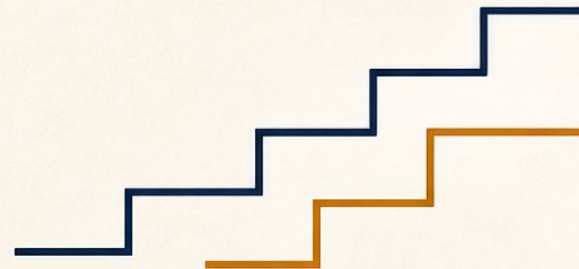


How to Use Email Marketing for Sales:

A Practical Workflow

- Email stays the highest-ROI channel in 2026: \$36–\$42 per \$1 spent
- Consent is now a deliverability requirement, not just a legal nicety
- Gmail, Yahoo, and Microsoft enforce authentication, one-click unsubscribe
- Spam complaint ceilings sit near 0.1–0.3%
- Roadmap: consent, workflow mapping, writing, automation, measurement, 30-day launch



Why Consent-Based Email Still Wins for Sales



- **Permission-based lists:** 25–40% opens, spam complaints below 0.1%



- **Non-permission lists:** 1–5% opens, 1–5%+ complaints, inbox suppression



- **Opted-in B2B lists:** 28–45% opens, 5–14% replies, 96% inbox placement



- **Consent decays:** B2B contact data degrades ~22.5% per year



- Opt-in is now the global baseline; smaller verified lists win

Permission-based lists



Opens



Complaints



Inbox Placement



Non-permission lists



Opens



Complaints



Inbox Placement



Building a Permission-Based List People Actually Want



- Name the content, frequency, and benefit on every form — not "Subscribe for updates"



- Keep consent checkboxes unchecked by default: one checkbox per purpose, plain-language labels, visible privacy policy link



- Double opt-in filters invalid addresses, lowers bounces, and creates strong consent evidence



- Log consent at signup: timestamp, IP address, source form, exact checkbox wording, policy version



- Never buy, rent, or scrape lists — no permission provenance, fastest way to damage sender reputation



Stay Informed. Get Value.

Practical insights delivered to your inbox.

Email address

What you'll receive

Weekly practical tips, best practices, and how-to guidance.

I'd like to receive:

- ☐ Weekly tips and best practices
- ☐ Product updates and announcements

You can unsubscribe at any time.

Read our [Privacy Policy](#).

Name the content, frequency, and benefit clearly.

Unchecked consent checkboxes, one per purpose, plain-language labels, visible privacy policy link.



Confirm your subscription

We've sent a confirmation email. Please click the link to complete your subscription.

Double opt-in creates strong consent evidence.

Consent Evidence Ledger



Timestamp



IP Address



Source Form



Exact Checkbox
Wording



Policy Version

Log consent at signup with complete details.

Compliance Essentials: GDPR, CAN-SPAM, and CASL in Practice

	 GDPR	 CAN-SPAM	 CASL
 Consent model	 Opt-in only — freely given, specific, informed, unambiguous consent	 Opt-out model	 Consent required even for B2B; implied consent expires after two years
 Key obligations	 Clear, affirmative consent before marketing emails	 Accurate headers, postal address, honor opt-outs in 10 business days	 Clear consent records and easy opt-out mechanisms
 Penalties	 Significant administrative fines under GDPR	 Enforcement by regulators (FTC)	 CAD \$10M cap

- Pre-checked boxes are invalid under GDPR and most US state laws
- Going international? Apply the strictest standard list-wide, suppress unsubscribes globally



Authentication Setup: SPF, DKIM, and DMARC



- **SPF:** one TXT record at the domain apex; over 10 DNS lookups fails entirely



- **DKIM:** RSA-2048 keys at selector._domainkey; publishing the record is only half the job



- Enable signing in your sending platform, then confirm dkim=pass



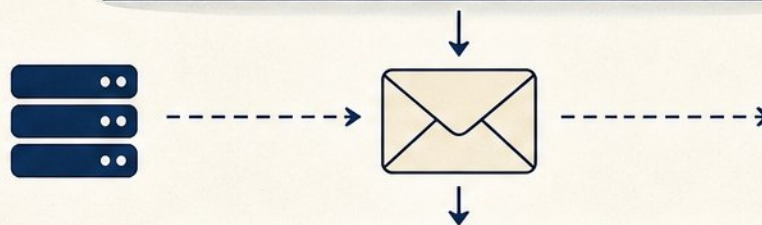
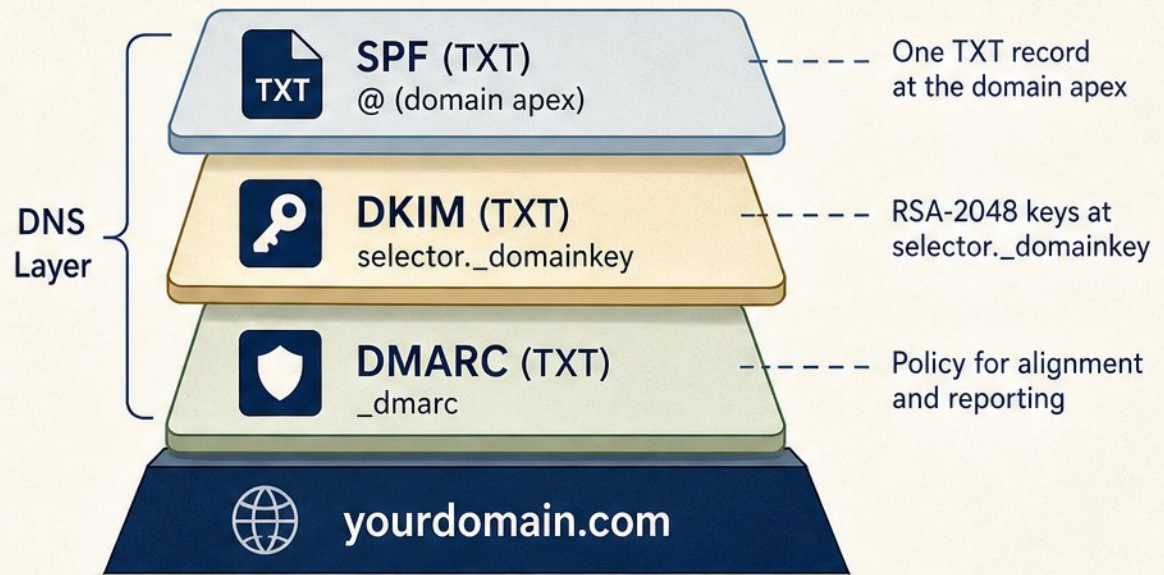
- **DMARC:** start at p=none with rua address, escalate to p=reject in 60-90 days



- Alignment decides everything: d= and return-path must match the visible From domain



- Verify in a real Gmail header: dkim, spf, and dmarc all pass before scaling



Message Header Verification (Example)	
dkim=pass	✓
spf=pass	✓
dmarc=pass	✓



Deliverability Protection

List Hygiene, Re-Permissioning, and Suppression



- Set inactivity thresholds: 60–90 days for frequent senders, 90–180 for monthly



- Verify addresses before re-permission — dead mailboxes damage your domain first



- Run 2–3 re-permission emails with clear confirm and unsubscribe options



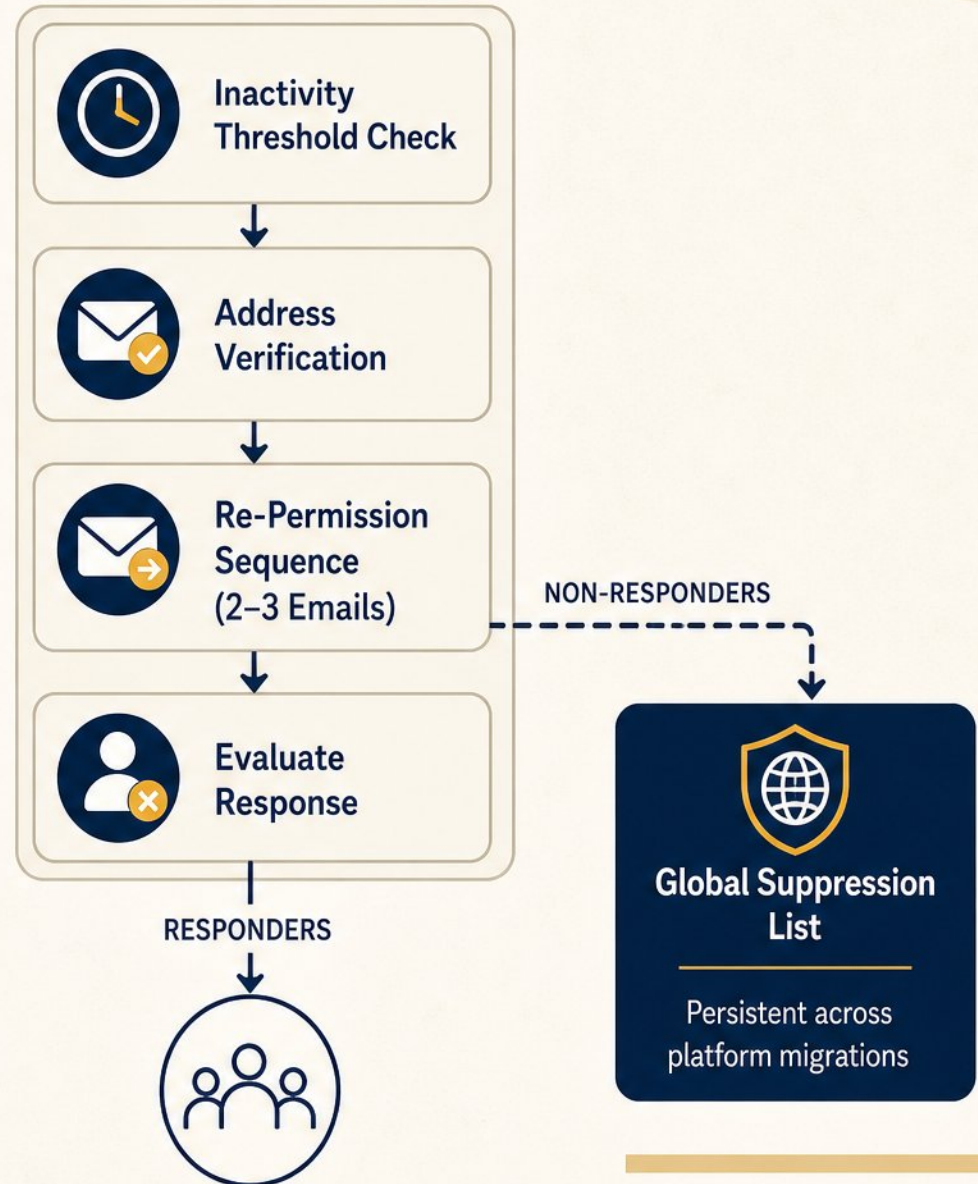
- Suppress non-responders even if the mailbox is still technically valid



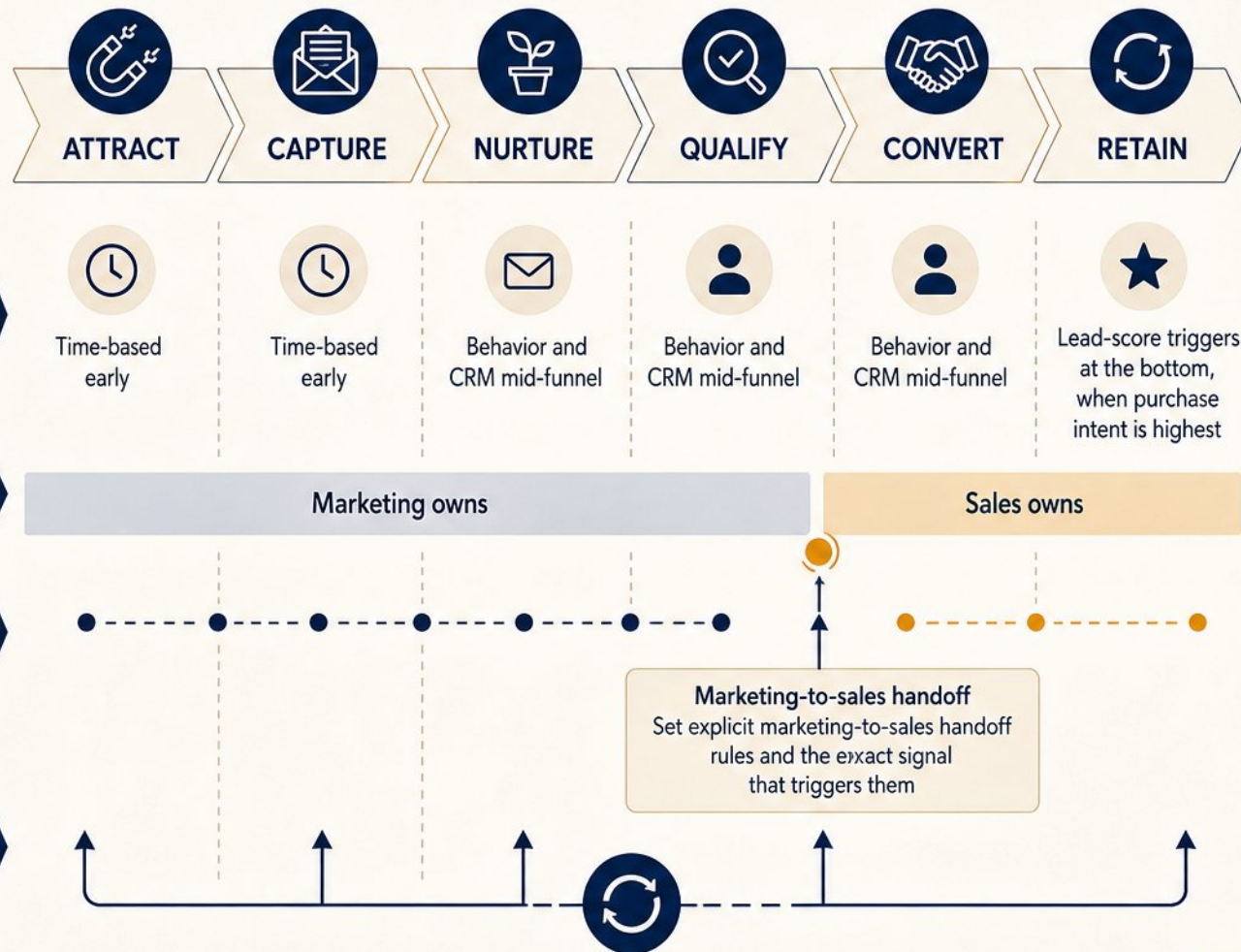
- Keep a global suppression list that survives platform migrations



- Schedule hygiene: monthly bounces, quarterly verification, annual audit

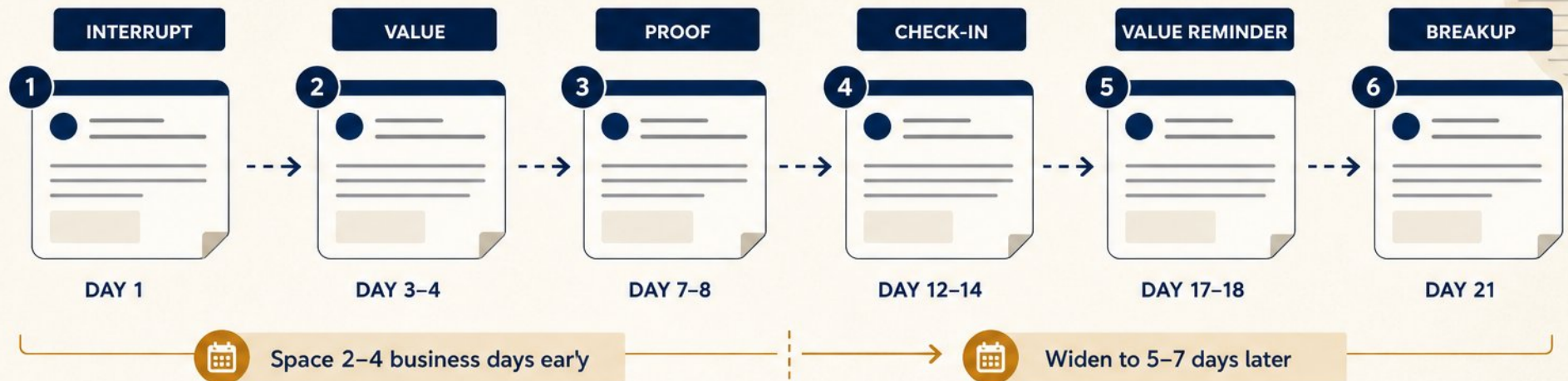


Mapping the Sales Email Workflow End to End



- Define stage sequence: attract, capture, nurture, qualify, convert, retain
- Decide which stages email owns versus supports
- Match triggers to funnel stage: time-based early, behavior and CRM mid-funnel
- Use lead-score triggers at the bottom, when purchase intent is highest
- Set explicit marketing-to-sales handoff rules and the exact signal that triggers them
- Choose deliberately: manual sends, templated sequences, or fully automated flows
- Most programs need all three across different segments
- Segment and score from the consent layer, not just firmographics

Anatomy of a Multi-Step Sales Sequence



- ✓ 4-7 touches over 10-21 days; most replies arrive on touch one or two
- ✓ Give every touch a distinct job: interrupt, value, proof, check-in, breakup
- ✓ Space touches 2-4 business days early, widening to 5-7 days later
- ✓ Keep each follow-up shorter than the one before it
- ✓ Reply in the same thread; build in stop-on-reply and stop-on-opt-out rules
- ✓ Re-queue non-responders after 90 days with a genuinely new reason

WORKFLOW & STOP RULES



Send Next Touch
(at the planned interval)



If Reply Received
Stop Sequence Immediately



If Opt-Out Received
Stop All Future Touches



Timing, Cadence, and Knowing When to Stop



- Tuesday–Thursday, 9–11 AM
local time: best B2B send window



- Skip Monday morning triage
and Friday afternoon check-out



- Inbound leads compress fast:
reply within minutes, follow up
every 1–2 days



- Cold sequences: 4–6 touches
over 14–21 days, gaps widening
over time



- Multi-channel orchestration lifts
replies: add LinkedIn and one call
between emails 3–4



- Hard exits protect the domain:
stop on reply, unsubscribe, two
non-opens, or cap

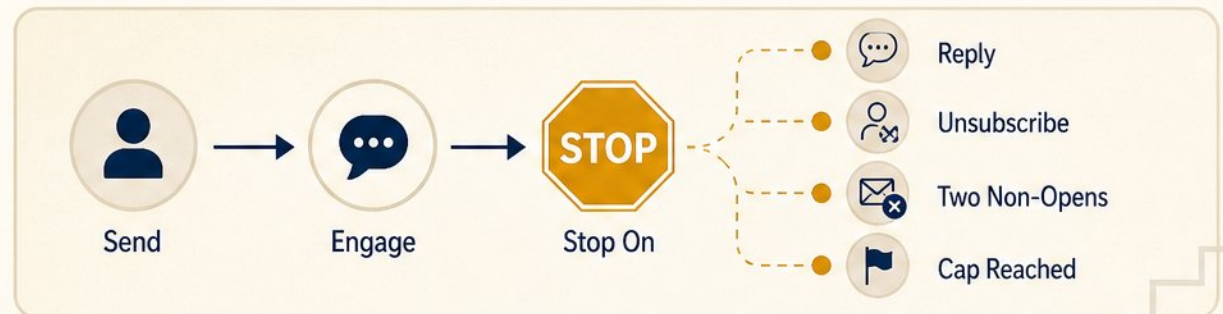
COLD OUTBOUND CADENCE

4–6 touches over 14–21 days, gaps widening over time



INBOUND LEAD FOLLOW-UP

Inbound leads compress fast: reply within minutes, follow up every 1–2 days



Writing Sales Emails That Get Replies

- Short, personalized subject lines and a named human sender win opens
- Personalization means role, company initiative, or trigger event — not just {first_name}
- 46% opens with personalization vs 35% generic; replies jump 3% to 7%
- Structure: one hook, one value statement, one low-friction ask, 80–125 words
- Every follow-up carries something new — plain-text beats heavy HTML, one CTA per email
- “Just checking in” gives no reason to reply; each touch needs a distinct angle

EXAMPLE: ONE SHORT SALES EMAIL, ANNOTATED

Subject: Idea to support your hiring initiative

30–60 characters

Subject-line character range

From: Alex Kim

Named human sender choice

Hi Jordan,

Concrete personalization (line 1)

Saw your team is prioritizing faster time to hire this quarter.

Hook (one clear reason)

I help teams reduce time to hire by streamlining interview scheduling—freeing up managers and improving candidate experience.

Value statement (one key benefit)

Open to a 15-minute chat next week to explore what would be most useful?

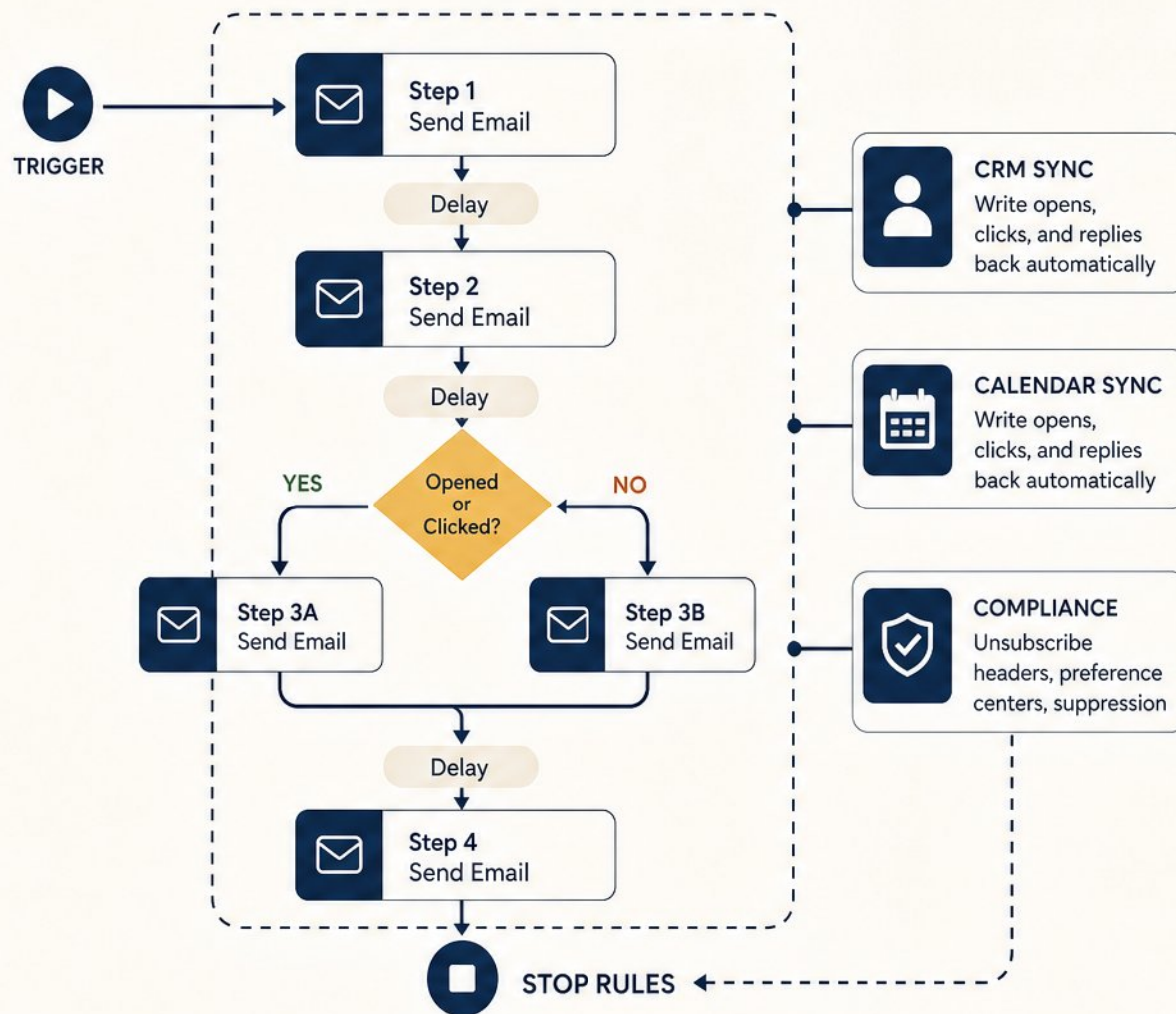
Low-friction ask (one simple next step)

Best,
Alex



Building and Automating the Sequence

- Visual builder: map steps, delays, and branches in readable cards
- Behavior-based branching is where automation ROI lives
- CRM and calendar sync write opens, clicks, and replies back automatically
- Automate compliance platform-wide: unsubscribe headers, preference centers, suppression
- Test one variable at a time; 500+ recipients per variant
- Reference shapes: 5 steps over 14 days, 3 steps over 7 days



REFERENCE SHAPES:
5 STEPS OVER 14 DAYS



REFERENCE SHAPES:
3 STEPS OVER 7 DAYS



Measuring What Matters: From Opens to Pipeline

- Track a small set: delivery, click-through, reply, conversion, revenue per email
- Keep unsubscribe rate under 0.5%; spam complaints under 0.1%
- Treat open rate as directional only — Apple MPP inflates it 15–20 points
- Use a tiered view: direct response, assisted influence, pipeline contribution
- Run holdout tests to separate causation from correlation
- Report in business language: pipeline created, influenced revenue, cost per opportunity

DELIVERABILITY METRICS



FOCUS ON HEALTHY DELIVERY



Unsubscribe rate
under 0.5%



Spam complaints
under 0.1%



DELIVERY



CLICK-THROUGH



REPLY



CONVERSION



REVENUE
PER EMAIL



Treat open rate as directional only —
Apple MPP inflates it 15–20 points

TIERED PIPELINE ATTRIBUTION VIEW



DIRECT RESPONSE
Emails that drove
an immediate action
or reply.

...



ASSISTED INFLUENCE
Emails that supported
engagement along
the buyer journey.

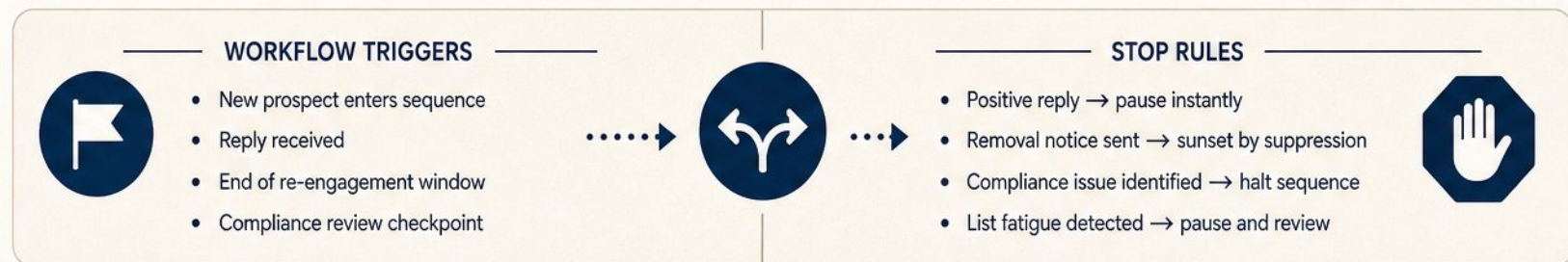
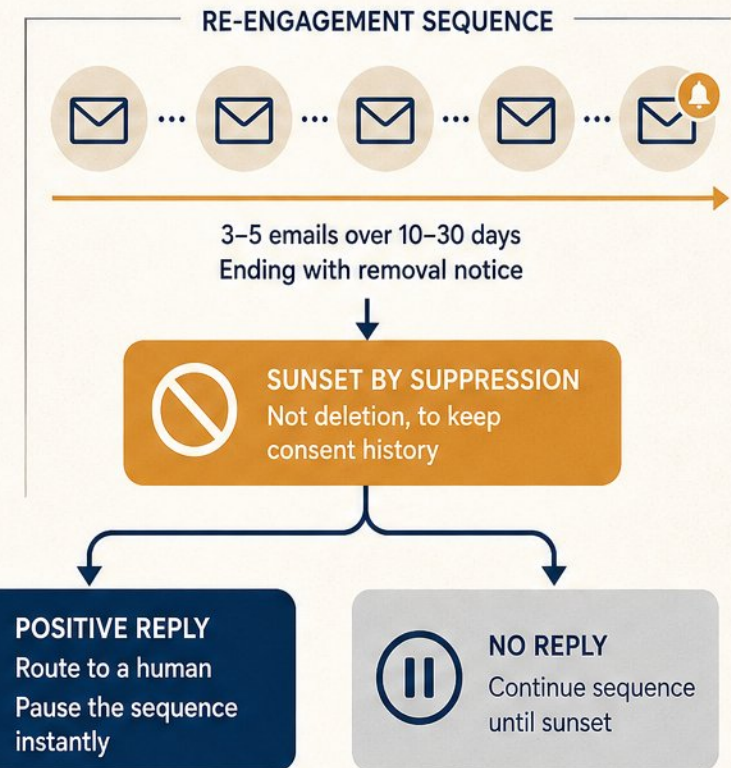
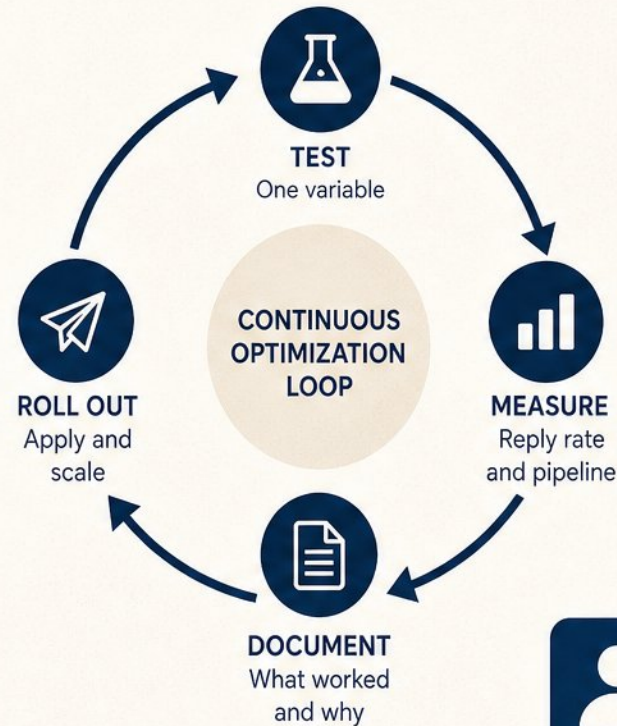
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PIPELINE CONTRIBUTION
Emails that contributed
to opportunities and
revenue outcomes.

Optimizing, Re-Engaging, and Scaling the Workflow

- Continuous loop: test one variable, measure reply rate and pipeline
- Re-engagement: 3–5 emails over 10–30 days, ending with removal notice
- Sunset non-responders by suppression, not deletion, to keep consent history
- Route positive replies to a human; pause the sequence instantly
- Audit known failure modes: over-automation, list fatigue, stale consent, compliance drift





Your 30-Day Plan to Launch the Workflow

WEEK 1		- Week 1: Audit opt-in provenance; remove unclear permission; start SPF, DKIM, DMARC
WEEK 2		- Week 2: Add one-click unsubscribe; refresh preference center; warm up new domains
WEEK 3		- Week 3: Build first sequence — trigger, delays, branches, stop rules; test small
WEEK 4		- Week 4: Turn on measurement; review reply rate and pipeline; set hygiene calendar



- Tooling by budget: free tiers early, mid-market platforms once branching and CRM sync matter

PersonWise.

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Scan the code or click anywhere to watch this course live, with voice Q&A

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