Writing a perfect PRD for your email task

According to Statista, 333 billion emails were sent and received each day in 2022. That’s a little over 10,000 emails per second. In the time it took me to write this post, I received more than 5 emails.

Emails have become such an integral part of our daily lives that we consider emails as a primary mode of communication in a lot of our interactions.

Be it carrying out a transaction on any e-commerce platform, sharing documents with our friends/colleagues, communicating with clients, marketing our products, or connecting with customer support **-** we tend to prefer emails as the primary mode of communication.

Emails are being used for hundreds and thousands of use cases, the biggest one being order updates in any sort of digital transaction.

> 💡 Have you ever wondered who creates these emails?

The majority of these emails are drafted by **Product Managers**.

No matter what sort of role you are in, you will inevitably come across situations where you will have to work on emails. These emails could be:

- Transactional updates to users

- Pitching users to perform certain activities
- Announcement emails announcing the launch of new features
- Information/knowledge-based emails to build trust among users
- And, many more reasons.

When you work on drafting these emails, you often have to work with your engineering team to get these developed so that you don't have to identify the audience and send it manually every time.

For an engineering team to develop these emails, they would need a good PRD (**P**roduct **R**equirements **D**ocument) so that they execute quickly and efficiently.

This post lists 15 key elements that are required to make a great email PRD that your engineering team will love.

1. Objective

Objectives for sending an email can be multi-fold. The most common ones are:

- Drive traffic to the app/website
- Convert leads into customers
- Target dormant users to make them active
- Transactional updates
- Nudge users to complete pending actions (such as completing their profile)
- Marketing emails announcing offers/coupons to drive transactions
- And, many more

Writing a clear objective helps us identify why are we sending this email. Based on the objective, you can define the audience of your email, timing, messaging, copy, tracking, and everything else. Not having a clear objective will lead to less-than-desired outcomes.

2. Sender name

What name will appear as the sender name when the email lands in the user's inbox? Is it going to be 'Customer Care' or 'Support' or 'Founder' or anyone else?

> 💡 *Sender name can have a significant impact on the open rate of your emails.*
> *How many times would you have opened an email with an unknown name vs an email with a familiar name?*

3. Sender email address

This refers to the email address that will be used to send the email. You can either use 'no-reply@CompanyName.com' or 'support@CompanyName.com' or your own email ID or anything else.

> 💡 *Based on this email ID, you can define if users will be able to reply to your email.*
> *If you don't want users to reply, use 'no-reply' email. If you want to hear back from users, do set out 'reply-to' email in the email.*

4. Recipients

Who is the intended audience for this email? Try to create different segments/cohorts of your audience and send them personalized and contextual emails. A few examples of segments could be:

- Users who visited the website yesterday
- Users who dropped off in the signup journey on the app
- Users who initiated their profile completion but left at 50%

> 💡 *The more targeted your audience set, the better your email will perform. The targeted audience will find your email more relevant and contextual, and will not consider it spammy. On top of it, unsubscriptions will be less from your email.*

5. When to send this email?

Timings matter. The timing at which you send an email can create a big difference in its performance.

At one of my previous organizations, our best-performing emails and notifications were the ones that we used to send at 4 PM - a few minutes after the stock market closed.

In a lot of cases, an immediate trigger as soon as the user drops off in the journey works best. In other cases, an email at 10 PM in the evening works best.

> 💡 *In the initial days, you may have to experiment with different timings based on your domain and email context.*
> *Eventually, you will be able to identify what works best for your business.*

6. Validations before sending

Identify validations that should be put into place before going live with your email. These validations ensure that you are not spamming users and you are sending the right kind of content to the right audience.

A few examples of validations are:

- Exclude users from the email who have unsubscribed
- Users who have received email 1 should not be sent email 2
- One user should receive this email only once a week
- If the content is not available for a user, skip that user
- If content ‘x’ is not available for a user, send content ‘y’

> 💡 *Make sure not to send contradicting emails to users and avoid sending multiple promotional emails in a single day.*

7. Number of variants of an email

You may choose to create multiple variants for the same email. The logic behind creating multiple variants is to identify which one works best. In point 5 - we talked about the timings of the email. Based on the timing, you may create 2 or more variants as well.

You can carry out A/B testing by creating different variants of the email.

💡 *Don't create too many variants of an email. Your analysis may become very thin.*
2 or at max 3 variants are good.

8. Logic for selecting variants

If you are sending multiple variants of the email, mention the logic of each variant. It could be based on timings, subject line, CTA copy, or any of the other factors.

9. Email Subject

The email subject line plays a crucial part in deciding the open rate of the email. In case of multiple variants of the email, list down different subject lines, if you wish to keep them different.

💡 *Keep the main part of the subject line at the start.*
Usually, the subject line in the Gmail app truncates after 32 characters, so anything after that will not have a major impact on users' decision to open the email.

10. Email body

This is the biggest part of your email, based on which users will decide if they want to engage further. Try not to keep the email body very long, unless you are known for writing very detailed and lengthy blog-like emails.

💡 *Try to keep the email body short and concise.*
For transactional emails, keep it to the point and the main information in the first half of the email.
For other emails as well, your main action should be reflected in the first half of the email.

11. CTA text

CTA refers to 'Call-to-action.' This basically means what action should users take from the email. A few examples of CTA copies are:

- Buy Now
- View Now
- View Orders
- Avail Discount
- Download Now

Usually, we keep one CTA in an email. You can choose to add 2, but not more. More choices increase the cognitive load on users and they end up not doing any action at all.

> 💡 *Keep a very clear, short, and action-oriented CTA copy that tells users what will happen after clicking on it.*
> *Use action verbs such as view, buy, act, get, etc. in the CTA copy.*

12. CTA link

This is the link where you want to take users when they click on CTA. Try to add a deep link here so that users can perform the intended action in the minimum number of steps.

13. UTM parameters

UTM or Urchin Tracking Module is a simple code that you can attach to any URL to track the count of actions (visits, downloads, conversions, etc.) happening through the URL. It is used to measure the performance of various campaigns.

You track the source, medium, and campaign by adding UTM parameters in the link.

An example of a URL with UTM parameters is notion.com?utm_source=vishal-bagla&utm_medium=Testing&utm_campaign=email-prd. This URL with UTMs and notion.com without UTMs will work in the same way. They both will take users to the same page, the only difference will be tracking at the backend.

> 💡 *Do not miss out on adding UTMs to your CTA link. If you have multiple CTAs in the email, add separate UTMs for each CTA.*

14. Footer

If you have a standard footer that you use for organization-wide emails, go ahead with that. Usually, we don’t tend to change the footer very often.

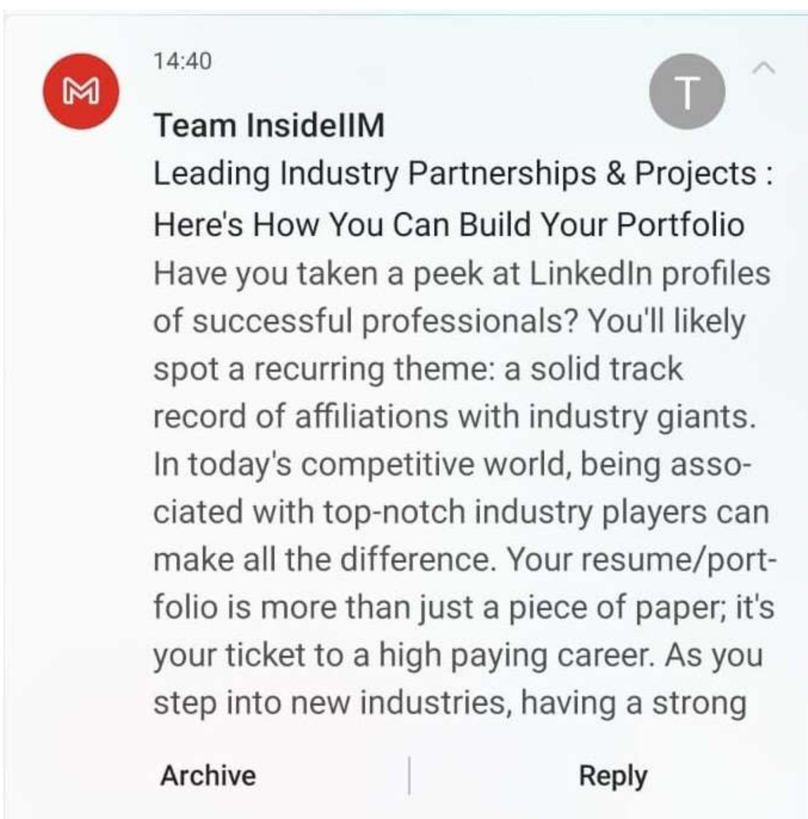
Make sure to add an ‘Unsubscribe’ link in the footer, if not adding anywhere else.

> 💡 *At times, the footer is also used as a place to improve your brand perception or market your products. You may talk about key metrics of your brand or a product feature or any other message that you want to reinforce among your audience.*

15. Pre-header

An email preheader is a brief text that you see after the sender information and the subject line when you're looking at an email in your inbox. This can have a significant impact on your open rate.

Below is a screenshot of the email from the notification tray. The message we see “Have you taken a peek ……. As you step into new industries, having a strong” is called a pre-header. This is the message you see in the notification tray or in the inbox.



You may or may not see this content when you open the email. If you don't add a pre-header, Gmail and other email clients will automatically pick up content from your email and show it.

💡 *Though not mandatory, it is advisable to add a pre-header because you can use this text to nudge/convince the user to open the email.*

I hope that this will help you create the right emails for your users and help you in your journey to becoming a great PM.