



# The Practical Guide to Email Marketing with Zoho Campaigns



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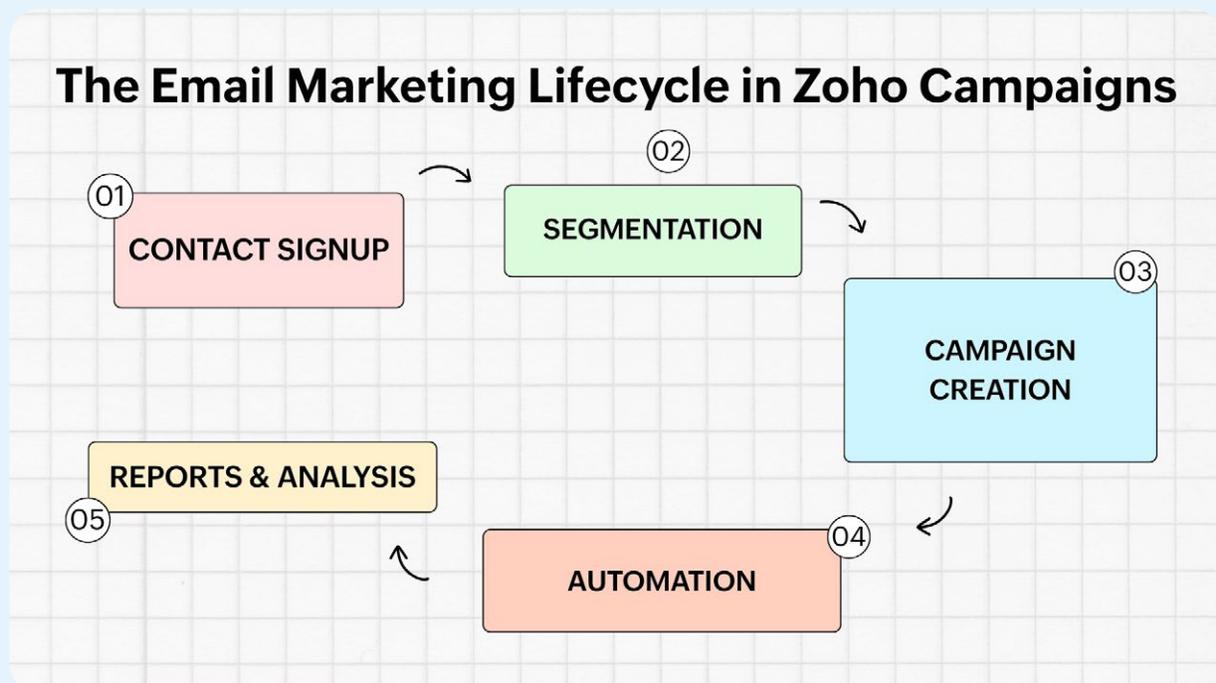
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# Introduction

Email is one of the most reliable channels for marketers to acquire, engage, and generate revenue from prospects. Even though there are several other marketing channels available, email remains one of the most dependable sources for marketers.

However, for email campaigns to be effective, proper planning is essential. Blindly sending emails to a large audience can easily result in your emails landing in spam folders. The goal of this guide is to help you, as marketers, land your emails in your customers' inboxes, encourage them to open your emails, and generate more revenue in the long term. This guide will help you plan and send your email campaigns more effectively—when done right in Zoho Campaigns.



For a campaign to be successful, you need to start with a clear understanding of your audience. For that, you need to send the right emails to the right people at the right times. With Zoho Campaigns, you can organize your contacts using lists, segments, and tags. Contact data, such as engagement history and signup sources, helps you steer away from generic email blasts and send targeted email messages.

Note also that an email should have a single purpose; you shouldn't explore too many themes in the same email, as this might confuse your subscribers and customers and dilute your message. Rather, your emails should be short, concise, and have at least one or two CTAs that encourage engagement. With Zoho Campaigns' email editor, you can design exactly that and set specific purposes. Our pre-designed templates offer a wide variety you can choose from, which you can then customize according to your business needs. All our templates are fully customizable, so you don't have to worry about your brand's tone or colors missing in the templates—which also leads to more meaningful engagement.

Your emails aren't going to work unless you're consistent with your customers. Sending emails is almost like talking to your customers on a regular basis; if you don't send emails, they may miss you or even forget your brand. That's why it is necessary to send emails to keep your brand top of mind. At the same time,

you shouldn't go overboard; if you send messages too frequently, recipients may mark them as spam or unsubscribe. For these reasons, it's important to find the right frequency at which to send emails.

Let's say all of this has worked. You have your contacts, you've worked hard on your content, subject lines, and CTAs, and you've sent your emails consistently. But all of that is pointless if you don't analyze what has worked and what hasn't. You may have worked hard, but whether it resonates with your audience remains a question. This is why you need to analyze and rework your content based on reports.

Zoho Campaigns enables you to see how your audience has engaged with your campaigns, including open rates, click rates, which links got the most clicks, and other key metrics marketers need. These reports give you a clear direction to move forward so you can rework your content and improve future campaigns.

To make your life even simpler, Zoho Campaigns offers automation—because marketers are often better at creative thinking than sending emails, which can be automated. The platform's workflows make your life easier; all you need to do is plan your campaigns ahead of time and set branches for each campaign based on whether it was opened, just delivered, unopened, or if a link was clicked. For each action, you can set up an automation that triggers another action. One simple example would be sending another email campaign to customers who clicked on a link. We'll look at more examples in the chapters ahead, but the idea is clear: Automation is handy for marketers.

So far, we've looked at segmenting your contacts, creating solid content, being consistent, and analyzing reports for your email campaigns and automation. Throughout this ebook, we'll explore these concepts in greater detail, and by the end, you'll know how to apply them practically using Zoho Campaigns to make your next email campaign stand out.



# Chapter 1: Aligning Goals, Audience, and Content in Email Marketing



While email marketing isn't new to marketers, the way emails are sent has evolved significantly over time. Initially, marketers sent generic email blasts that stood out because there was little competition and inboxes weren't crowded. Today, competition is high and every business is sending emails. In this environment, making your email stand out becomes a real challenge. While sending emails is easy, planning and execution are important, and the actions you take after sending emails are equally so.

Modern email marketing isn't about sending generic bulk emails; each email should feel like a direct conversation with your customer or audience. It should resonate with them, rather than simply be another generic email that never gets opened and eventually gets cleared from the inbox.

Zoho Campaigns is built with your audience in mind and supports a modern approach that enables marketers to create the kind of content that makes your emails stand out. This also has the benefit of adding value to your campaigns and reducing complexity in your workflow.

## What's your goal?

Before creating your first campaign with Zoho Campaigns, it's important that you clearly understand your goal. While all of us are marketers, what we want our recipients to do can vary. One customer might be onboarding, while another might have been with your brand for years—and we can't treat them both the same. How you write to them and how your email campaign is designed will be different. Likewise, your company might have different objectives, such as introducing your brand to a new customer, welcoming them, encouraging them to try a new offering, asking them to sign up for a webinar, prompting them to upgrade to a premium feature, or simply maintaining healthy engagement. In some cases, it could even be a simple check-in.

Once you've defined your goal—and therefore your target audience—you'll be ready to create your first campaign and its content.

Zoho Campaigns helps marketers stay goal-oriented by offering flexible campaign types and detailed performance insights. If your objective is **engagement**, metrics such as open rates, click-through rates, and link activity help you understand how your audience is responding. If your focus is **consistency and visibility**, scheduling tools and recurring campaigns make it easier to maintain a steady communication rhythm.

Defining your objective early ensures that you're not just sending emails, but building a repeatable and scalable marketing process.

## Who is your audience?

Audience relevance is another critical aspect of effective email marketing, as sending the same message to every contact often leads to disengagement over time. Zoho Campaigns enables you to organize contacts using lists, segments, and tags, which makes it easier to tailor communication based on attributes such as signup source, engagement level, or previous interactions. This means you can send educational content to contacts who are still exploring while sharing more detailed updates with those who are already familiar with your offerings.

# How focused is your email message?



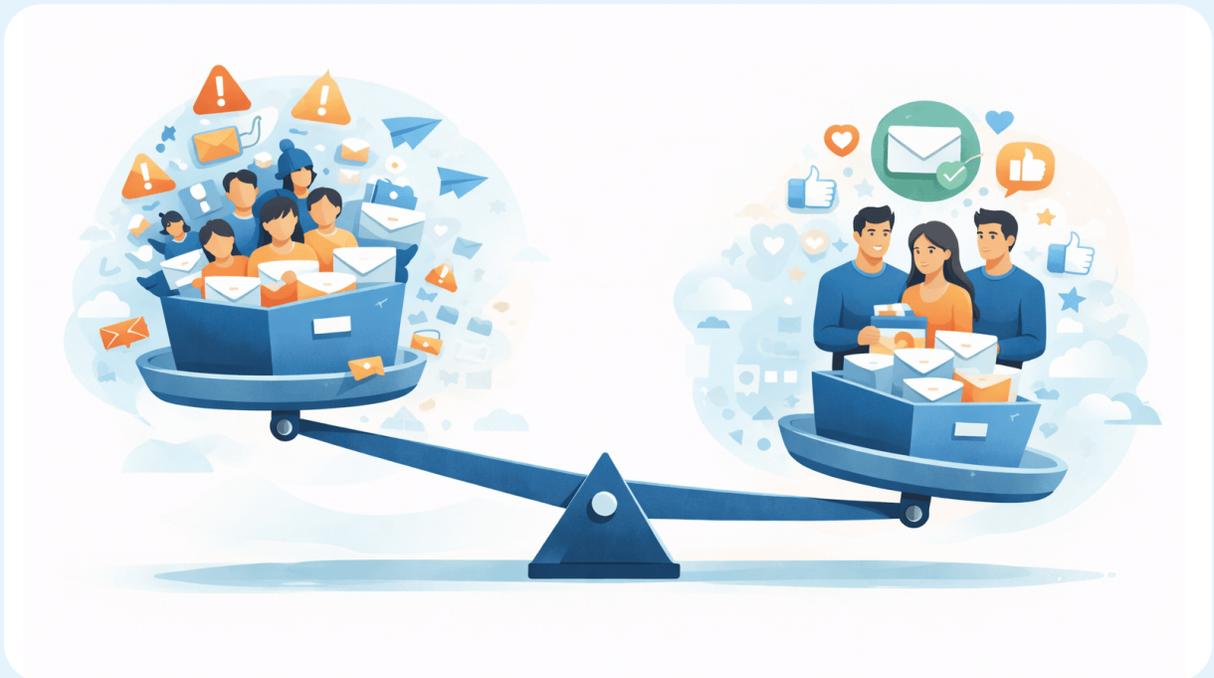
The content in your emails must be clear and focused, with one well-defined purpose. Ask yourself why you're sending that email and write the answer down. Your email should clearly answer that question. Otherwise, the content will feel scattered. You may have done the segmented your contacts correctly and set up everything to send the right email, but if the content doesn't stand out, your audience may open it once and ignore future emails because the previous content bored them. Indeed, the content needs to be relevant and useful to your

audience; it should feel like a solution they care about. So ask yourself what you're giving to your audience. It could be a discount or something informative. Once you define that, check whether your content fulfills that purpose. If it doesn't, rework it—as many times as you need.

Zoho Campaigns offers a host of pre-designed templates that are fully customizable. You can remove components, add elements, and let your creative ideas take over while keeping the message clear. Zoho Campaigns also helps you design responsive emails that look good on all devices, whether your audience opens your emails on laptops or mobile phones. This means you don't have to worry about plain text or HTML emails and can focus on the important aspects of your campaign, such as a strong subject line, a concise message, and a clear call to action. All of this helps deliver the message effectively and adds value to your brand.



## Chapter 2: Building a Strong and Reliable Contact List



You need a high-quality contact list for your email campaign. You may already have plenty of contacts in your Zoho Campaigns account from different sources, such as signup forms, manual entries, or imports from Zoho CRM. Regardless, how you use them for your next email campaign is what matters most, because you can't send every campaign to everyone. Rather, you must tailor your campaign to your audience, and

you must choose your audience carefully. This means it's essential to segment your contacts before sending an email campaign, as it directly affects your emails' relevance and how well your audience interacts with them.

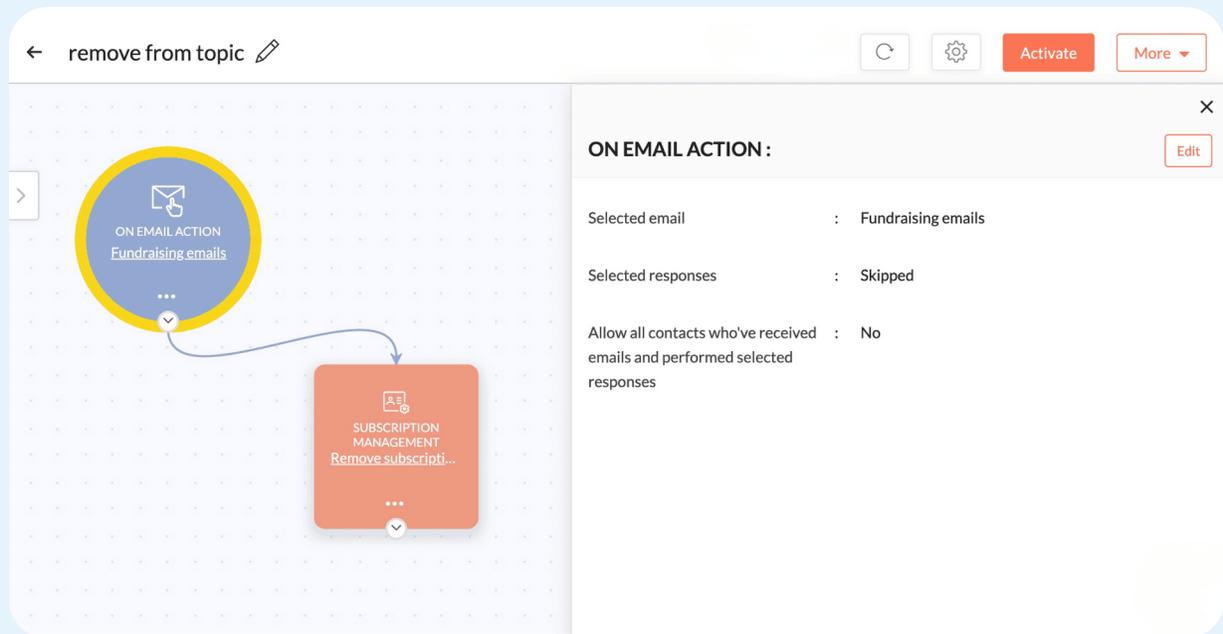
But note also that the number of contacts you target doesn't guarantee revenue; a large list doesn't guarantee results, but a smaller group of contacts who are genuinely interested in your offering will likely bring more engagement, more revenue, and better outcomes than a large list that of people who aren't interested. That's why choosing the right contacts is critical.

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Zoho Campaigns offers many tools to help you build contact lists that are healthy and actionable, such as double opt-in and compliance settings.

Within the Contacts section, you can manage lists, topics, segments, and signup forms, as well as assign tags to your contacts and allow them to choose the topics they want to hear about. Many of these processes can be automated within Zoho Campaigns.

For example, you can set up a workflow that removes a contact from a specific topic if they skip an email campaign, which helps you avoid sending repeated messages that are no longer relevant.



Similarly, you can configure workflows to remove contacts from a list if they haven't clicked any links in a campaign over a defined period. This ensures your active lists remain focused on engaged contacts, while reducing noise and improving overall campaign performance.

As you acquire more contacts and send them more emails, you can use campaign reports and engagement data to segment them into lists, which we'll learn more about in the next chapter.



## Chapter 3: Using Segmentation to Improve Relevance and Engagement

Not every contact in your account will have the same expectations or interests, and it's crucial to understand that sending email campaigns without identifying your audience's interests can lead to disengagement. In Zoho Campaigns, you can group your contacts into lists or segments; let's go over the difference between the two.

### How do segments differ from lists?

You can import lists from other databases, sync them from other apps, add contacts manually, or let contacts enter through signup forms. On the other hand, segments are more advanced; you can set conditions that, when met, tell the system to add relevant contacts to the segment automatically—a process that's dynamic and ongoing. In this way, segments are continually kept fresh. That's the key difference between lists and segments; lists are more static, whereas segments are more dynamic.

You can base your segmentation on a wide range of criteria, including contact attributes, contact activity, campaign activity, or even ecommerce activity. With Zoho Campaigns, you can create rule-based segments that update automatically as contact data changes. This ensures that your audience groups remain accurate without constant manual updates.

Contacts > Segments > create

### Create Segment

Name

Criteria

1 City is New York (+)

Criteria Pattern: 1

Tip: Comma-separated search values can be given. They will be interpreted as 'OR' criteria. Ex: "Last Name contains Jones, West" will be treated as (Last Name contains Jones) OR (Last Name contains West).

Example Last Name contains Jones, Smith, West will be treated as (Last Name contains Jones) OR (Last Name contains Smith) OR (Last Name contains West).

Save Cancel

Behavior-based segmentation is particularly powerful. For example, you might choose to group contacts who regularly open your emails separately from those who haven't engaged recently. This enables you to adjust your messaging accordingly and share deeper content with engaged contacts while reintroducing value to less active ones. Zoho Campaigns tracks these interactions and makes them easy to act on.

Contacts > Segments > create

### Create Segment

Name

Opened

Criteria

1 Any Campaign Opened Till Today (+)

Criteria Pattern: 1

Tip: Comma-separated search values can be given. They will be interpreted as 'OR' criteria. Ex: "Last Name contains Jones, West" will be treated as (Last Name contains Jones) OR (Last Name contains West).

Example Last Name contains Jones, Smith, West will be treated as (Last Name contains Jones) OR (Last Name contains Smith) OR (Last Name contains West).

Save Cancel

Segmentation also enables better planning. Instead of designing one campaign for your entire list, you can plan targeted campaigns for specific groups with clear intent. This reduces message fatigue and improves overall engagement metrics. Over time, segmentation helps you understand which types of content resonate with different audiences.

Zoho Campaigns makes segmentation accessible even for marketers who are new to advanced targeting. The interface is designed to be intuitive and to enable you to define conditions without complex logic. This lowers the barrier to personalization and encourages marketers to move beyond generic campaigns.

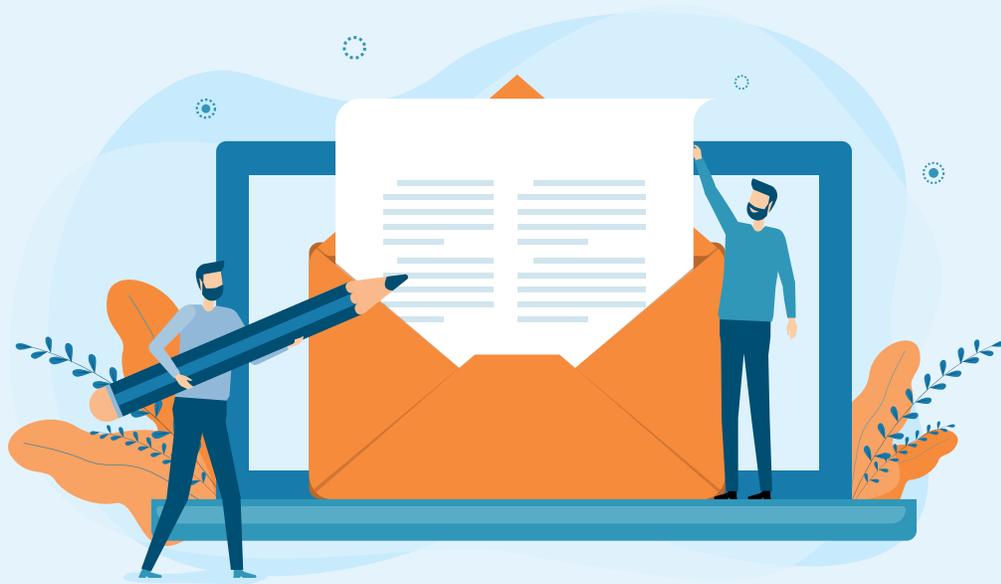
1 Contact Email contains gmail (-)

2 and Company Name is Zoho (-)

3 or Added Time is Jan 05, 2026 01:00 AM (+) (-)

Criteria Pattern: ((1 and 2) or 3) [Change pattern](#)

By using segmentation, marketers can turn email into a more conversational and responsive channel.



## **Chapter 4:** Designing Emails That Encourage Action

A good email is clear, focused, and easy to act on. Every email campaign should have a single purpose; it could be to share information, drive engagement or revenue, or prompt your audience to take a specific action. Zoho Campaigns helps marketers design emails that are visually clean, actionable, and aligned with that purpose.

# Subject Line

The subject line is the first part of the email you should focus on, because a good subject line helps improve open rates. Only after opening the email will your audience read the content inside it, so having a strong subject line is important.

In Zoho Campaigns, you can experiment with subject lines and analyze open rates to refine them for future campaigns. This can be done using A/B testing. Instead of sending a subject line that may not perform well, you can perform an A/B test on two narrow slices of your audience, and Zoho Campaigns will automatically send the campaign with the better-performing subject line (i.e., the one with higher open rates, say) to the rest of your audience.

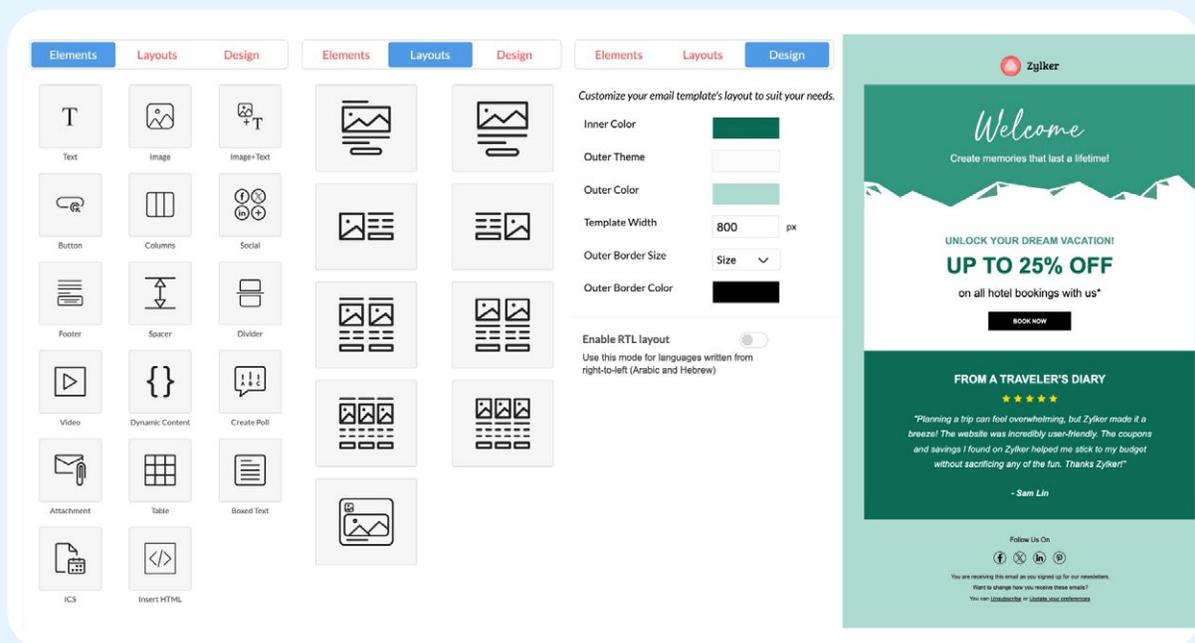
The screenshot shows the A/B testing configuration interface in Zoho Campaigns. At the top right, there are five numbered tabs: 1 (AB Info), 2, 3, 4, and 5. The main form includes the following fields and options:

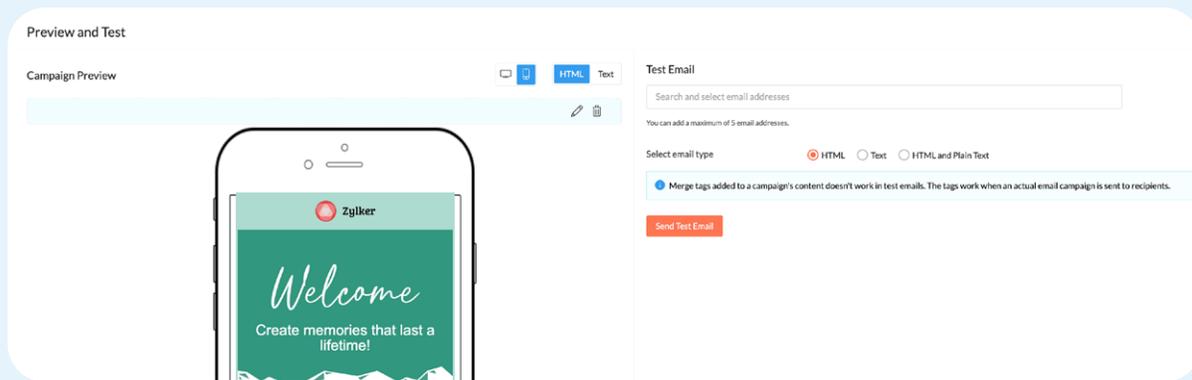
- Name:** A text input field containing "A/B testing".
- Select test parameter:** Three tabs: "Subject" (selected), "Sender Details", and "Email Content".
- Select the size of test group:** A horizontal slider ranging from 0 to 60. Below the slider, two groups are defined: "A 2.5% of Recipients" and "B 2.5% of Recipients". A note states: "The winning version will then be sent to the other 95% of your list."
- Decide Winner by:** Three radio button options: "Open Rate" (selected), "Click Rate", and "Manual".
- Test duration:** Two dropdown menus. The first is set to "1" and the second is set to "Hours".
- If results are inconclusive, send:** Three radio button options: "Version A", "Version B", and "I'll decide later" (selected).

# Email Content

So your subject line worked and was catchy enough to get your audience's attention. What comes next is the email content. Your content should guide readers with a logical flow and eye-catching—but not overwhelming—design. It should help readers understand the message and take the action you intended them to take.

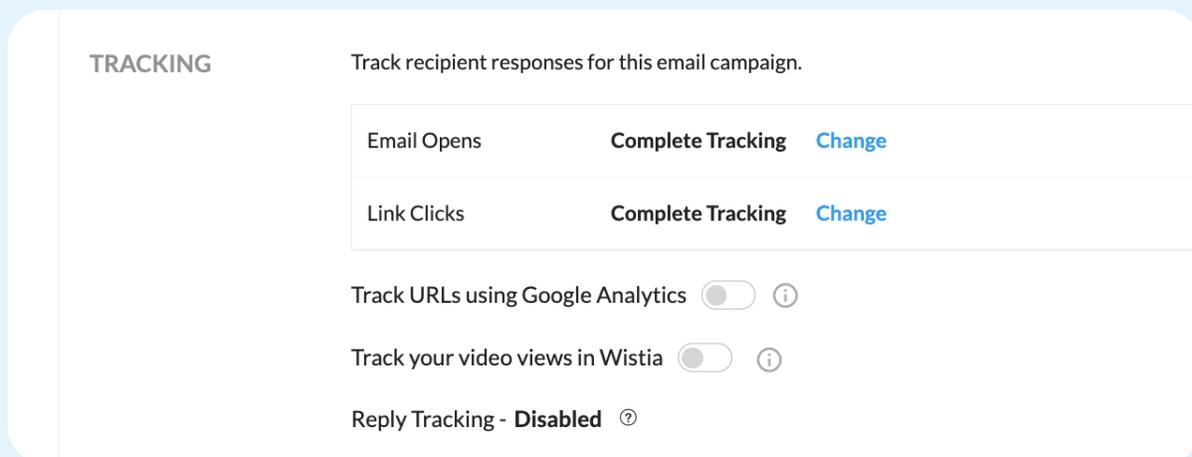
Zoho Campaigns' drag-and-drop editor helps you structure emails into clear sections, create neat content, and add prominent calls to action. You don't need to worry about technical aspects, as Zoho Campaigns' pre-designed templates work well on all devices, including laptops and mobile browsers. You can also preview and test your emails before sending them.





It's important to limit your email campaign to a single purpose and avoid sharing multiple messages in one email. If you include a CTA, make sure it's clear and prominent, and avoid confusing your audience with multiple CTAs. Use clean layouts and good design. You can customize buttons, colors, columns, sections, and spacers to make your email visually appealing.

When you add a CTA, you can also enable link tracking to measure how recipients engage with your campaign. Over time, analyzing these metrics will help you refine your content even further.



While all of this helps you build the right content for your audience, personalization takes it a step further. In the next chapter, we'll learn more about personalization, which helps you design emails that are relevant to your audience and make the content feel like it was written just for them.



## Chapter 5: Applying Personalization with Purpose

Although personalization isn't mandatory, it's important to help your emails stand out from the crowd. Personalizing emails involves writing directly to your audience such that your message feels tailored to each of them as individuals.

But you may have hundreds of contacts, and you can't feasibly personalize emails for each contact by manual means.

Accordingly, Zoho Campaigns offers personalization tools—such as merge tags and dynamic content—to help you personalize emails for your audience at scale and without manual effort.

# Merge Tags

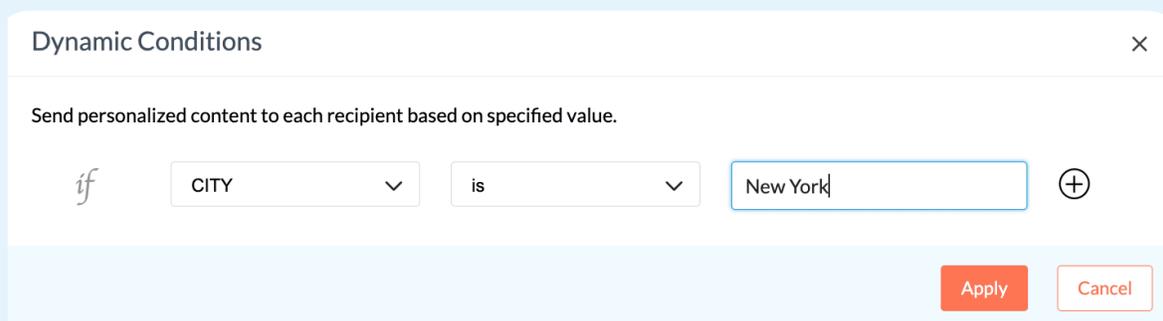
Adding a merge tag at the start of your email changes a message that would otherwise be generic into one that addresses your contact by name—such as, "Hey, John. Do you want to try this?" Adding a contact's name immediately makes the email feel more personal. Zoho Campaigns provides a host of merge tags that can pull information from custom fields in Zoho CRM so you can use your customer data directly in your emails.

### Add a personalization

<a href="#">Contact Merge Tag</a>	>	<a href="#">Contact Email</a>
<a href="#">Header and Footer Merge Tags</a>	>	<a href="#">First Name</a>
<a href="#">List Merge Tags</a>	>	<a href="#">Last Name</a>
<a href="#">Video Merge Tags</a>	>	<a href="#">Company Name</a>
<a href="#">Comment Merge Tags</a>	>	<a href="#">Phone</a>
<a href="#">Print Merge Tags</a>	>	<a href="#">Address</a>
<a href="#">vCard Merge Tag</a>	>	<a href="#">City</a>
<a href="#">Consent Merge Tags</a>	>	<a href="#">State</a>

# Dynamic Content

Dynamic content takes personalization further by allowing you to display different pieces of content based on different conditions. For instance, if you want to send a special offer to people in New York, you can set a condition such that contacts from New York will see content that contacts from other locations won't.



The screenshot shows a 'Dynamic Conditions' dialog box with a close button (X) in the top right corner. Below the title bar, there is a descriptive text: 'Send personalized content to each recipient based on specified value.' The main configuration area contains an 'if' icon followed by a dropdown menu with 'CITY' selected, a second dropdown menu with 'is' selected, and a text input field containing 'New York'. To the right of the input field is a plus sign icon (+). At the bottom right of the dialog, there are two buttons: 'Apply' (in red) and 'Cancel' (in white with a red border).

Using this approach, you can personalize emails without sending multiple campaigns—and thereby save time by personalizing a single email.

The goal of personalization is to reduce friction and improve long-term engagement. When your subject lines and content reflect what your recipients care about, they're more likely to engage—and Zoho Campaigns provides all the tools you need to personalize your message.



## Chapter 6: Finding the Right Balance with Timing and Frequency

How often you send emails matters as much as what you send. Sending too frequently can lead to fatigue, while infrequent communication can reduce recall. Zoho Campaigns helps marketers find the right balance through engagement insights and scheduling tools.

### Timing

Not all emails need to be sent immediately; sometimes, it makes sense to send them later.

Zoho Campaigns features multiple sending options: You can set a fixed time and time zone, send emails in batches at specific intervals, choose the recipient's time zone, or select the recipient's optimal open time. All of this means you can send campaigns when recipients are most likely to open them.

In other words, with these options, you don't have to worry about timing; Zoho Campaigns handles it for you. You can also analyze reports later to see when and on which days your contacts open emails. Based on this analysis, you can manually schedule your next email campaign.

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**Launch options**

Send Immediately     Send Later

**Fixed Time and Time Zone**  
We'll launch your campaign on the date and time you specify.

**Send in Batches**  
Send campaign in batches at specified intervals.

**Recipients' Time Zone**  
Your campaign will be launched based on the recipient's time zone.

**Recipients' Optimal Open Time**  
Your campaign will be launched based on the time your recipients are more likely to open it.

Date: Jan 21, 2026 

Time: 02:55 PM 

Time Zone: Europe/Paris 

**Schedule**

# Frequency

Consistency is important, but marketers send emails for a variety of purposes. Keeping track of all your campaigns and ensuring that no single contact receives multiple emails in the same week can be difficult.

Zoho Campaigns helps you manage this easily. You can set weekly or monthly email limits and define the intervals between emails—meaning you don't have to track your frequency manually. For example, if you set a limit of one email per week or two emails per month, each contact will receive only that

of emails. Even if a contact is part of multiple lists, they won't receive additional campaigns once the limit is reached. This makes it easy to manage timing and frequency in Zoho Campaigns.

Set limits on the number of emails being sent out at various recurring intervals.

Email-Sending Policy

Time	Value
Weekly Email Limit	1 email <input type="text"/>
Monthly Email Limit	2 emails <input type="text"/>
Interval Between Emails	3 days <input type="text"/>

By using these tools, you can create email campaigns that are effective without overwhelming your audience.

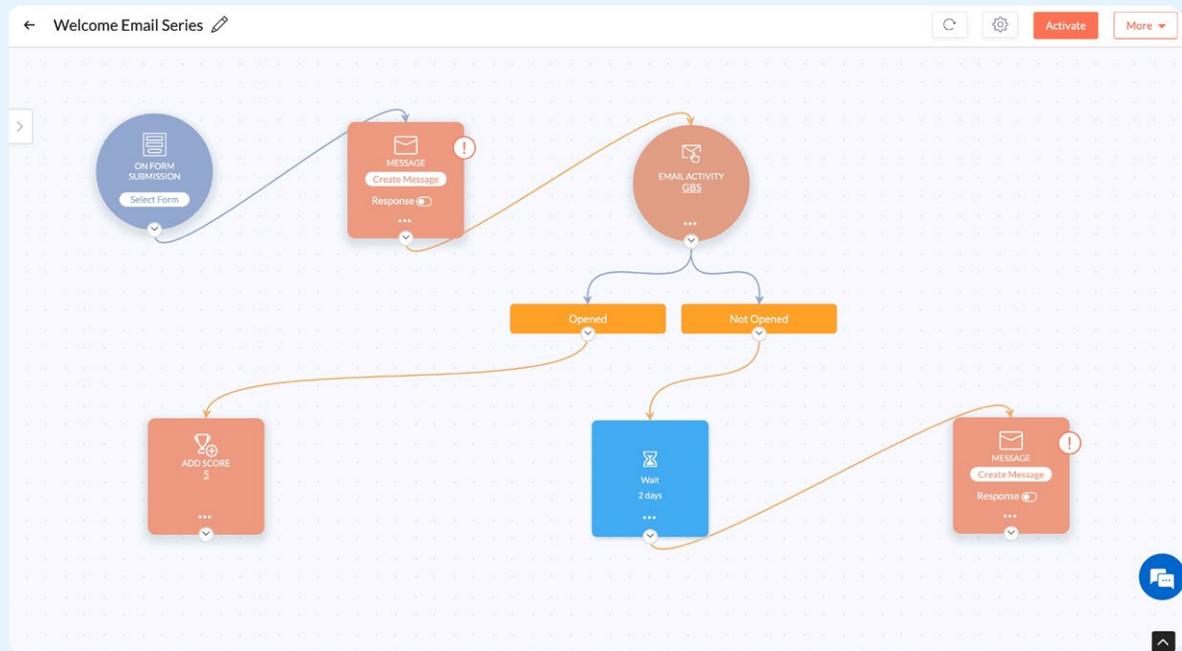


## Chapter 7: Scaling Communication with Email Automation

In this chapter, we'll look at how to scale your email communication. As marketers, we don't just send one email campaign and call it a day. We take further steps based on engagement; we add engagement scores, send more emails to people who opened our previous ones—or didn't—or to those clicked on a link.

With Zoho Campaigns, you don't need to plan separate campaigns for each group; you can plan everything and set up an automation for each group you want to target.

For example, you can create an email series that sends a welcome email when a contact signs up via your webform. From there, you have two outcomes: some contacts open the email and some don't. For contacts who open the email, you can add a score. For those who don't, you can wait for two days, check again, and then send another email.



Doing all of this without automation would take a lot of time, as you'd need to send different campaigns and add scores manually. Instead, you can set up workflows to make this process much simpler, which involves setting triggers and connecting them to automated actions.

With Zoho Campaigns' email activity component, you can create branches for different scenarios, such as when an email is opened, not opened, delivered, skipped, not sent, replied to, or opened but not replied to, as well as when any link is clicked—or even a specific link. Using these branches, you can target each group and add a followup action, such as sending another email campaign.

### Configure Action ✕

This action allows contacts to enter your workflow based on their email activity.

Select an email

Select an email action

- Delivered
- Not Sent
- Opened
- Not Opened
- Replied
- Opened but didn't replied
- Skipped ⓘ
- Clicked on any link
- Opened but didn't clicked on any link
- Clicked on specific link

**Note**

- Contacts will enter into further processes of the workflow only once, when they initially satisfy the conditions selected above. [Learn more.](#)
- For plain text email campaigns, opens will be tracked only if the links in the email campaign are clicked.

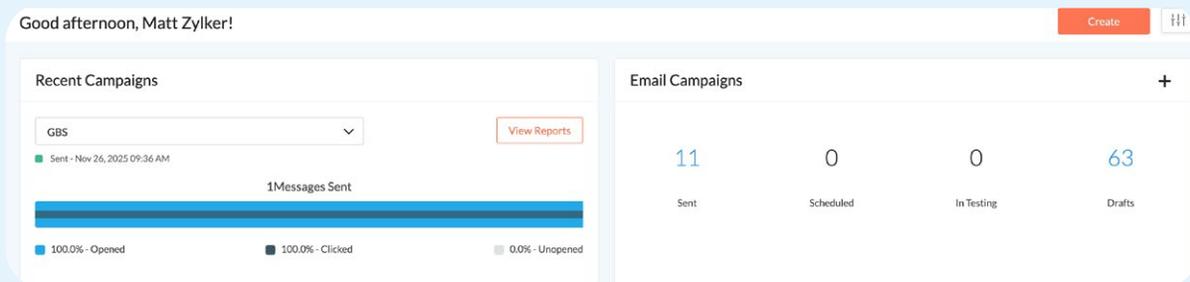
Setting up a workflow for your email campaigns is useful for onboarding series, follow-ups, and re-engagement, all of which Zoho Campaigns makes straightforward and manageable. Workflows also ensure consistency, so that every contact has the same structured experience, regardless of when they join. You don't have to worry about sending the first onboarding email to a contact who joins later; as soon as a contact joins, the automation takes care of it. This saves time and allows you to focus more on planning and strategy instead of repetitive tasks.



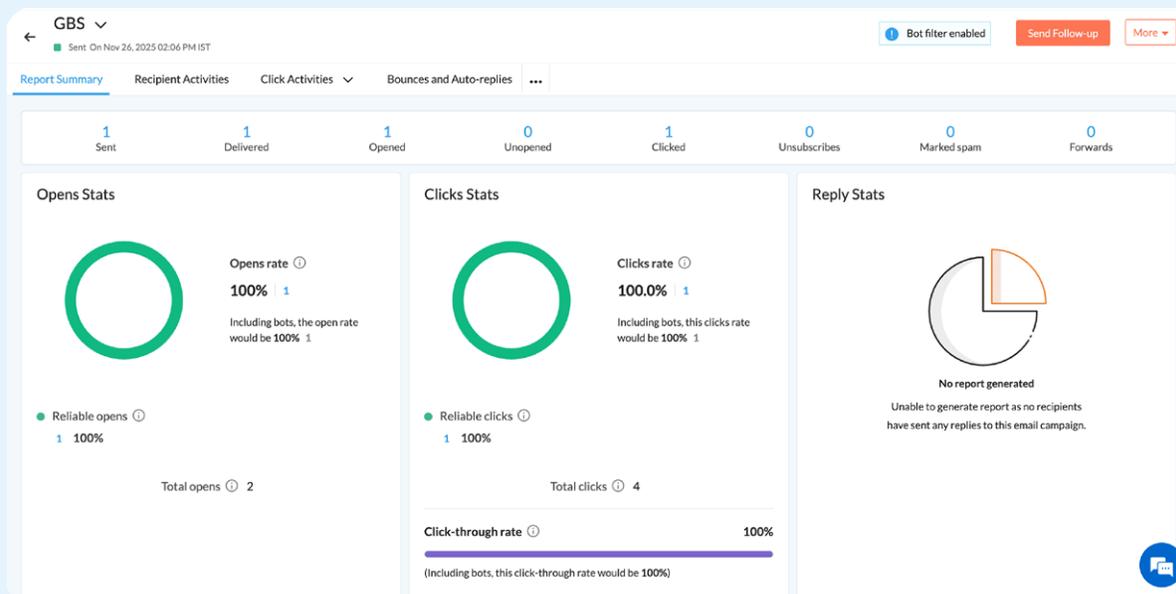
## Chapter 8: Measuring Performance and Improving Continuously

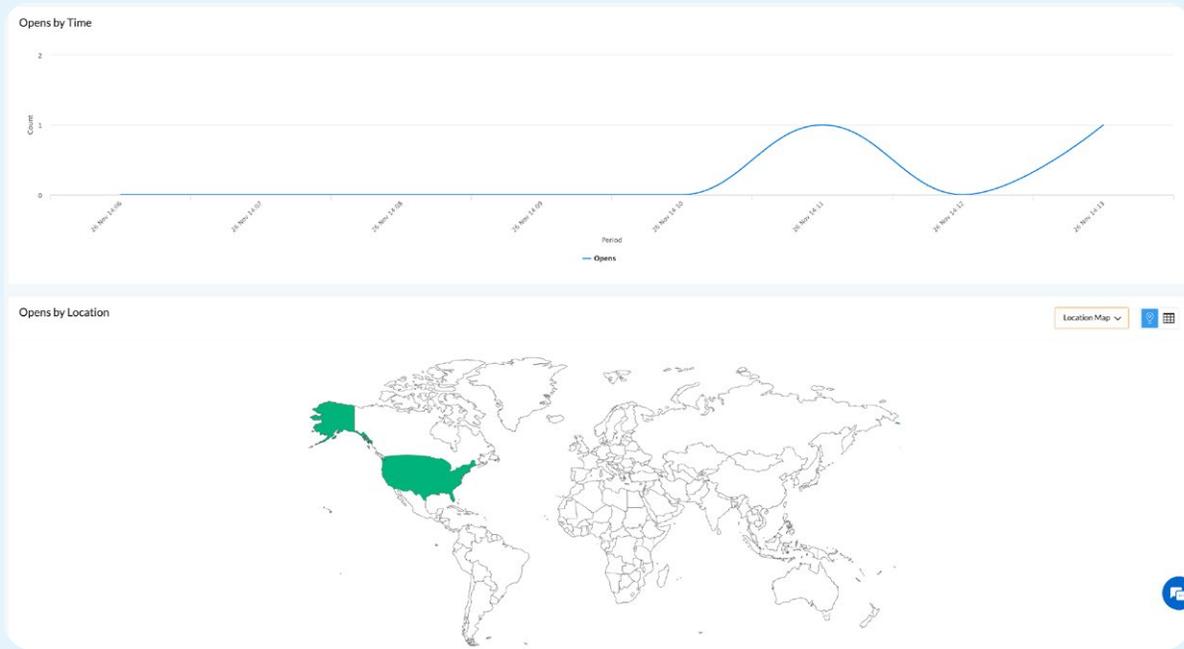
Email marketing is a continuous learning process that involves sending emails, analyzing what works and what doesn't, and refining your content or approach for future campaigns. There's always something to learn from past campaigns, including mistakes and areas where you can improve.

Zoho Campaigns makes this process easier. You don't have to open each campaign manually to see results. Campaign performance is available directly on the dashboard when you open Zoho Campaigns.

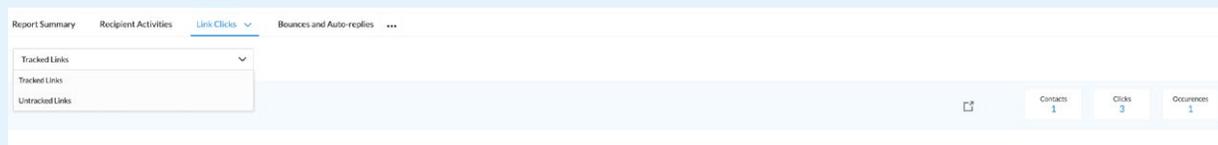


For more detailed insights, you can open any individual campaign to view its reports. These include open rates, delivery rates, spam reports, hard and soft bounces, and click data.





You can also see how many people clicked on each link. This link-level data can guide your next campaign. If a specific link performs well, you can reuse it as a CTA in future campaigns. Zoho Campaigns provides access to all this data in one place.



By reviewing campaign performance regularly, you can refine your content, improve timing and targeting, and optimize your personalization strategies. This ongoing learning approach helps you plan stronger future campaigns and supports better engagement and revenue over time.

# Conclusion

In this ebook, we've covered several key aspects of email marketing. Let's briefly cover them again:

First, you should define your goal or objective in sending an email campaign.

Next, you should build a strong contact list, manage it, and keep it healthy, and segment it to target your audience effectively. Then it's time to focus on your email itself and its design, which includes your subject line and content, and all the ways you can apply personalization—namely, using Zoho Campaigns' merge tags and dynamic content.

We also discussed timing and frequency, including how many emails a contact should receive. We explored advanced concepts like workflows, whereby you can automate email campaigns, send a series of emails, and perform actions with triggers and action components.

Finally, we covered how to measure the performance of your email campaigns and use those insights to improve future campaigns.

You have the tools and the concepts to get started. All that's left is for you to apply these concepts in your next campaign. Happy campaigning!



Zoho  
**Campaigns**

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