for them. This will help to answer the "so what?" and spark genuine interest.

## Keep your data accurate

It's important to stay on top of your data for effective personalisation. Research shows there's been a high turnover of professionals with the B2B space in recent years, with many changing roles or companies. This means **average email deliverability rates have seen a drop from 96.8% to 92.1%** due to out-of-date contact details.

An effective way of maintaining data accuracy is having access to live intelligence that integrates with your CRM system.

The Barbour ABI platform makes this process simple for those operating in the construction industry. Our specialist researchers are continuously ensuring project and contact details are up to date, and with our API you always have access to the most current and relevant data you need.

## Make it Happen

Learn about understanding who to target in our **essential guide for marketing to the construction industry.**

# The WHAT

STEP  
1

## Email subject line

When crafting the perfect email, the subject line is key. This is the first thing the recipient sees, and can be the difference between either catching their attention and having your email opened or being just another email they disregard in their inbox. Keep it brief, eye catching and related to the content of your email.

Research suggests that subject lines with **50 characters or less** result in 12% higher open rates and 75% higher click-through rates than emails with longer subject lines.

STEP  
2

## Talk about them

For the main body of the email, start with **key information that shows you've researched the recipient**. This can be extracted from the Barbour ABI platform, so you can reference details such as a project they're involved in and explain how they can benefit from working with you. The focus can be on what you can offer within the current project or similar, upcoming projects.

Make the benefits of working with you clear and related to the pain points of your target audience. Show what problems of theirs you can solve and how your unique selling points (USPs) can enhance their work.

STEP  
3

## Talk about you

(but only things they care about)

When you understand your audience, you can understand what they're looking for from a partnership with a business like yours. When you reach out, every prospect wants to know **whether you'll be the right fit for what they need**. To help them make a quick decision, include concise information on similar work you've been involved in and successes that show your expertise.

STEP  
4

## Call to action

What do you want the recipient to do after reading your email? Keep your WHY in mind with a clear call-to-action (CTA).

It's best practice to include the purpose of your email at the start, as the recipient is unlikely to read the entire email if they're not hooked in at the beginning. Follow this with justification as to **why they need to take the action**. Finish with what they need to do to achieve this action, such as booking a meeting with you to discuss the project.

## Make it Happen

You can find out more about writing great email subject lines in our blog: [How to Improve Email Open Rates](#).

# The WHERE

A solid CRM system will set you up for success when targeting and tracking communications with your target contacts. There is a multitude of tools you can use to manage your data, activity and for the delivery of your emails – all with varied capabilities and complexities.

## The automated

Setting up an automated workflow that sends emails when your prospects perform (or don't perform) an action is the ideal way to maximise your productivity. This means your campaigns can be running in the background while you're taking care of your day-to-day responsibilities. This can also integrate different communication streams and content formats so you can meet your audience where they're at.

These can be a little more complex if you haven't used them before, but once you've got the hang of them, they will seem nice and easy. And you can make them as straightforward or as complex as you like.

## The old-faithful

Keeping things simple with classic email platforms can work well for SMEs that may not have a dedicated marketing function. These platforms have an array of templates and drag-and-drop design elements for you to construct your email with minimal design input.

## The all-rounder

There are systems available that integrate CRM, communication delivery and reporting in one. This could be a great option if you're wanting to save money on multiple systems and streamline your processes without the need for an Application Programming Interface (API).

## Make it Happen

Popular B2B email systems you can explore include:

- **Intercom**
- **Mailchimp**
- **Salesforce**
- **Hubspot**
- **Constant Contact**
- **Campaign Monitor**

# The WHEN

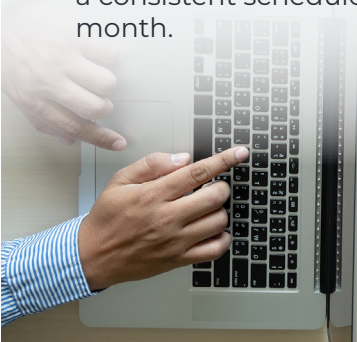
Having your audience engage with your email on delivery is the aim. This is why it's important to send your emails at the optimal time of day to catch your audience when they are most open to being approached and respond to the CTA.

**For emails rich in content** like a newsletter or reports, it can be useful to send these during downtime such as lunch or as they come to the end of their workday.

**For emails that require action** it's best to send these during your business hours so you can respond to any enquiries with minimal downtime. The start of their workday can work well, as they'll be actively working through emails during this time.

Consider what days of the week or times of the month your audience will be able to engage with you, so you can deliver on an appropriate day. For example, if your audience works Monday to Friday, avoid weekend emails as they'll get missed by the time the new week starts. If your audience work within in regular, monthly time constraints such as month-end sales targets, avoid their busiest periods where you can.

You can also build expectation if your emails are delivered on a consistent schedule, for example the first workday of the month.



## Make it Happen

Keep track of your leads and connect your schedule to relevant projects using the Barbour ABI platform. Our experts can show you how to use the platform tools and features to your advantage.

[Book Your Demo](#)

	For B2B professionals		
	Most Optimal	Less Optimal	Least Optimal
Days	Tuesday Wednesday Thursday	Monday Friday	Saturday Sunday
Times	Morning (8am-10am) Lunch (12pm-1pm)	Early Evening (4pm-6pm)	Peak Work Hours (10am-12pm and 2pm-4pm)

These are a guideline you can use as a starting point, but the best way to find peak times for your audience is to keep testing and tracking when your emails are having the greatest impact.

# The HOW

## Achieving the results you want comes from setting the right foundations by developing a good email structure and design that will effectively present your content.

Simple, consistently branded design elements will become immediately recognisable to the recipient as they become familiar with you and your brand.

To avoid your emails appearing disjointed, make sure you're using a consistent font and text sizing. You can embolden significant words or statements to draw attention, but avoid using multiple colours and complex design elements to keep the focus on your primary message.

Break up a large body of text with graphics, bullet-pointed or numbered lists. If you're listing products, services or benefits of working with you for example, you can display these in a concise list with supporting imagery within your email. This allows you to go into more detail once you're engaging the prospect, having sparked initial interest.

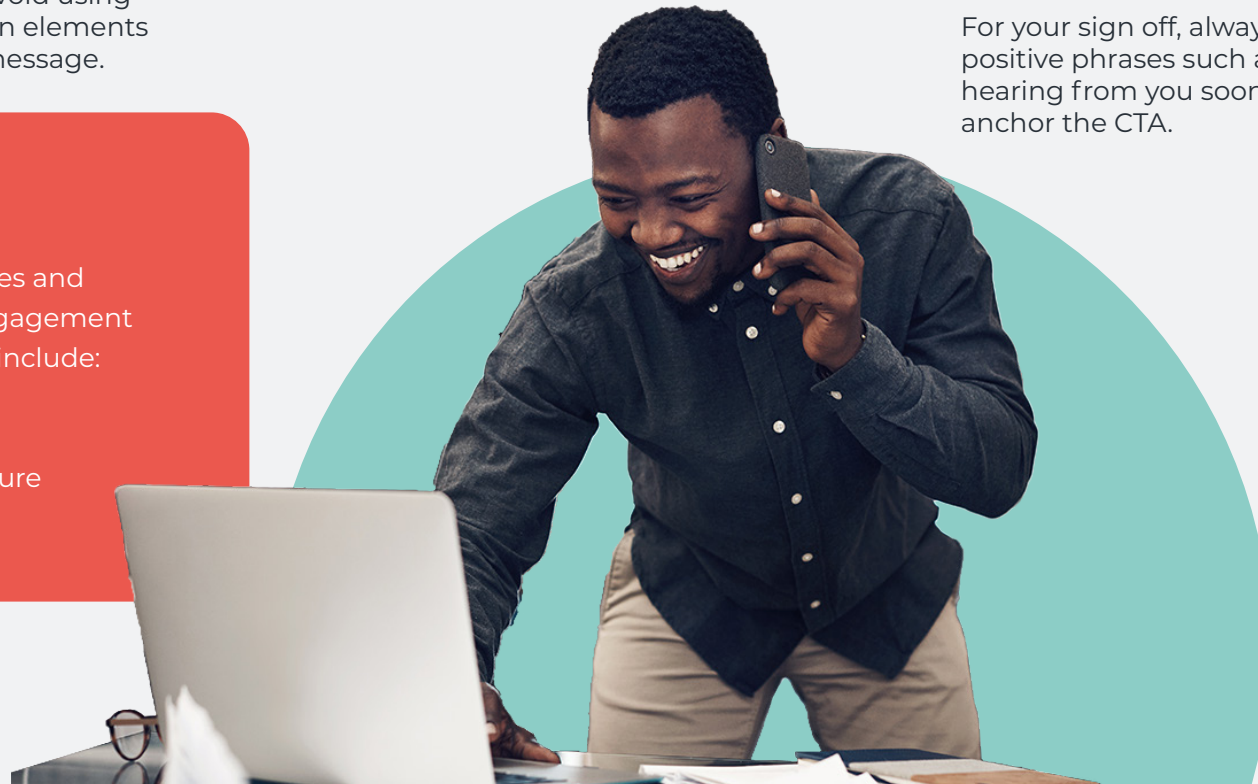
To continue the conversation, if you're looking to have a meeting for example, suggesting some days and times you're available simplifies some of the decision making for the recipient, as this allows them to easily choose a suggested time or provide an alternative date. Even better, refer to a booking link that's connected to your calendar to encourage autonomy and transparency.

For your sign off, always be assumptive. Using positive phrases such as "I look forward to hearing from you soon" can be effective to anchor the CTA.

### Make it Happen

Use A/B testing with varied structures and designs to see what encourages engagement with your target audience. This can include:

- banner vs no banner
- multiple CTAs vs one focus CTA
- multiple sections vs simple structure
- buttons vs hyperlinks



Want granular insight into the projects and contacts  
you need to be targeting with your email marketing?

Get 10 Free Leads



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