1.

To pass this optional practice quiz, you must receive 100%, or 1 out of 1 point, by completing the activity below. You can learn more about the graded and practice items in the course overview⬈.

Activity Overview

In this activity, you will create and preview a marketing email in HubSpot. Please note that this activity is optional, and will not affect your completion of the course.

HubSpot is a marketing automation platform with a customizable email editor. By learning to create emails in this widely-used tool, you'll be better prepared to work on a variety of marketing campaigns in the future.

Note: This activity uses HubSpot's drag and drop email editor, which is available to all users. If the editor is updated, the steps below may differ from your experience of the tool. Visit HubSpot's Knowledge Base⬈ for information on the latest version.

If you prefer to use the classic editor (available to Professional and Enterprise users), learn about the latest version from HubSpot's Knowledge Base⬈.

The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the scenario below. Then complete the step-by-step instructions.

Odos Eyewear is an e-commerce business that sells prescription eyeglasses and sunglasses online and in stores. As a member of their marketing team, you are helping to create a welcome email for new subscribers in HubSpot. Your team has provided a copy of the Odos logo and a draft of the email text for you to use. The draft document contains:

A subject line

Preview text

Alt text for the logo image

The welcome email body (including headings, subheadings, and button text)

Your job is to use this content to design an email in the HubSpot email editor. The finished email should reflect the brand's personality and attributes (logo style, tone of voice, etc.). It should also contain 1–2 stock images (selected through the email editor).

Step-By-Step Instructions

Step 1: Access supporting materials

The following supporting materials will help you complete this activity. Keep them open as you proceed to the steps below.

To use the supporting materials for this course item, click the link below and select "Use Template."

Link to supporting materials: Odos welcome email⬈

OR

If you don't have a Google account, you can download the supporting materials directly from the attachment below.

Odos Eyewear welcome email
DOCX File

Step 2: Log in to HubSpot or create an account

If you have an existing HubSpot account, go to the Hubspot Partnership Page⬈ and select *Log in*. If you're new to HubSpot, click *Start free or get a demo*⬈. On the next screen, select *Get started free*. Then, follow the prompts to create a new account.

During the account creation process, you'll be asked to provide information like your company's name and website. Answer the questions to the best of your ability. If you're not sure how to respond, you can enter placeholder information (e.g., "Test Business" or "TestWebsite.org").
Note: Some domains will not be accepted and will prevent a successful sign up, such as hubspot.com, google.com, linkedin.com, facebook.com, and test.com.
Step 3: Create a new email
Once you've created an account or logged in, open the email editor by selecting *Marketing > Email* in the menu bar. Then click *Create email.*
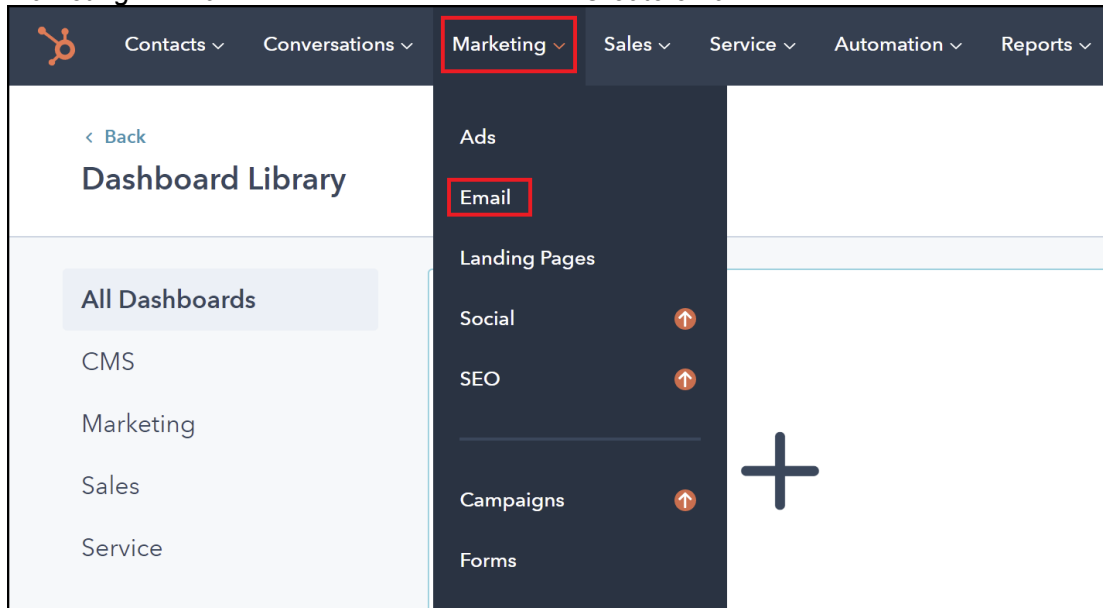
If this is your first time using HubSpot, a product tour may begin automatically. If you want to skip the tour:
Close and exit the tour.

If prompted to select an email type, choose Regular.

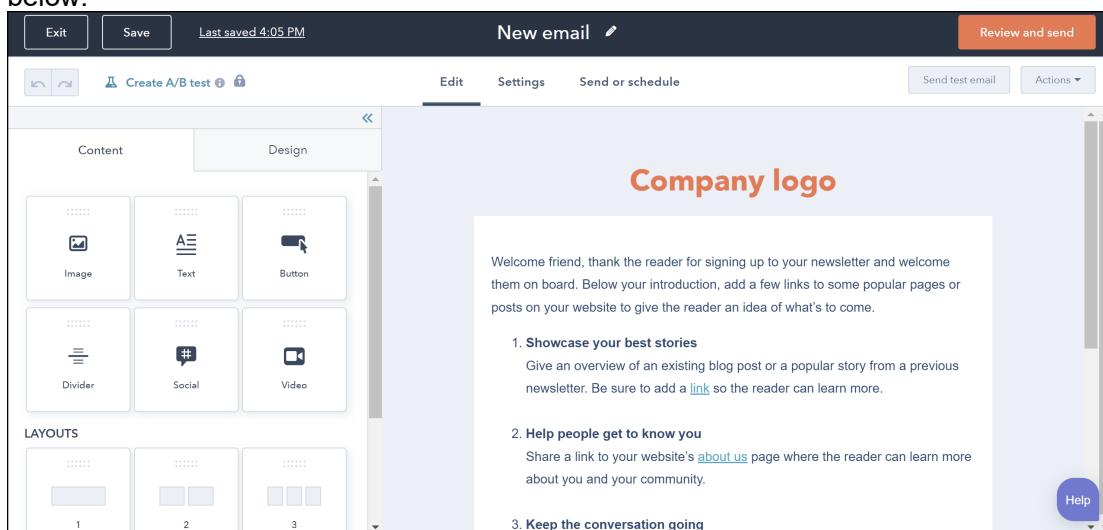Select the Welcome template from the Basic templates menu.

If you choose to complete the tour:

Click *End tour > Exit* when the tour is over.

Click *Create email* again to return to the Templates page.

Choose the Welcome template to open it in the email editor.

Once you've selected the template, your screen should appear similar to the image below:

Step 4: Edit the email settings
Go to the Settings tab to customize the sender information, subject line, and preview text.
Select the From name dropdown menu and click *Add from name* to enter "Odos Eyewear."

Add the subject line from the welcome email to the Subject line field.

Add the preview text from the welcome email to the Preview text field.

If you'd like, you can customize the subject line or preview text by adding an emoji.

	Edit	Settings	Send or schedule

Email settings

From name * ⓘ

Odos Eyewear	▾

From address * ⓘ

☑ Use this as my reply-to address 🔒

noreply@odoseyewear.com	▾

Make sure you're using a **HubSpot connected inbox** as your reply-to address to track replies

Subject line *   Help me write a great subject line ⎋

	☺	👤 Personalize

Preview text ⓘ

	👤 Personalize

Internal email name * ⓘ

Note: Since you are not sending this email to a subscriber list, you do not need to update the remaining fields on this screen. Keep in mind, however, that you must select a subscription type and include an office location when sending marketing emails.
Step 5 (Optional): Personalize the subject line
If you want the subject line to display the recipient's first name, you can insert a personalization token (HubSpot's term for a personalization tag). You can also set this token to display the default text (called the "default value") if the recipient has not provided a first name.
To add a token:

Highlight the phrase"glasses lover" in the subject line and click *Personalize.*

Select *Contact* from the Type dropdown menu.

Type "first name" in the Search contact tokens field.

Type "glasses lover" in the Default value field and click *Insert*.

Select the Edit tab to return to the email template.

Step 6: Add the Odos logo

The basic Welcome template contains two placeholder content elements: one for a logo image and the other for text. To add the Odos logo (below) to the template, you'll first need to import it to your HubSpot photo library:

Right-click the logo image above and select *Copy image address* (or *Copy image location*, depending on your browser).

Select the Company logo element in the email template.

Click *Replace* in the Edit Image panel.
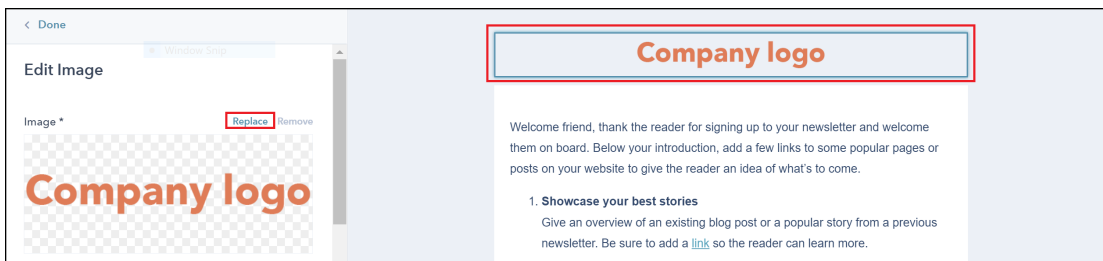
Select *Add image > From a URL.*

Paste the URL in the Enter URL field and select *Preview.*

Check the *Select all* box and click *Import selected (1).*

Choose the imported logo and add it to the email.

Change the alt text to "Odos Eyewear logo" in the Edit Image panel.

Click *Done.*

Note: If you have previously set a default logo, you can <u>override it</u>⬀ without affecting your settings.

Step 7: Add the email text and additional content elements

Copy the first section of text from the Odos email draft and paste it over the placeholder text in the template. (Note that the pasted text preserves the heading sizes and links from the email draft. These settings can also be modified through the text format menu bar.)

As you add the remaining email text, experiment with different elements (e.g., text, button, etc.) and layouts (single or multi-column). For example, from the Content menu, you can:

Add an element: Drag an element from the Edit menu to the template.

Move an element: Drag an element by the left edge and drop it in a new position.

Edit an element: Click inside the element and make changes in the the Content menu or text formatting toolbar (you don't need to finalize the formatting yet).

Duplicate or delete an element: Hover over the element and select *Clone element* or *Remove element.*

Add a preset layout: Drag a layout from the Content menu to the template; then drag elements (e.g., text) to the empty columns and add the appropriate content.
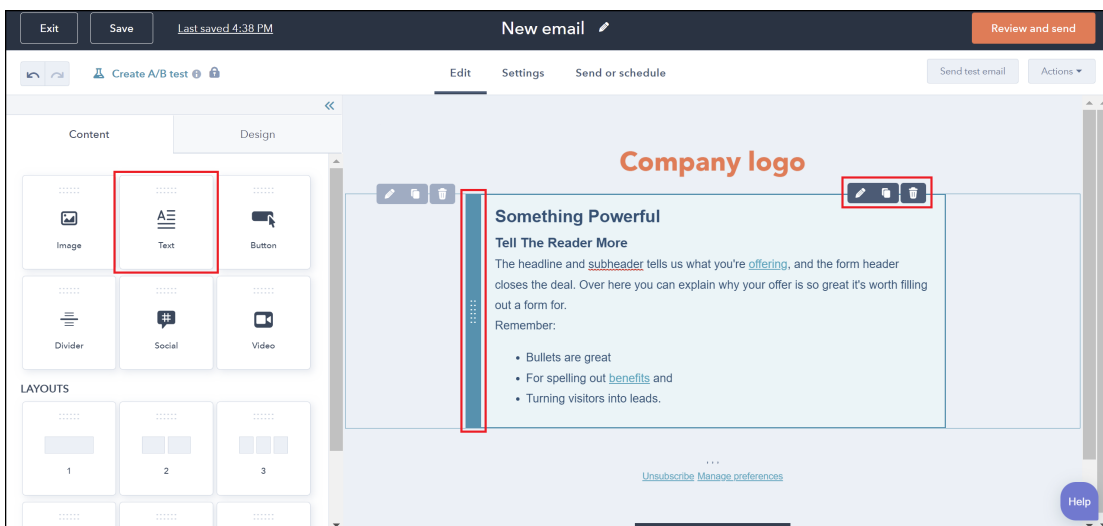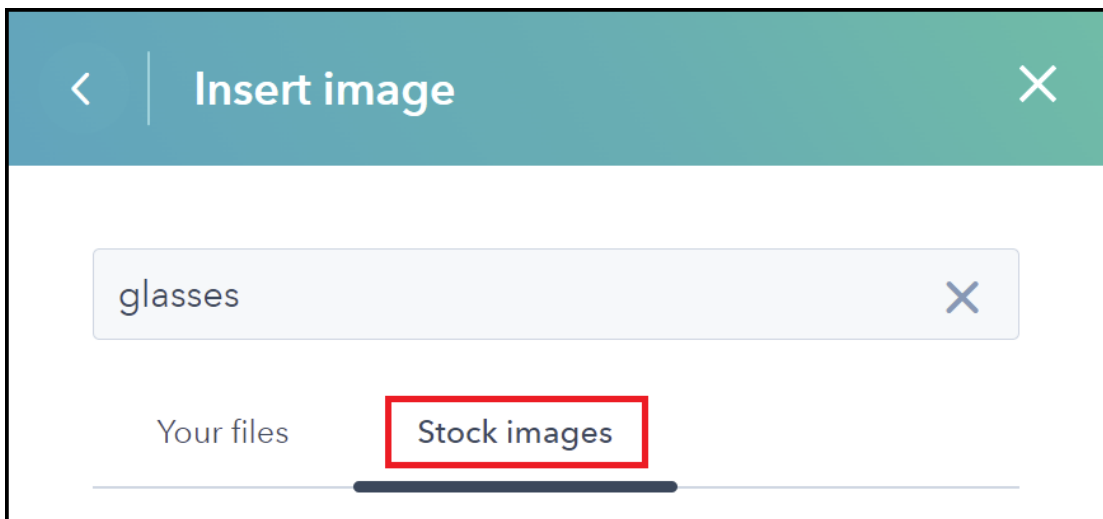

Note: Visit <u>HubSpot's Knowledge Base</u>⬀ to learn more about what you can do in the drag and drop email editor.

Step 8: Add stock images

HubSpot provides access to stock images you can use in your email. To add a stock image:

Add a new Image element to the template.

Click *Select image.*

Use the search box to find images that relate to the email content (e.g., search for "glasses," "eyeglasses," "sunglasses," "eye exam," etc.).
Select the Stock images tab to browse images.

Once you've found an image you want to use, click *Insert.*

If necessary, adjust the alt text to reflect the content of the email.

You can add and delete as many images as you like before making selections.
Remember that your finished email should contain 1–2 stock images.
Step 9: Adjust the formatting and design
Once you have added all the content, try reformatting different elements to change the look of the email. You can format individual elements by clicking inside them and making adjustments in the menus that appear.
You can also customize the overall design in the Design menu. Some examples of design adjustments include:
Background color and pattern

Body color

Text size, color, or font

Link color or style

Button shape, color, and font

Divider height, color, and style

When making design choices, consider Odos' brand attributes (e.g., the tone of the message and the logo style), as well as the stock image(s) you selected. Keep experimenting with different styles, colors, and layouts until you are satisfied with the design.

Step 10: Preview the email

Before completing your adjustments, click *Actions > Preview* to find out how your email looks on desktop and mobile devices.
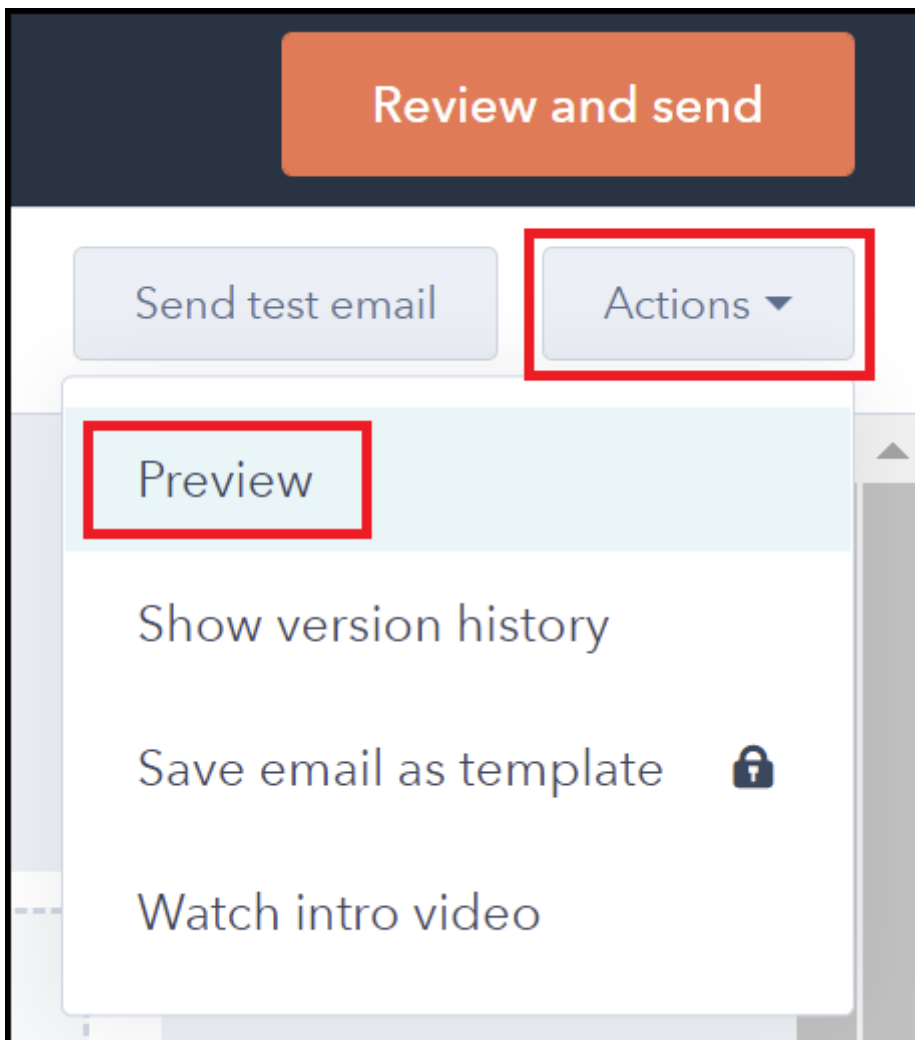
If your email includes a personalization token, test it by selecting a contact from the Preview as specific contact menu. The contact's name will replace the default text in your email subject.

Once you've finished, Return to the email editor to make any additional changes.

Note: When sending marketing emails to subscribers, you must also fill out the fields in the Send or schedule tab. Here, you can add or exclude contact lists. You can also choose to send the email immediately or schedule it for later.

Step 11 (Optional): Send a test email

If you'd like, you can also send yourself a test email to view it in your inbox:

Click *Send a test email.*

Make sure the Choose one or more recipients field contains the email address you want to use for the test.

If you used a personalization token, select a contact from the Receive email as specific contact list.

Click *Send test email.*

Go to your inbox to view the message (check your spam filter if you don't receive the test email).

Note: You may be prompted to verify your address before sending the test email.

What to Include in Your Response

Be sure to include the following elements in your completed email:

The Odos Eyewear logo

The subject line, preview text, and content from the Odos welcome email

1–2 stock images

Design choices that reflect Odos' brand attributes