

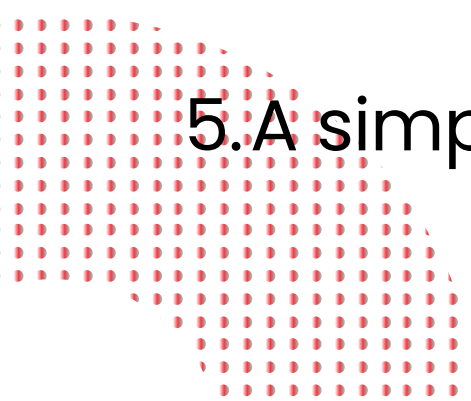


Why Your Email Marketing Isn't Working (And How to Fix It)


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WHAT WE'LL COVER TODAY

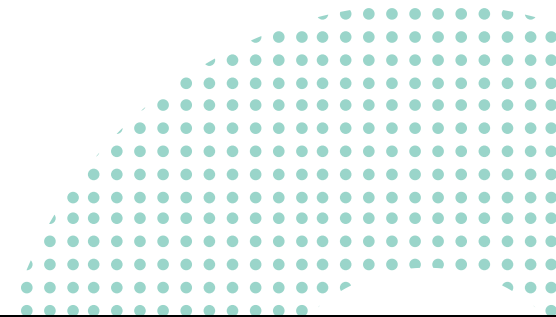
1. Why email still works (and where common issues pop up)
 2. How to handle prospect data
 3. Tools: CRM, list building, email platforms
 4. How to organize data so email performs
 5. A simple checklist to audit your setup
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EMAIL MARKETING STILL WORKS!

- 73%–77% of B2B buyers say email is their preferred channel for communication from vendors, more than double any other channel.
 - Long B2B buying cycles (6–12+ months) mean buyers rely on email to “research in private” before speaking to sales.
 - Across multiple studies, over 80% of buyers say they appreciate relevant, personalized email content.
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Where it usually breaks down:

- Inconsistent sending
- Irrelevant calls to action
- Little to no audience segmentation
- No connection to sales activity



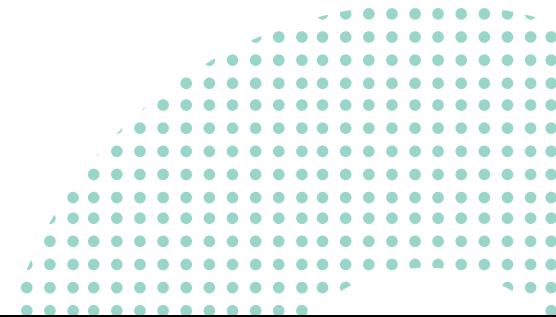
CUSTOMER RELATIONSHIP MANAGEMENT

(CRMs)



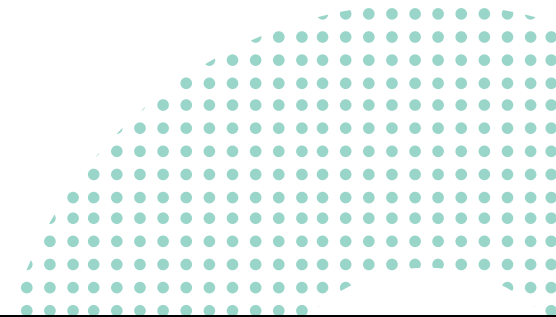
WHERE YOUR PROSPECT DATA LIVES

- Microsoft Dynamics
- Wingmate
- HubSpot
- spreadsheets
- salespeople's inboxes
- Trade show lists



Your CRM should be your source of truth:

- track prospects, not just customers
- store notes and context
- connect to marketing tools



THE ROLE OF EMAILS

What email marketing should be doing:

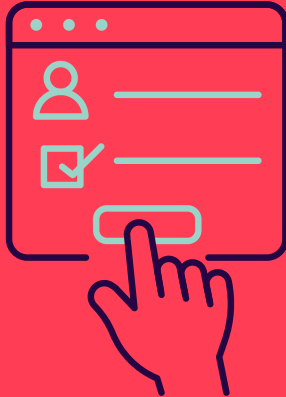
- staying visible between sales conversations
- reinforcing credibility
- creating additional touchpoints

In this space, people don't switch providers quickly. Staying visible over time matters more than one-offs.

Building Your Prospect List

Where new data comes from:

Organic



- website forms
- contact pages
- newsletter signups
- downloadable tools

Paid



- ZoomInfo
- data providers
- list enrichment tools

Paid Prospecting Tools

Data + outreach + light CRM in one place

Apollo.io

- ✓ Combines contact data + email outreach in one tool
- ✓ Easy to build lists quickly & built-in tracking
- ✓ Good for running outbound campaigns
- ✗ Data quality can be inconsistent
- ✗ Can be overkill if not doing regular outbound emails
- ✗ Setup can be complicated

Seamless.AI

- ✓ Fast way to find individual contacts
- ✓ Good for phone numbers and direct outreach
- ✓ Works well for reps prospecting on their own
- ✗ Less structured for building campaigns
- ✗ Data accuracy can vary
- ✗ More manual, less scalable

LeadIQ

- ✓ Pulls contact info directly from LinkedIn
- ✓ Easy to capture and sync contacts into a system
- ✓ Helps turn networking into usable data
- ✗ Dependent on LinkedIn activity
- ✗ Smaller dataset compared to larger platforms
- ✗ Not built for large-scale list building

Paid Prospecting Tools

Focus on accuracy + enrichment, not outreach

UpLead

- ✓ Strong filtering (industry, size, role)
- ✓ Email verification before export
- ✓ Simple and easy to use

- ✗ Smaller database than larger tools
- ✗ No built-in outreach
- ✗ Limited advanced features

SalesIntel

- ✓ Higher accuracy with human-verified data
- ✓ Strong for direct-dial phone numbers
- ✓ Good for cleaning and enriching CRM data

- ✗ More expensive
- ✗ Smaller scale compared to automated tools
- ✗ Not built for campaigns

Lead411

- ✓ Contact data plus company growth and intent signals
- ✓ Helps prioritize higher-probability prospects
- ✓ Adds context beyond just names and emails

- ✗ Smaller database than larger platforms
- ✗ Coverage can vary by industry or region
- ✗ No built-in outreach or campaign tools

ORGANIC PROSPECTING

- **Website contact forms** – connect these forms to your email marketing tool or CRM. Make sure the fields include specifics that will help you organize the data such as industry, location, etc.
- **Newsletter signups** – A simple opt-in like, “Stay updated” or “Join our email list,” used for industry updates, cost insights, or operational tips. Consistency is important for newsletters!
- **Downloadable Tools / Content** – Something of value in exchange for contact info, such as cost calculators, checklists, or guides.



You Have
Your
Prospect
Data.

Now what?



A quick note...

The following tools can be used to send **marketing or prospecting emails** with some small exceptions:

- Dynamics
- Wingmate
- Hubspot

Email Marketing Platforms



**Constant
Contact**



MailChimp



MailerLite

Lists

Think: High-level buckets

What they are:

- A list is usually your top-level database or audience.

How to set it up – Start with:

- Customers
- Prospects

Tags

Think: Labels you assign to contacts

What they are: Tags track what you know about someone over time.

Examples:

Source

- Trade Show
- Referral
- Website Form

Website Form Activity:

- Quote Requested
- Demo Scheduled
- Proposal Sent

Interest

- Uniform Rental
- Floor Mats
- Facility Services

Segments

Think: Who you actually send emails to

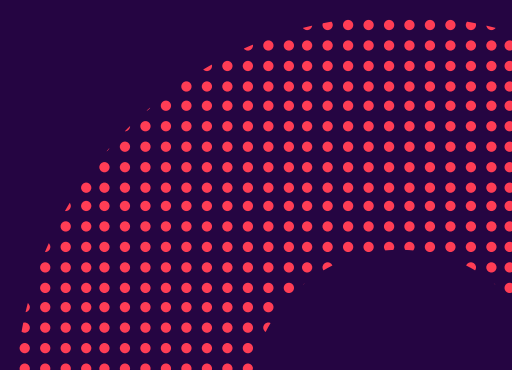
What they are: Segments are groups built using lists, tags, and behavior.

How to set them up – Examples:

- Healthcare prospects
- Hospitality prospects
- Quote sent, no response
- Inactive leads (no engagement in 6+ months)
- Interested in floor mats

Quick Distinctions

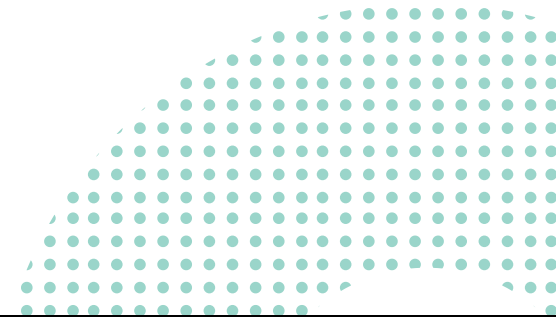
- List = where they live
 - Top-level bucket (customers vs prospects)
- Tags = what you know about them
 - What they've done, where they came from, what they care about
- Segments = who you're sending to
 - The specific group you pull when it's time to send an email



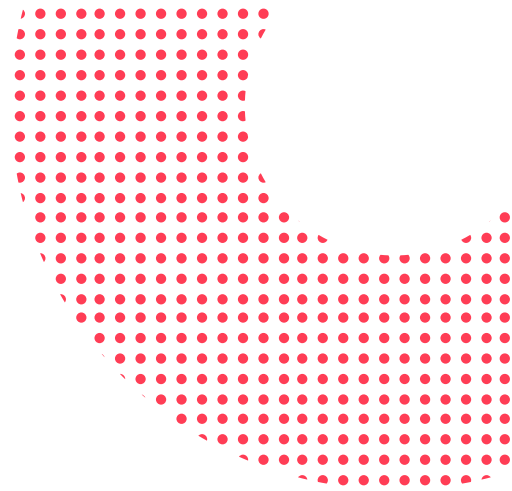
CLEANING AND MAINTAINING DATA

Email marketing databases degrade by about 22% per year. This is due to:

- people change roles
- emails go inactive
- companies change



What To Clean



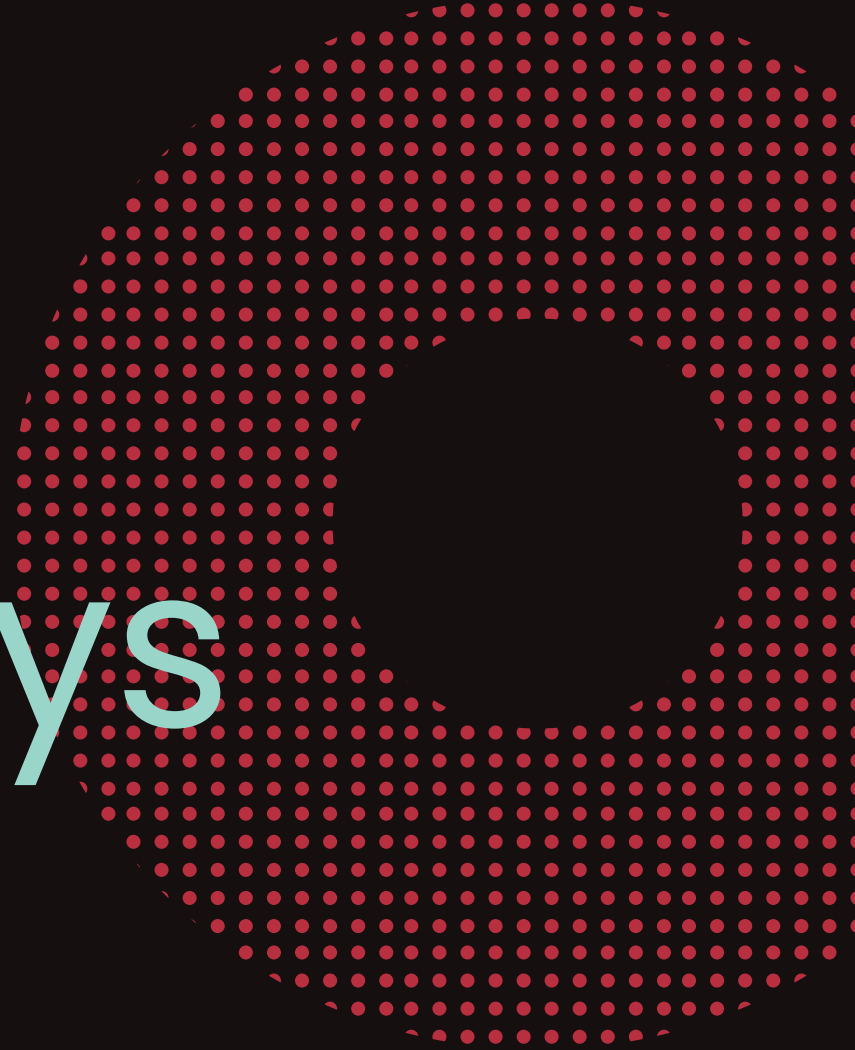
Start with the basics

- invalid emails
- duplicates
- unsubscribes
- role-based emails (info@, sales@)

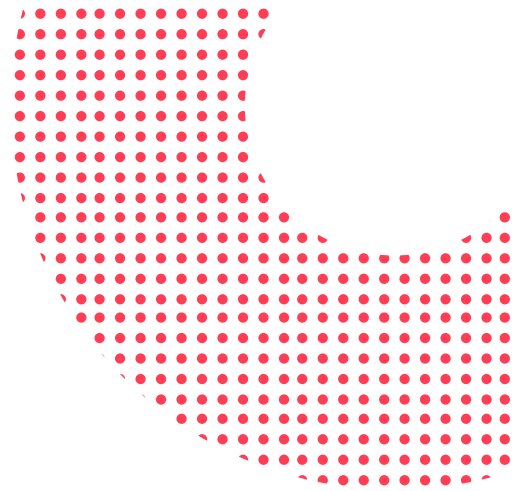
List Cleanup

- Prospect Lists should be updated every 1-3 months
- Customer Lists should be updated every 3-6 months

Key Takeaways



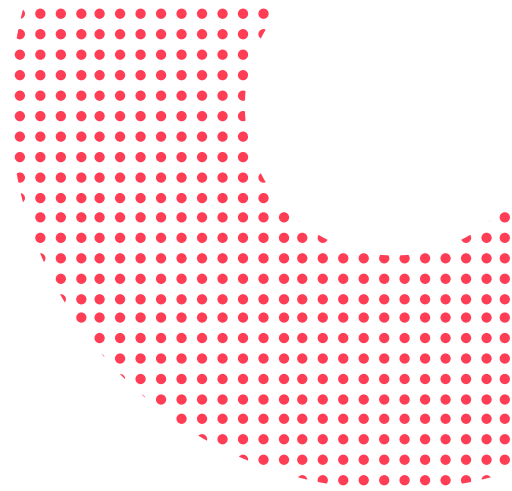
What Actually Drives Email Performance



Email performance comes down to three things:

- usable data
- basic organization
- consistent follow-up

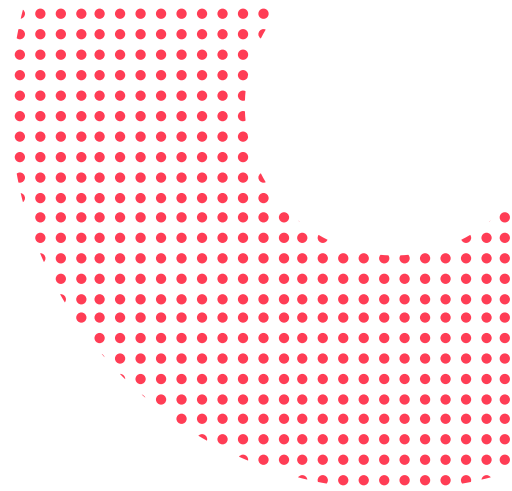
Where Most Companies Get Stuck



- data lives in multiple systems
- prospects aren't tracked consistently
- no clear structure for lists or segments
- follow-up depends on individual reps

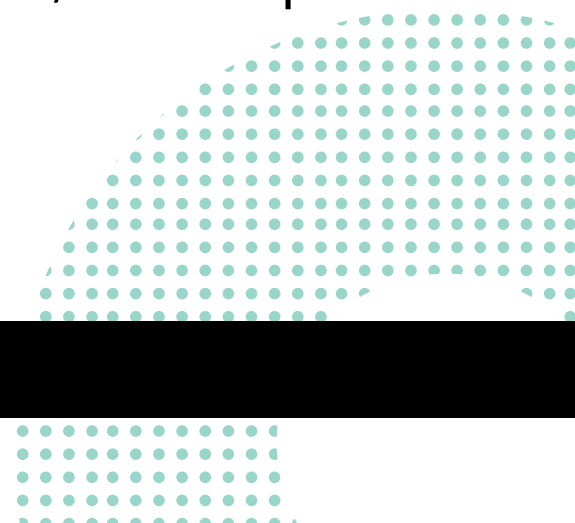
What Actually Fixes It

- centralize what you already have
- clean the obvious issues
- create a few simple segments
- start using the data consistently



THE BOTTOM LINE

- Email marketing works best when your data is clean and your audience actually wants to hear from you.
- A well-organized, segmented list will consistently outperform a large, messy one.
- This doesn't have to happen all at once. Start simple: organize your data, build a single clean segment, or set up a basic way to capture new prospects.

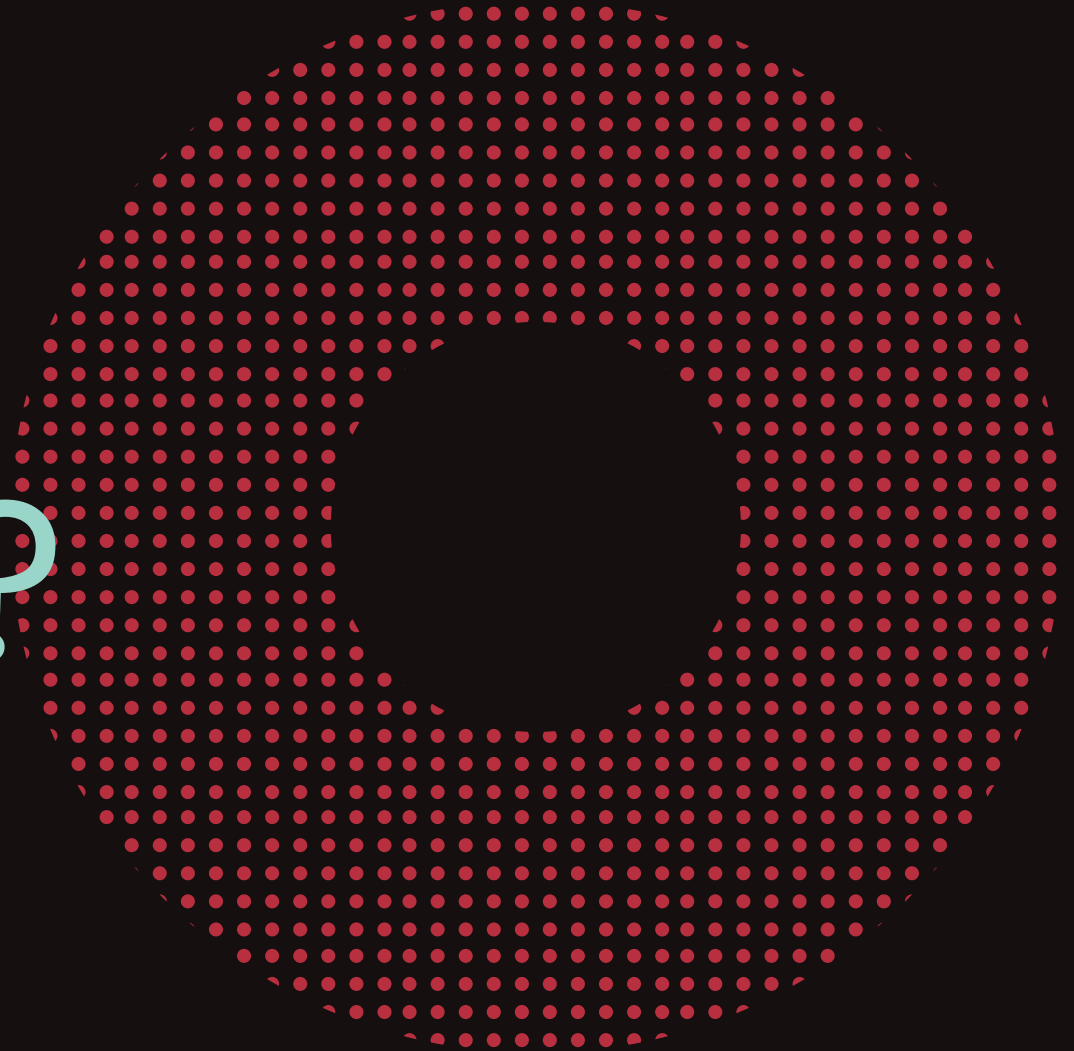


IF EMAIL ISN'T WORKING, LOOK AT THE DATA FIRST

Once the data is solid, email becomes a lot easier to manage and a lot more successful!



Q & A?

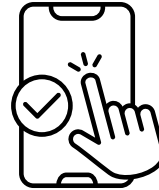


The Email Data & List Hygiene Checklist

It breaks your setup into 5 areas:



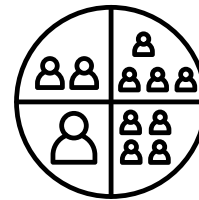
PROSPECT DATA



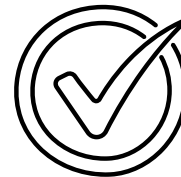
ENGAGEMENT



DATA QUALITY



SEGMENTATION



**SOURCE &
COMPLIANCE**

RESOURCES

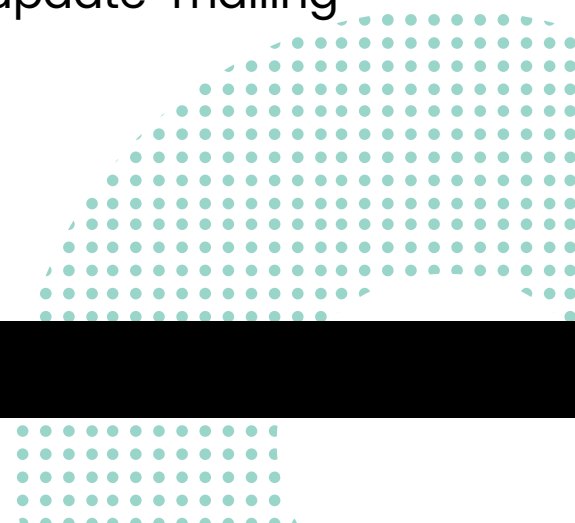
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Thank You!



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