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Professional Services

Your Agenda Guides Our Actions

Welcome to the Emma Professional Services catalog! In the following pages you'll find our comprehensive range of training and design services. Each offering is tailored to empower you to unlock the full potential of your Emma account and ensure success at every stage of your marketing journey.

Whether you're a new user seeking a customized account training or a seasoned marketer in need of a design revamp, we are here to be your trusted partner, dedicated to helping you achieve your objectives. We understand that every account is unique, which is why all of our services begin with a strategic touchpoint so we can craft a plan around what is most important to you.

We take pride in delivering solutions to your specific requirements. We are committed to your success and are dedicated to helping you achieve your marketing goals.

Looking forward to partnering with you,

Nate Gallagher
Director of Professional Services

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Onboarding Packages

Let our team of experts help you get up and running in your new Emma account as smoothly as possible.

Whether it's hands-on training and importing your contact data, sharing best practices regarding list growth, or coding a template design to work with the Emma content editor, we've got you covered.

Essential Onboarding Package

A group of services designed to get you up and running in your account as efficiently as possible. We'll get your contacts imported and organized as well as train you on how to make best use of the new platform's feature set.

- Strategic kickoff call
- List Import (Limit up to 5 Excel/CSV lists and up to 10 custom contact fields)
- Custom Account Training

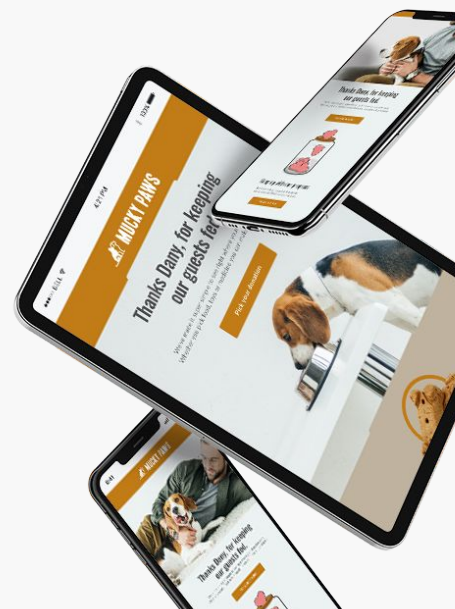## Template Onboarding Package

A group of services designed to get you up and running in your account as efficiently as possible. We'll get your contacts imported, train you on how to make best use of the platform's feature set, and get your template re-created for use with the drag and drop editor.

- Strategic kickoff call
- List Import (Limit up to 5 Excel/CSV lists and up to 10 custom contact fields)
- Custom Account Training
- Template Build (1 template)

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Expert Hours

Having a point person who understands your email marketing goals, has a deep understanding of your account set up, and can act as an extension of your team makes Expert Hours service one of our most popular services.

Whether you need help configuring your Emma account for the first time or would like a monthly standing monthly meeting , our email experts will coordinate with you to meet your needs. Their goal is to ensure you are using your account to the fullest while using best practices to boost engagement with your subscribers.

Below are examples of the types of work that can be accomplished with both a one-time bucket of Expert Hours or monthly hours:

One-time bucket of Expert Hours
For when you need a helping hand with::

- Scalable onboarding assistance
- Automation creation and/or updates
- Audience clean-up and/or reorganization projects
- Re-engagement campaign strategy and implementation
- API and integration assistance
- Custom reporting
- Custom dynamic content campaigns
- Hands-on training for new users
- Bulk sub-account creation

Recurring monthly Expert Hours
For when you want regular assistance with:

- Ongoing list maintenance and contact management
- Ongoing admin assistance i.e. setting user permissions, account updates
- A/B testing review and/or implementation assistance
- Segmentation + automation workflow strategy and/or implementation
- Email design + development consultations
- Manage preference and sign up form strategy and/or creation
- API and integration consultations

Details

One-time Expert Hours include a strategic kick-off call. Recurring Expert Hours include a recurring planning call and can be used for strategic recommendations, analytics review and hands-on help. All time spent toward service is tracked and hours do not roll over. Email specialist will let you know when your hours are running low.

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Quick Start Training

Our team of experts is here to help you get started with Emma, whether you need help importing your first list of subscribers or setting up an automated journey. Quick Start trainings are designed to teach you how to get up and running by using some of Emma's most popular and powerful features.

Audience and Contact Management

Work with an email expert to help import and organize your subscriber list ahead of your first send. Ahead of the meeting we'll make sure to share with you some best practices around email subscriber data collection so we can hit the ground running.

Templates and Campaigns

If you're ready to dive into email design using our drag-and-drop editor, this training is for you! An email expert will walk you through the ins-and-outs of the Emma editor and help you feel confident in creating your first design.

Automation

From a quick welcome email journey to more complex segment-based sends, one of our email experts will walk you through the different automation options available in Emma so you can take some manual sending off your plate!
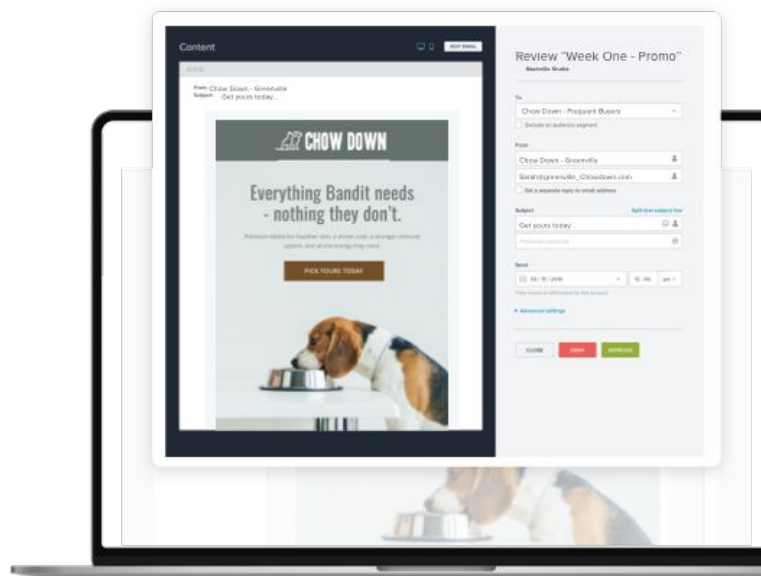
Details

Quick Start Trainings Include:

- A strategic kickoff email, including articles about best practices to review ahead of the training.
- One 30-minute virtual training about a topic selected by the Customer. This meeting will be recorded.
- The recorded meeting link, as well as any resources discussed following the call.

Visit **myemma.com/email-marketing-services** to get started!

myemma.com

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Select Topic Training

A one-hour training session with an email specialist to review a single topic or a pair of topics in-depth.

Your specialist will walk you through the ins-and-outs of your selected topic(s) and provide tailored examples of how to best use these features to improve your email marketing efforts.

Audience

Automation

Campaigns

Response

A/B Testing

Suggested pairings: Lists & Subscribers (single topic), Audience & Automation, Campaigns & Insights, Insights & A/B testing.

Details

Kickoff call (15 minutes)
Recorded screen-share consultation (1 hour)
Can be recorded if requested

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Custom Account Trainings

Two one-hour bespoke training sessions with an email specialist to review the features and functionality available within your account, tailored to your particular use cases and areas of interest.

Prior to the training, you'll meet with an email specialist to outline your organization's goals for the training so they can tailor the agenda to meet your needs.

Our specialists have extensive experience in training users of all levels across multiple industries, including: universities, franchise businesses, government and non-profit, health and fitness, and food and beverage.

Your specialist will walk you through adding and organizing your contacts in a way that works best for your organization. As well as:

- Segmenting your contacts
- Creating a signup form
- Creating and sending an email
- Automating emails based on trigger events
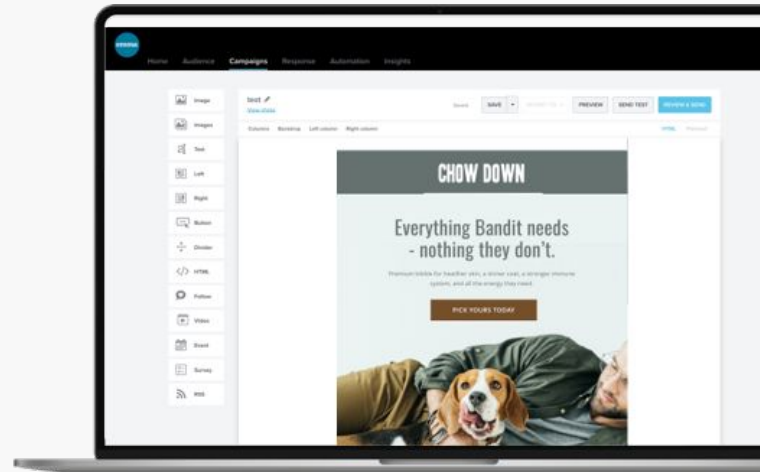- A/B content testing
- Reviewing your analytics

Details

Kickoff call (15 minutes)
Screen-share training (two 1-hour screenshares) *Can be recorded if requested*

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Design Services

Our team of expert email designers is here for you, whether you need us to create and develop a brand-consistent template, code a design of yours to work with the Emma content editor, or review your emails to help improve the effectiveness of their design and accessibility.

Custom Template

Work with an email designer to create a ready-to-send mailing consistent with your brand's look and feel and incorporating your content. The designer crafting your template will lay out the content to focus on your calls to action and save the mailing for you to use as an example of best practices for effective email design in the future.

Details

Design discovery call (20 minutes)
Image proof
Two (2) rounds of revisions
Email client render testing
Reusable template installation
HTML and final flattened image assets are available upon request

Template Build

An email developer will build your submitted email design into a reusable, responsive template using the drag and drop editor. The design will be created with the ability to edit, rearrange, or duplicate/delete all modules.

Details

Email client render testing
One (1) of round of revisions
Reusable template installation

Email Design Review

One of our expert email designer/developers will review up to five (5) of your existing email designs and detailing improvements we would recommend, covering visual hierarchy, content organization, calls to action, and accessibility.

Details

Kickoff call (15 minutes)
Screen-share consultation (1 hour)
Screen-share recording
Next steps checklist