

A printable planning workbook for online business owners

Email Marketing Planner

Plan, write, and send campaigns that grow your list — and your business — one email at a time.



THIS PLANNER BELONGS TO _____

PLANNING PERIOD _____

Welcome to your planner

Email is still the most direct, most profitable way to reach the people who care about what you do. Unlike social media, your list is yours — no algorithm decides who sees it. This workbook turns “I should really send more emails” into a calm, repeatable plan you can actually follow.

● What’s inside

- ✓ The fundamentals, in plain English
- ✓ Goal-setting and subscriber growth trackers
- ✓ Lead magnet and welcome sequence planners
- ✓ Weekly, monthly, and campaign calendars
- ✓ Promotion and newsletter templates
- ✓ Performance tracking and monthly reviews

● How to get the most from it

- 01 **Print what you need.** Reprint the weekly and tracking pages as often as you send.
- 02 **Start small.** One email a week beats a perfect plan you never ship.
- 03 **Write by hand.** Drafting subject lines on paper keeps you out of the editor’s rabbit holes.
- 04 **Review monthly.** The numbers only help if you look at them.

● No experience needed

Every section explains the “why” before the “how.” If a term is new to you, check the plain-English glossary in Section 01. You don’t need a big list or fancy tools to begin — just this planner and the willingness to hit send.

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What's inside

Ten sections take you from first principles to a repeatable monthly rhythm. Work through them in order the first time, then dip back in whenever you plan a new email or campaign.

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Plus: a notes & subject-line parking lot at the back — page 17.

SECTION 01

Email marketing overview

Email marketing means sending useful, relevant messages to people who asked to hear from you. Done well, it's a relationship — not a megaphone. You earn attention by being helpful, and over time that trust is what turns readers into customers. The best part: you own your list, so no platform can take your audience away.

● The four types of emails you'll send

01

Welcome

Sent automatically when someone joins. Makes a warm first impression and sets expectations.

02

Newsletter

Regular value — tips, stories, links. Builds the habit of opening your emails.

03

Promotional

Invites readers to buy, book, or sign up. Direct and time-bound.

04

Automated

Pre-written sequences that send on a schedule or trigger, working while you sleep.

● Key terms, in plain English

List Everyone who has given you permission to email them.

Subscriber One person on your list.

Segment A slice of your list grouped by interest or behaviour.

Lead magnet A free, useful resource people get in exchange for their email.

Open rate The share of recipients who opened the email.

Click rate (CTR) The share who clicked a link inside it.

CTA Call to action — the one thing you want readers to do.

Deliverability Whether your emails reach the inbox instead of spam.

Your email marketing foundations

Answer these once. They'll anchor every email you write from here on. Keep them somewhere you can see them.

WHAT DOES MY BUSINESS SELL?

WHO IS MY IDEAL SUBSCRIBER? (BE SPECIFIC)

THE #1 ACTION I WANT SUBSCRIBERS TO TAKE

MY BRAND VOICE IN THREE WORDS

EMAIL PLATFORM I'M USING

HOW OFTEN I'LL EMAIL

MY USUAL SENDING DAY(S)

MY USUAL SENDING TIME

MY PROMISE – COMPLETE THE SENTENCE

“When you join my list, you'll get...”

Subscriber growth goals

A list grows when more people join than leave. Set a clear target, then watch the trend — steady net growth matters more than any single big day.

CURRENT SUBSCRIBERS → GOAL BY WHEN

_____ → _____ _____

By _____ I'll grow from _____ to _____ subscribers.

● Monthly growth tracker

MONTH	START	NEW	UNSUBS	END	NET +/-
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					

MY TOP 3 GROWTH CHANNELS

ONE EXPERIMENT I'LL TRY THIS QUARTER

SECTION 03

Lead magnet planning

A lead magnet is a small, free resource people happily trade their email for. The best ones solve one specific problem fast. Plan yours here.

WORKING TITLE

FORMAT (TICK ALL THAT APPLY)

- | | | |
|---|--|--|
| <input type="checkbox"/> Checklist | <input type="checkbox"/> Guide / PDF | <input type="checkbox"/> Template |
| <input type="checkbox"/> Mini ebook | <input type="checkbox"/> Email mini-course | <input type="checkbox"/> Discount / coupon |
| <input type="checkbox"/> Quiz | <input type="checkbox"/> Resource library | <input type="checkbox"/> Swipe file |
| <input type="checkbox"/> Video / workshop | | |

THE ONE PROBLEM IT SOLVES

WHO IT'S FOR

THE PROMISE – WHAT THEY'LL BE ABLE TO DO AFTER USING IT

CALL TO ACTION AFTER OPT-IN

WHERE I'LL PROMOTE IT

● Opt-in page checklist

- | | |
|--|---|
| <input type="checkbox"/> A clear, benefit-led headline | <input type="checkbox"/> One single call to action |
| <input type="checkbox"/> A picture of the freebie | <input type="checkbox"/> Only the fields you truly need |
| <input type="checkbox"/> A short line on what happens next | <input type="checkbox"/> A privacy reassurance |

Welcome sequence planner

A welcome sequence is a short series of automated emails that every new subscriber receives, in order, starting the moment they join. It's your highest-engagement moment — people are most interested right after they sign up — so it's worth getting right. Five emails is plenty.

● A five-email arc that works

- 1 Welcome & deliver**
Say hi, deliver what you promised, and set expectations for what's next.

- 2 Your story**
Share who you are and why you do this. People buy from people.

- 3 Best of your value**
Send your most helpful resource or tip. Prove you're worth reading.

- 4 Social proof**
A result, review, or story that shows what's possible with your help.

- 5 A soft invitation**
Make a gentle, relevant offer. No pressure — just a clear next step.

● Spacing tip

Send the first email immediately, then space the rest one to three days apart. Map your timing and content on the next page.

Map your welcome sequence

Draft each email's timing, subject, goal, and call to action. One clear purpose per email keeps the whole sequence focused.

Email 1 SEND TIMING _____

SUBJECT LINE

GOAL OF THIS EMAIL THE ONE CTA

Email 2 SEND TIMING _____

SUBJECT LINE

GOAL OF THIS EMAIL THE ONE CTA

Email 3 SEND TIMING _____

SUBJECT LINE

GOAL OF THIS EMAIL THE ONE CTA

Email 4 SEND TIMING _____

SUBJECT LINE

GOAL OF THIS EMAIL THE ONE CTA

Email 5 SEND TIMING _____

SUBJECT LINE

GOAL OF THIS EMAIL THE ONE CTA

Weekly email planner

Use one sheet per email. Print a fresh copy each week and you'll never face a blank screen again.

THIS WEEK'S THEME / BIG IDEA

SEND DATE

AUDIENCE / SEGMENT

● Build the email

SUBJECT LINE – PLUS TWO ALTERNATES

PREVIEW TEXT (THE LINE SHOWN AFTER THE SUBJECT)

HOOK – THE FIRST LINE THAT EARNS THE OPEN

BODY – THE VALUE, STORY, OR TEACHING

THE ONE CTA

P.S. (OPTIONAL BUT POWERFUL)

BEFORE YOU SEND

- Proofread for typos
- Every link works
- Previewed on mobile
- One clear CTA
- Scheduled / sent

Monthly campaign calendar

MONTH

● Newsletter ● Promotion ● Launch ● Automated

Sun	Mon	Tue	Wed	Thu	Fri	Sat
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—
—	—	—	—	—	—	—

THIS MONTH'S FOCUS

KEY DATES & HOLIDAYS TO PLAN AROUND

SECTION 07

Promotion planning

A promotion is any time you make a clear offer — a sale, a launch, a booking window. Plan the offer first, then the emails that carry it.

PROMOTION / OFFER NAME

STARTS

ENDS

GOAL (SALES / SIGNUPS)

THE OFFER IN ONE SENTENCE

WHO IT'S FOR

HOW I'LL MEASURE SUCCESS

● The promotion email plan

EMAIL	SEND DATE	SUBJECT LINE IDEA
Announce Reveal the offer and open the cart / sign-ups.		
Benefits Show what changes for them — the transformation.		
Social proof Share a result, testimonial, or case study.		
Objections / FAQ Answer the "but what about..." questions.		
Last chance Remind them the offer is ending. Create honest urgency.		

Launch timeline

Map the run-up to your promotion so nothing gets left to the last minute. Jot the tasks and dates for each stage.



2 weeks before

Tease it. Warm up your list and build curiosity.



1 week before

Open a waitlist or send a heads-up. Confirm all links and pages.



Launch day

Send the announcement. Be available to answer replies.



Mid-promotion

Send proof and answer objections. Keep the momentum.



Final day

Send the last-chance email(s). Make the deadline clear.



After it ends

Thank buyers, follow up, and note what you'd change.

SECTION 08

Newsletter content planner

A newsletter is your regular, value-first email. Decide what it's about, build a bank of ideas, and use a simple template so writing it stays light.

NEWSLETTER NAME

HOW OFTEN I'LL SEND IT

CONTENT PILLARS – THE 3-4 THEMES I'LL ROTATE THROUGH

● Idea bank

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

● One-issue template

SUBJECT	
ONE BIG IDEA	
TEACH / STORY	
RESOURCE / LINK	
SIGN-OFF / CTA	

SECTION 10

Monthly review worksheet

MONTH IN REVIEW

● The numbers

SUBSCRIBERS – START

SUBSCRIBERS – END

EMAILS SENT

AVERAGE OPEN RATE

AVERAGE CLICK RATE

REVENUE FROM EMAIL

● Reflect

MY TOP-PERFORMING EMAIL THIS MONTH – AND WHY I THINK IT LANDED

WHAT RESONATED WITH READERS

WHAT FLOPPED (AND THAT'S OKAY)

ONE LESSON I'M TAKING FORWARD

NEXT MONTH'S #1 PRIORITY

WINS WORTH CELEBRATING
