The Email Playbook for B2B and B2C Marketers – 20 Tips

Sharpen your strategy with proven tips to drive engagement, conversions, and long-term loyalty.

Common mistakes, overlooked opportunities, and easy wins to improve your email performance today.

1. Hook With Your Subject Line

You have 3–5 seconds to earn the open. Lead with curiosity, urgency, or clear value.

2. Make the Preview Text Count

This space is your second headline – don't waste it with "Can't read this email? Click here."

3. Lead With the Reader's Need

Don't start with "We're excited." Start with why they should care.

4. One Email, One Purpose

Focus on a single CTA. Multiple asks dilute results and confuse readers.

5. Personalization Should Add Value

Go beyond "Hi [First Name]." Segment by interest, behavior, or stage.

6. Design for Mobile First

Over 60% of users read email on phones. Use short blocks, big buttons, and simple visuals.

7. Test, Don't Guess

A/B test subject lines, CTA language, and send times regularly. What works evolves.

8. Use Clear, Direct CTAs

"Learn more," "See pricing," and "Book a call" beat vague prompts like "Click here."

9. Avoid Jargon

Speak your audience's language, not your internal product lingo.

10. Nurture, Don't Nag

Build a relationship over time. Every email shouldn't be a hard sell.

11. Get to the Point Fast

Busy people skim. Use strong headlines, bullets, and short paragraphs to guide them.

12. Visuals Should Reinforce, Not Distract

Choose images that support your message – not just fill space.

13. Subject Line ≠ Clickbait

Deliver what you promise. Trust lost is hard to earn back.

14. Use Automation Intentionally

Set up journeys based on behavior, not just dates. Drip with purpose.

15. Segment by Behavior, Not Just Demographics

Someone who clicked yesterday needs a different message than someone who hasn't opened in weeks.

16. Make It Easy to Unsubscribe

Hiding the opt-out damages your sender reputation – and your brand.

17. Optimize for Dark Mode

It's common now. Check how your emails render in both light and dark settings.

18. Re-engage With a Reason

Win back inactive users with a clear offer or reminder of your value.

19. Use Real Metrics, Not Vanity Metrics

Opens are helpful – but clicks, replies, and conversions tell the real story.

20. Respect Frequency

Just because you can email often doesn't mean you should. Let the data guide you.