



The SMB marketing blueprint



How to improve visibility, stay consistent, and win repeat customers - without a marketing team

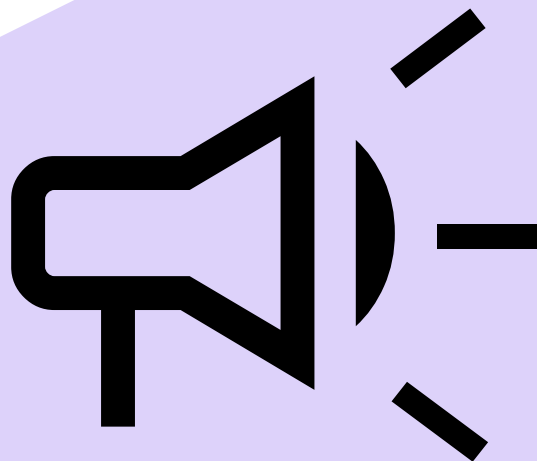
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Introduction



If the word “marketing” makes you feel slightly anxious, you’re not on your own. There’s every chance you may not think of yourself as a marketer – and you know what?

That’s *completely* fine.

This guide isn’t written for marketing professionals. We’ve put marketing jargon to one side and put it together for people *like* you; business owners who are great at what they do, but just need a helping hand in getting started with marketing.

Before we get started, let’s start with the positives: the chances are, you’re already marketing every day – you just don’t know it.

Every time you follow up with a customer after a job, ask for a referral, or drop a former client a message to say hello, it may not feel like marketing, but newsflash: that’s *exactly* what it is.

This guide will show you how to ramp up your efforts and make your processes more consistent, scalable, and outline the steps you can take to ease your workload and stop having to remember to do everything yourself.

By the time you've worked through the upcoming chapters, you'll have a crystal clear picture of:

- Why proactivity, not *reactivity* will always win
- How to use the customer data you already have to send smarter, more targeted messages
- How to build professional-looking emails without any design skills
- How to automate follow-ups so nothing gets missed
- Which emails consistently drive repeat business and referrals
- How to understand your results and improve over time
- How to extend your email system into text messaging and social media

Before we get started, bear in mind that we're going to cover a lot of ground. You don't need to do everything at once. In fact, we'd advise against it.

Instead, take your time, digest the information at your own pace, and prioritize the areas that feel most relevant to where you are right here, right now.

Because taking a small step today is worth more than a perfect plan that never gets started.

On that note, let's set the ball rolling...

Chapter 1

Why proactive, not reactive marketing, will *always* win...



First and foremost, we want to make sure you're approaching marketing in the right way.

Many businesses fall into the trap of marketing reactively. When business is slow and customers are quiet, they put out a message. When they're busy, priorities shift elsewhere and marketing activity is put on hold.

You may think spending time on marketing when you're attracting customers is a fruitless exercise. However, this approach is costing you more than you realize...

Why reactive marketing can be detrimental to your business



When you only reach out to customers when you need something - more work, more revenue, more leads - your marketing feels transactional.

Trust us: your customers *will* notice, and unsurprisingly, if you go quiet for weeks or months at a time, they won't sit and wait for you. They'll move on and take their custom elsewhere. Not because your work wasn't good enough, but because you weren't there when they needed you.

The reactive cycle looks like this: business slows down, you panic and send some messages. Sure, this may bring in some business (albeit temporarily), but your sales pipeline pays the price, with leads drying up and business grinding to a halt.

Marketing can't be something you pick up ad hoc when you have time. It needs to be treated as something that runs in the background all the time, whether you're busy or not.

Why proactive marketing is your ally - not your enemy



Proactive marketing isn't about sending more. It isn't about being pushy, going overkill with promoting yourself, or spamming inboxes with emails people don't want.

Rather, it's simply about being consistently present and making sure the people who already know and trust you hear from you often enough to keep you front of mind. So that when they need your service again, or when a friend asks them for a recommendation, your name is the first that springs to mind.

The businesses that grow consistently aren't the ones doing the most impressive marketing. They're the ones doing it regularly, and they're the ones customers know, like, and above all else, trust.

So, don't fall into the trap of thinking a brilliant one-time campaign will do the trick. Instead, focus your efforts on building a steady, reliable presence.

What this looks like in practice

Adopting a proactive mindset doesn't mean overhauling everything you do. Rather, you need to build small, consistent habits to help you stay in touch, and then automate the process.

For most businesses, a proactive marketing system looks something like this:

-  **A short, useful email to your client list once a month**
-  **A follow-up message after every job is completed**
-  **An occasional check-in with customers you haven't heard from in a while**
-  **A simple ask for a referral when a job goes particularly well**
-  **A weekly post on social media**

None of these things are complicated. The challenge isn't knowing what to do. It's doing it consistently, week after week, when you're busy running the actual business. Which is exactly why the rest of this guide focuses on automating processes to make sure they happen whether you remember them or not.



Key takeaway

If you're marketing reactively, the first thing to change isn't your strategy or your tools, it's your mindset. Commit to staying consistently present, even when things are going well. That single shift is the foundation everything else in this guide builds on.

Action points



Ask this question honestly: are you marketing reactively or proactively? If your marketing is reactive, what's been stopping you from staying in touch more consistently?



Identify three customers you haven't contacted in six months or more



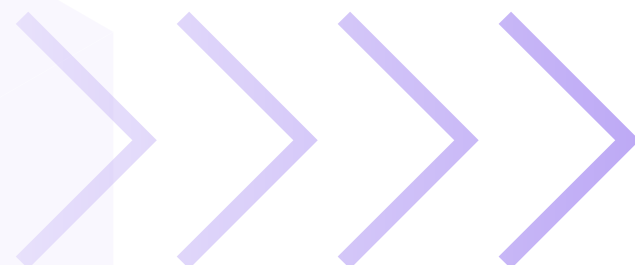
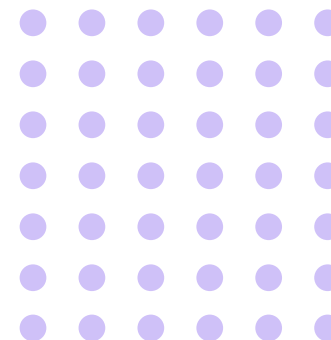
Send each of them a short, personal message this week. Not a promotion. Just a genuine check-in



Decide on a realistic sending frequency for regular communications. Once a month is a good starting point



Commit to that frequency. Write it down somewhere visible



Chapter 2

Your customer data is a marketing goldmine
- but are you using it properly?



Businesses the world over are blinded by the misconception that a huge budget or pioneering idea is needed to kickstart their marketing into life.

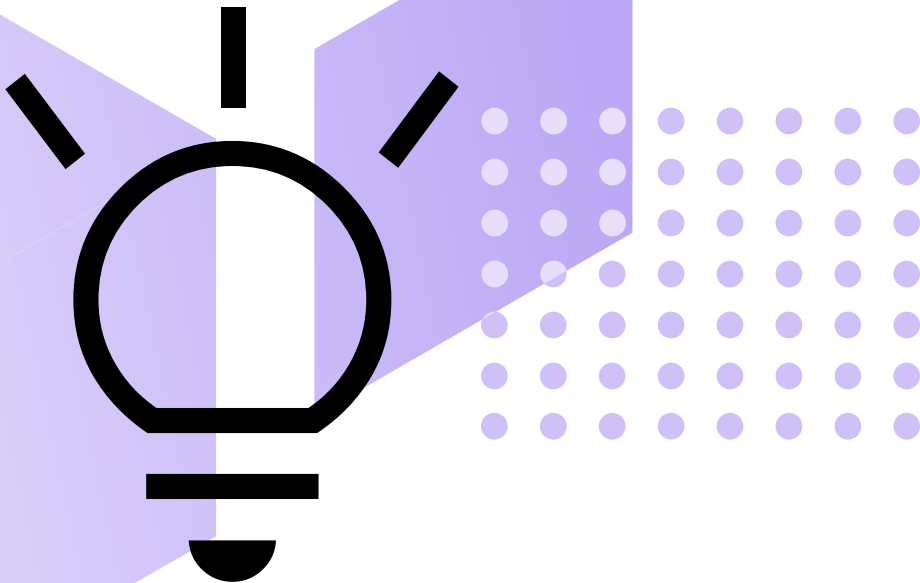
However, there's every chance there's a goldmine of information right under your eyes: customer data.

They already know you, have paid for your services, and are far more likely to come back or refer you than a cold prospect who's never heard of you.

This data might be in a spreadsheet, an email inbox, or a customer relationship management tool (a CRM, software designed to store and organize your customer information).

The question is whether you're making the most of it.

Why you already know more than you think



Your customer data contains far more useful information than a list of names and email addresses. Look at it with fresh eyes and you'll start to notice patterns:



Customers who come back regularly.



Ones who haven't been in touch for a while.



People who always buy a particular service.



Contacts who have referred others in the past.

Each of these patterns is a marketing opportunity waiting to be acted on. A customer who hasn't heard from you in six months is a re-engagement message waiting to happen, a cluster of customers who all bought the same service might be interested in something related, while a client who once referred a friend is someone worth keeping especially close.

Auditing your contact list

Before you can use your data, you need to know what you've got and whether you can trust it. Take some time to go through your contact list and ask:

-  **Is every contact's name spelled correctly and formatted consistently?**
-  **Do you have a valid email address for everyone you want to stay in touch with?**
-  **Are there duplicates, i.e. does the same person appear twice under slightly different details?**
-  **Are there contacts who are no longer relevant?**
-  **Are there customers you've worked with recently who aren't on your list at all?**

Cleaning your list isn't glamorous work, but it matters. Sending emails to outdated or incorrect addresses damages your reputation with email providers over time, making it harder for your messages to reach the people you actually want to hear from.

We'll come back to this in Chapter 6.

Once your list is clean, think about how you can add more structure to it. Most tools let you apply labels or tags to contacts. These are simple markers that describe who someone is or what they've bought. For example, you might tag contacts as "current client," "lapsed client," "prospect," or by the type of service they've used. These tags become the foundation for everything you do next.

It's worthwhile syncing your marketing tool with your CRM. This ensures that the information is always up to date as things change.

Why segmentation matters

Sending the same message to everyone on your list might feel efficient, but it often does more harm than good. Think about it from the recipient's perspective. If you've been a loyal customer for three years, a "welcome" email feels odd. If you've never actually bought anything, a "thanks for your continued support" message feels impersonal and a little hollow.

Segmentation divides your contacts into meaningful groups so you can send each group something relevant. It's the difference between a message that feels like it was written for the reader, and one that clearly wasn't.

You don't need sophisticated software or complicated logic to get started. Even a basic set of groups makes a significant difference:



Current clients - people you're actively working with or have worked with recently.



Lapsed clients - customers you haven't heard from in six months or more.



Prospects - contacts who have expressed interest but haven't yet become customers.



Contacts by service type - useful if you offer more than one service and want to send targeted information.

For each of these groups, the messaging is different. A lapsed client needs a warm re-engagement message. A prospect needs something that builds confidence and moves them toward a first purchase. A current client needs to feel valued and well looked after.

The difference between groups and segments in Transpond

If you're using Transpond, you'll come across two ways of organizing contacts: groups and segments. They sound similar but work differently, so it's important to understand the difference and use the right one.

NB: These names differ, depending on which platform you use. For example, HubSpot uses lists, while DotDigital uses Address Books for static lists and Segments for active/smart lists.

What is a group?

Groups are essentially subscription lists. Think of them like opt-in lists that contacts can choose to join or leave. A monthly newsletter is a good example. So are product update emails, or a list of customers who've signed up for a particular promotion.

The key point is that contacts have control: they can choose to unsubscribe from one group while staying on others. Every marketing email you send should include an unsubscribe link, it's both good practice and a legal requirement in most countries, and groups make it easy to manage this properly.

What is a segment?

Segments are filters, not lists. A segment doesn't store contacts in a separate place. It simply displays a filtered view of your existing contacts based on criteria you set.

For example, all contacts tagged as "lapsed clients based in Chicago" are a segment. The contacts themselves are just in your main list; the segment is a lens you apply to that list when you want to send something specific.

Here's a practical way to think about the difference. If you're setting up a monthly newsletter that people can choose to subscribe to and unsubscribe from at will, that's a Group. If you want to send a one-off promotion to all clients who bought a specific service in the last year, that's a Segment.

Contacts who unsubscribe from a Group will stop receiving emails sent to that Group, but they won't disappear from your list entirely. That means you can still reach them through other Groups they're still subscribed to, or through specifically targeted Segments.



Key takeaway

Your customer data is already doing a lot of the hard work for you. The goal is to organize it in a way that lets you act on it. A little time spent structuring your contacts will pay dividends every time you send a message.

If you're using a CRM alongside a marketing platform, look for one where the two connect directly.

When they're linked, lists you create in your CRM can sync automatically to your marketing tool as segments, so you only ever have to organize your contacts once. Any new contacts you add in your CRM will appear in your marketing platform automatically.

Action points



Go through your contact list and remove duplicates, incorrect addresses, and irrelevant contacts



Add tags or labels to your contacts to indicate their status: current client, lapsed client, prospect, and so on



Create a saved list or segment for each of the following:

- All current clients
- Lapsed clients (no contact in six months or more)
- Prospects (contacts who haven't yet become customers)
- Contacts by primary service type, if relevant to your business



Decide which lists need a Group in your marketing platform (for example, a newsletter people can subscribe and unsubscribe from) and which should be Segments (for example, a filtered view of clients who bought a specific service)



Set up those Groups and Segments in your marketing platform

Chapter 3

How to build professional-looking emails, without a designer



One of the most common reasons business owners opt against sending email marketing is the assumption that their emails won't look professional enough. Oftentimes, there's an assumption that a designer, a brand kit, and high-level expertise is needed to make a fist of it.

Sound familiar? Well, you needn't panic.

The emails that perform best for small service businesses are rarely the most elaborate. A well-written email in a clean, simple layout will almost always outperform a heavily designed one that feels corporate and impersonal.



While email's established itself as a tried and tested marketing channel, research has revealed that **19% to 20%* of small businesses aren't using it as part of their strategy.**

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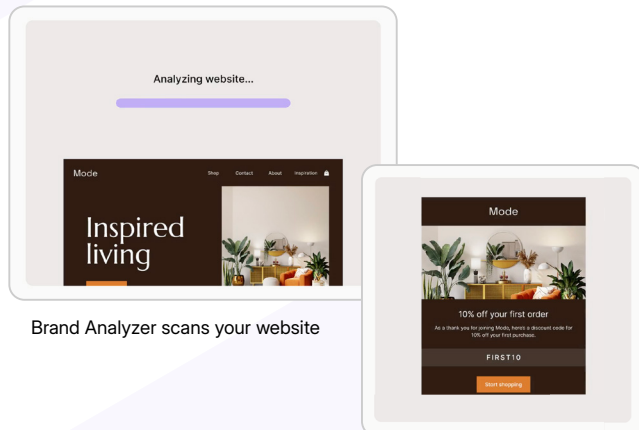
* <https://www.forbes.com/advisor/business/software/email-marketing-statistics/>

Tips for getting started

Start with your brand basics

Before you build your first email, gather the basics: your logo as an image file, your brand colors (if you don't know the exact color codes, your web designer or the person who built your website will), and the name of the font you use most often. Transpond lets you save these as global settings, so every email you create looks consistent without you having to set it up each time.

Transpond also offers a Brand Analyzer tool that scans your website and pulls your colors, fonts, and logo through automatically, meaning you can quickly and easily create emails that match the look and feel of your brand.



Brand Analyzer scans your website

Outcome of the branded email

Use templates

You don't need to design an email from scratch. A reputable email marketing platform should provide a library of pre-built templates: professionally designed email layouts that you can customize with your own content to make your life easier.

Look for a platform with a drag-and-drop editor. This is a type of an email builder that works visually, without any coding. You click on any part of the email, change it, and see the result immediately. You can move sections around, add or remove elements, and customize colors and fonts, all without touching a single line of code.

Most platforms also offer a mobile preview, which shows you how your email will look on a phone or tablet before you send it. This matters because a large proportion of people read emails on their phones. An email that looks great on a desktop computer but is difficult to read on a small screen will cost you opens and responses. Always check the mobile preview before sending.

The good news is that most modern email templates are “responsive” by default. Responsive simply means that the email automatically adjusts its layout to look good on whatever device it's being read on, whether that's a desktop, a laptop, a tablet, or a phone.

Make it feel personal

As a smaller business, you have an advantage over bigger competitors in that you're able to offer a more dedicated, personal experience for your customers.

The goal of your email marketing should be to preserve that feeling, instead of replacing it with something that sounds like it was written to appeal to a mass audience.

Here are a few things to bear in mind to make your emails feel personal:



Use the recipient's first name in the greeting. "Hi Sarah" lands differently from "Hi there." Most marketing platforms let you do this automatically using a merge tag, a small piece of placeholder text that gets replaced with the actual contact's information when the email is sent. So where you write `{{first_name}}` in your email, the platform automatically inserts "Sarah" for Sarah, "James" for James, and so on. You write the email once, and every recipient sees their own name.



Write like a human. Read your email back and ask: does this sound like me, or does it sound like a press release? If it's the latter, rewrite it. Use short sentences, plain words, and a conversational tone.



Be specific. "We've been working with clients like you for over 10 years" is generic. "We know that managing a growing team while keeping clients happy is no small thing" is specific and relatable.



Send at the right moment. Great email marketing hinges on timing. A check-in email sent a week after a job is completed feels timely and thoughtful. However, if the same email's sent four months later, this feels random and loses its impact.

Focus on one message and outcome

Before you send anything, ask yourself: what is the single thing I want the reader to do after reading this? Book a call? Read a blog post? Claim an offer? Whatever it is, build the email around that one action.

The thing you want people to click on is called a call to action, or CTA. It's usually a button or a link that takes the reader somewhere: to a booking page, a website, a contact form. Make it obvious, easy to find, and only include one.

An email with one clear message and one clear call to action will consistently outperform a busy, multi-section email that asks the reader to do multiple different things. If you ask too much of the reader, there's a fair chance they'll be overwhelmed and do nothing.



Key takeaway

You don't need design skills to send great-looking emails. You need a clear message, a simple layout, and a platform that handles the design work for you. Use templates to do the heavy lifting, add your brand, and write like a human.

Subject lines matter more than you think

The subject line is the first thing your recipient sees. Before they've read a single word of your email, they've already decided whether to open it based on the subject line alone.

A good subject line is short (aim for under 50 characters so it doesn't get cut off on a phone), specific, and honest. It tells the reader what's inside without overpromising.

Avoid subject lines that feel like marketing emails, because people have been trained to ignore them. Subject lines that feel like they're from a real person, with a genuine reason to get in touch, consistently get higher open rates.

From: john@transpond.io

To: jane@transpond.io

Subject: Discover a simpler way to manage your marketing

Action points



Gather your logo file, brand colors, and primary font



Add a merge tag for the recipient's first name to your email greeting



Set up your branding in your email marketing platform so it applies to every email you send



Write a subject line that sounds like it came from a real person



Browse your platform's template library and choose one that suits your style



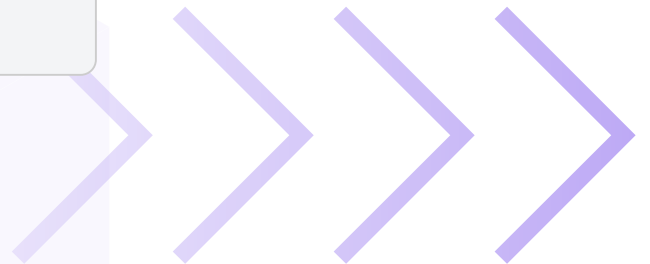
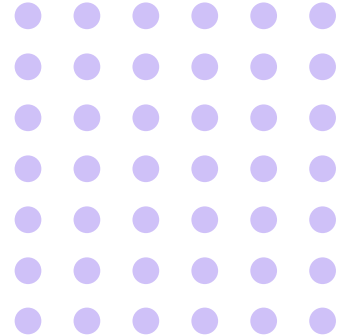
Send a test email to yourself and check how it looks on both desktop and mobile



Customize the template with your branding and a short piece of content



Send your first real email to your client segment



Chapter 4

Why customer communication doesn't have to be difficult



Ask any business owner what their biggest marketing challenge is, and there's often a common answer: following up consistently. Not because they don't know it matters. But because running a business is hard work; things get in the way, and the follow-up that seemed important gets lost among other tasks and falls by the wayside.

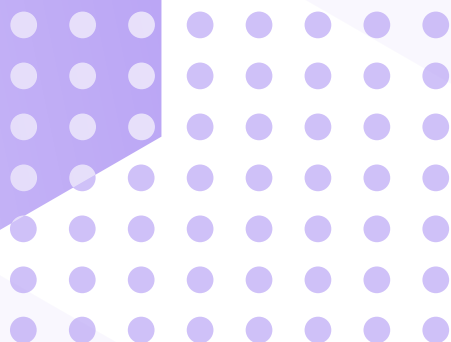
Email automations solve this problem in a way that willpower and good intentions never can.

What is email automation?



The four building blocks of an automation

Every automation, no matter how simple or complex, is built from the same four components. Understanding these makes the whole concept much less intimidating.



1

A trigger

This is the event that starts the automation and kicks the sequence off.

Common triggers include:

- A new contact being added to a list
- A customer completing a purchase or a job being marked as finished
- A contact not having opened an email in a certain number of days
- A specific date being reached, like a customer's one-year anniversary
- Someone filling in a form on your website

The trigger is simply the “when”, as in, “when this happens, start sending.”

2

An email

This is the message that goes out when the trigger is activated. This can be written in advance, just like any other email, using Transpond's template editor.

You can personalize it using merge tags so every recipient sees their own name and relevant details. Your automated messaging isn't limited to emails; you can also automate SMS and social media posts.

3

A delay

This is a pause between steps. After the first email goes out, the automation waits for a set period of time, one day, three days, a week, before doing the next thing.

Delays are important because you don't want to send multiple emails in quick succession. Most recipients don't open emails the moment they arrive, and a delay gives them time to engage with the first message before you follow up.

4

A condition

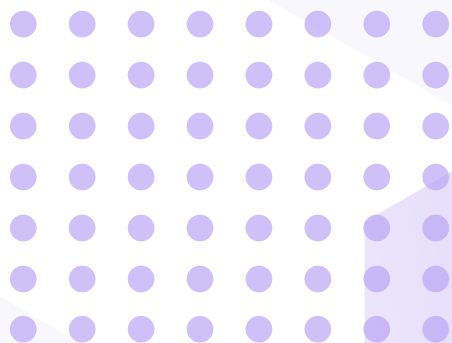
This is an optional decision point that routes contacts in different directions based on what they've done.

For example: "if the contact opened the last email, send them this follow-up X. If they didn't, send them follow-up Y."

Conditions let your automation respond intelligently to how people are engaging, rather than sending the same thing to everyone regardless.

You don't need to use all four components right away.

The simplest possible automation is just a trigger and one email, so start small and build things from there.



Example 1:



The post-job follow-up

Every automation, no matter how simple or complex, is built from the same four components. Understanding these makes the whole concept much less intimidating.

This is the automation most businesses should set up first.

Here's how it works:

If you have your marketing platform connected to your CRM, set up a trigger for when a job or purchase is completed.

Day 1: An email goes out thanking the customer and asking if everything was satisfactory. Personalized with their name.

Day 7: If they haven't replied, a gentle check-in goes out. "I just wanted to make sure everything is still going well."

Day 30: A value-add email is sent. A useful tip, a relevant piece of advice, something genuinely helpful.

Day 90: A re-engagement email checks in and asks if there's anything they need.

Set this up once and every single customer gets that same attentive follow-up, whether you're flat out on a big project, on holiday, or simply having one of those weeks where everything else takes priority.

Example 2:



The lapsed client re-engagement

A contact goes six months without any activity, activating the trigger.

Day 1: A warm, personal email goes out. "It's been a while since we worked together. How are things going?"

Day 14: If there's been no response, a second email offers something of value. A helpful resource, a relevant tip, a seasonal offer.

Day 30: If there's still no response, send a final short email. "I don't want to keep landing in your inbox if it's not useful. Just let me know if you'd ever like to pick things up again."

This sequence works because it feels human, not automated. The goal isn't to sell, it's to restart a genuine conversation and rebuild relationships.

Scheduling and campaign calendars

As well as automations, most marketing platforms let you schedule one-off campaigns to go out at a specific date and time. This is useful for planned newsletters, seasonal offers, or content you want to time around a particular event.

Transpond has a Calendar View, providing a useful overview of everything scheduled to go out across email, SMS, and social media all in one place. This makes it easy to see whether your communications are well-spaced, consistent, and not clashing with each other.



Key takeaway

Consistent follow-up is one of the highest-value things a business can do. Automations make it possible without adding anything to your to-do list. Start with one simple sequence and build from there.

If your CRM and marketing platform are connected, adding a tag to a contact in your CRM can trigger an automation in your marketing platform automatically. When you mark a job as complete, the follow-up sequence starts and you don't have to do anything with either tool.

Action points



Identify the one follow-up that most often gets missed in your business.
For example, a post-job check-in or a re-engagement message for lapsed customers



Write a simple follow-up email for that scenario



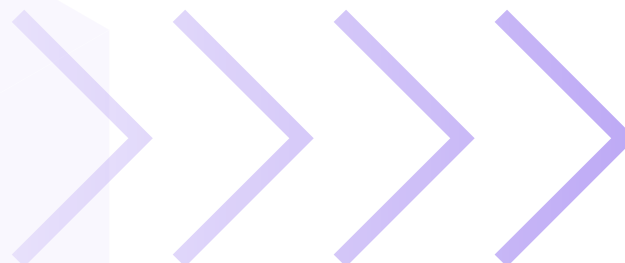
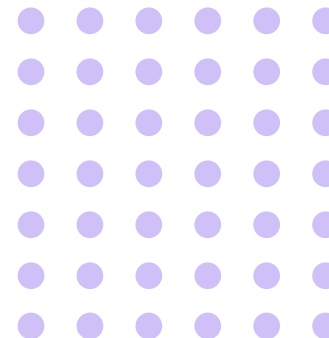
Set up your first automation: one trigger, one email, one delay



Test it by adding a contact to the relevant list and checking the email arrives as expected and at the right time



Once that automation is running, identify the next one worth building and repeat the process



Chapter 5

The five emails every small business should be sending



Newsletters are the second most popular tool for keeping users engaged*, often used to round-up what's been happening, provide updates, or offer a promotion.

There's no doubt they have their place, but there are other types of emails you need to be sending as part of your marketing outreach.

Let's take a look at the five emails you can't ignore:

* <https://www.litmus.com/blog/trends-in-email-marketing>

The “What’s New” update



What it is: A relevant update that shares something new in your business that a contact is likely to find useful, based on their industry, business type or previous interests.

Why it works: Rather than simply checking in, this approach gives you a genuine reason to get back in touch. By highlighting something that’s changed – such as a new service, feature, resource or capability – and tailoring it to the recipient’s needs, you can restart conversations in a way that feels helpful rather than promotional.

What to include: Focus on one update that’s likely to be relevant to the recipient. Briefly explain what’s new, why it might be useful for their business, and invite them to get in touch if they’d like to find out more. Keep the tone conversational and avoid turning the email into a sales pitch.

Example opening: “Hi [Name], I hope you’re doing well. I wanted to share a quick update that I thought might be relevant to you. We’ve recently introduced [new service/feature/resource], which is helping businesses like yours [specific benefit]. I thought it might be of interest given your work in [industry/business type].”

How to automate it: Segment your contacts based on factors such as industry, business type, previous purchases or interests. When you have a relevant update, send a targeted campaign to the most appropriate audience so each contact receives information that’s genuinely useful to them.

The post-purchase follow-up



What it is: An automated email sent after a customer has received your product or service to ensure they have everything they need and encourage ongoing engagement.

Why it works: A thoughtful follow-up reassures customers that your relationship doesn't end when the sale is complete. Whether you're inviting feedback, sharing helpful resources or reminding customers how to get support, these emails build trust, improve the customer experience and keep your business front of mind.

What to include: Thank the customer for choosing your business, provide links to any helpful resources or guides, remind them how to get in touch if they have questions, and consider including a short feedback survey. Keep the message helpful and informative rather than sales focused.

Example opening: "Hi [Name], thanks again for choosing us. We hope everything's going well so far. If you have any questions or need any support, we're here to help. We'd also love to hear your feedback – it only takes a couple of minutes to complete our short survey."

How to automate it: Trigger the email when an order is completed or a project is marked as finished. Depending on your business, send it a few days or one to two weeks later, giving customers enough time to use the product or service before inviting feedback.

The referral request



What it is: A simple message to happy customers asking if they know anyone who might benefit from your products or services.

Why it works: Most customers who'd happily recommend your business simply don't think to do it unless they're prompted. A friendly referral request gives them an easy opportunity to spread the word without feeling pressured, helping you generate new leads through trusted recommendations.

What to include: Thank the customer for choosing your business, express your appreciation for their support, and explain that referrals are always welcome. Make it easy for them to recommend you by including your contact details or a link they can share.

Example opening: "Hi [Name], thanks again for choosing us. We hope you've had a great experience. If you know anyone who could benefit from our products or services, we'd really appreciate you passing our details on. Personal recommendations mean a great deal to us."

How to automate it: Trigger the email after a project is completed, an order is fulfilled or a customer reaches another positive milestone in your CRM. You could also include it as part of your post-purchase follow-up sequence, a few weeks after your customer feedback email.

The value-add



4

What it is: An email offering additional value without asking for anything in return.

Why it works: This email is sent to build long-term customer trust by offering a tip, short guide, or a piece of relevant advice aligned with your customer's challenges. It positions you as a knowledgeable, generous contact rather than just a service provider. Over time, it makes you the person your customers think of first when they need help, and the person they recommend to others.

What to include: One piece of useful content or a practical tip they can act on. If you're unsure what to focus on, consider what question you get asked all the time and use that as a starting point. Remember, this email should be short, useful and shouldn't be used as a promotional tool.

Example opening: "Hi [Name], I've been getting a lot of questions recently about [common problems]. Here's the simplest way I know to deal with it."

How to automate it: This works well as a scheduled monthly or quarterly campaign to your full client list, rather than an automation. Write it once, schedule it, and send it to everyone at the same time.

The milestone email



What it is: This email is used to mark a meaningful moment in the customer relationship. This may be a one-year anniversary, the completion of a significant project, or a personal milestone.

Why it works: It won't come as a surprise that your customers like to feel recognized. A milestone email, sent at the right moment, makes a customer feel valued in a way that's rare and memorable. It's the kind of thing that gets mentioned: "they actually remembered it was a year since we started working together."

What to include: Acknowledge the milestone and reflect on what you've worked on together. Be sure to express genuine appreciation and consider including a small gesture, a discount, a free resource, an offer to review how things are going, but it's not required. The recognition itself is the value.

Example opening: "Hi [Name], I just realized it's been exactly one year since we started working together, and I wanted to take a moment to say thank you. It's been a genuinely great year."

How to automate it: Use a date-based trigger tied to the date a customer first purchased or the date you started working together. Record this date in your CRM when a new client comes on board, and your automation can run without you ever having to remember.



Key takeaway

None of these emails are primarily about selling. They're about staying in a genuine relationship with the people who've trusted you with their business. The repeat work and referrals follow naturally.

Action points



Choose one of the five email types above to write this week



Write it as if you're sending it to one specific customer, then adjust it to work for a broader list



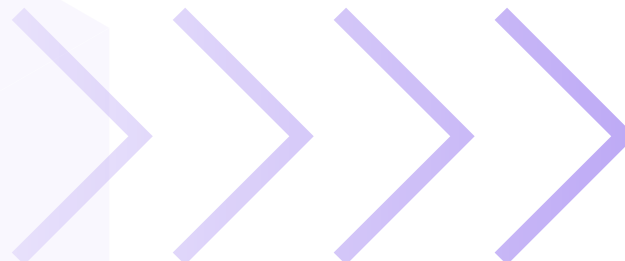
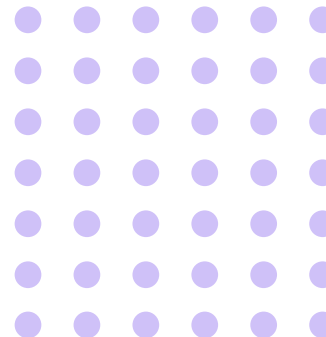
Decide whether it should be a one-off campaign or an automation



Set it up and schedule or activate it



Work through the remaining four email types over the following weeks, one at a time



Chapter 6

Understanding your results and improving over time



Sending your first few emails and seeing what happens can feel a little like throwing mud at the wall and seeing what sticks. But every email you send generates data, and that data, if you know how to read it, makes every future send a little more effective than the last.

You don't need to be a data analyst to improve your email marketing. You just need to pay attention to a handful of numbers and develop a simple habit of checking in after every send.

Key metrics you need to track



Open rate

This is the percentage of people who received your email and actually opened it.

If you sent an email to 100 people and 30 of them opened it, your open rate is 30%. For small service businesses with an engaged, personal list, a healthy open rate is typically between 25% and 45%.

If yours is consistently lower than this, the most common causes are a weak subject line, or a deliverability issue (more about that shortly...)



Click rate

This is the percentage of people who clicked on a link or button inside your email.

If 100 people opened your email and 4 of them clicked the link you included, your click rate is 4%. For business email lists, a click rate of 2% to 5% is reasonable.

If yours is lower, it usually means the content didn't give readers a clear or compelling reason to click and you may need to revisit your call to action.



Unsubscribe rate

This is the percentage of people who chose to unsubscribe after receiving your email.

A small number of unsubscribes after every send is completely normal and healthy. Not everyone on your list will stay relevant forever, and it's better for someone to unsubscribe than to mark your email as spam.

A sudden spike in unsubscribes, however, is a signal worth paying attention to. It usually means the content wasn't relevant to the people who received it, which is often a segmentation issue.



Bounce rate

A bounce happens when an email can't be delivered.

There are two types of bounce:

1. A "soft bounce" is a temporary problem, like the recipient's inbox being full.
2. A "hard bounce" is a permanent issue, usually because the email address no longer exists.

Hard bounces need to be removed from your list ASAP. A high proportion of hard bounces is a sign that your list hasn't been maintained, and this can damage your ability to reach people who do have valid addresses.

Transpond handles this automatically, flagging bounced addresses so you can review them.



Replies and direct responses

Replies and direct responses aren't usually tracked as a formal metric by marketing platforms, but this doesn't mean they aren't important.

If your email generates genuine replies from real people, it's working. It means the content resonated, the tone felt human, and the reader felt enough connection to respond.

If not possible within your marketing software, track this manually. A reply rate, even an informal one, tells you more about how your emails are landing than almost any other number.

Understanding deliverability

Deliverability is simply the ability of your emails to reach people's inboxes, rather than landing in their spam or junk folders. It sounds technical, but the basics are straightforward, and getting them right from the start makes a significant difference.

Here's are some quick tips to improve deliverability:



Send from a domain you own

A domain is your website address, like yourbusiness.com. If you send marketing emails from a free email address, like yourname@gmail.com or yourname@hotmail.com, email providers will treat your messages with more suspicion. Sending from your own domain, like hello@yourbusiness.com, is a signal that you're a legitimate sender.



Authenticate your domain

Authentication is the process of proving to email providers that you are who you say you are, and that emails claiming to come from your domain are actually sent by you. It involves adding some technical settings to your domain configuration, which your email marketing platform will walk you through. It sounds complicated but typically takes less than 30 minutes and makes a meaningful difference to whether your emails reach the inbox.



Use a reputable sending platform

Email providers like Gmail and Outlook pay attention to who is sending emails and how people respond to them. Using a well-established email marketing platform means you're sending from infrastructure with a good reputation, which helps your emails land in inboxes rather than spam folders.



Keep your list clean

Sending emails to addresses that bounce, or to people who consistently ignore your emails, signals to email providers that your messages aren't wanted. Remove hard bounces promptly, and consider removing contacts who have never opened a single email after a reasonable number of attempts.



Don't send too much, too fast

If you suddenly send a large volume of emails from a new address, there's a fair chance it'll arouse suspicion amongst email providers. If you're just getting started, begin with your most engaged contacts and build from there.

The importance of reviewing your campaigns

After every send, it's important to spend five minutes with your results.

You're looking for a few things:

- Was the open rate in a healthy range? If not, what might have put people off opening it?
- Did people click on anything? If not, was the call to action clear enough?
- Did anyone reply? What did they say?
- Did the unsubscribe rate spike? If so, was there something about the email that might have felt irrelevant or unexpected?

Note one thing that could be improved next time and change just that one thing.

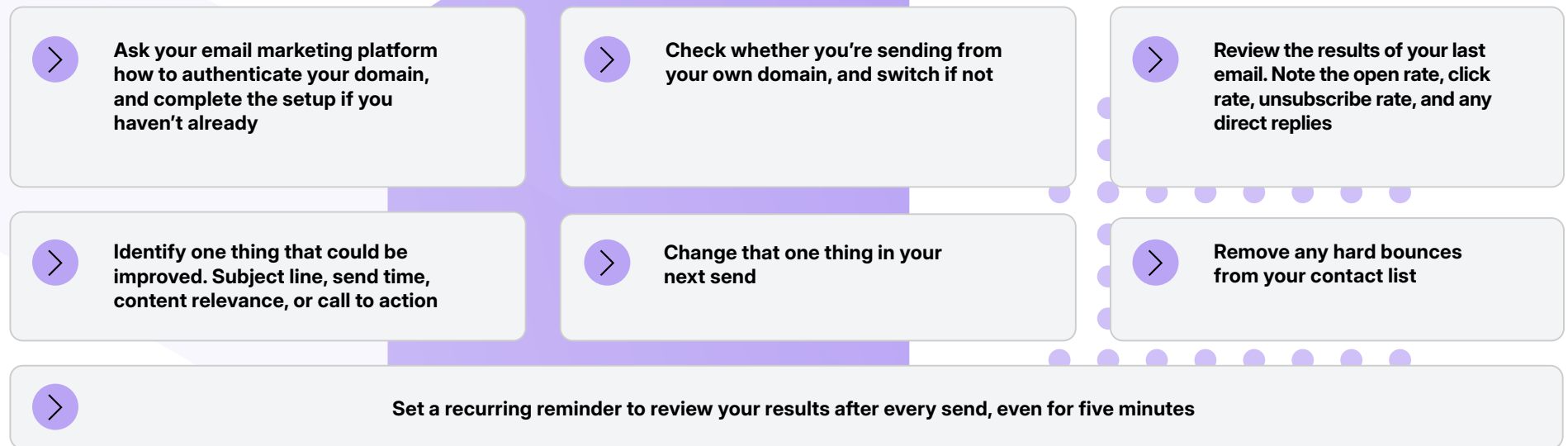
Don't try to fix everything at once. Incremental improvements, made consistently, can have a positive impact over time.



Key takeaway

Every email you send teaches you something. Build the habit of looking at your results after every send, even briefly, and your marketing will improve naturally over time without you having to become an expert.

Action points



Chapter 7

Complementing email marketing with SMS and social media



First things first: Email marketing has a pivotal role to play in your marketing strategy.

However, your customers aren't all in the same place and they don't necessarily gravitate towards the same platform. For every customer that favors emails, another prefers SMS, while others will be more receptive to receiving marketing via social media.

Once your email marketing is in reasonable shape, branching out to additional channels is more straightforward than it might seem and doesn't need to take up significant time and resources.

Let's take a look at the role SMS and social media have to play in a multi-channel marketing strategy.

SMS (Short Message Service)

SMS stands for Short Message Service. In practical terms, it just means text messages. Transpond lets you send text messages to your customers in the same way you send emails, from a central tool, to a list of contacts, with results you can track.

The reason SMS is worth considering is simple: people read text messages. **The open rate for SMS marketing sits at around 98%***, which means that almost everyone who receives a text message actually reads it, and most do so within a few minutes. Compare that to email, where a **30% to 40% open rate**** is considered healthy, it's easy to see why SMS is deserving of its place in a well-rounded marketing system.

That said, SMS should be used thoughtfully. Text messages feel personal and land directly on someone's phone, alongside messages from their family and friends. That's a pretty privileged position, and you need to make sure you don't exploit it. SMS marketing should be used sparingly and saved for instances that genuinely benefit from immediacy and relevance:



Time-sensitive offers with a clear deadline



A short follow-up, where a quick personal message feels more natural than a formal email



An urgent update that the customer needs to know about quickly

Keep SMS messages short, clear, and purposeful. If you're unsure if the text is really necessary, perhaps keep your powder dry and consider another channel.

One important note: just as with email, you need to have permission before sending marketing text messages to someone. Make sure anyone you contact via SMS has opted in, and always make it easy for them to opt out.

If you're unsure how to run SMS campaigns compliantly, take a look at our in-depth guide, where we've outlined everything you need to know.

**READ
THE GUIDE**



* <https://www.atlascommunications.co/2026/01/01/why-sms-is-still-the-king-of-open-rates-in-2025/>

** <https://qualtrix.com/blog/email-open-rates-by-industry-2026>

Social media



The thought of managing social media on top of everything else may seem exhausting.

Remember why you're using social media, in the first place: you're not trying to go viral or build a following in the millions, at least not on the first day. You're trying to be visible to the people who already know you, or who might be looking for someone who needs your services.

That said, we completely understand getting started may seem overwhelming. So, with that in mind, here's a few principles that make social media a little more manageable:

Begin with one or two platforms

Focus your efforts on the platform where your customers are most likely to be. For example, if you work with other businesses, LinkedIn is the platform for you. Doing one platform well is far more effective than doing three platforms badly.

Here's an overview to help you choose the best platform for your business:

Choosing the right social platform for your business			
The three platforms that connect to Transpond			
	LinkedIn	Meta	X
Audience	1.3 billion members Mostly aged 25 to 34 Skews male (about 57%)	Facebook ~3 billion Instagram ~2 billion Broad ages, IG younger	About 600 million Mostly aged 25 to 34 Skews male (about 61%)
Purpose	Professional networking and industry talk	Community, brand awareness and sharing	Real-time news and public conversation
Best for	B2B lead generation, thought leadership and hiring	Broad reach, B2C, local businesses and visual products	Real-time engagement, customer service and tech or news posts
Watch out for	Formal tone and lower posting frequency	Low organic reach, so you often pay to show	Short shelf life and a fast, noisy feed

Repurpose content you've already created

Content repurposing can alleviate the workload and help you work smarter, not harder, when it comes to publishing content for your social media channels.

If you've written a useful email, turn it into a social post. If you've answered a customer question that comes up all the time, write it up and share it. You don't need to create new content from scratch for every channel. Taking one idea and adapting it slightly for each format is a much more sustainable approach.

Post consistently rather than frequently

Two or three posts a week, published reliably, will serve you better than a burst of daily posting followed by two weeks of silence. Consistency is what builds familiarity over time.

Use scheduling tools

With Transpond, you can write and schedule social posts in advance. Spend an hour once a week writing and scheduling your posts for the coming days. It's far more efficient than trying to post in real time.

One strategy, three channels

The most efficient way to manage email, text messages, and social media is to treat them as three complementary parts of the same marketing plan, rather than three separate things to manage. Start with one piece of content, campaign or idea, and adapt it for each channel.

Here's how that might look in practice:

You write a short, useful email about a common challenge your customers face. That's your email campaign for the month.

You take the key point from that email and turn it into a short social post with a link back to your website or a longer version of the content. That's your social content for the week.

If there's a time-sensitive element, or a follow-up that would benefit from being sent immediately, you send a short text to your most engaged customers. That's your SMS.

One idea. Three channels. A fraction of the effort of creating everything separately.

Simple.



Key takeaway

Get your email marketing working first. Then add one more channel when it feels manageable. Text messaging is usually the easiest next step: high impact, low complexity, and easy to connect to the systems you've already built.

The best marketing platforms let you manage email, text messages, and social posts from the same place, with a single Calendar View of everything going out. That's worth looking for when choosing or reviewing your marketing tools.

Action points



Identify one type of message in your business that would work better as a text than an email. An appointment reminder is a good starting point



Check whether your marketing platform supports SMS and, if so, set up text message sending



Choose one or two social media platforms to focus on



Take your most recent email and adapt it into a social post



Schedule three social posts for the coming week



Review your platform's campaign calendar to get a single view of everything going out across all channels

Chapter 8

Seven steps from zero to
a working marketing system



Everything in this guide points to the same destination: a simple, largely automated marketing system that keeps you visible, consistent, while maintaining contact with the people most likely to bring you repeat business and referrals.

Here's how to get there.

Step 1: Get your contact data in order

Bring your customer data together in one place. Clean your list: remove duplicates, outdated addresses, and irrelevant contacts. Add tags or labels that describe who each contact is and what they've bought. Even a basic structure makes everything downstream significantly easier.

Step 2: Connect your tools

If you're using a CRM, integrate it with your marketing platform.

Let's take Capsule and Transpond integration as an example:

When the two are connected, lists you create in Capsule sync automatically to Transpond. You only ever have to organize your contacts once, and any new contacts added to Capsule will automatically appear in Transpond.

It's a well oiled machine that'll make your life infinitely easier.

Step 3: Set up your branding

Before you build your first email, set up your brand (if you're using Transpond, simply fire up the Brand Analyzer to do this in record time). This will ensure every email looks consistent from day one.

Step 4: Send your first email

Don't wait to send your first email until it's perfect. Write a short, warm message to your client list, a hello, an update, something genuinely useful, and send it. The goal is to start, not to impress. Your first email will not be your best one, and that's completely fine.

Here's how to get there.

Step 5: Set up your first automation

Start with the simplest possible automation: a follow-up email that goes out automatically after a milestone is completed. For example, when a purchase is completed, or a renewal link is clicked. One trigger, one email, one delay. Set it up once and let it run. When it's working, build the next one.

Step 6: Create your evergreen segments

Create saved lists or segments for your most useful groups: current clients, lapsed clients, prospects. These will update automatically as your contact list grows, and they'll be ready to send campaigns to whenever you need them.

Step 7: Build your review habit and add channels when ready.

After every send, spend five minutes with your results. Note what worked, identify one thing to improve, and change that one thing next time. Once email feels manageable, add text message marketing for time-sensitive follow-ups. When that feels comfortable, add social. One channel at a time, built on a foundation that's already working.

You don't need to do all of this at once.

Pick the step that feels most achievable right now and start there. The businesses that build the best marketing systems aren't the ones that planned the most carefully. They're the ones that started, learned, and kept going.

So, what are you waiting for?

Go forth and conquer.

Begin marketing confidently with Transpond



You've got the blueprint. Now it's time to put it into action.

Transpond makes it easy to segment your audience, automate your communications and build more meaningful customer relationships - all from one place.



Campaign Builder

Build emails that look great



Signup forms

Collect sign-ups effortlessly



Conversations

Handle replies from one inbox



SMS Campaigns

Send messages people actually read



Automations

Set it up once, let it work



Social Campaigns

Manage all your socials together



AI Content Assistant

Get help writing your content

Take the product tour today and get everything you need to get started.

**GET
STARTED**



