

EBOOK

# Email Infrastructure: A Smartlead Handbook



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# Introduction

Cold email marketing is an effective strategy. From hospitality to SaaS, cold emailing is known to generate high results in every industry.

That being said, it is also important to acknowledge how challenging this outbound strategy is. According to statistics, only [8.5%](#) of outreach emails get a response. It means if you send 100 emails only 8 of them are likely to bag a response.

This brings the need to send bulk emails to see fruitful results from cold emails. The benefit of sending bulk emails can also be seen from recent studies. As per [studies](#), sending cold emails to multiple prospective clients from the same email address increases reply rates by 93%.

The reason is simple—the more your emails land in the primary folder, the more reply rates they will generate. Not to forget, the improvement in deliverability factors.

Cold email marketers send 1000s of emails everyday to achieve their marketing goals. For example, Directsystems.io, a lead generation agency, contacted 1000 contacts via cold emails to see 5X revenue growth in two months.

When targeting leads at such a scale, one needs a proper structure, discipline, and best practices lined out for everybody in the team to follow. This is where an email infrastructure comes into play.

Creating an email infrastructure helps you build a roadmap for your cold email campaigns and calculate practical roadblocks, such as budget.

Our marketing team has interviewed hundred cold email marketers—from beginner to expert—ranging from various sectors, learned about their day-to-day blockers and the creative solutions that many of them have come up with. Based on information from such sources, we have created this: Email Infrastructure – A Smartlead Handbook.

This book will play the role of a mentor from the beginning of your cold email journey, guiding you from step to step. You can expect to learn creative solutions to bypass spam filters and land in the inboxes of thousands of leads.

All the best for your cold emailing endeavors!

**Smartlead Revenue Team**

# 1 Domain Purchases



A domain is a unique, human-readable address that identifies a specific location on the internet. Buying a domain is a step before building a cold email infrastructure.

For example, our domain name is **smartlead.ai**

Similarly, lavender.ai and hubspot.com are also domain names.

Please note that these examples are all primary domains or main domains.

## What is a Primary Domain?

A primary domain is the main and authoritative web address associated with a website or email system. It serves as the central point for online identity.

In cold email lingo, a primary domain is also called a main domain.

Examples: *smartlead.ai*, *lavender.ai*, *neilpatel.com*, etc.

Buying a primary domain is **Step 0** to building an email infrastructure.

The next step is buying secondary domains.

## What are Secondary Domains ?

Secondary domains are additional domain names that a business or individual gets to complement their main domain. The secondary domain names are often similar to the primary domain.

These domains are used for various purposes, including cold email marketing, brand protection, or redirecting traffic to the main website.

For example, our primary domain is [smartlead.ai](https://smartlead.ai), but our secondary domains are: [smartleadgrowth.info](https://smartleadgrowth.info), [smartleadinfo.co](https://smartleadinfo.co), [smarterleaderemails.co](https://smarterleaderemails.co)

### Why do you need secondary domains?

Sending bulk emails from the main domain may lead to high spam rates, eventually getting blacklisted.

Cold email marketers create multiple secondary domains to divide the email-sending load, enhance deliverability, and protect the main domain's reputation.

### How many secondary domains for a cold email campaign

Divide the total number of emails by 50 to get the number of email accounts you need for the campaign.

Next, divide the number of email accounts required by 3, and you get the number of domains.

For instance, to send 1000 emails daily, it's advisable to divide them among approximately 7 secondary domains, each with 2-3 addresses.



**Note:**

Don't send more than 50 emails per email address; don't create more than 3 email addresses per domain.

One shouldn't create more than 3 email accounts per domain so as to not rely on a single domain for their entire email infrastructure. As reputation may vary from domain to domain, there's always risk for getting blacklisted. This way, if one domain gets blacklisted (and they lose 3 email accounts), the marketer can still manage to continue with the campaigns.

## Where to buy secondary domains

When buying secondary domains for cold emailing, consider factors like price fluctuations upon renewal, registration duration, domain transfer ease, expiration policies, and additional services like hosting and privacy protection.

Some of the best Domain Sellers are:

- GoDaddy
- Cloudflare
- Hostgator
- CrazyDomains

We use GoDaddy and recommend the same.

## Setting up 301 Redirects

A 301 redirect is crucial in 3 scenarios:

- when moving a website to a new URL
- when you've changed a page's URL
- when you want to consolidate multiple pages into one.

This step ensures visitors are redirected to the right website. This permanent redirect informs search engines about the change, preserving SEO rankings.

***Cold email marketers do 301 redirects to improve email landing page URLs for tracking, targeting, and analytics optimisation.***

### What is 301 Redirect

A 301 redirect is an HTTP status code indicating a permanent redirection from one URL to another. It informs browsers that the requested content has moved permanently, transferring ranking power and ensuring users are automatically directed to the new URL.

### How to Do a 301 Redirect

Here's how to set up a 301 redirect:

#### 1 Access Your Server or Hosting Control Panel

You'll need access to your website's server or hosting control panel. This might be through FTP, cPanel, Plesk, or other server management tools, depending on your hosting provider.

## 2 Ramp Up the Sending Volume Slowly

There are different ways to implement a 301 redirect, and the method you choose depends on your server configuration and preferences.

Popular DNS providers like GoDaddy offer a "forwarding" feature, making the setup of a 301 redirect even easier. It just takes a few simple steps:

- Log in to your DNS provider's account.
- Navigate to "My Products" and select the domain you want to set up the redirect for.
- Access domain settings or management.
- Locate the "Forwarding" section and click "Add Forwarding."
- Enter the destination URL and choose "Permanent (301)" as the forwarding type.
- Save your changes

\*\*\*Keep in mind that DNS propagation may take up to 48 hours.

If the above method doesn't work for you, you have two more ways:

- Using .htaccess (Apache Server)
- Using server-side scripting (e.g., PHP, Python, Node.js)

### Using .htaccess (Apache Server):

If you're using an Apache web server, you can use the .htaccess file to set up 301 redirects. Here's an example of how to create a 301 redirect in an .htaccess file:

```
Redirect 301 /old-page.html http://www.example.com/new-page.html
```

## Using server-side scripting (e.g., PHP, Python, Node.js):

You can also use server-side scripting languages like PHP, Python, or Node.js to create 301 redirects. For example, in PHP:

```
<?php
header("HTTP/1.1 301 Moved Permanently");
header("Location: http://www.example.com/new-page.html");
exit();
?>
```

### 3 Test the Redirect

After implementing the redirect, it's essential to test it to ensure it's working as expected. Open your web browser and enter the old URL, and you should be automatically redirected to the new URL.

### 4 Update Links and Inform Stakeholders

Update any internal links on your website to point to the new URL. Additionally, inform stakeholders, such as search engines, by submitting an updated sitemap or using Google Search Console (for Google).

### 5 Monitor and Maintain

Keep an eye on your website's traffic and monitor the performance of the 301 redirect. Make sure it's still functioning correctly, and if you ever need to change the destination URL again, update the redirect accordingly.

#### Note:

Remember that a 301 redirect is a permanent redirection, and it's essential to use it for cases where you don't intend to use the old URL anymore. Temporary redirects, such as 302 redirects, are used when you plan to bring the old URL back in the future. Using a 301 redirect helps maintain SEO rankings and ensures a better user experience for visitors looking for the old content.

# 2 ESP Selection



After buying domains, the next step involves selecting an ESP to create email accounts/addresses (mailboxes).

**We recommend choosing Gmail and Outlook for better deliverability. *Don't use Zoho for cold email campaigns.***

3 things to keep in mind for this step:

- Create 5-10 domains per workspace/tenant.
- Create only 3 mailboxes per domain.
- Send only 36-50 messages per day from an email address.

Here's a simple layout on how to get secondary domains and email addresses you will need for your campaign.

Spoiler alert—it depends on the number of emails you want to send.

Number of Emails	10,000	5,000	1,000
Number of Email Addresses	200	100	20
Number of Secondary Domains	67 - 68	33 - 34	6 - 7

## Popular ESPs vs SMTP softwares – Which is Better?

ESPs, short for Email Service Providers, are companies that offer email marketing and delivery services. They typically provide a platform for creating, sending, and tracking email campaigns. Examples include Mailchimp, SendGrid, Gmail, Outlook, and Constant Contact.

ESPs often have user-friendly interfaces that make it easy to design and send professional-looking emails without advanced technical skills.

SMTP software, on the other hand, refers to software that uses the Simple Mail Transfer Protocol for sending emails. It can be a standalone application or integrated into other systems. Examples include Postfix, Exim, and Microsoft SMTP Server.

SMTP software offers more control over the email-sending process. It is often used by organizations that require a high level of customization for their email infrastructure.

### Which is Better?

The choice between ESP and SMTP software depends on your specific needs and resources.

#### Choose ESPs when:

- You want an easy-to-use platform for creating and managing email campaigns.
- Analytics, reporting, and high deliverability are critical.
- You want a managed solution without the need for extensive technical expertise.

#### Choose SMTP software when:

- You need more control over your email infrastructure.
- You're sending a high volume of transactional emails from your applications or systems.
- You have the technical expertise to set up and maintain your email server.

In some cases, a hybrid approach is used, where organizations use an ESP for marketing campaigns and SMTP for transactional emails. This allows them to leverage the strengths of each solution based on the specific requirements.

## Things to Keep in Mind

### 1 IP tracing for consistency

- Use the same IP address for sending emails from your workspaces or tenants to build a good sender reputation and improve deliverability.
- Regularly monitor and maintain this IP address for consistency.

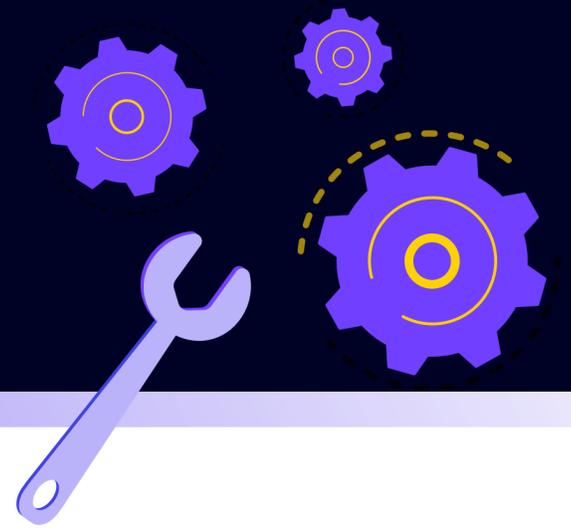
### 2 Update Links and Inform Stakeholders

- Use the same IP address for sending emails from your workspaces or tenants to build a good sender reputation and improve deliverability.
- Regularly monitor and maintain this IP address for consistency.

### 3 Avoid reusing credit cards (CC)

- When creating multiple workspaces or tenants, use different payment methods or credit cards to prevent potential CC-level blocks.
- Repeated use of the same credit card may be seen as suspicious behavior.

# 3 Technical Setup



This chapter outlines everything you need to do after you have readied the ESPs and domains and before the email warm-up process:

- Email authentication protocols
- Email forwarding
- Email account setup
- Third-party SMTP providers
- Email tracking
- Custom tracking domain

Let's get started.

## Email Authentication Protocols

Once you have bought the domains, selected an ESP, and created email account, you can now proceed to add DNS records to these email accounts, such as DKIM, DMARX, SPF, and MX records.

## MX (Mail Exchange) Record

### Purpose

Specifies the mail servers that are responsible for receiving emails on behalf of the domain.

### Format

Points to a mail server hostname and includes a priority value to determine the order of preference if multiple mail servers are listed.

You won't be able to receive or send emails without the MX setup. Go to the links below and follow the instructions for MX record setup.

- [Gmail MX Record Setup](#)
- [Zoho MX Record Setup](#)
- [Outlook MX Record Setup](#)

## SPF (Sender Policy Framework) Record

### Purpose

Helps prevent email spoofing by specifying which mail servers are authorized to send emails on behalf of the domain.

### Format

Contains a list of authorized IP addresses or hostnames.

Go to the links below and follow the instructions for SPF Record setup.

- [Gmail SPF Record Setup](#)
- [Zoho SPF Record Setup](#)
- [Outlook SPF Record Setup](#)

## DKIM (DomainKeys Identified Mail) Record

### Purpose

Provides a method for validating the authenticity of email messages by associating a domain name with an email message, allowing the recipient to check that it was really sent by the domain owner.

### Format

Involves the publication of public keys in DNS.

Go to the links below and follow the instructions for DKIM Record setup.

- [Gmail DKIM Record Setup](#)
- [Zoho DKIM Record Setup](#)
- [Outlook DKIM Record Setup](#)

## DMARC (Domain-based Message Authentication, Reporting, and Conformance) Record

### Purpose

Specifies how a recipient's email server should handle messages that fail SPF or DKIM checks, and it provides a reporting mechanism for senders to receive feedback on email authentication failures.

### Format

Contains policy settings and reporting addresses.

Go to the links below and follow the instructions for DMARC Record setup. Before you do the Gmail DMARC setup, read [this](#).

- [Gmail DMARC Record Setup](#)
- [Zoho DMARC Record Setup](#)
- [Outlook DMARC Record Setup](#)

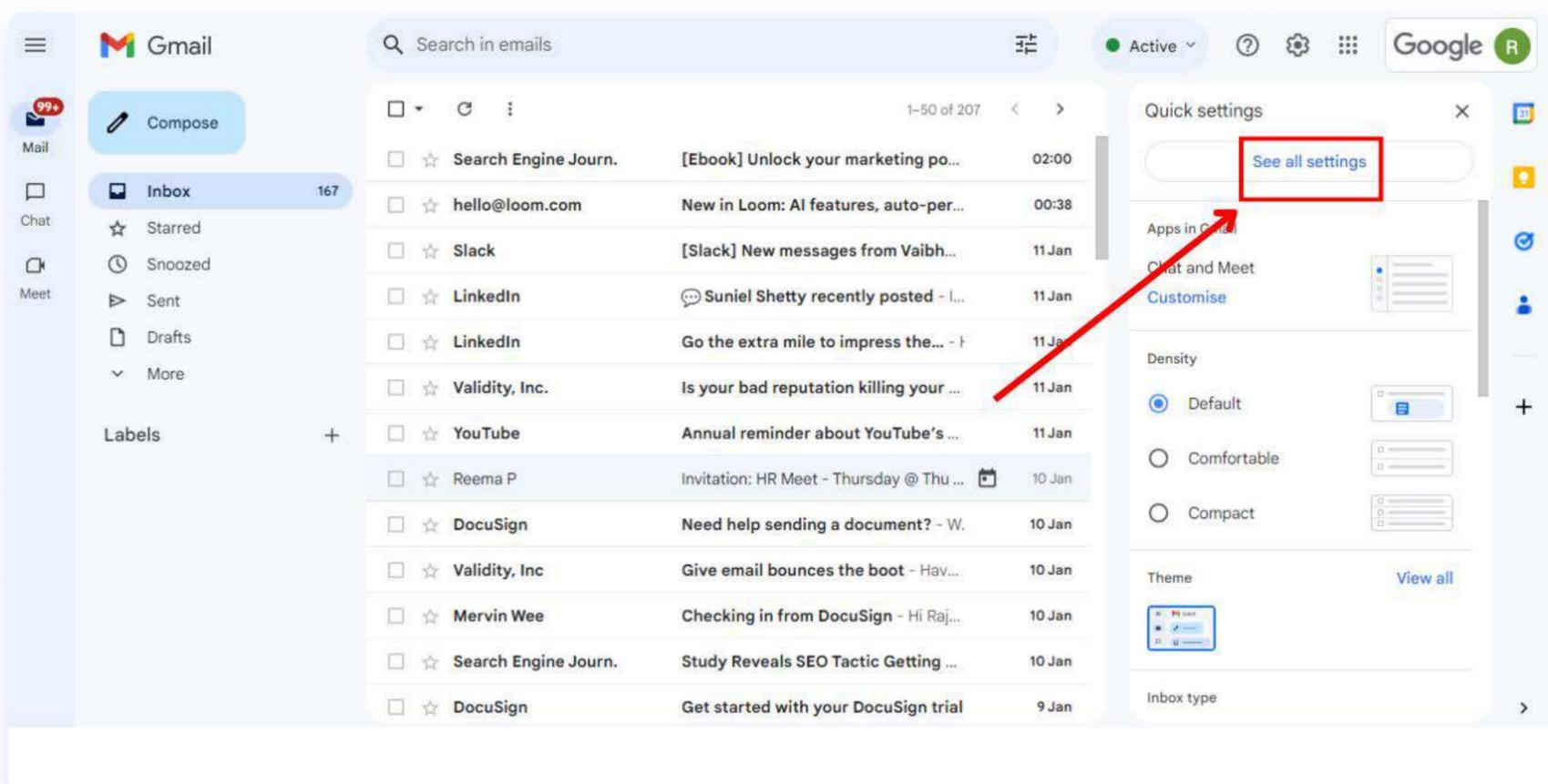
# Email Forwarding

Setting up email forwarding before sending campaigns with bulk emails ensures you receive responses and inquiries in one place. This step helps you maintain communication efficiency and prevents potential delays or missed opportunities in your outreach efforts.

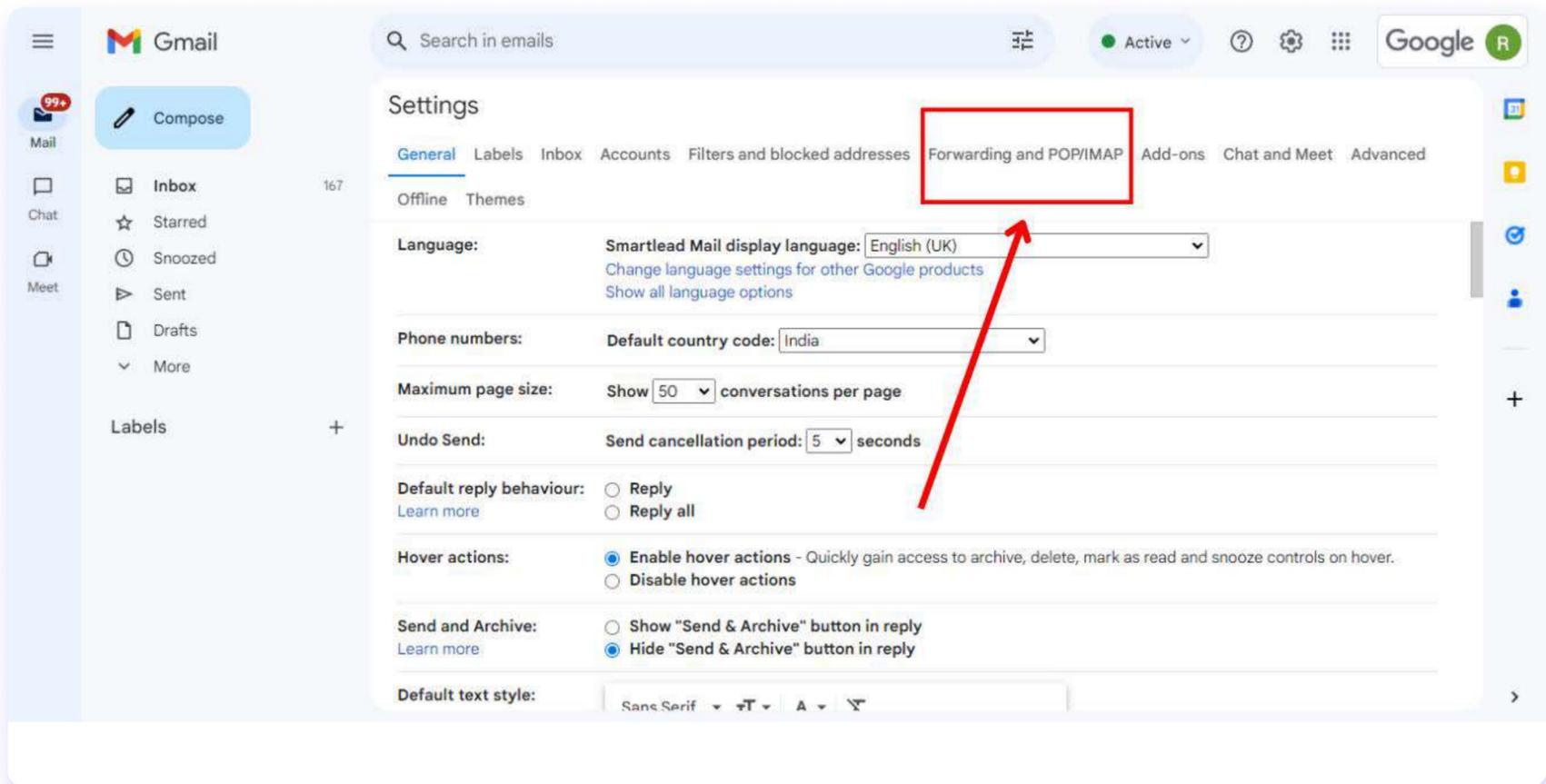
This section contains instructions for automation email forwarding setup in Outlook and Gmail. For Namecheap email forwarding instructions, go [there](#).

## Email Forwarding Setup in Gmail

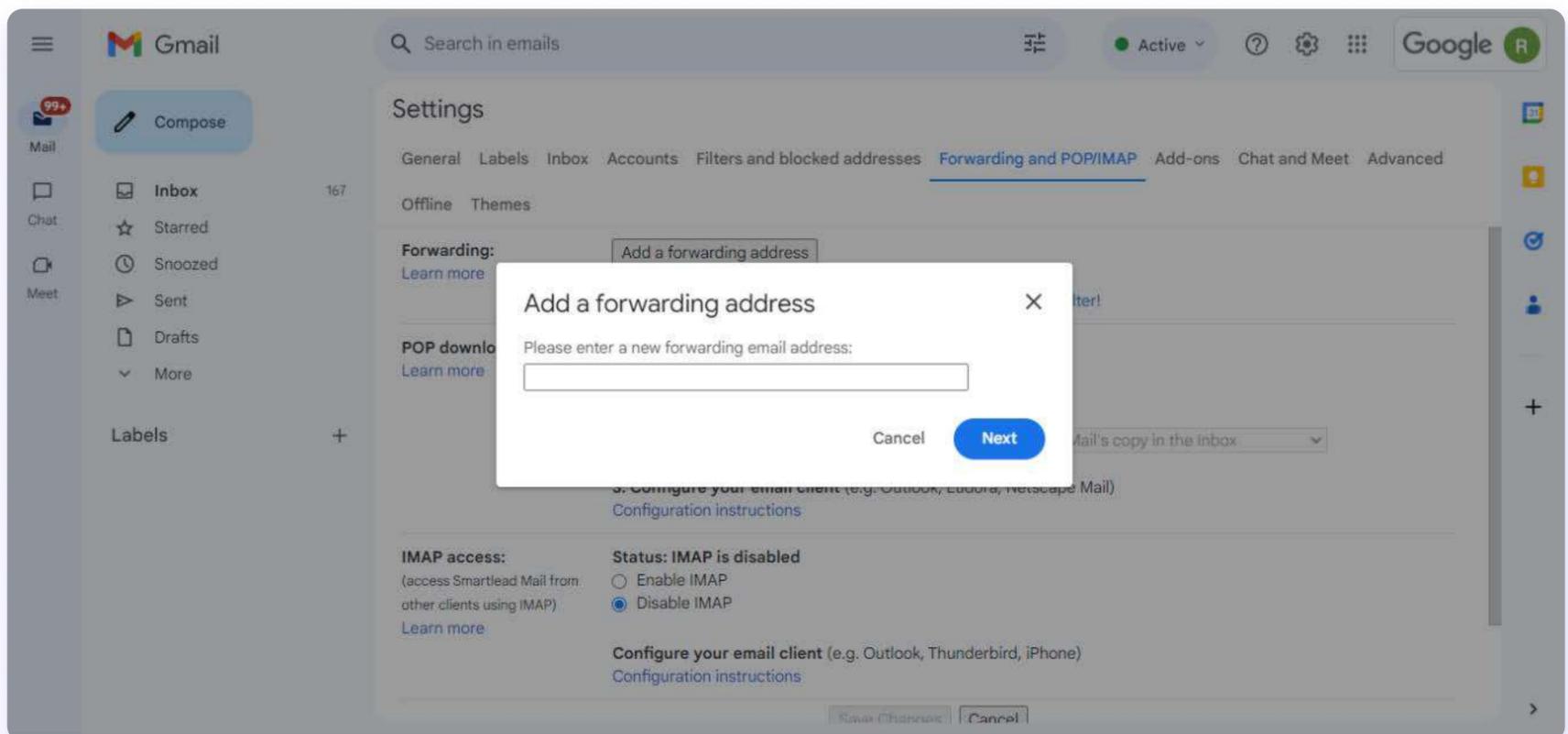
- Open Gmail and log in to the account from which you want to forward messages.
- In the top right corner, click on "Settings" (gear icon), and then select "See all settings."



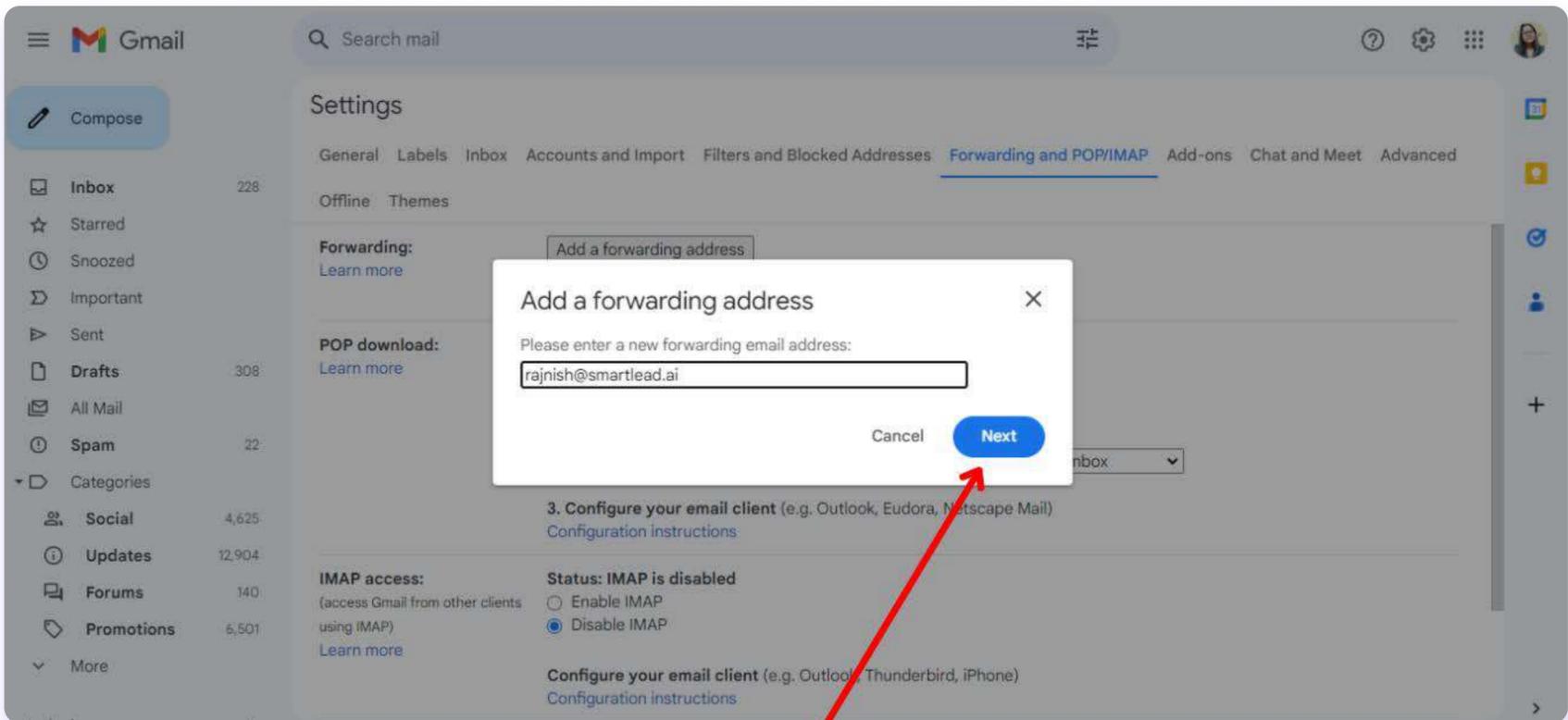
- Navigate to the "Forwarding and POP/IMAP" tab.



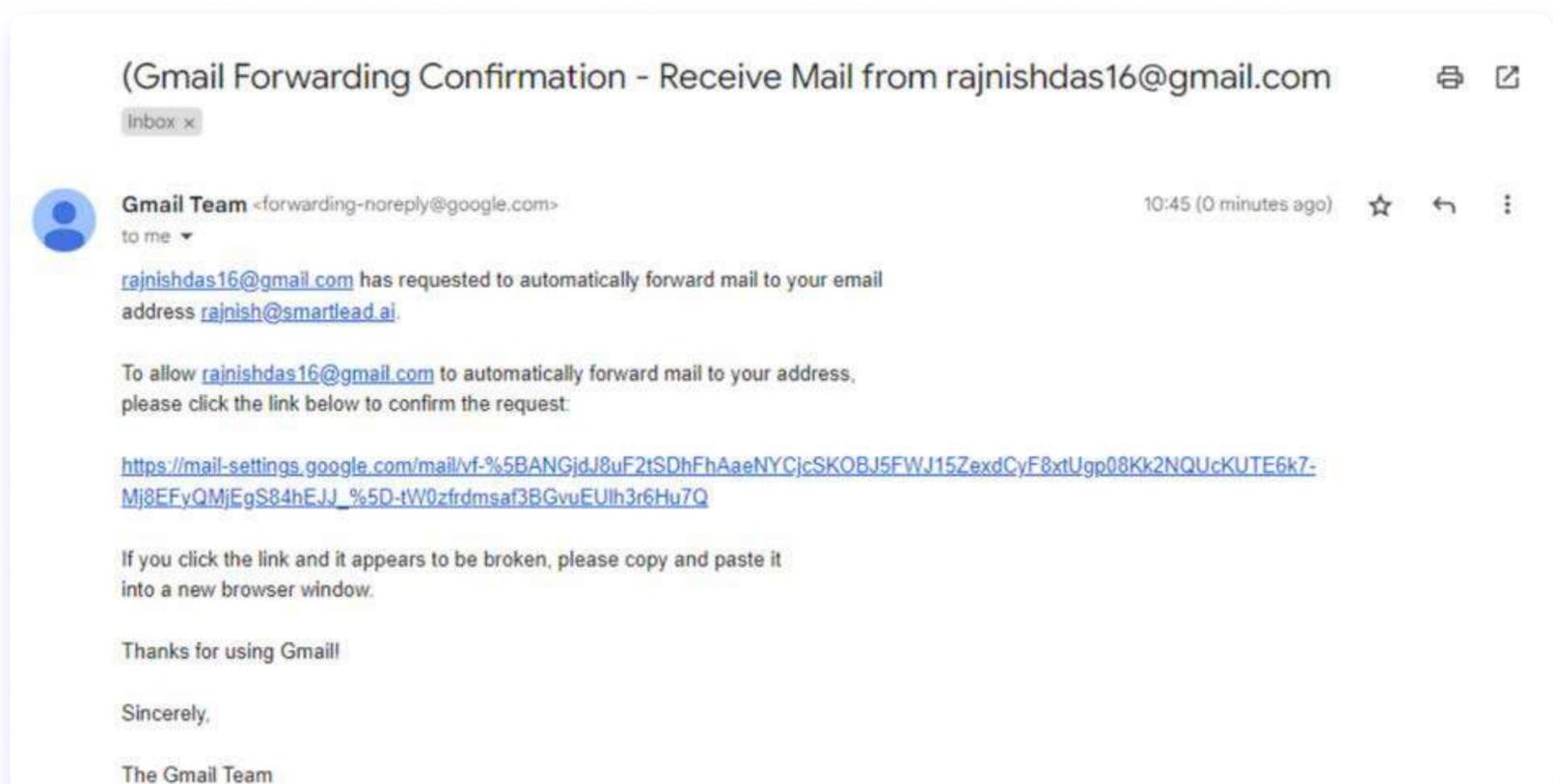
- In the "Forwarding" section, click on "Add a forwarding address."



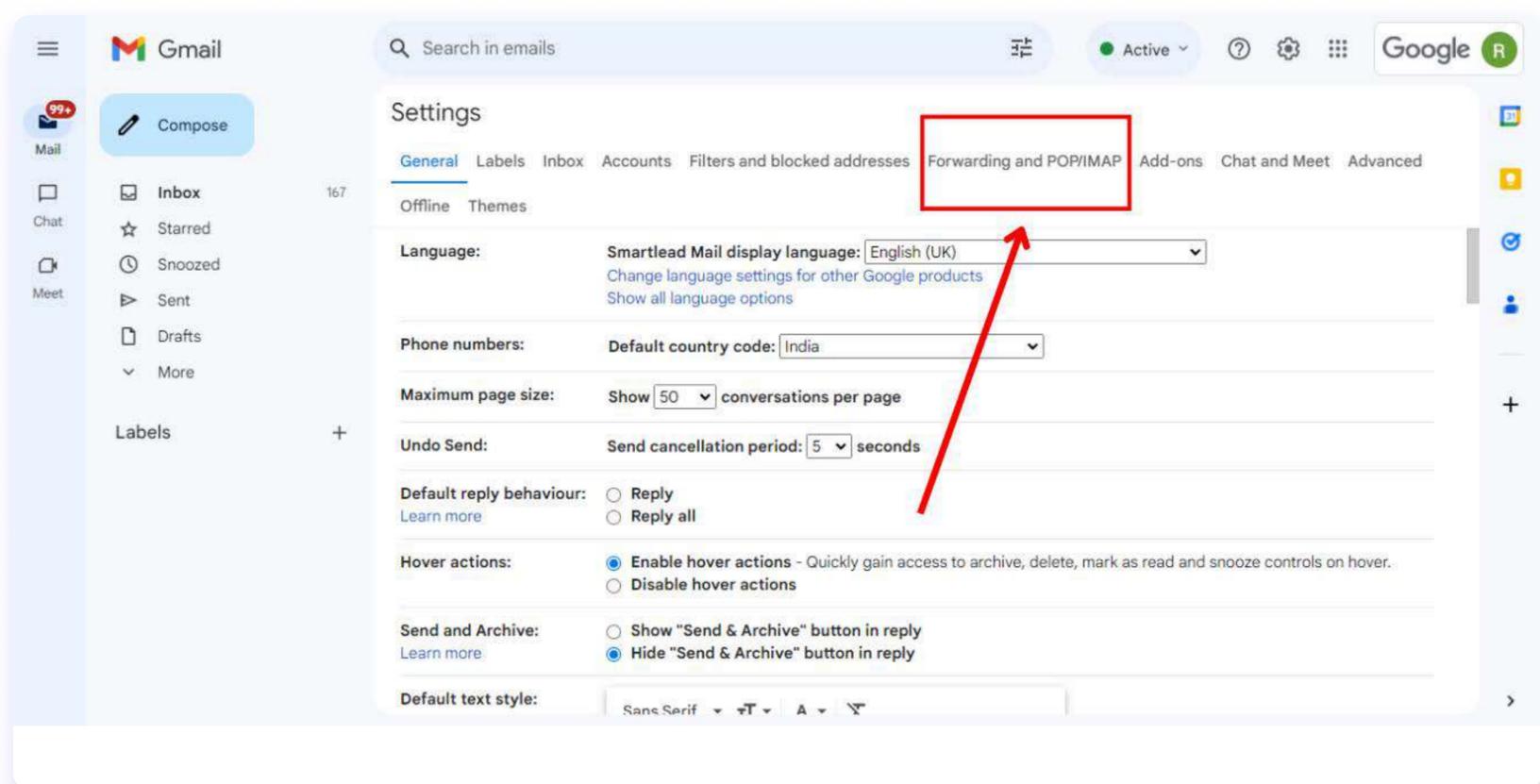
- Enter the email address to which you want to forward messages and click "Next," "Proceed," and then "OK."



- A verification message will be sent to the specified address. Click the verification link within that message.



- Return to the settings page for the Gmail account you're forwarding messages from and refresh your browser.
- Again, go to the "Forwarding and POP/IMAP" tab.
- In the "Forwarding" section, select "Forward a copy of incoming mail to."
- Choose the desired action for the Gmail copy of your emails; we recommend selecting "Keep Gmail's copy in the Inbox."



- Finally, at the bottom of the page, click "Save Changes" to apply the automatic forwarding settings.

To learn more about email forwarding setup in Gmail, go [there](#).

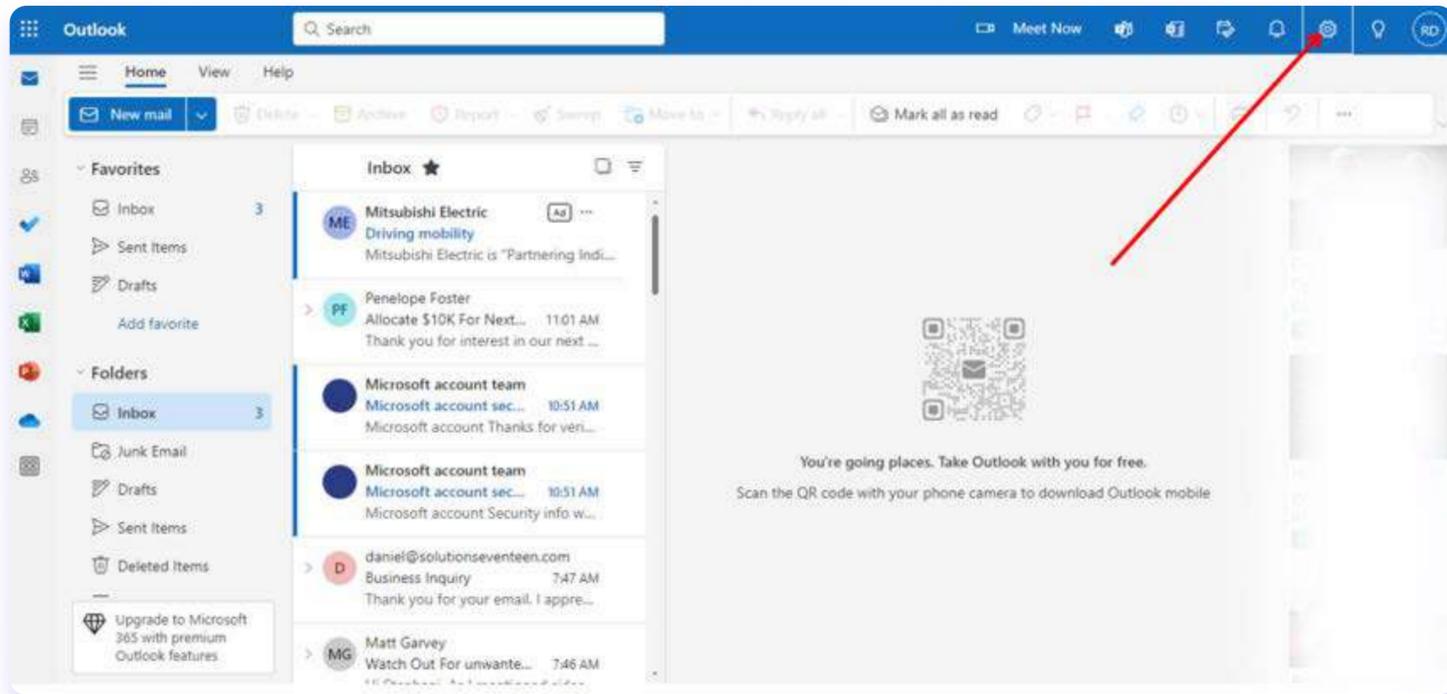
## Email Forwarding Setup in Outlook

### On Outlook 2013 & Outlook 2016

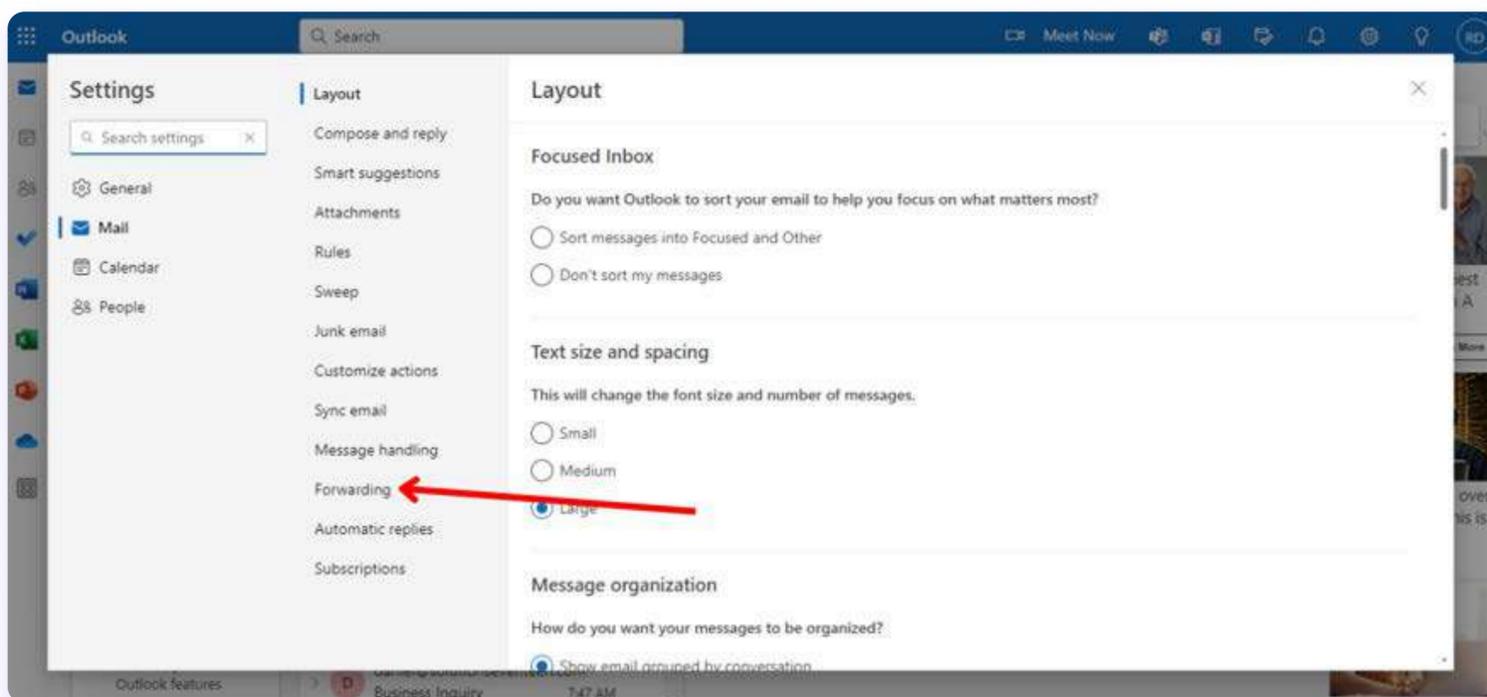
- Open Outlook and select "File" from the top menu on the left.
- Choose "Manage Rules & Alerts" to set up email forwarding.
- Select the email address you want to apply the rule to if you have multiple addresses.
- Click on "New Rule" to create a new rule for email management.
- Opt for "Start from a blank rule" and select "Apply rule on messages I receive." Click "Next" to continue.
- Set your preferred conditions for forwarding, such as forwarding emails from specific individuals or those marked as important. Customize the rule description accordingly.
- Choose the emails to which you want to apply the rule and click "OK."
- Once the rule description is edited, select "Next" to proceed with the configuration.
- In the next window, choose "forward it to people or public group." Click the provided link to add the email address to which you want the emails forwarded.
- If needed, create exceptions to exclude specific emails or spam from being forwarded.
- Name your forwarding rule for easy identification and select "Turn on this rule" when you're ready to activate it.

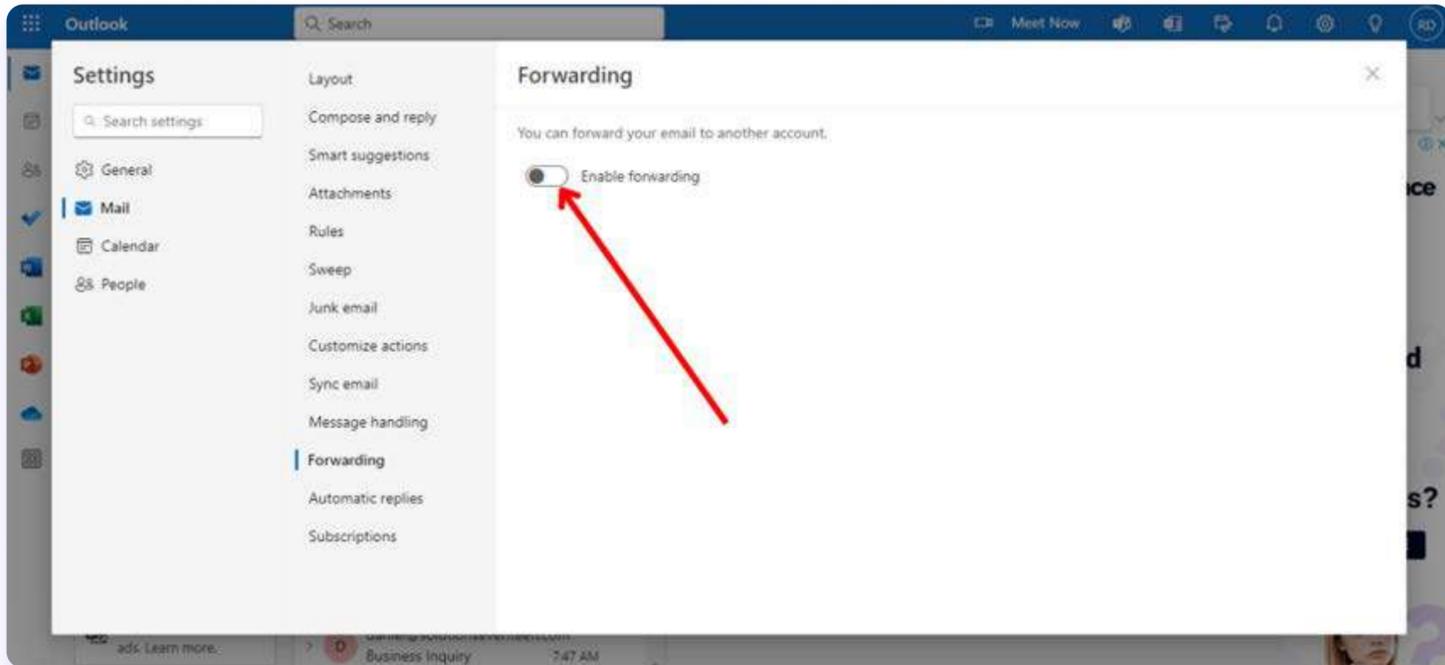
## On Outlook.com

- Begin by logging into your Outlook.com email account.
- Locate "Settings" in the upper right corner of the screen.

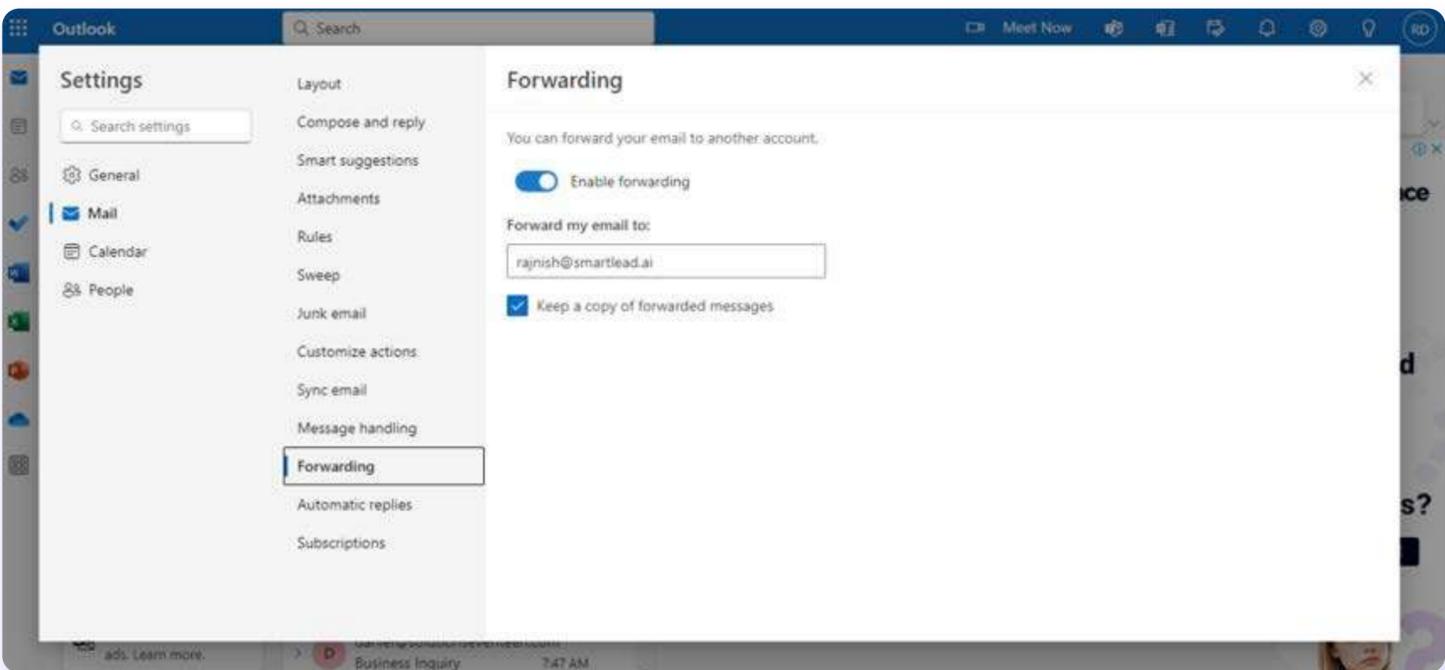


- There will be a pop-up box on your screen. Click on the "Forwarding" tab to access the forwarding settings, as shown below.





- Set up your forwarding address by following the provided options on the screen.



## On Outlook 365

- Access your Office 365 account by signing in.
- Navigate to the top of the screen and locate the "Rules" option.
- Within the "Rules" section, click on "Edit Rules" to manage your email forwarding settings.
- Identify the "+" symbol at the bottom of the screen. If you are using a PC, you might encounter "Inbox rules." Select this option and then choose "New."
- Assign a name to your rule for easy reference. Define the rule parameters according to your preferences.
- Click on "Forward To" to specify the action you want to take for the incoming emails.
- Enter the email address to which you want to forward messages and confirm by clicking "Ok."

## Email Account Setup on Smartlead

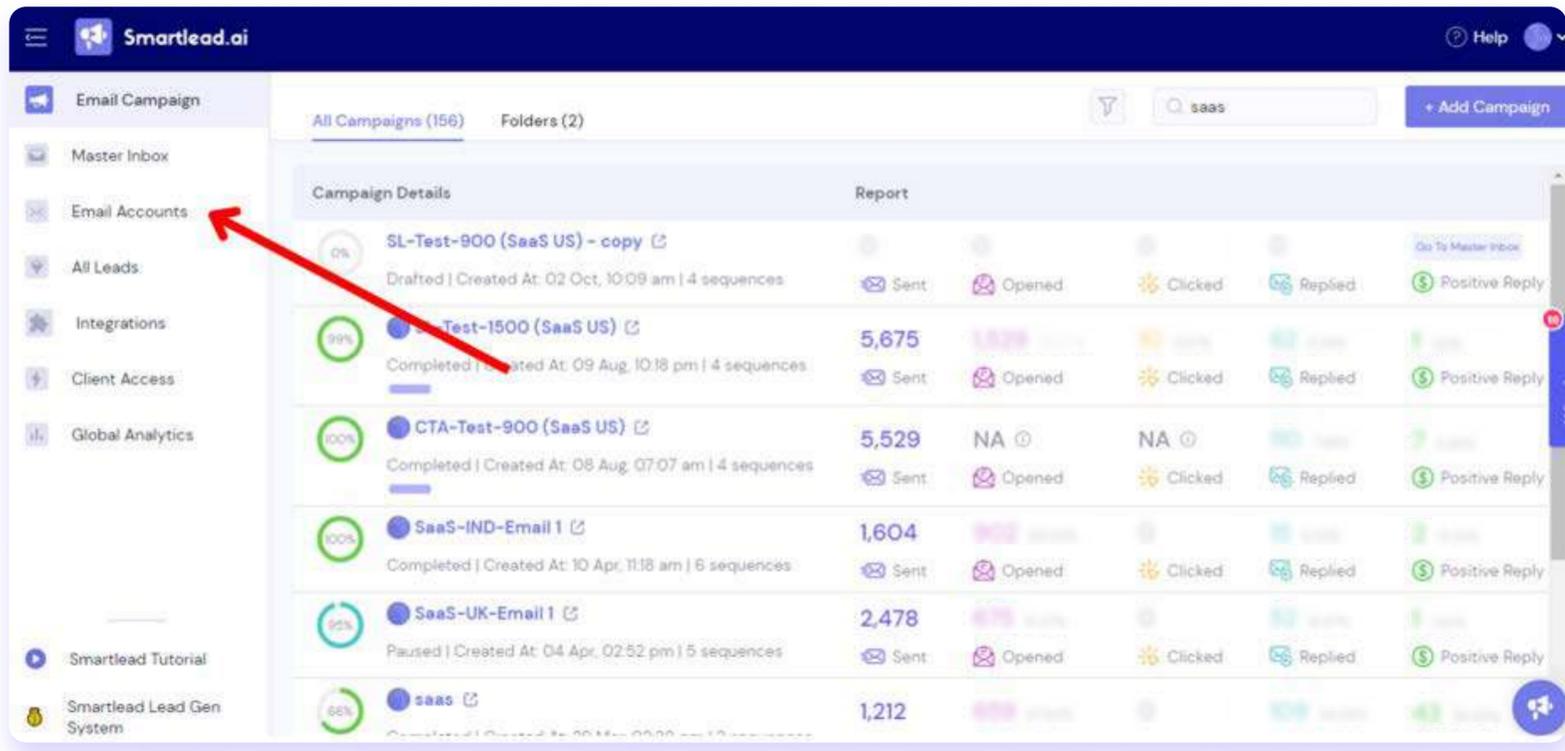
Once done with email authentication protocols and email forwarding setup, the next step involves connecting these "email accounts" to Smartlead or whichever cold email tool you're using.

This section contains how to

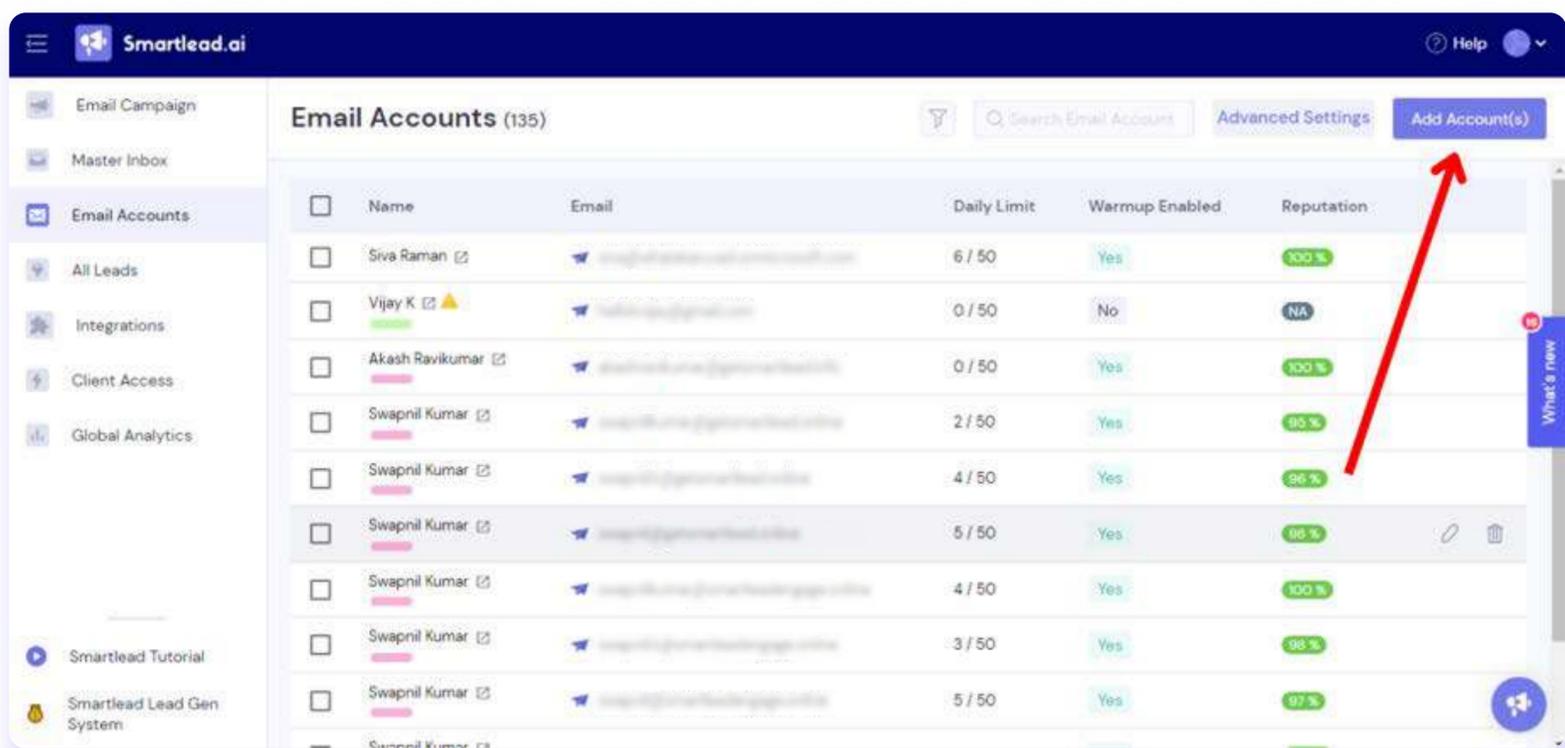
- Connect Gmail accounts with oAuth 1 Click Authentication
- Connect Outlook accounts
- Connect bulk email accounts to Smartlead

### Connect Gmail Accounts

Open Smartlead app, click on the "Email Accounts" tab on the main menu as pointed below.



Next, click on the “Add Campaign” box at the top right of the screen.



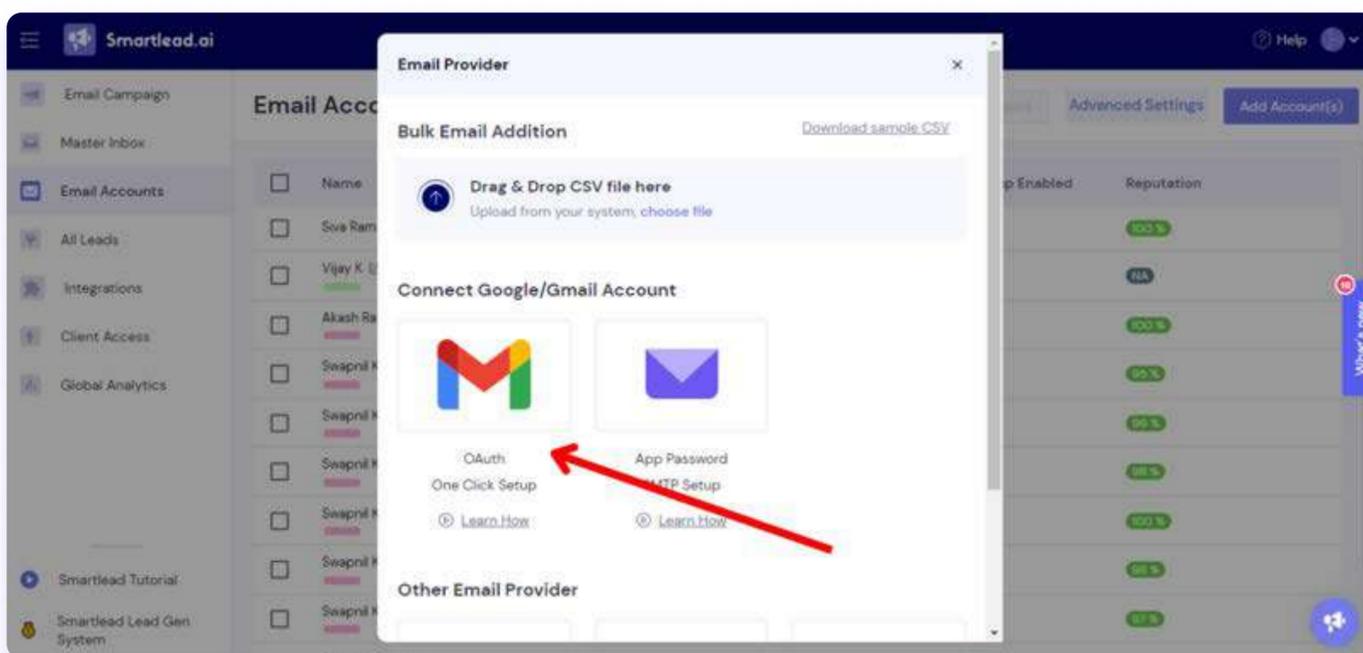
Once you click on the “Add Account”, there should be a pop on the screen with two options:

- OAuth One Click Setup
- App Password SMTP Setup

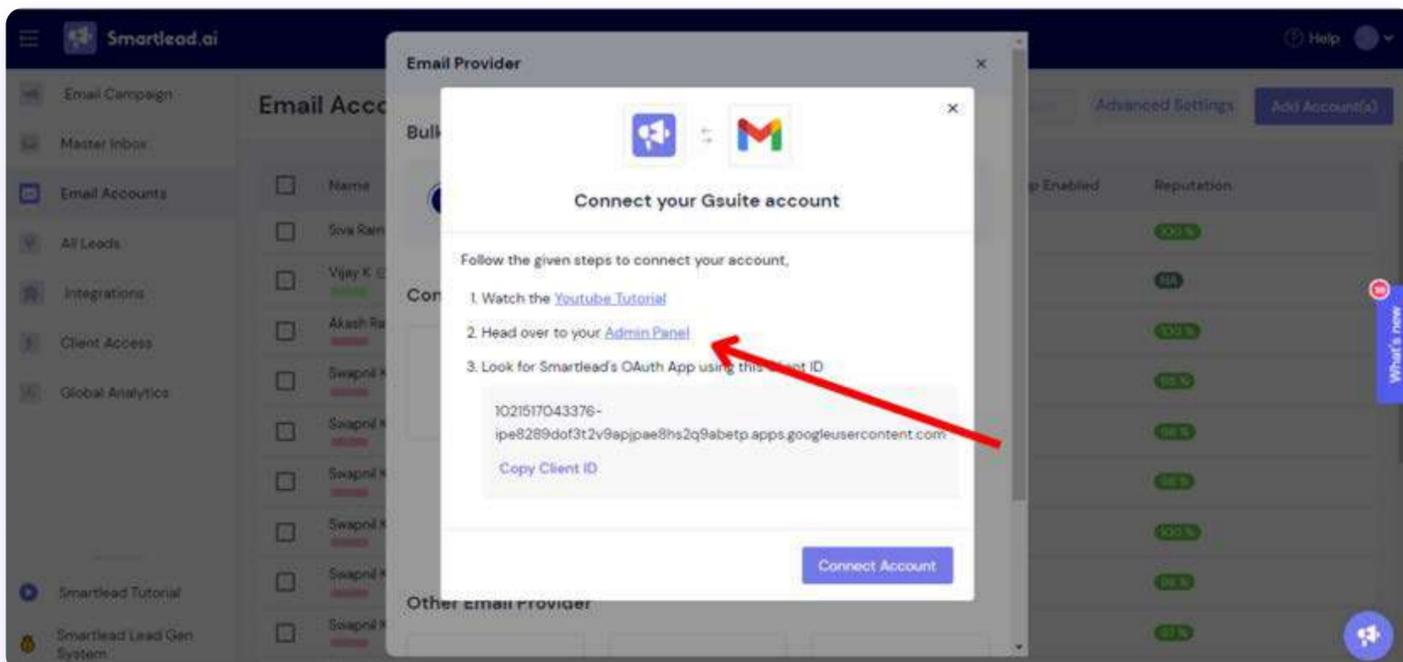
We recommend using the “OAuth One Click Setup” option over App Password SMTP Setup because of reliability issues.

However, if you still want to add an email account with SMTP, go [there](#) for instructions

To add a Gmail account to Smartlead with OAuth One Click Setup, click on it as shown below:



Next, access the Admin Panel.



- You will be prompted to log in to your Google Admin account.
- If you have multiple domains or accounts in your workspace, ensure you are logged in as the administrator of the relevant workspace. Select your admin account if prompted.
- Enter your admin account's password.
- Next, click on the "Add App" button, which may be labeled as "OAuth Name" or "Client ID."
- A panel will appear with OAuth information. Copy the OAuth information provided.
- Paste the copied information into the search bar, and search for "SmartLead." Select Smartlead when it appears in the search results.
- You will be asked to grant permissions. Choose "Trusted" and grant access for Smartlead to access your Gmail services. You may see options related to sending, receiving, and viewing emails.
- After configuration, Smartlead will be listed as a trusted application to access your Google services. Approve Smartlead to connect with your G Suite.
- Click on the option to "Connect with G Suite." This will finalize the authentication process.
- Once the connection is established, you may be required to confirm access permissions again. Follow the prompts to complete the setup.

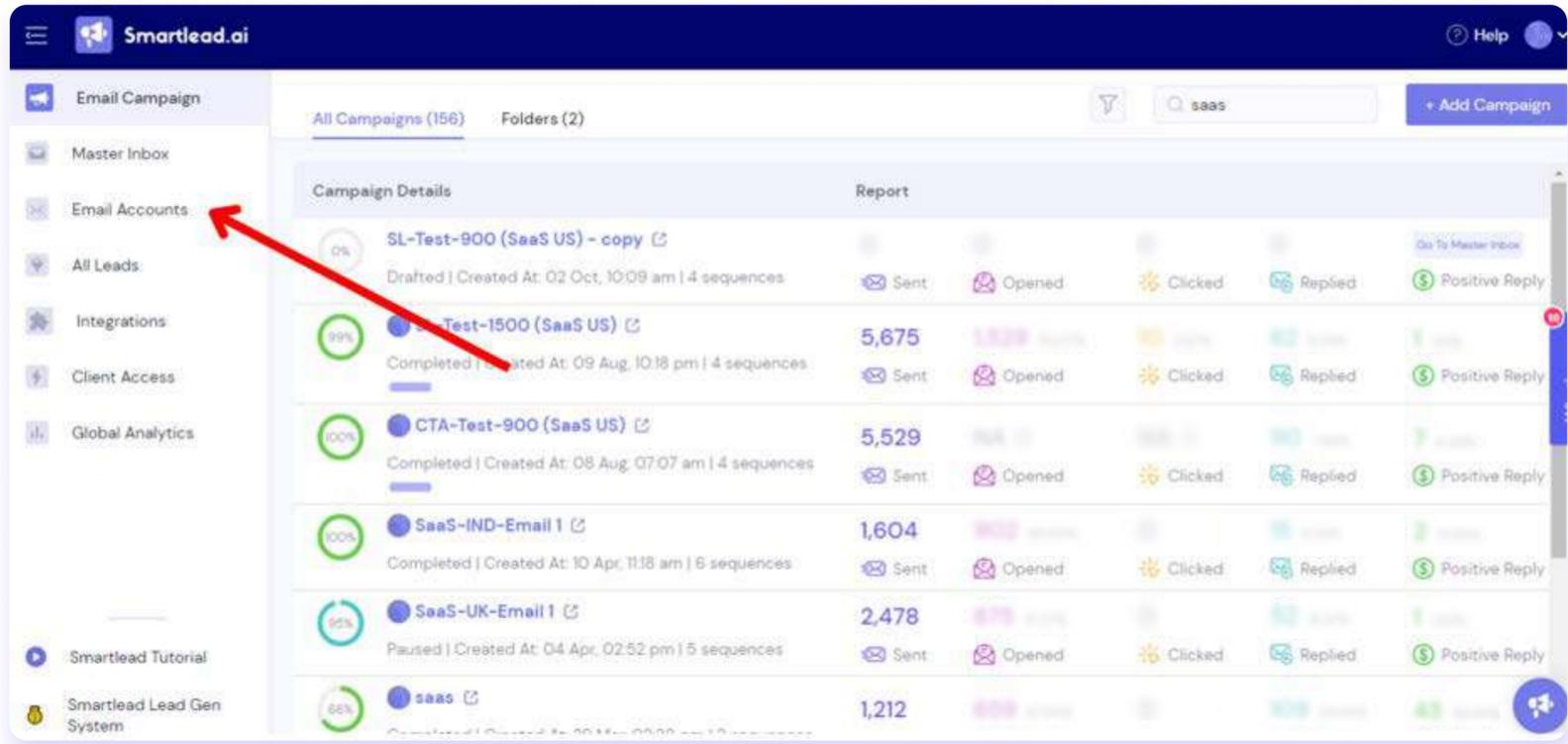
After the initial setup for the admin account, any future Gmail accounts belonging to the same workspace will not require the same extensive setup. You can easily add these accounts without going through the entire process again.

Voila! You have successfully added your Gmail account to Smartlead using OAuth 1 Click Authentication. You can now use Smartlead for your email outreach campaigns without the need for app passwords or two-factor authentication.

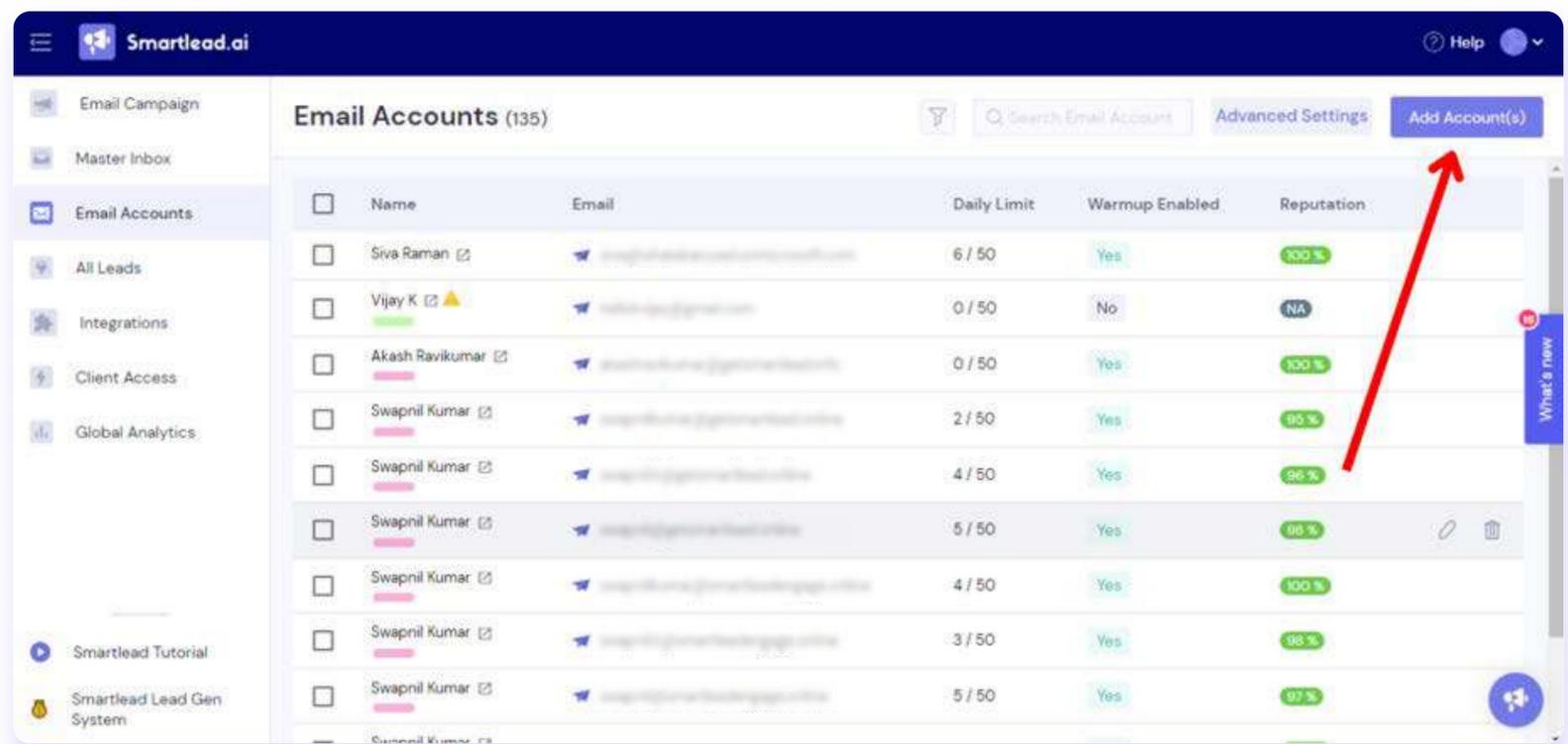
Please note that the process may vary slightly depending on the version of the Smartlead app and Google Workspace settings, but these steps provide a general guideline for setting up OAuth 1 Click Authentication with the Smartlead app.

## Connect Outlook Accounts

Open Smartlead app, click on the “Email Accounts” tab on the main menu as pointed below:

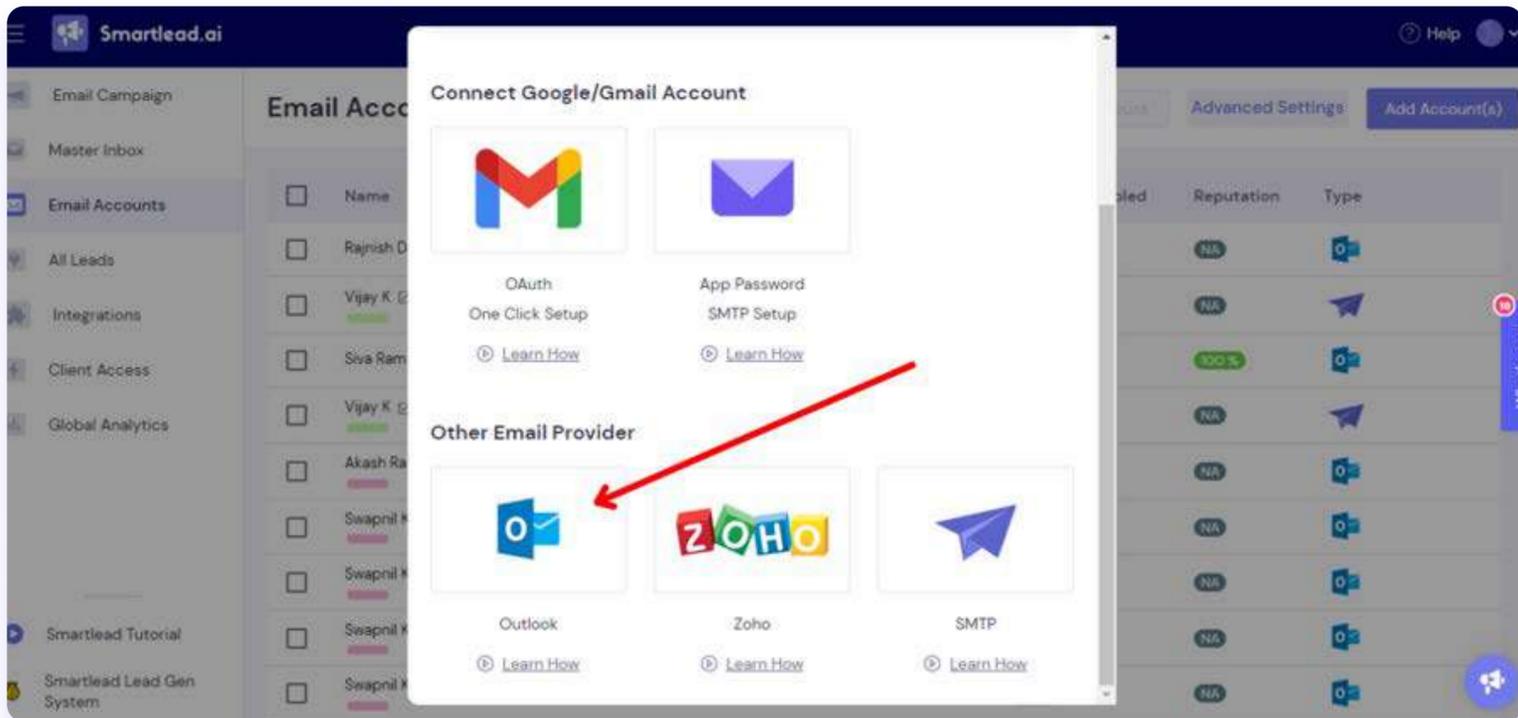


Next, click on the “Add Campaign” box at the top right of the screen.

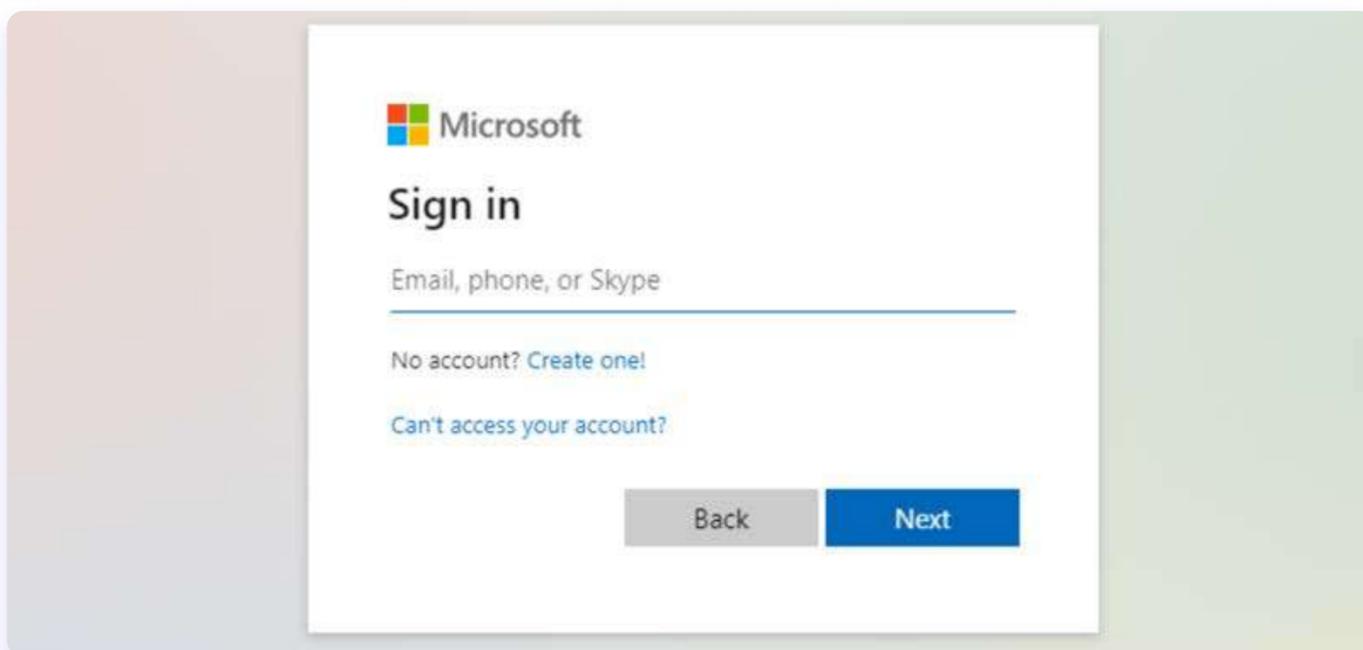


Once you click on the “Add Account”, there should be a pop on the screen as shown below.

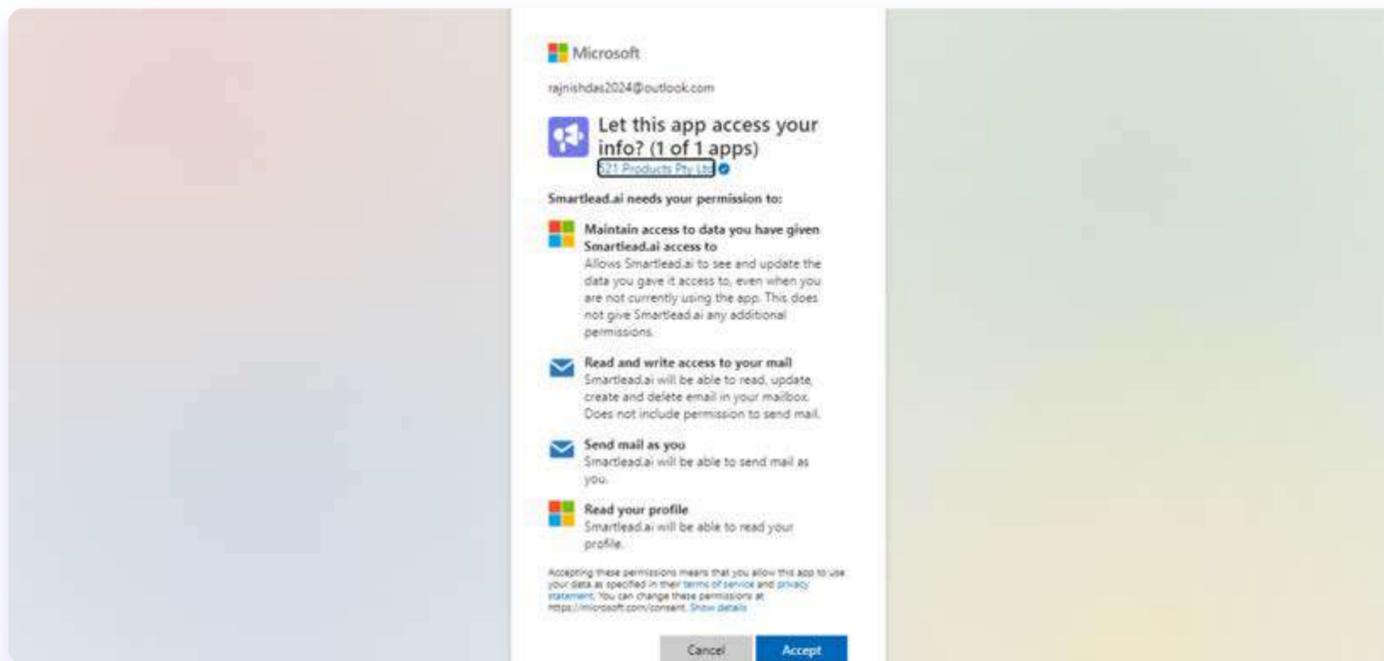
Click on **Outlook** under “Other Email Provider”.



It will lead to the “Sign in” page on Outlook. Fill in the credentials and click on “Next”.



After signing up, there will be a pop-up asking “Smartlead.ai needs your permission” as shown below. Click on “Accept”



That’s it. You’ve successfully added your Outlook email account to Smartlead.

### Connect Bulk Email Accounts to Smartlead

Most cold email marketers send 1000s of emails daily. To do that successfully, one needs many email accounts.

With Smartlead, you don’t need to add email accounts one by one. You can simply create a CSV file, like [this](#) with all the necessary details, and upload it to Smartlead.

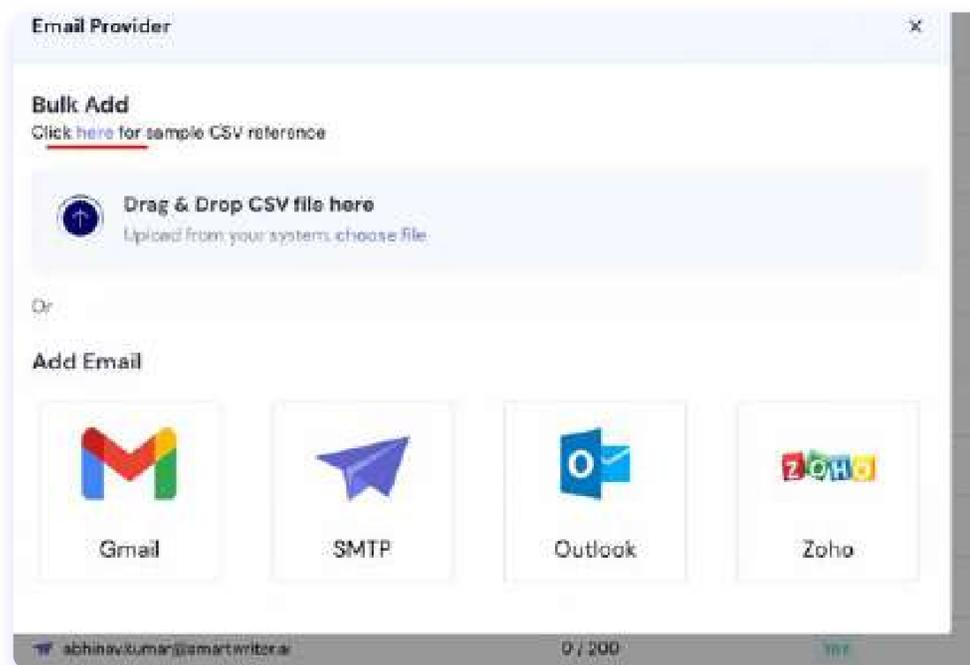
The CSV file will contain the following details:

- from\_name
- from\_email
- user\_name
- password
- smtp\_host
- smtp\_port
- imap\_host
- imap\_port
- max\_email\_per\_day
- custom\_tracking\_url
- warmup\_enabled
- total\_warmup\_per\_day
- daily\_rampup
- reply\_rate\_percentage
- bcc

- signature
- different\_reply\_to\_address
- imap\_user\_name
- imap\_password

Follow the below instructions to add bulk email accounts to Smartlead:

- Open your email accounts
- Click on “Add Account(s)”
- Click on “choose file” to upload the CSV file



- Once you upload the CSV you'll get a preview of the CSV and immediate feedback on any invalid details you might have put in, such as setting the warmup number too high or missing password, etc.
- If you have errors you can choose to skip those and just upload the valid ones or reupload.
- Now, you can see the live status of your email accounts being added.
- Once processed, you'll get an email with a link to your email accounts upload status, if opened it will look like this:

Copy of Smartlead Bulk Upload Example - Sheet1.csv

From Name	From Email	Warmup Enabled	Connectivity Status
Vaibhav Namburi	vaibhav@trysmartwriter.co	Yes	Success
Dinesh M	dinesh@thesmartlead.co	No	Error
Vaibhav Namburi	vaibhav@smartwriter.co	Yes	Account already exist

Records per page: 10 1-3 of 3

If the email looks like the above, all good. If there's any error, you'll see why there's an error.

## Third-Party SMTP Providers

SMTP stands for Simple Mail Transfer Protocol. It's a widely-used protocol for sending and receiving email messages between servers on the internet.

### What are SMTP Providers? Do You Need One?

Third-party SMTP providers offer dedicated IPs with better reputations than shared ones, enhancing the chances of emails being delivered to recipients' inboxes. They are beneficial for cold emailing, primarily due to improved email deliverability control. **Using an SMTP provider isn't mandatory** for all, but it's useful for high-frequency campaigns.

There are a few tools in the market like BareMetalEmail, Superwave, Mailreef, Mailscale etc, that you can explore. Please note that we are not affiliated with any of them. We would recommend running tests using them and see which tool best fits your needs.



**Note:**

Don't use popular SMTP providers like SendGrid, or MailGun. Sending cold emails is against their terms and conditions. Their IPs are also usually blacklisted from people abusing them given their availability for subscription emails.

## Disable Email Tracking – Send Plain Text Emails

Email tracking is a feature used in email marketing campaigns to track when recipients open emails and interact with them. It typically involves injecting a tracking pixel or invisible image into the email, which sends a signal to the sender's server when the email is opened.

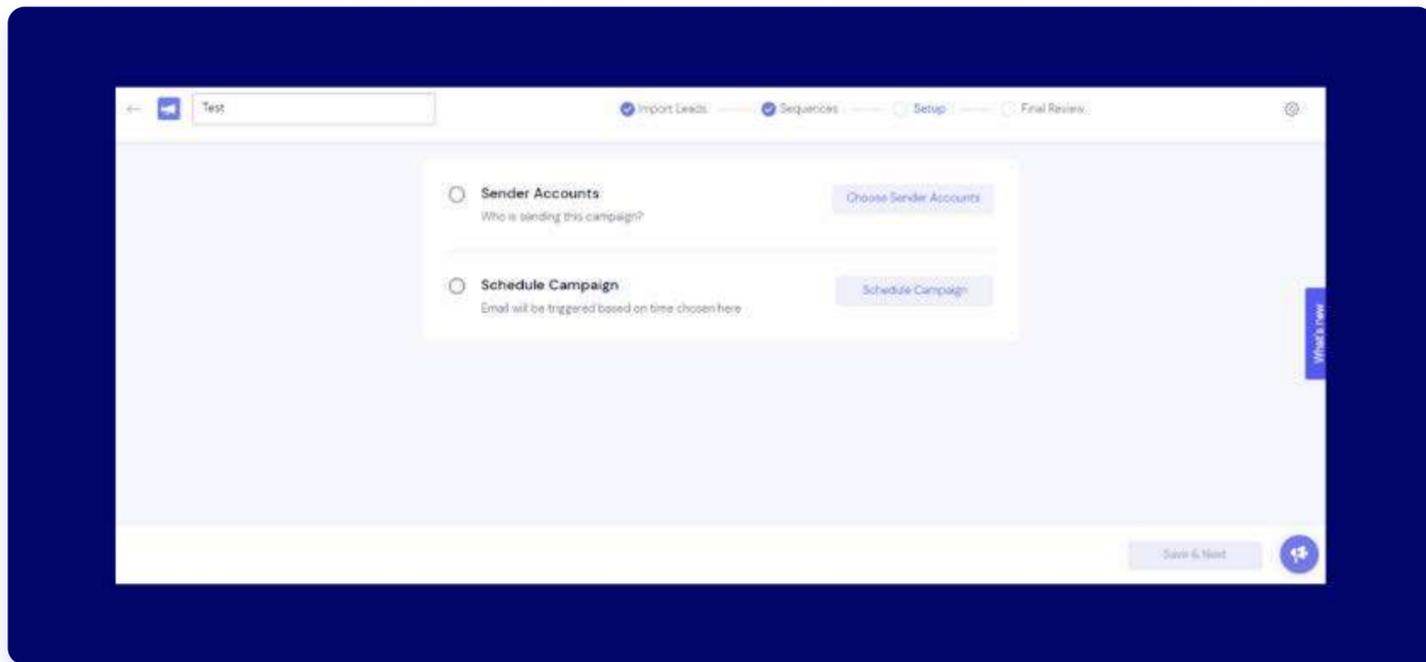
However, due to privacy protection policies implemented by some email clients, such as Apple's proxy system, email tracking may not always provide accurate results. For better results, at Smartlead, we recommend custom domain tracking.

***Send plain text emails without any tracking features enabled to improve deliverability.***

Here's how you can do it:

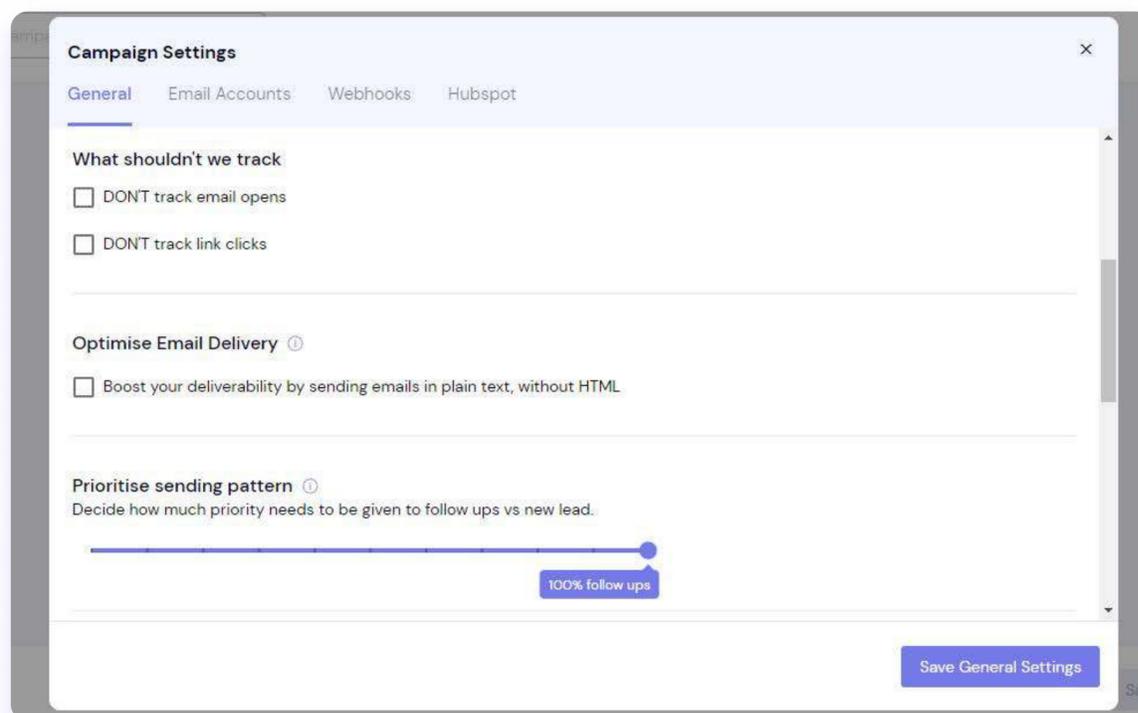
### **Step 1: Access Campaign Settings**

Once you're done creating an email campaign, there's Campaign Settings option on the "Setup" page. Click on the settings icon on the top right.



## Step 2: Choose Plain Text Option

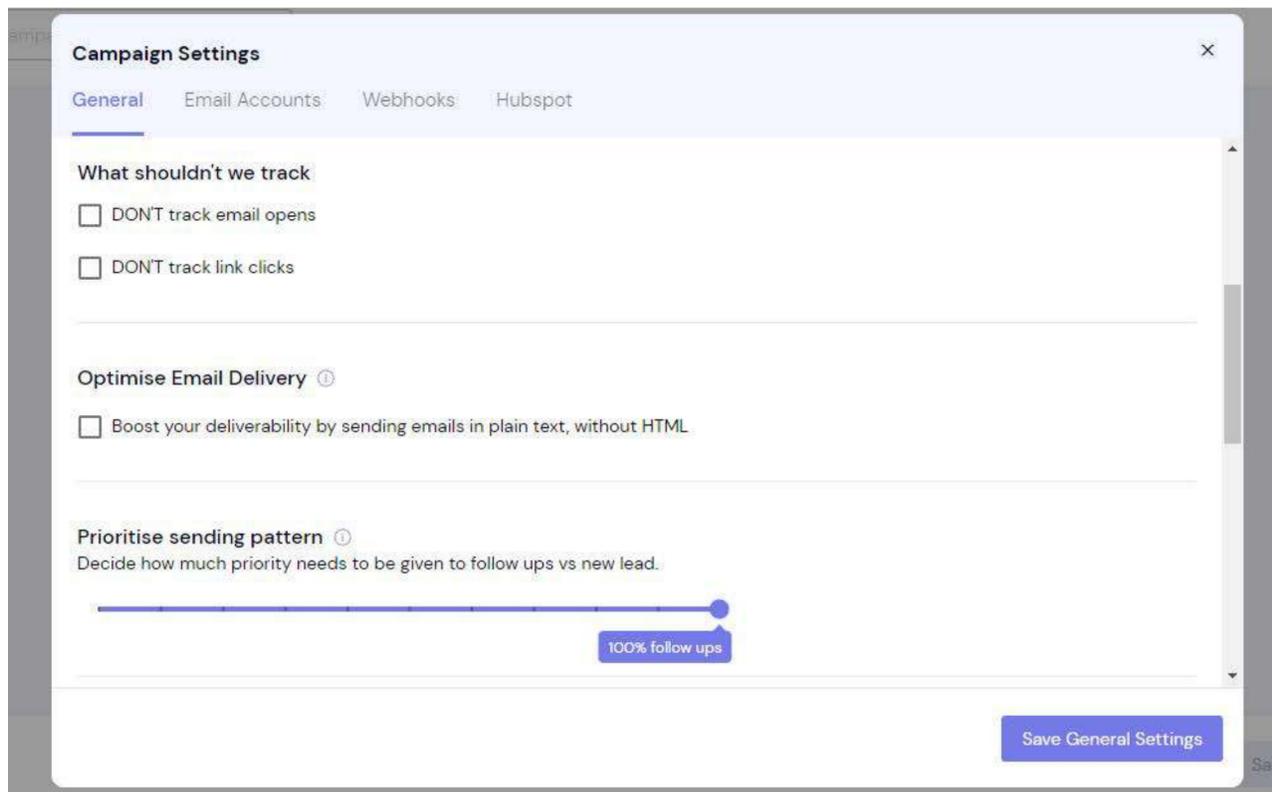
Under the Campaign Settings, look for the option “Optimize Email Delivery” to send emails as plain text.



Select the option to send emails as plain text.

### Step 3: Disable tracking

Click on the boxes under “What we shouldn’t track”, as per your necessities



### Step 4: Save Settings

Save your settings to apply the changes.

## Custom Tracking Domain

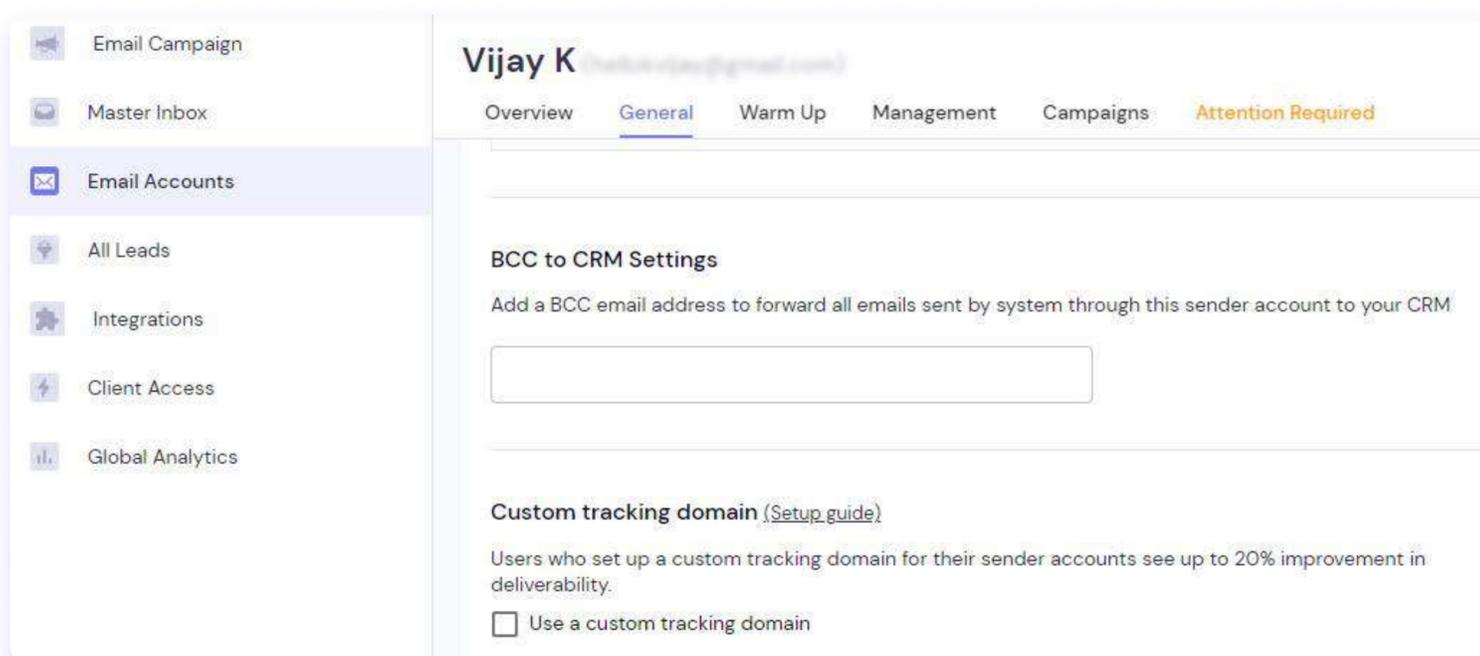
**Custom domain tracking involves using a unique tracking domain for monitoring email open rates and click-through rates.** It's necessary because common tracking mechanisms rely on a shared tracking domain, which can trigger deliverability issues.

Email service providers recognise multiple requests to the same tracking URL from various campaigns, potentially impacting email deliverability. Custom domain tracking reduces this risk by providing a dedicated tracking domain, improving campaign performance and reducing the chances of emails being marked as spam.

# Set Up Custom Domain Tracking in Smartlead

## Step 1

- Add a new email account or open an existing email account within Smartlead
- Go to “Email Accounts” on the main menu and click on the email account you want to enable the custom tracking domain of
- Now, go to the “General” option as shown in the screenshot and scroll down to “use a custom tracking domain” and tick the box.



## Step 2

- Open your domain management tool e.g. Godaddy, Namecheap, Crazydomains, etc.
- Head over to the DNS management section
- In your Host Records section add in a CNAME with the following:

Type: CNAME Record

Host: emailtracking

Value: open.sleadtrack.com

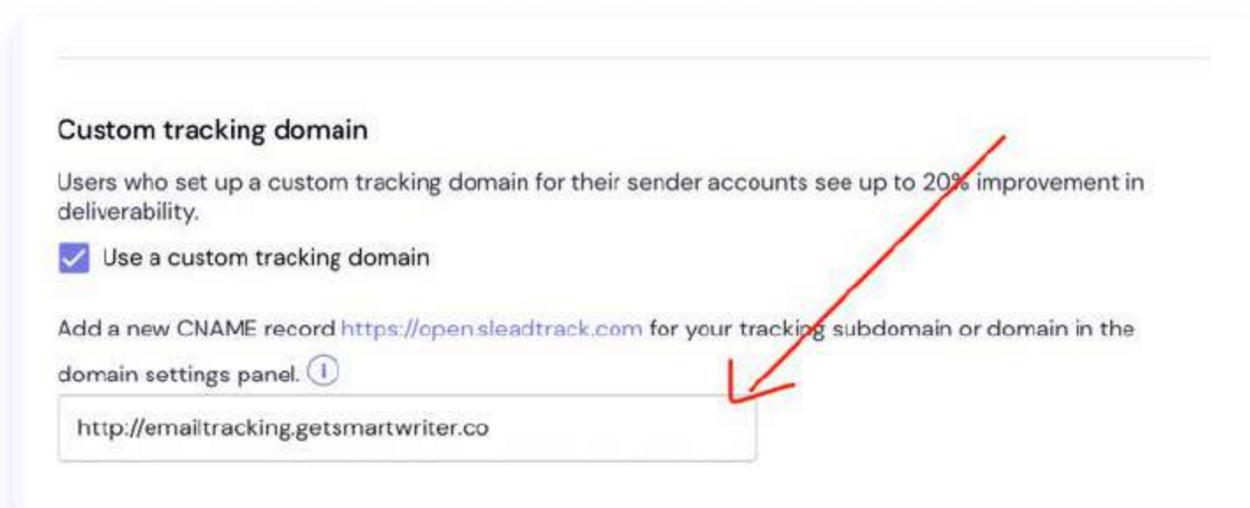
TTL: Automatic

Type	Host	Value	TTL
CNAME Record	<u>emailtracking</u>	<u>open.sleadtrack.com.</u>	Automatic

- Once this is done, wait for 30 mins to 24 hours to be bubbled to your account.
- Now head over to your app and paste the full url into the text field like below in this format

http://{host}.{yourdomain}

For example, our domain is [getsmartwriter.co](http://getsmartwriter.co) (<http://getsmartwriter.co>) and our host is [emailtracking](#)



### Step 3: Verify Your CNAME Tracking

- Next, click on the “Verify CNAME” button. It’ll take you to a nslookup.io link.
- If underneath the “Canonical name” it says “open.sleadtrack.com”, then you are done with this step.



Note: If you have an old domain or a domain with a good reputation, you can use that single domain for tracking instead of setting up a custom tracking per email domain.



**Note:**

If you have an old domain or a domain with a good reputation, you can use that single domain for tracking instead of setting up a custom tracking per email domain.

## API Integrations and Webhooks

### APIs

API is short for Application Programming Interface. It's a set of rules and protocols that allows different software applications to communicate with each other. API integrations refer to connecting different software systems through their APIs to enable seamless data exchange and functionality sharing.

SmartLead offers API integration allowing you to fetch emails and integrate with platforms like HubSpot, Clay, and ListKit, etc.

From fetching all email accounts associated with a user to deleting leads by campaign id, you can do it all using APIs. Here's [Smartlead's full API documentation for automation](#).

### Webhooks

Webhooks are a powerful tool for tracking and automating campaign activities. Understanding their capabilities and leveraging them effectively can greatly enhance your campaign management and analysis.

Smartlead users use webhooks for tracking replies, opens, and automating processes at an account level. Here's a [webhook guide](#) to understand what Smartlead users can achieve via webhooks.

Webhooks can be set up to send data to multiple external software or platforms, enabling customized integrations and comprehensive tracking. They're a key part of enhancing campaign management and analysis by providing immediate notifications and integrating with external software like CRM systems for streamlined workflows.

One of the most popular use-cases is enabling Slack notifications via webhook on Smartlead. You can select the events you want notifications for, like email opened or lead unsubscribed and enjoy the real-time updates. To do that, check out the webhook guide for detailed instructions.

Further resources:

- [How To Integrate With Hubspot Using Zapier – Detailed Guides](#)
- [Maximizing Webhook Capabilities for Effective Campaign Tracking](#)
- [How to replicate the UI Campaign Analytics using the API](#)
- [How to copy your GPT4 API Key](#)
- [How to use n8n and Smartlead automation](#)
- [Integrating Smartlead With Listkit](#)
- [Integrating Smartlead With Clay](#)

# 4 Warm-Ups



Once done with the technical set-up, the next step involves warming up the email accounts you've added to your cold email tool (Smartlead) in the last step.

***We recommend starting with 5 warm-up emails per day per account with a rampup of 5 and target reply rate of 30%. After two weeks, you can increase the warm-up volume up to 40 emails per day per account, with a higher target reply rate of 70% when engaging in outreach.***

The maximum recommended warm-up email volume is 50 emails per day with a reply rate of max 60%.

## What is Email Warm-Up?

Email warmup is the strategic process of gradually establishing a positive sender reputation for a new email account. It ensures that your IP or emails are not perceived as spam by the internet service providers (ISPs) when you send bulk emails.

## Why Should You Warm Up Your Inbox

- **Builds Sender Reputation:** Warm-up establishes a positive sender reputation, crucial for email deliverability.
- **Improves Email Deliverability:** Email warm-up enhances the legitimacy of your email account, reducing the risk of emails being marked as spam.

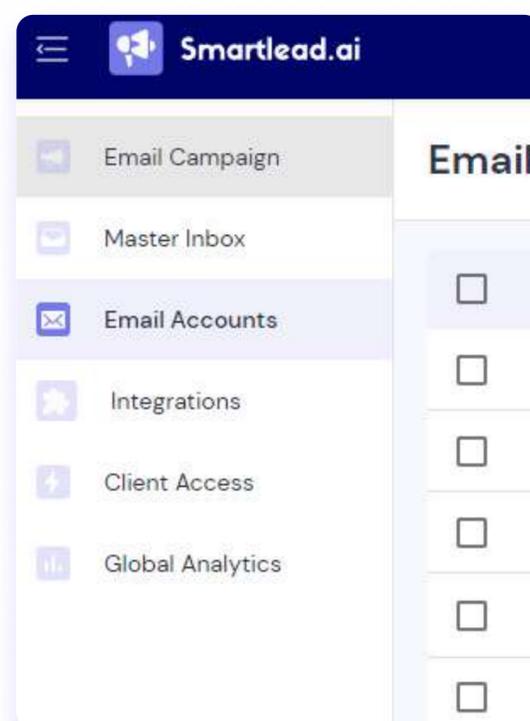
- **Shortens Time to Build Reputation:** While direct emailing may take months, warm-up reduces the time to establish a positive sender reputation to just a few weeks.
- **Avoids Spam Triggers:** Warm-up automates email actions, steering clear of spam triggers like bulk sales emails and suspicious link formats.

## Warm Up Email Accounts with Smartlead

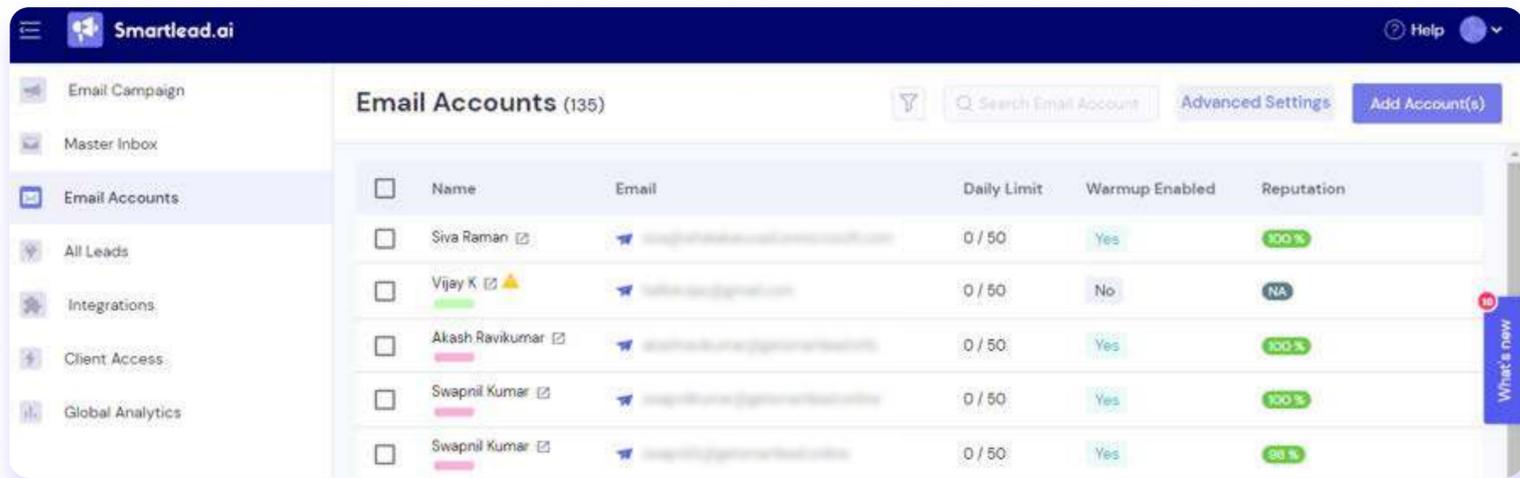
Complete the technical setup—email authentication protocols, email forwarding, adding email accounts to Smartlead, disabling email tracking, switching on custom domain tracking—before jumping to the warmup process.

Once you’ve done the above processes, follow the below instructions to warm up email accounts. Check the “Warmup Tips” section to do it efficiently.

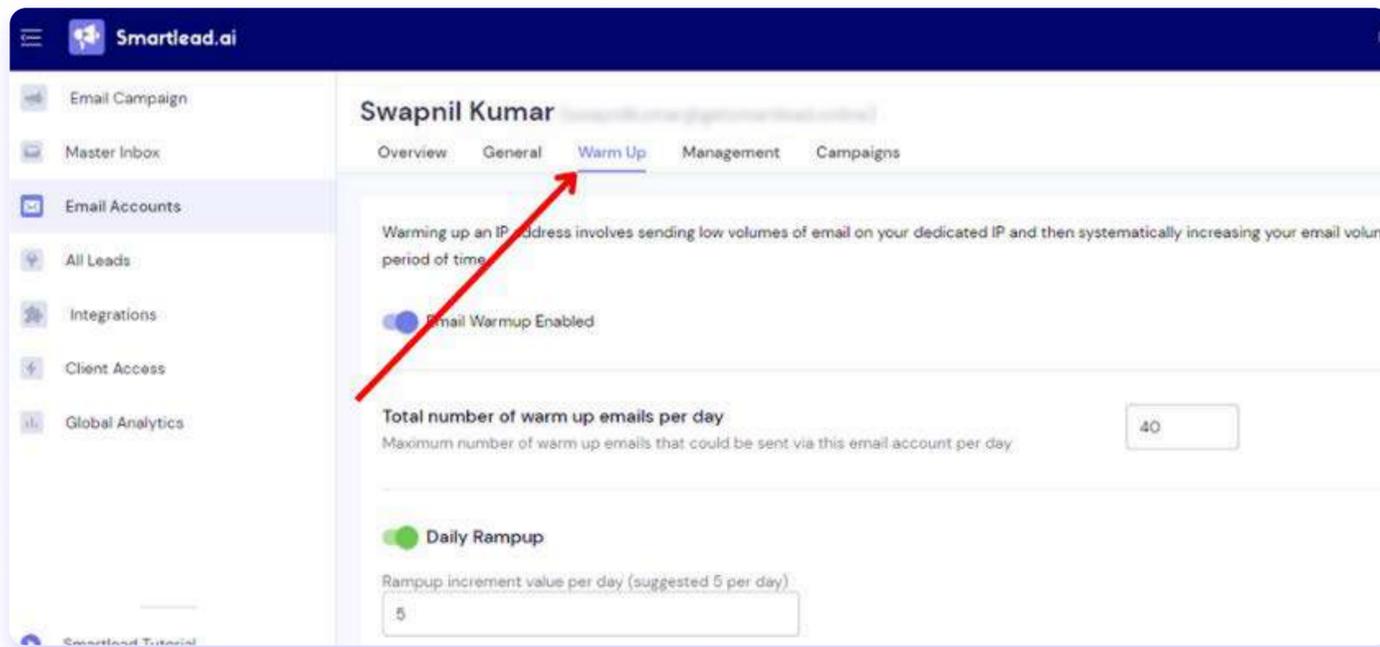
- Open the Smartlead app and go to the “Email Accounts” tab from the main menu.



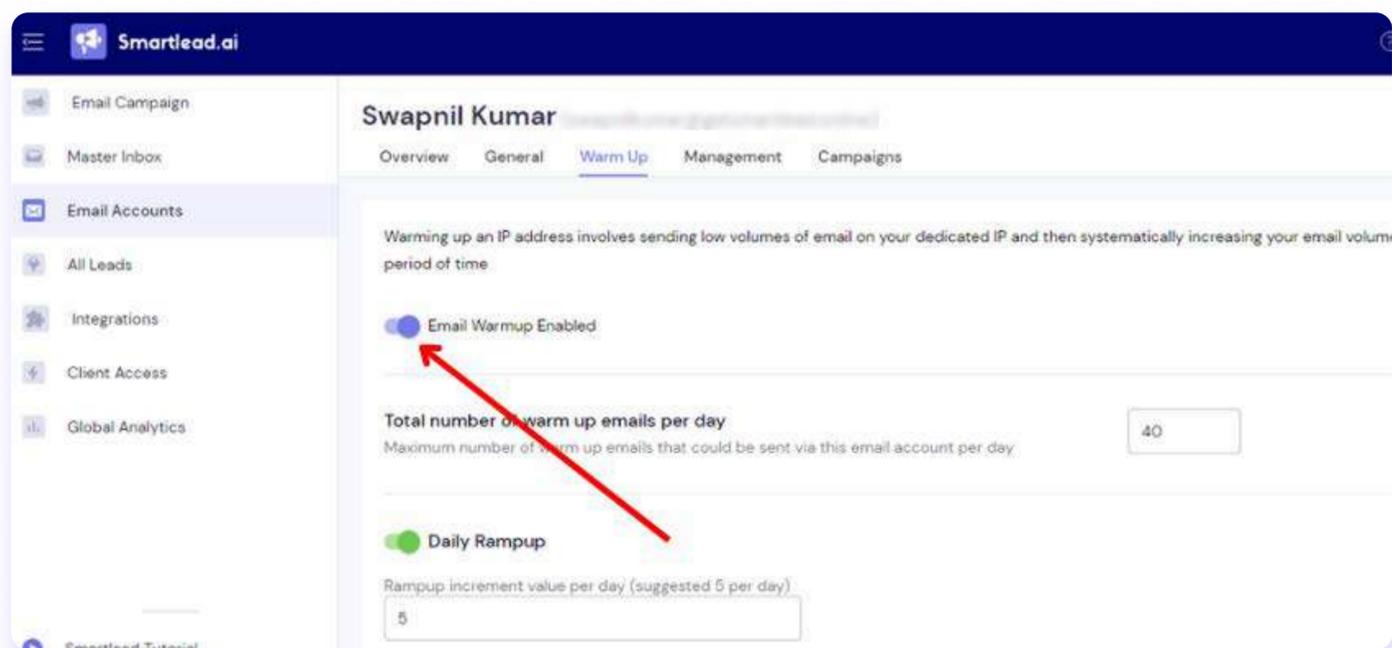
- Next, click on the email address you want to warm up



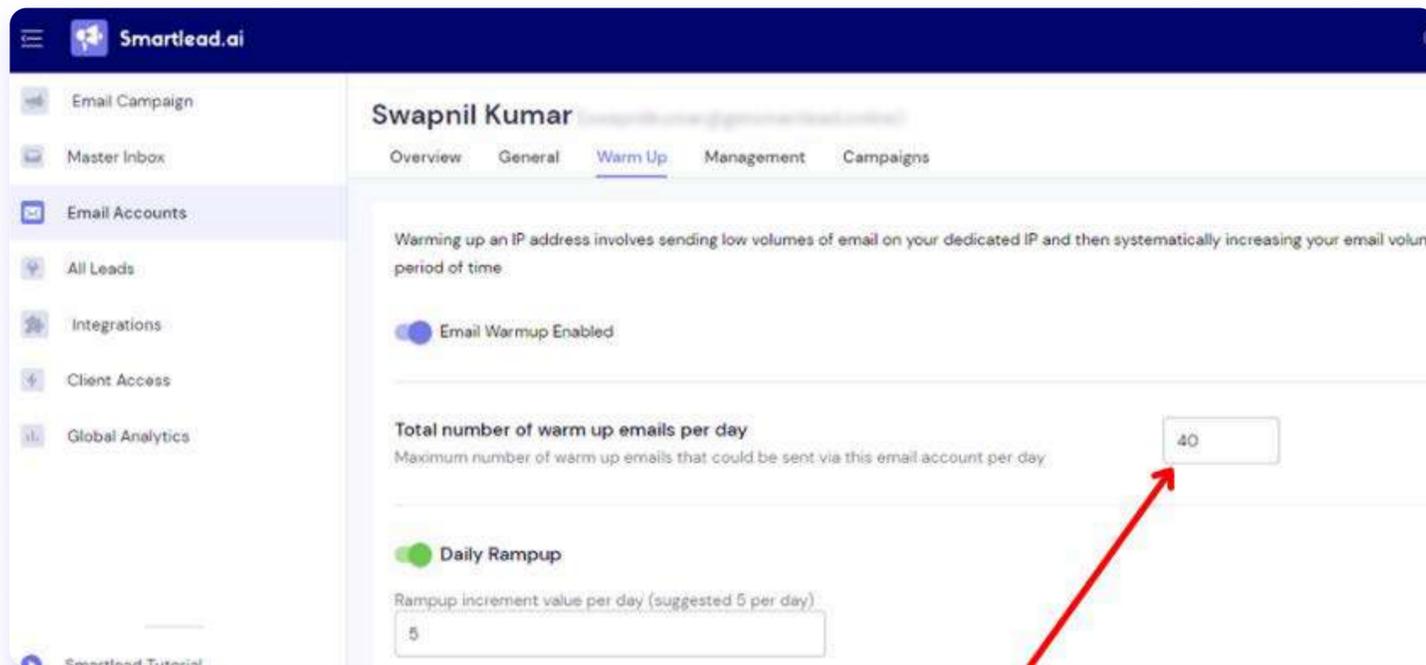
- Once you've opened the email account, go to the warm-up tab.



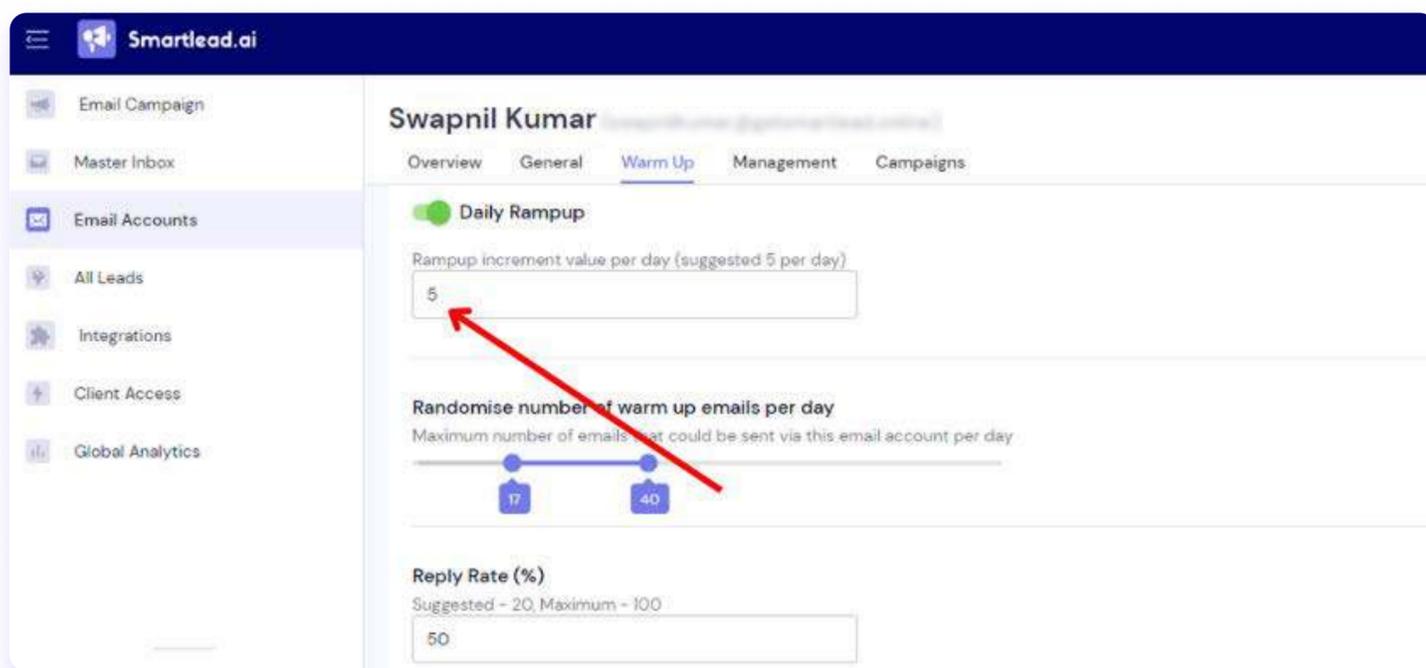
- Now fill in the configuration details. Switch on the "email warm enabled".



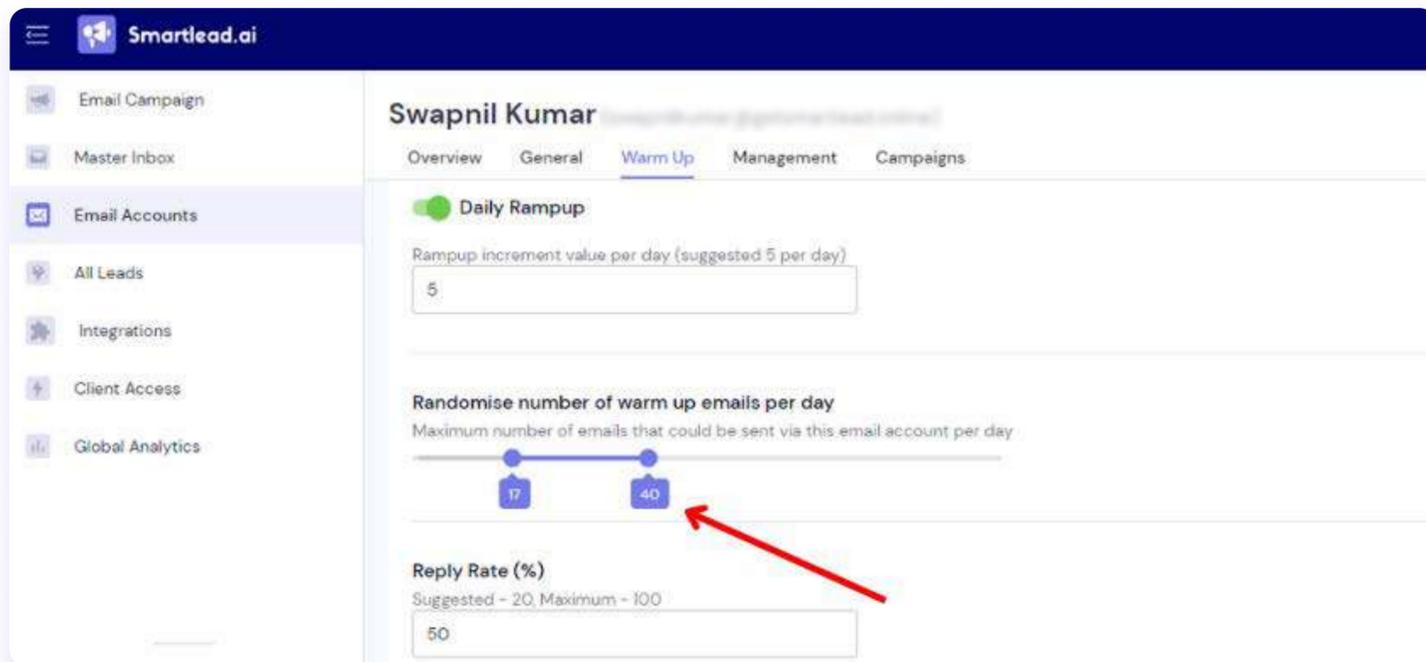
- Fill in the “total number of warm up emails per day”. If you’re just starting, we recommend starting with 4-8 warm-up emails per day. After two weeks, you can increase the warm-up volume to 20-30 emails per day per account.



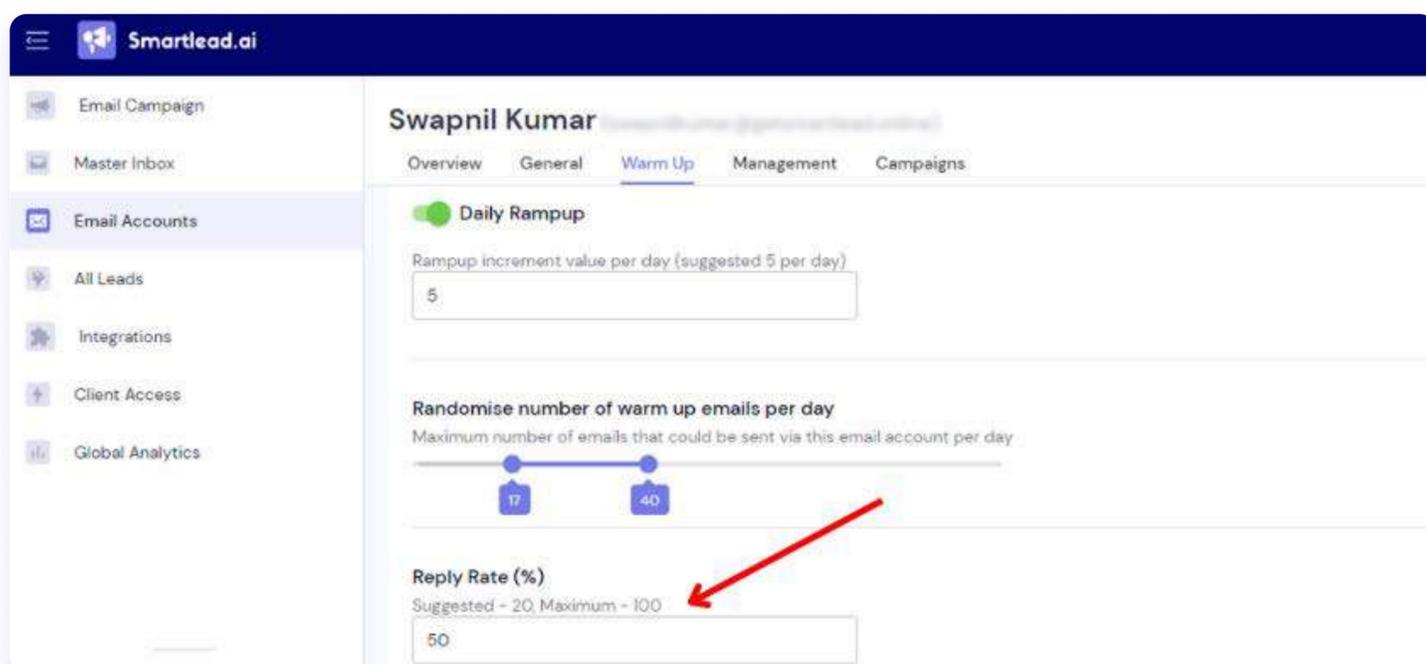
- Next, switch on the “Daily Rampup” button. It will naturally progress the number of emails you send each day. It will prevent jump-scaring the recipients' ESPs with bulk messages.



- Next, set the “Randomise number of warm up emails per day”. It’s the maximum number of emails that could be sent via this email account per day. Start with as small as 4-8 warm-up emails per day and increase gradually. Randomizing the emails ensure that your emails are not considered spam.



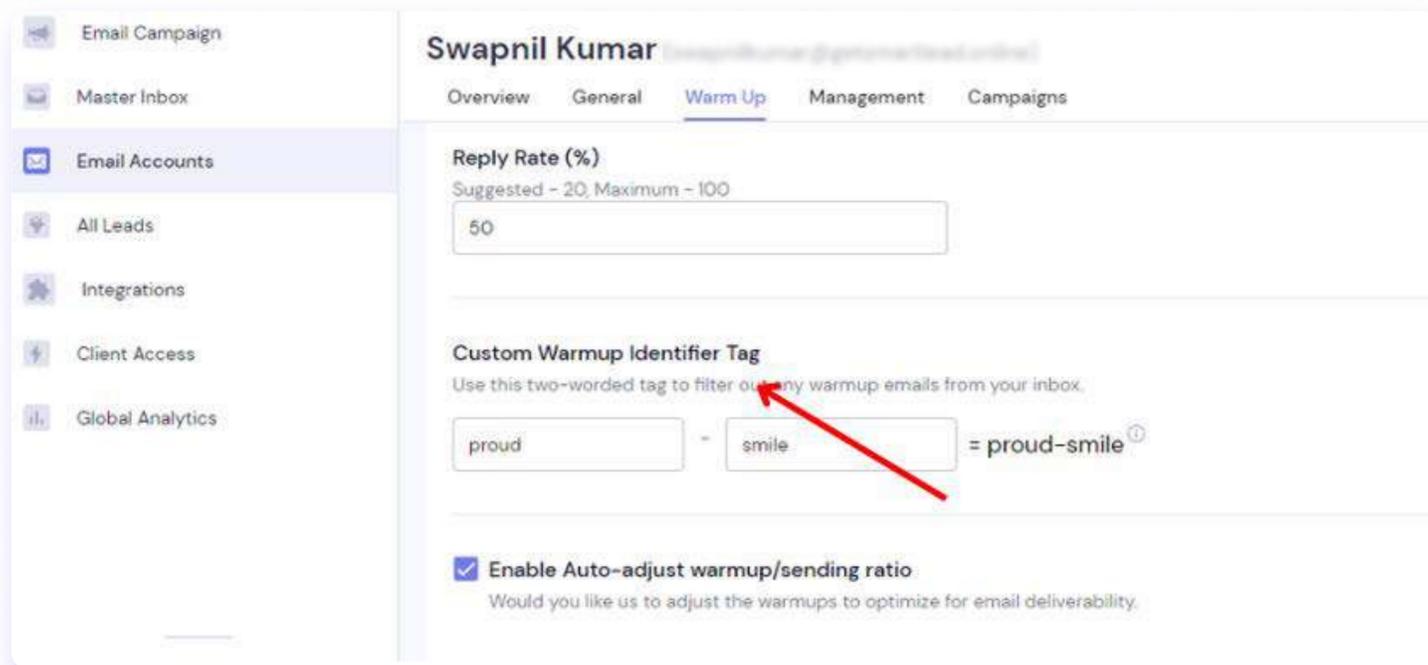
- Set the reply rate for your warm up emails. Start with a target reply rate of 30%. After two weeks, you can increase the warm-up volume to 20-30 emails per day per account, with a higher target reply rate of 70% when engaging in outreach.



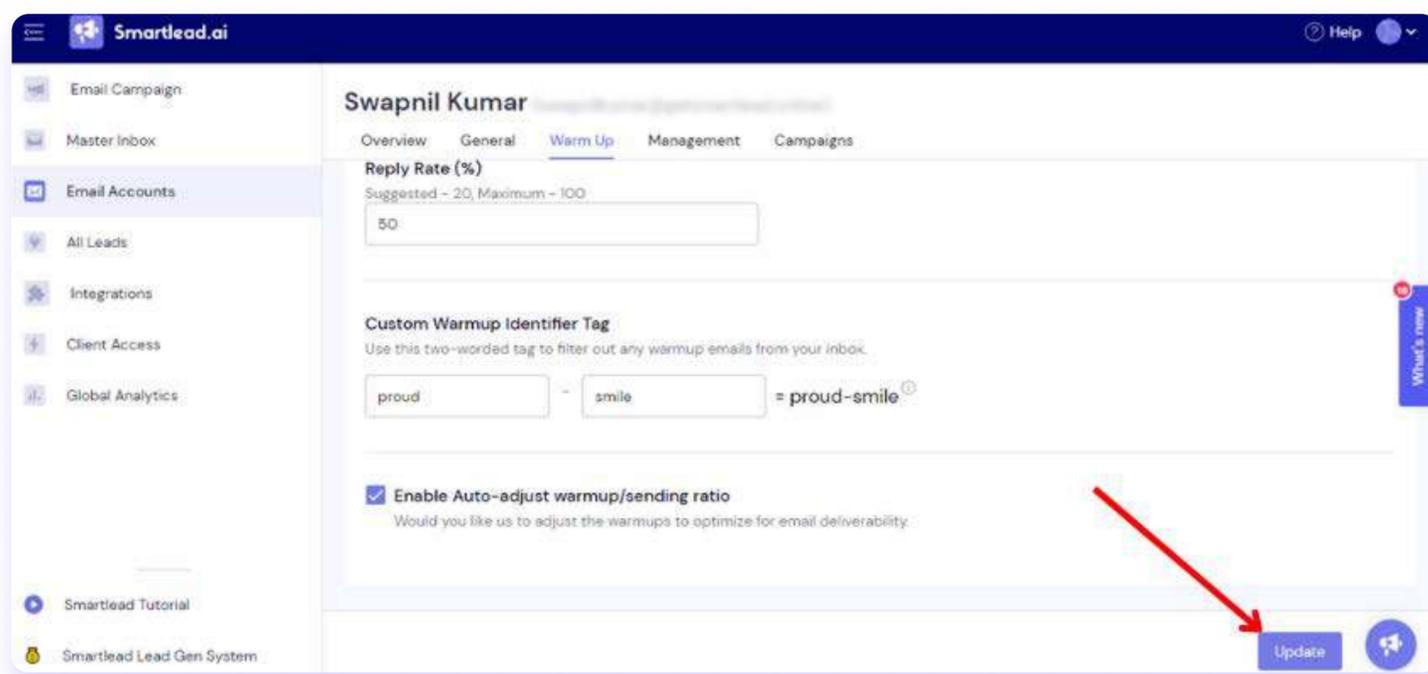


- Last step: set a custom warm-up identifier tag.

The warmup tag identifier in Smartlead.ai is a unique 2-word phrase assigned to each mailbox in your account. This identifier helps to filter out warm-up emails effectively. **Don't forget to replace your warmup tag identifier once in 3 months to avoid tracking and redundancy.**



- Now, enable the auto-adjust warmup/sending ratio and click on the "Save". That's it, you are done with this step. If you have used the warmup service before, click the "Update" button.



# Optimal Warmup Settings

For a clearer understanding of warmup settings, here’s a quick summary.

	For Fresh Accounts	For Accounts Coming from Other Tools	
	for 2 weeks	for first 1.5 weeks	after week 1
Total max emails per day	40	15	40
Daily Rampup	3-5	2-3	4
Randomise number of emails	20-30	5-15	30-40
Reply Rate	45%	30%	40%

## For Accounts Used in Active Campaigns After 2-Week Minimum Warm-Up

**Email account setting:**

Messages per day: 40 (preferred) – 50

**Warmup settings:**

Randomise: 25-30

Reply rate: 45%

# 5 Creating Lead Lists



Creating an effective lead list takes time and effort. If you're just starting, take the time when your mailboxes are warming up to build the perfect lead list for your campaign.

## Create a Lead List on Smartlead

For Smartlead users, the easiest ways to create a lead list are:

- Opt for Smartlead + Clay native integration
- Opt for Smartlead + Listkit integration

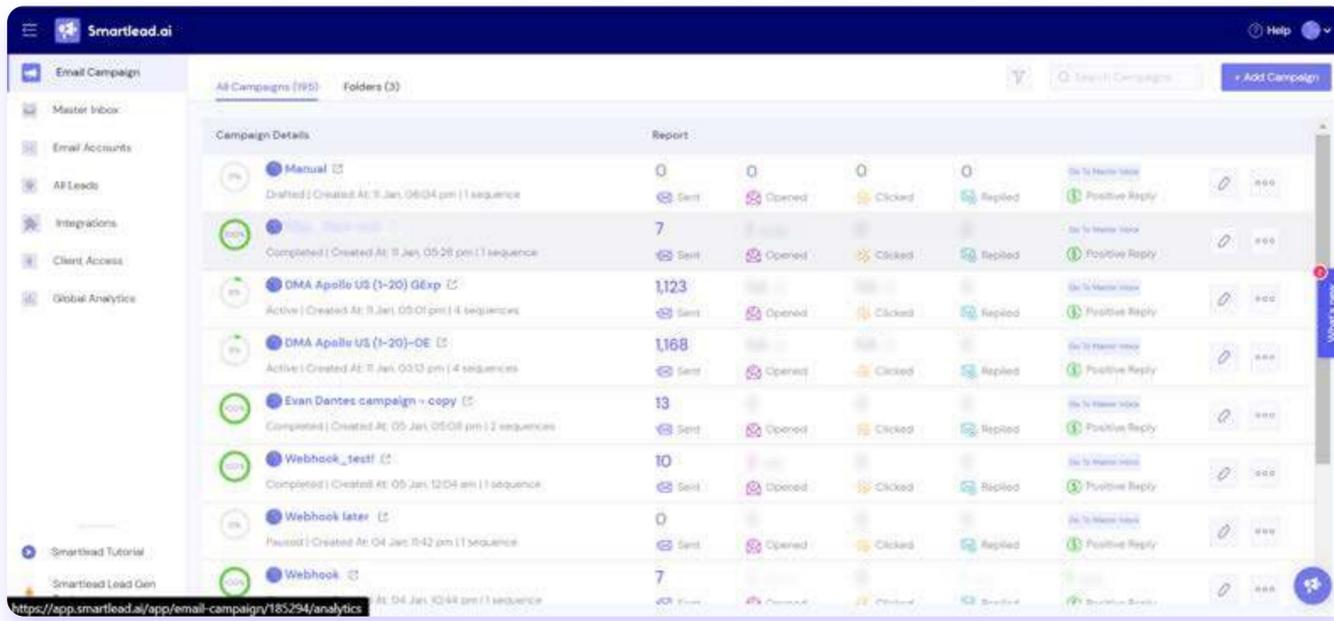
### Clay

Clay is a SaaS platform that offers lead list building, lead enrichment (combining 50+ data providers and real-time scraping) and hyper-personalized cold emails for outbound email campaigns.

To connect Smartlead with Clay, follow the below steps:

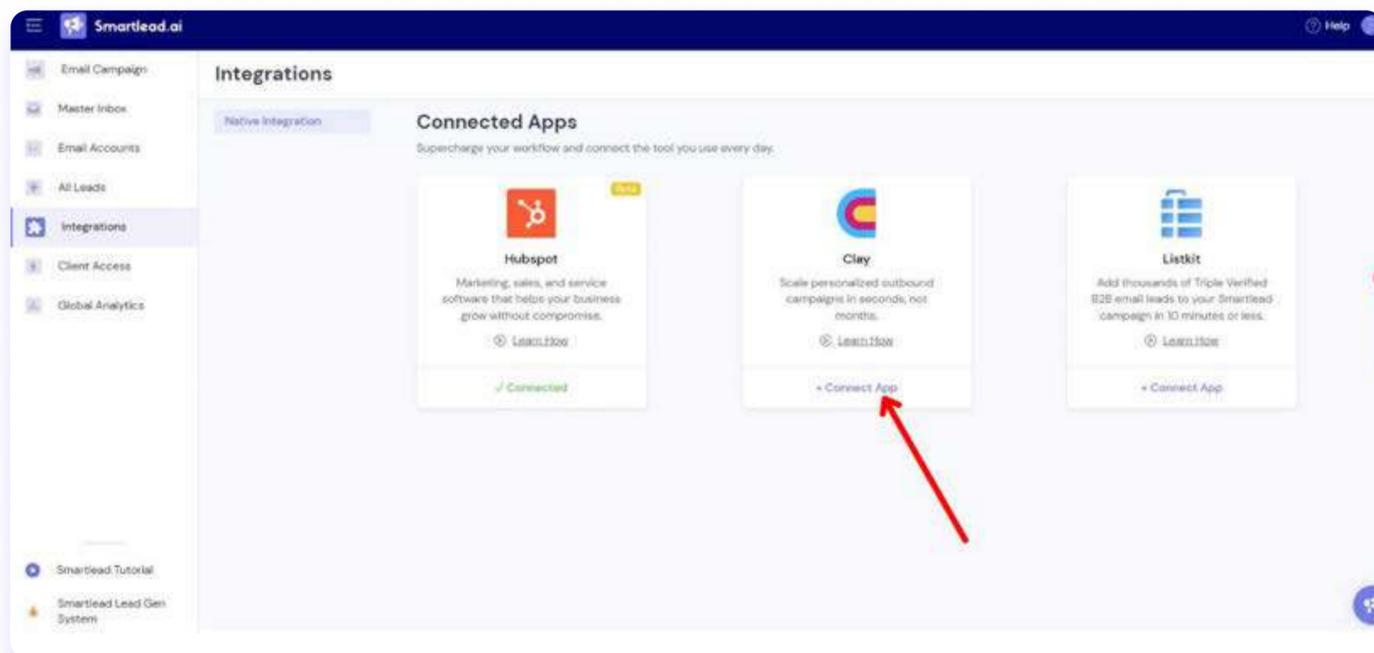
#### Step 1

Click on the "Integrations" tab from your Smartlead App dashboard.



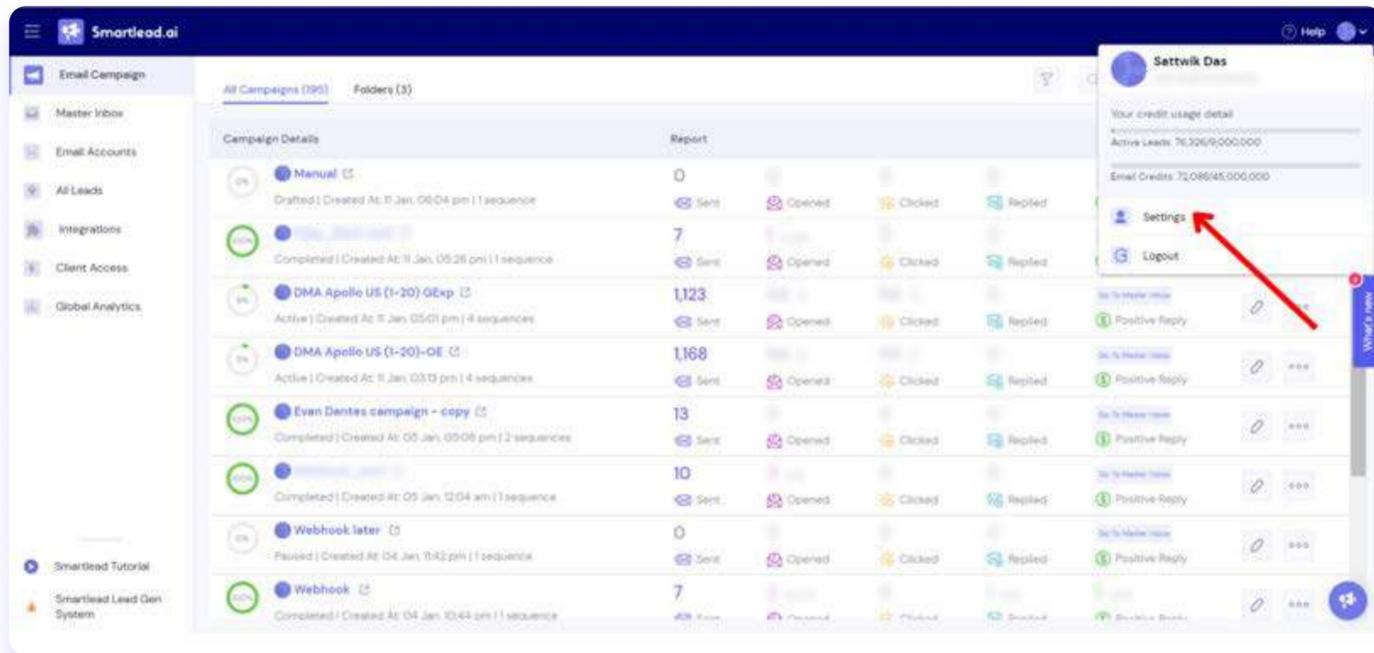
## Step 2

Hover over “Clay” and click on “Connect App”. You will be redirected to another tab where you have to login to your existing Clay account. But before moving forward, follow the next step.

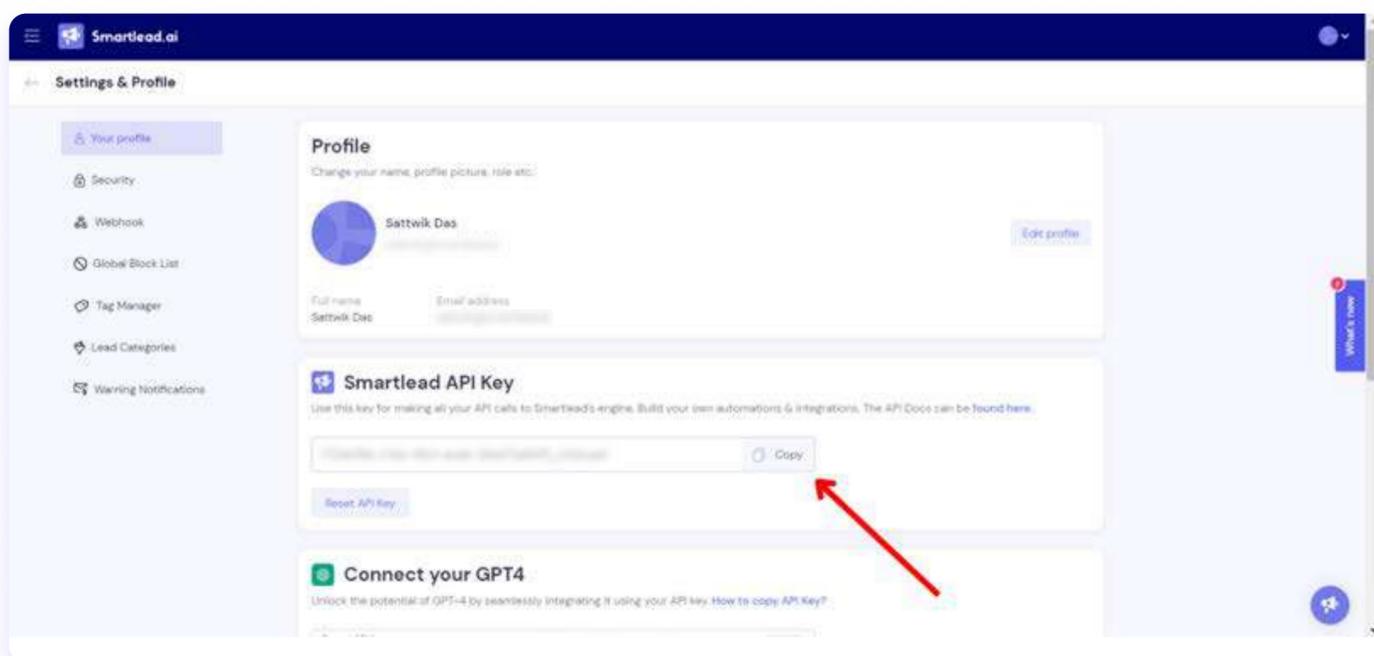


### Step 3

Hover to the top right corner, and click on the drop-down arrow on the profile icon. Click on Settings.

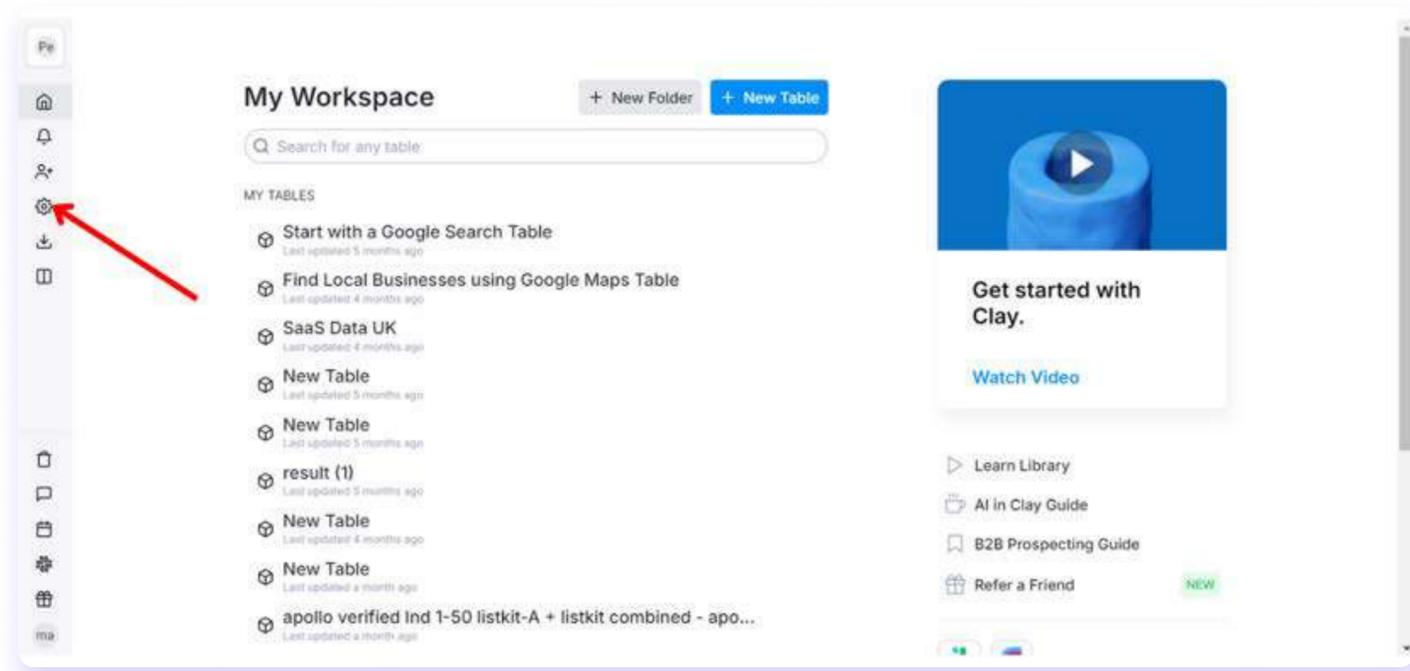


Now, copy your Smartlead API Key. Just click on the copy button.



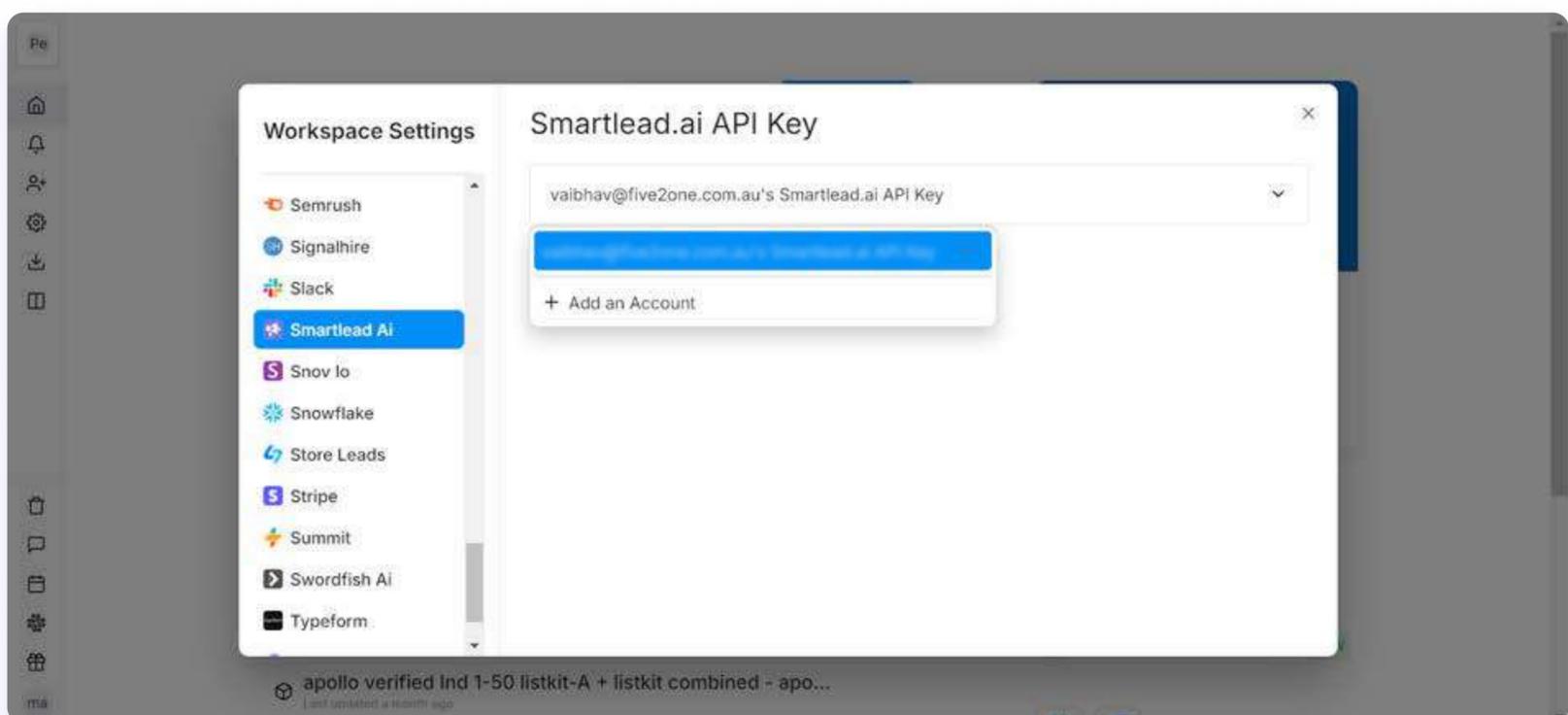
### Step 4

Now, open your Clay account and click on “Workspace Settings” on the side bar of the dashboard.

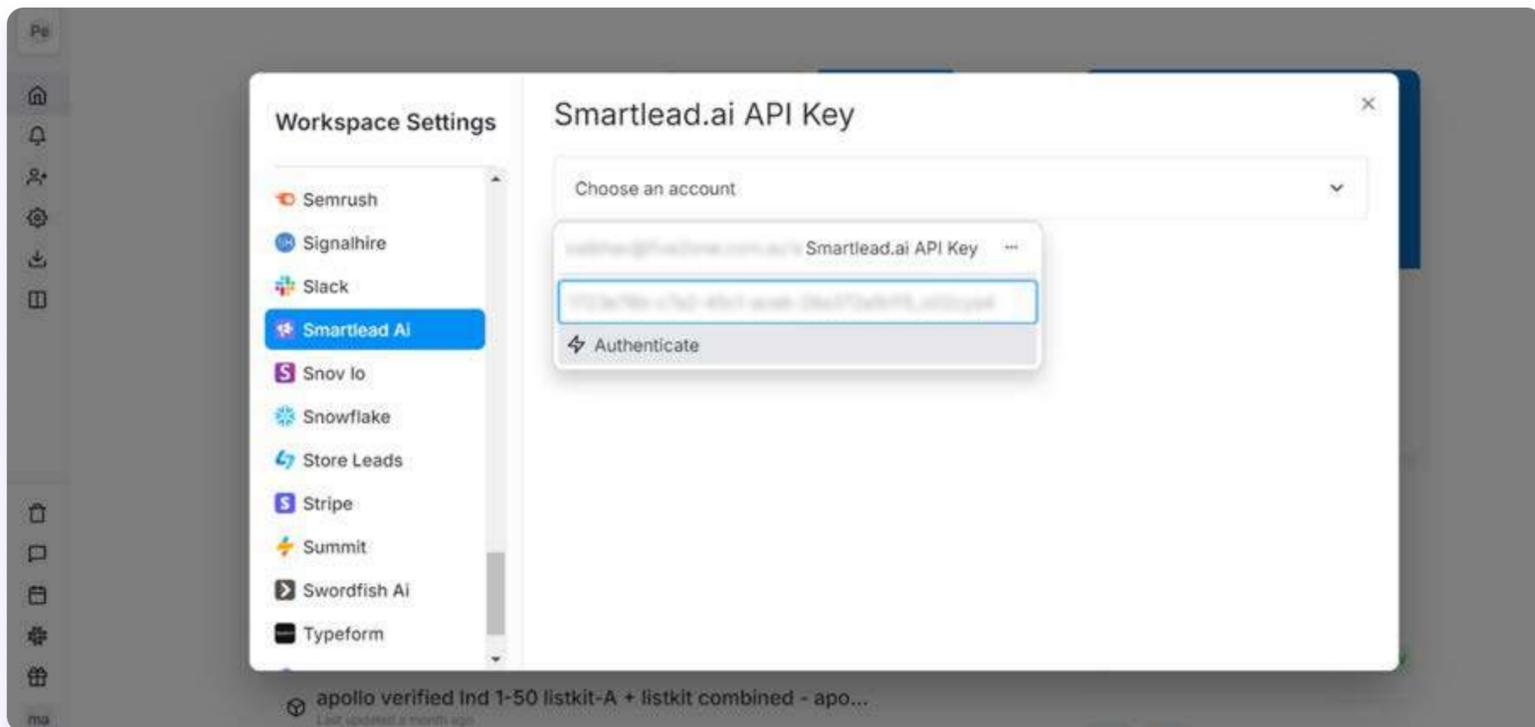


### Step 5

Under the “Integrations” section, scroll down, click on Smartlead.ai. Click on Add an Account and input your Smartlead API Key (that you’ve copied from your Smartlead account). You can see we already have an account connected to clay.



Once you've pasted the API key, click on Authenticate, and you are ready to go.



Here's a [guide](#) for additional assistance.

## Listkit

Listkit is a SaaS platform that is known for generating hyper-personalized B2B lead lists and delivering straight to your inbox within 24 hours. Not to forget, Listkit lead lists are totally verified.

### Listkit integration

#### 1. Retrieve API Key

- Navigate to your Smartlead account settings.
- Copy the API key from your profile.

#### 2. Integrate with ListKit

- Open ListKit settings.
- Find the "Integrate with Smartlead" section.
- Paste the copied API key.
- Click "Connect" to establish the integration.

### 3. Create a List in ListKit

- Specify your target criteria (e.g., CEOs of marketing companies).
- Choose desired credits and settings.
- Instead of redeeming credits, locate the "Add to Smartlead Campaign" widget.

### 4. Build a Smartlead Campaign in ListKit

- Open Smartlead and create a new campaign.
- Assign a name (e.g., CB Writes Copy Magic Campaign).
- Save the campaign.

### 5. Link ListKit List to Smartlead Campaign

- Find the newly created campaign in Smartlead.
- Go back to ListKit and locate the "Add to Smartlead" section.
- Choose the campaign (e.g., CB Writes Copy Magic).
- Save the changes.

### 6. Redeem Credits in ListKit

- Click to redeem the credits in ListKit.
- The list is now seamlessly sent to Smartlead within the specified campaign.

### 7. Verify Successful Transfer

- Check the Smartlead dashboard for the campaign.
- Confirm that the list from ListKit has been successfully imported into Smartlead.

This integration will streamline your lead generation process, eliminating tedious tasks and making cold email campaigns more efficient.

Here's an additional [resource](#) to help you optimize your campaign using Listkit and Smartlead.

## Databases

A database is a storehouse of info about potential customers. The information includes industry, contact details, company size, locations, and performance metrics.

To build a lead list, you need to use various filters and search these databases for potential customers that align with your ICP.

Apollo.io is one of the most popular B2B databases. We use it for our outbound, and we recommend the same.

Read [How to use Apollo to create an effective email list](#) to learn in detail.

## Email Finders and Scrapers

An email finder or scraper is a tool designed to retrieve email addresses publicly posted on the internet. Popular email scrapers are Clay, Instant Scraper, and FindyMail, PhantomBuster, GetProspect, Skrapp.io, Hunter.io, etc.

Here are a few more resources to come up with a lead list:

- [BuiltWith - Technology-Focused Intent](#)
- [Scrapping with Texau](#)
- [Wiza.co - Cloud LinkedIn Scraping](#)
- [Directories Scraping](#)

# 6 Copywriting



Once done with the lead list and all the technical processes, focus on creating the killer subject line, email body, and follow-ups.

As Vaibhav Namburi, our founder, says, ***the first rule of cold email: Do not make it sound like a cold email.***

Let's get into the details.

## Readymade Cold Email Template

A successful cold email roughly consists of four parts:

- Interesting subject line
- Offer
- Personalized message
- CTA

Let's look at an example:

*Subject: Do you use any editing tool?*

*Hey Vaibhav,*

*I was going through your articles on {website name} about {topic}.*

*Proofreading is fundamental to look authoritative with your audience and of course, Google. In short, proofreading = ranking higher.*

*This can be achieved without wasting 5 hours per blog post using {tool name}.*

*With {tool name}, you can:*

- *Paraphrase complex sentences*
- *Write human-like content*
- *Proofread, edit, and generate content ideas*
- *Check for plagiarism from billions of webpages in seconds*

*Can I interest you in a call for a brief walkthrough of the tool?*

*{Professional signature}*

This email works because it's short, simple, and offers a unique solution. It sets the tone right with a compliment at the beginning and includes a specific CTA (call-to-action). Another proven method is to start with a customer success story. No beating around the bush. Just jump straight to the point. This method specially works when the marketer doesn't have any information about the prospect to personalize the email content.

Here's an example:

*Hello Vaibhav,*

*Aveno Marketing achieved something incredible- 30+ meetings in just 3 weeks!*

*Here's how:*

- *Reached out to tons of leads effortlessly with unlimited emails.*
- *Efficiently managed all their leads using a unified inbox.*
- *Saved 20 hours/week by categorising leads based on their intent using AI.*

*Curious to know how you can achieve the same?*

*{Professional Signature}*

Like the above example? Copy right away.

Resources on crafting the killer email copy:

- [101 Cold Email Templates](#)
- [45 Different Types of Formulas for Cold Emails + Examples](#)
- [80 Scroll Stopping Subject Lines](#)
- [How to Follow Up?](#)

# Things to Keep in Mind While Crafting a Cold Email Body

Writing a killer cold email copy includes three things:

1. A template
2. A clear understanding of your buyer personas and ICP
3. Knowing the basic DOs and DON'Ts of cold email copywriting

Marketers can take a template and modify it, keeping points 2 and 3 in mind.

Follow the below DOs & DON'Ts of cold email copywriting to craft the best email.

## Short, Plain Text Emails Only

Avoid images in your initial emails. Keep it under 150 words to prevent spam triggers. In follow-ups, consider adding images to grab attention after the inbox is accustomed to your email address.

Keep paragraphs short, with no more than two sentences in the email body.

## No Links

Prospects find cold emails with links suspicious and avoid any engagement. Refrain from adding any links in cold emails.

## Add Unsubscription Text, Not Link

At the bottom of the email you can type *"Please respond with "not interested" if this isn't for you"*.

While it's necessary to have the unsubscribe link for GDPR compliance reasons based on the locations you're reaching out to, an alternate and healthier way is to ask leads to respond with a text if they're not interested.

This way, one can boost up the reply rate for free and improve the deliverability rate.

## Avoid Spam Trigger Keywords

Avoid spam trigger keywords and all caps in the subject line and email body. Focus on sounding conversational to align with semantic Natural Language Processing (NLP) algorithms.

Smartlead has a “spam checker” section in the mail sequence tab. It will show the words or terms that are likely to alert spam filters.

Go through the results and improve the email copy accordingly.

## Follow-Ups

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Although study shows 80% of sales take place between 5th to 12th follow-up, we recommend sending a maximum of 3 follow-up emails.

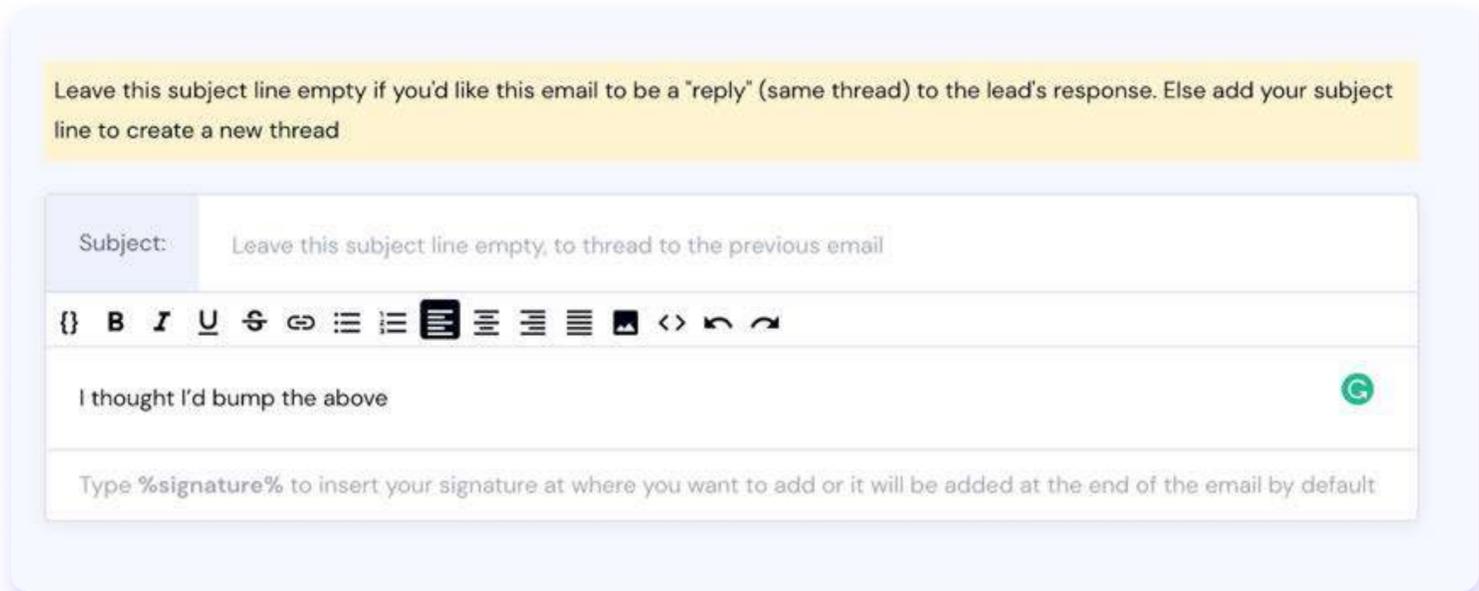
Keep a healthy interval between each follow-up email. Refrain from sending more than three follow-up emails, as it might lead to prospects marking you as spam for over-following. At Smartlead, we follow the below routine.

- First follow-up – 2 days after sending the cold email
- Second follow-up – 4 days after sending the cold email
- Third follow-up – 5 days after sending the cold email

## First Follow-up

The first follow-up’s job is to nudge the lead and keep your email top of mind, for this reason you don’t send the first follow up as a “new subject line”, but instead as a follow up in the same thread.

You can do that in Smartlead by leaving the follow-up email's subject line empty. When this happens, the follow-up email will appear as a "reply"/"thread" to the first email.



## Second Follow-up – Re-iterated/Revised offer

Clearly what you did in the first email didn't grab their attention. So, use the 2nd follow-up email as an opportunity to re-angle the offer.

For the second follow-up, focus on sending volume without affecting email reputation.



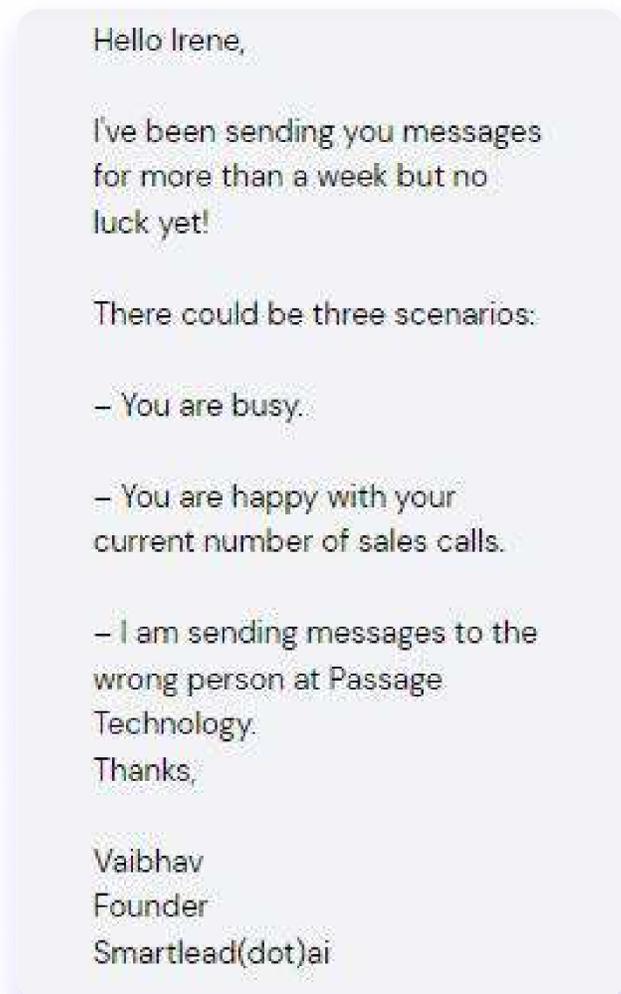
## Final Follow-up

Maintaining relationships with prospects is crucial in the SaaS space. Instead of breaking up with the lead, ask them to point you in the right direction.

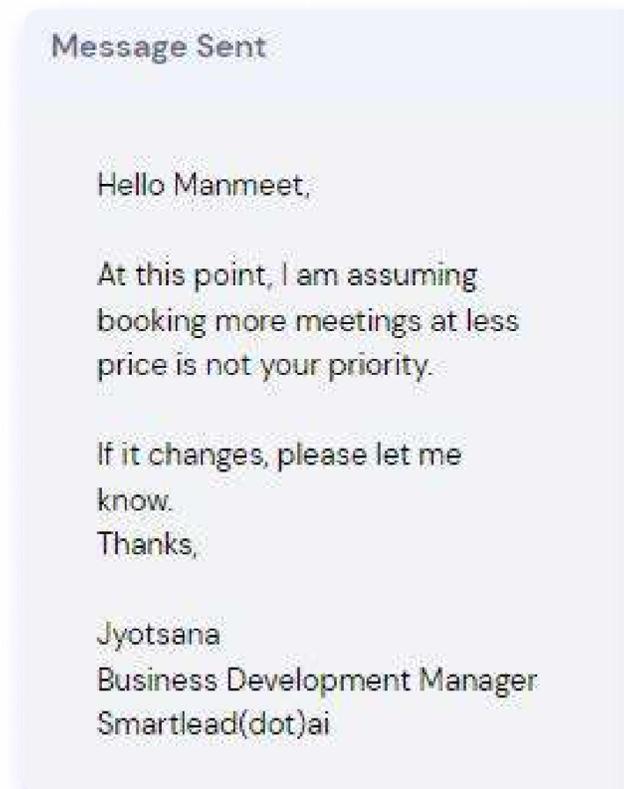
Here's how we do it:



Or



Or



## Personalisation

---

Study shows personalized subject lines generate [50% higher](#) email open rates.

Such statistics suggest only one thing: personalisation is the key to your prospects' hearts. You can personalize email messages in two ways—

1. Manually
2. Using an automation tool, such as Smartlead.

### Manual Personalisation

Manual personalisation is when you go through each and every cold email you're sending and personalize it using the information you've gathered from manual research.

Although highly effective, it's time-consuming and impossible for lead lists containing 1000s of leads. However, it's a good option when targeting a few prospects only.

Our experience with lead generation campaigns has shown that emails with personalized first lines can generate 2x positive reply rates. So, here are a few ideas on how to write a personalized opening line for cold emails:

- **Compliment on achievement:** *"Just completed reading your story on Bloomberg Businessweek! It's impressive how you have increased XYZ Company's sales by 57% in just a year."*
- **Referring to recent social media activity:** *I recently came across your LinkedIn post discussing the challenges in B2B lead generation, and I couldn't agree more with your observations.*
- **Referring to recent company funding round:** *"Congratulations on your recent funding round! I am curious about your so-and-so process."*
- **Referring to job ads:** *I noticed your recent job ads and wanted to introduce a {product} that can solve {pain point}."*

- **Referring to company growth:** *"Lets 2X your sales team from 3 people to 6, without hiring a single person, with AI"*
- **Compliment on product release:** *"Congratulations on the successful launch of your latest product! The features and capabilities it offers are truly remarkable."*

Effective campaigns require more than just personalisation; providing a unique solution to prospects' problems is crucial. Copywriting skills alone won't suffice—one needs a problem-solving approach for launching successful cold email campaigns.

Understand customer issues deeply, research your audience, and provide distinctive solutions based on an Ideal Customer Profile for engagement.

## How to Automate Personalisation in Smartlead

One can automate personalisation when sending bulk emails using Smartlead by adding custom variables.

### Custom Personalisation Variables

Custom Personalisation Variables or custom variables in Smartlead.ai are dynamic tags you can use in your emails to personalize content. They can represent the first name of the recipient, dates, time of day, sender's name, domain, or other custom fields.

You can use variables like `{{first_name}}`, `{{company_name}}`, or `{{phone_number}}` in subject lines and email templates. These variables are automatically mapped when you upload a lead list in a CSV file. For unique data fields, you can also map them as custom fields to create custom variables.

Here's how to add custom variables to personalize your cold emails:

**To add recipient's name or company name in the subject line, do this:**

Quick question, {{first\_name}}?

Solution for {{company\_name}}

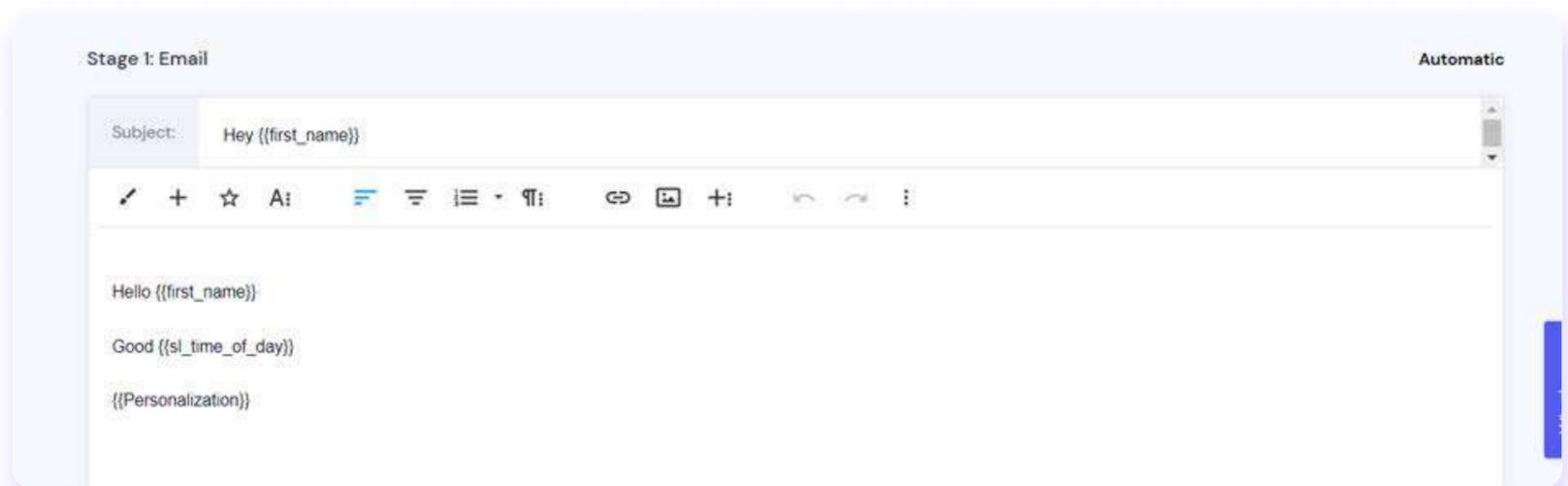
**To add the time of day, simply add this to your copy:**

Good {{sl\_time\_of\_day}}

This will convert to Good morning, Good afternoon or Good evening based on when the email is sent specific to the campaign timezone you selected. The daytime segments are set up as below.

- For emails sent before 12PM will say Morning
- Emails sent between 12 PM to 3 PM will say Afternoon
- Emails sent after 3 PM will say Evening

Refer to the screenshot for reference:

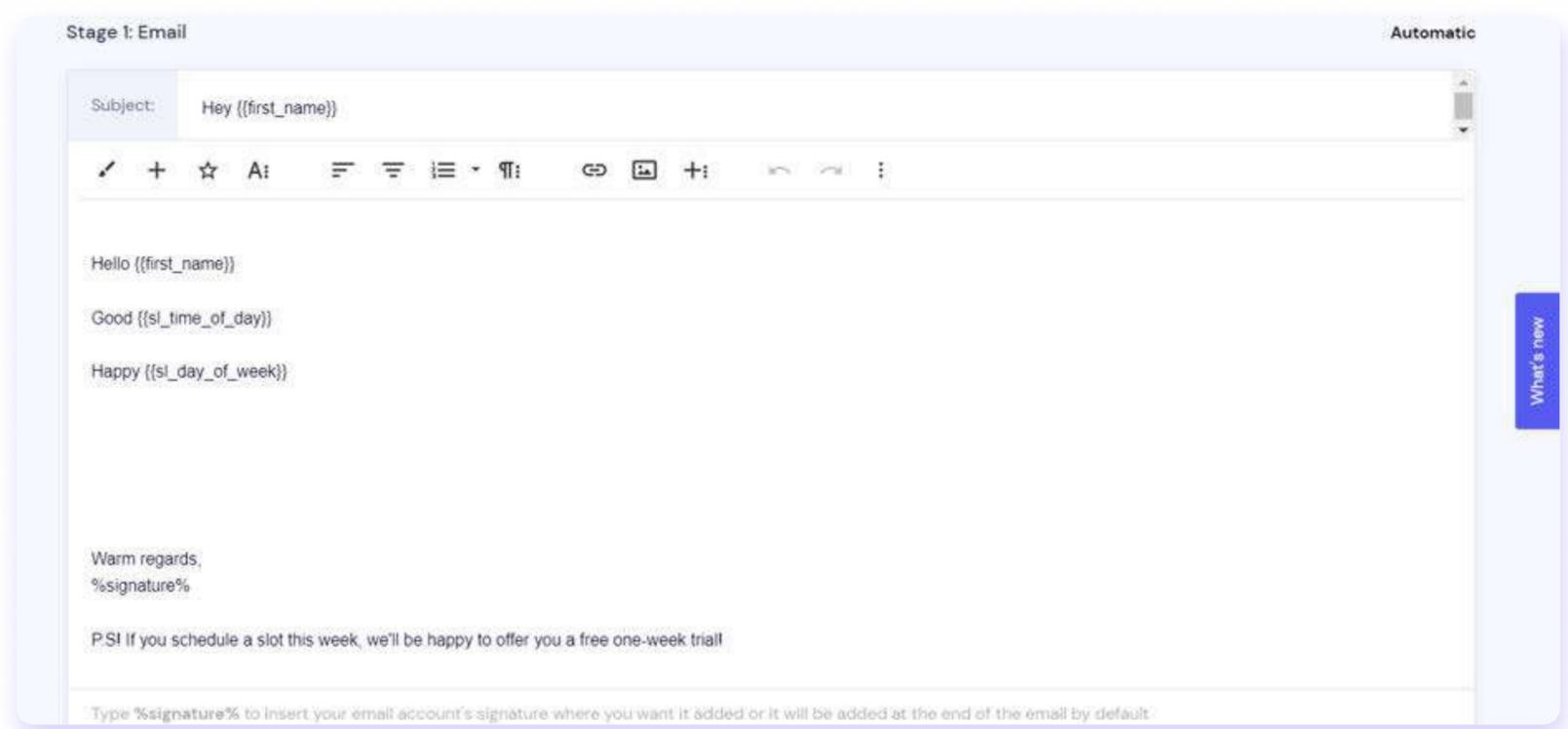


To add the day of the week, simply add this to your copy:

Happy {{sl\_day\_of\_week}}

This will convert to Happy Monday, Happy Tuesday, etc.

Refer to the screenshot:

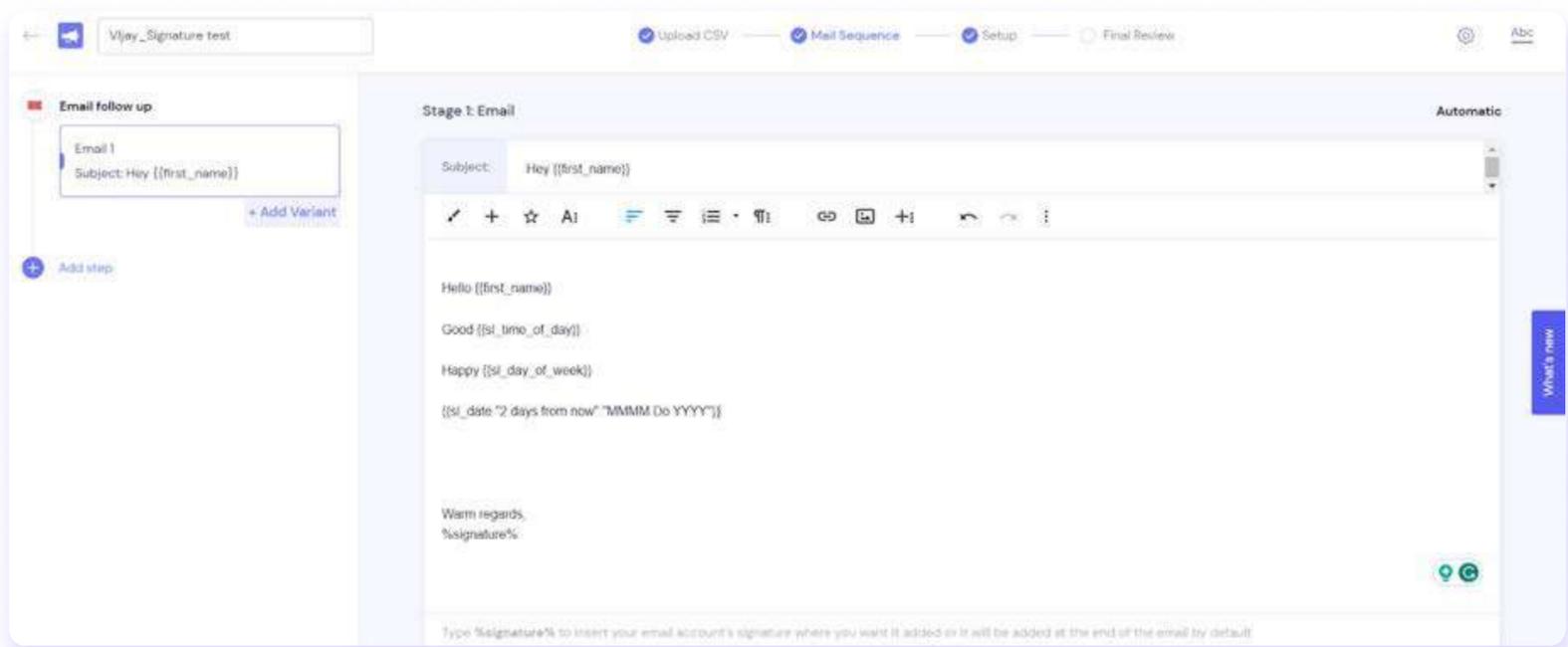


**Note:** Make sure there are no gaps between the brackets `{{}}` and `sl_time_of_day` or `sl_day_of_week`.

In a similar fashion, you can always add custom dates to try to book a time or meeting with your lead.

`{{sl_date "10 minutes from now" "dddd, MMMM Do YYYY"}}` -> Thursday, January 19th 2023

`{{sl_date "2 days from now" "MMMM Do YYYY"}}` -> Jan 21st 2023



Similarly, you can try all the below variables:

- adds 2 days from now
  - `{{sl_date "2Days"}}` '21 Jan 2023'
- subtracts 2 days from now
  - `{{sl_date "2Days ago"}}` '17 Jan 2023'
- adds 2 days from now in specific format
  - `{{sl_date "2Days" "Do MMM"}}` '21st Jan'
- adds 2 weeks from now
  - `{{sl_date "2week"}}` '02 Feb 2023'
- adds 2 months from now
  - `{{sl_date "2month"}}` '19 Mar 2023'
- adds 2 years from now
  - `{{sl_date "2year"}}` '19 Jan 2025'

\*\*\*If you want to only do weekdays, aka if you do `{{sl_date "2Days" "Do MMM"}}` and 2 days from now is a weekend, you can "Skip" weekends by adding `now_wd` as below:

`{{sl_date "now_wd 2Days" "Do MMM"}}` where `wd` refers "weekday"

Some other custom variable ideas:

`%signature%`

This will dynamically place the signature at different places in the body using the tag; else, it'll be attached to the bottom of the body.

`%sender-name%`

This will dynamically place the name of the sending mailbox into the body of the copy using the tag. Use this if you don't want to use your mailbox signature.

`%sender-firstname%`

This will dynamically place the First Name of the sending mailbox into the body of the copy using the tag. Use this if you don't want to use your mailbox signature.

`%sender-domain%`

This will dynamically place the domain of the sending mailbox into the body of the copy using the tag.

## 1 Spintax

Spintax or Spin Syntax is a bulk emailing hack that creates variations of sentences or words by using multiple words or phrases in the template. You can add similar words such as {Hey} and {Hi}, separated by a vertical line |

For example: {Hi|Hello|Hey}

### ***Why use spintax?***

Sending “different” versions of the same CTA or text prompts ESPs into thinking you’re

sending a different email to different people vs the same email to 1000 people, in effect not treating it as a “mass” cold email.

### Step 1

- Open the email body of an existing campaign or go to creating a new “mail sequence” of a new campaign

### Step 2

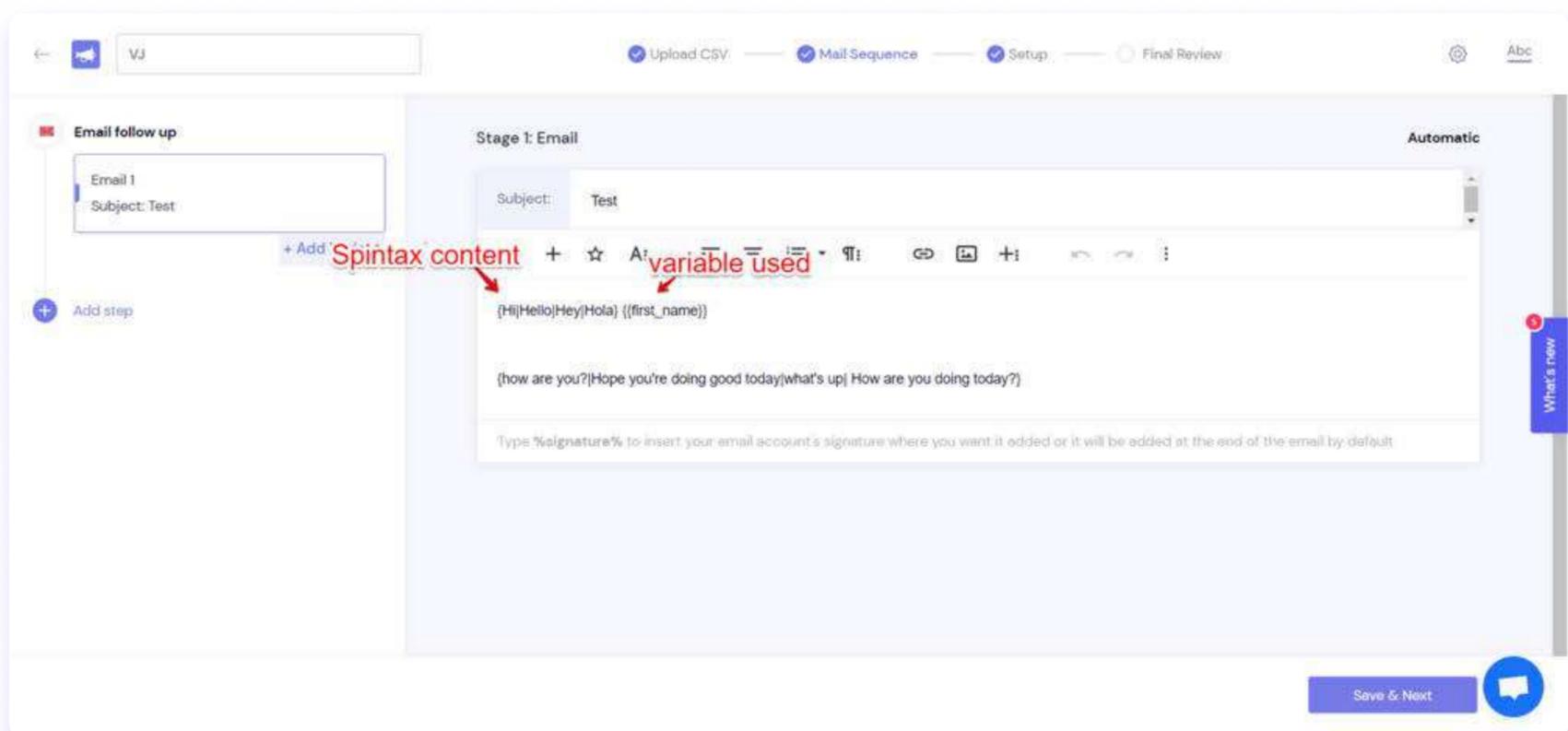
- In the email body, place your Spintax text in this format:

```
{Let's jump on a call | Are you free tomorrow? | Keen for a demo ?}
```

- You can put the texts with or without texts:

```
{Hi|Hello|Hey} Pierre
```

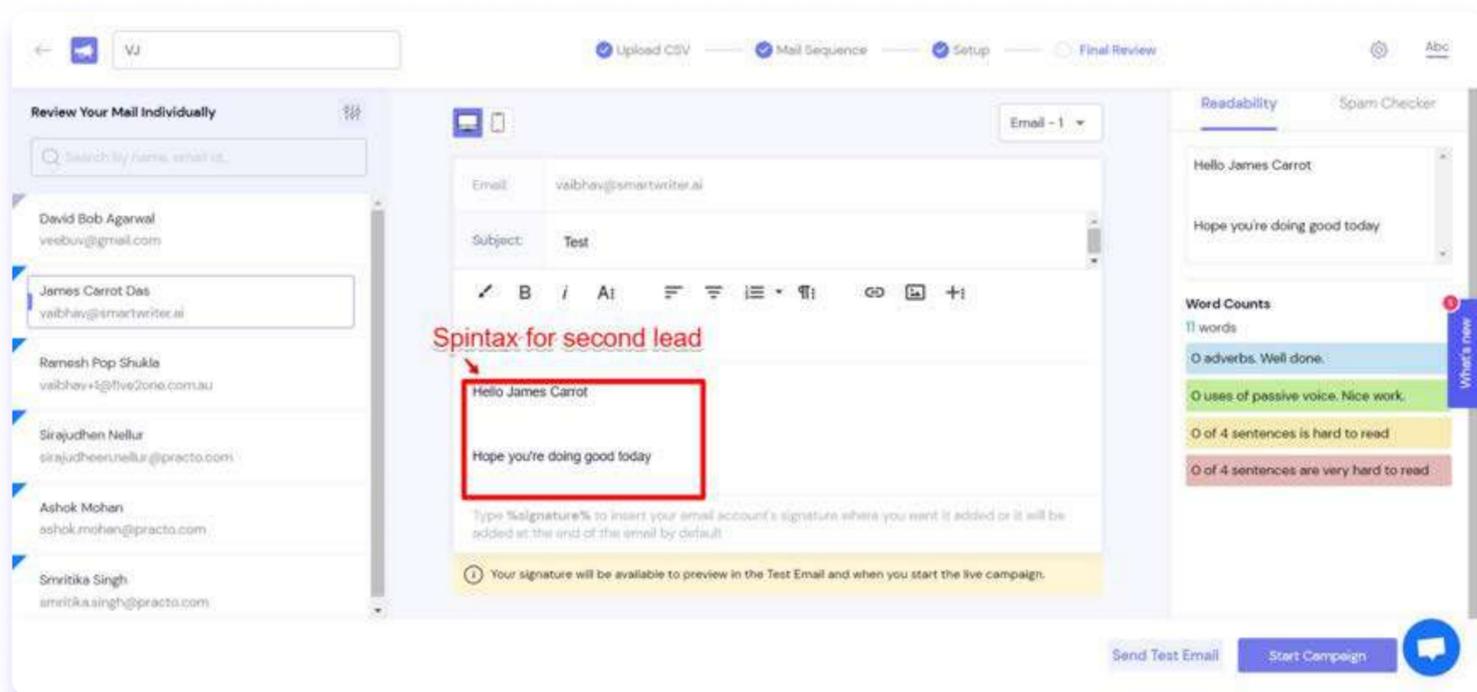
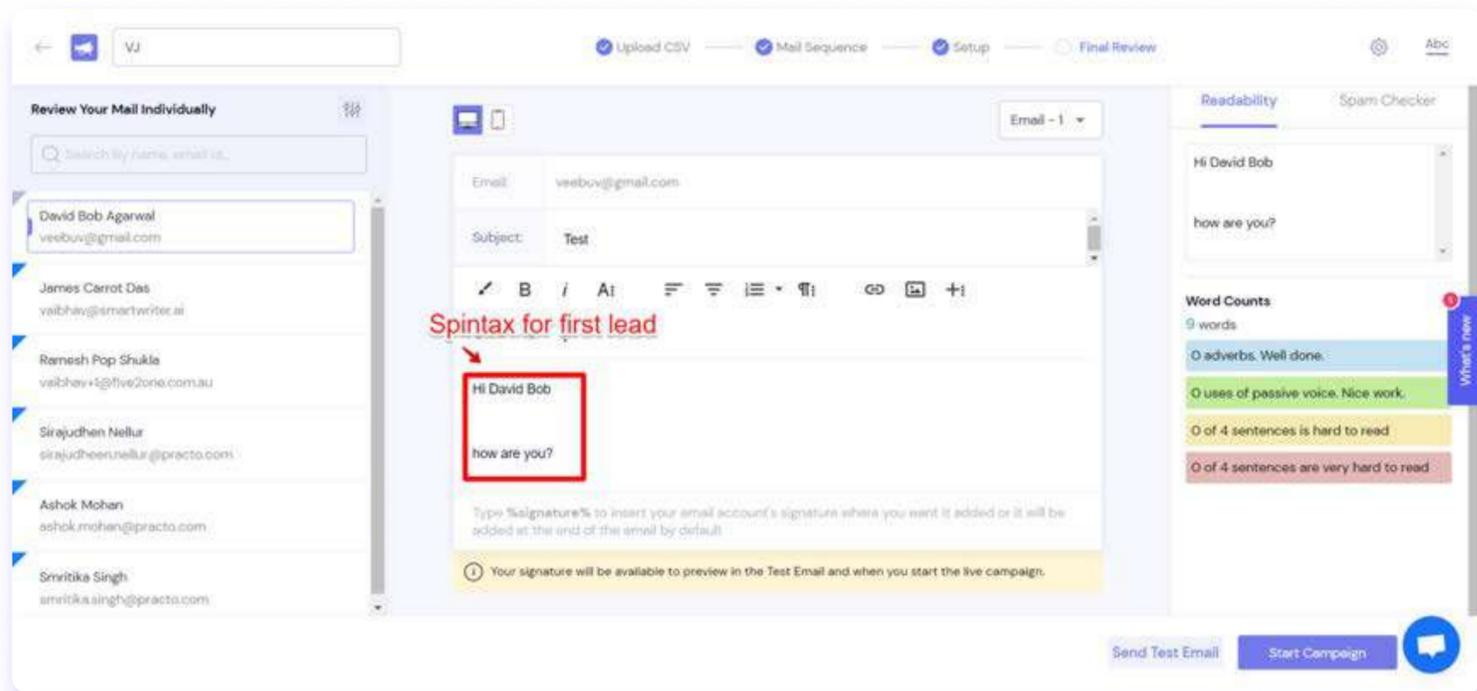
- Here’s an example for better understanding.

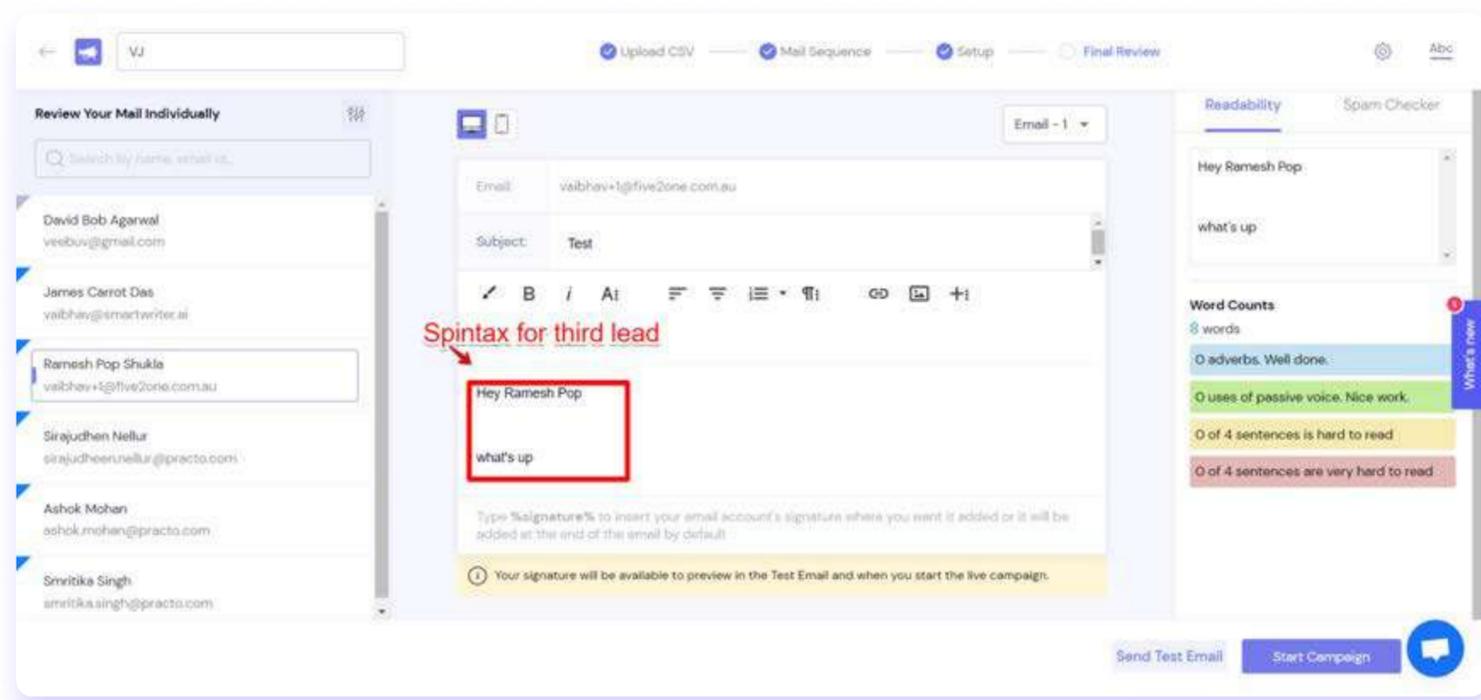




### Note

Please cross-check your Spintax in the final review to view the content.





## A/B testing

A/B testing allows you to test different subject lines, different email copy, different opening lines or call to action analytically to see which combination of the subject line + body + offer gives you the best result.

A/B testing is very important to assess and remove copy that isn't resonating with your audience or weed out certain "trigger" words hurting your deliverability.

We recommend A/B testing email copies to learn what best aligns with your target audience.

Smartlead users can A/B test in three ways:

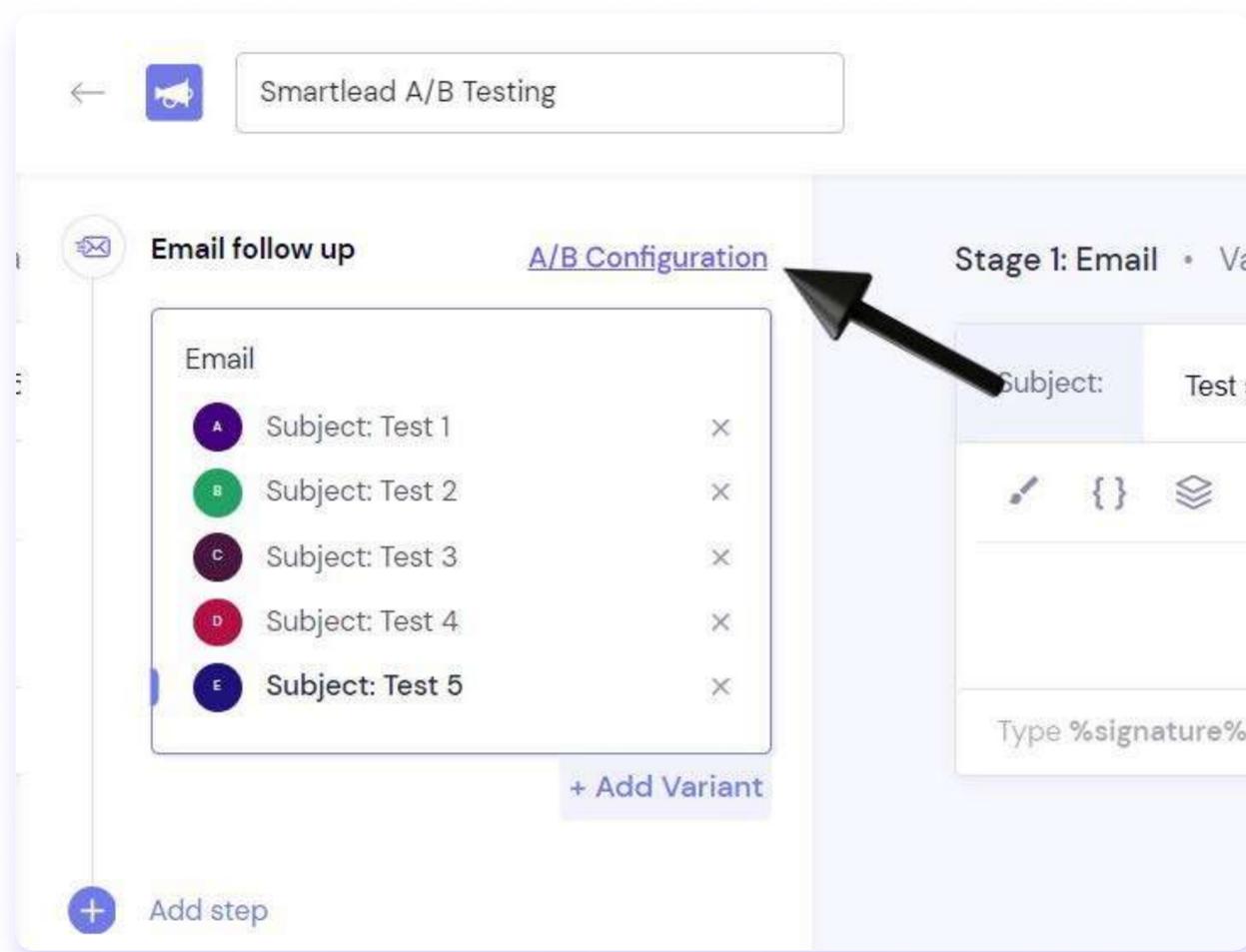
1. Manual Equal Distribution
2. Manual Distribution with Variant Percentage Allocation
3. AI Percentage Distribution

## 1 Manual Equal Distribution

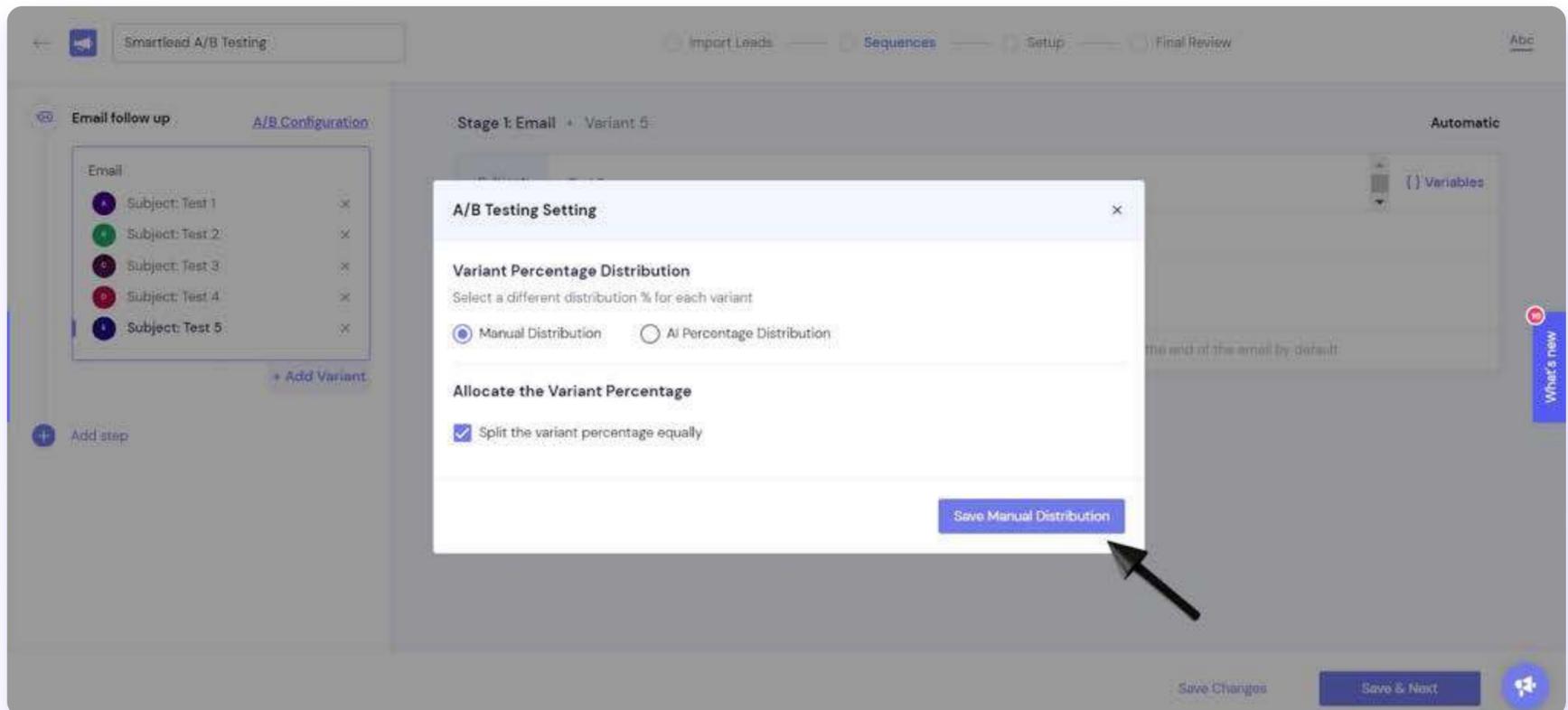
Manual Equal Distribution is a method in Smartlead's A/B testing system where, once you run the campaign, it will equally distribute the variants across all leads without requiring any further action from you.

This allows for an even distribution of each variant to the leads, ensuring that each variant has the same opportunity to perform.

To do this, click on the "A/B Configuration" button while creating the mail sequence.



In the popup "A/B Testing Settings", you don't need to do anything. The default settings will be "Manual Distribution" and "Split the variant percentage equally". Click on "Save Manual Distribution". And you are done.

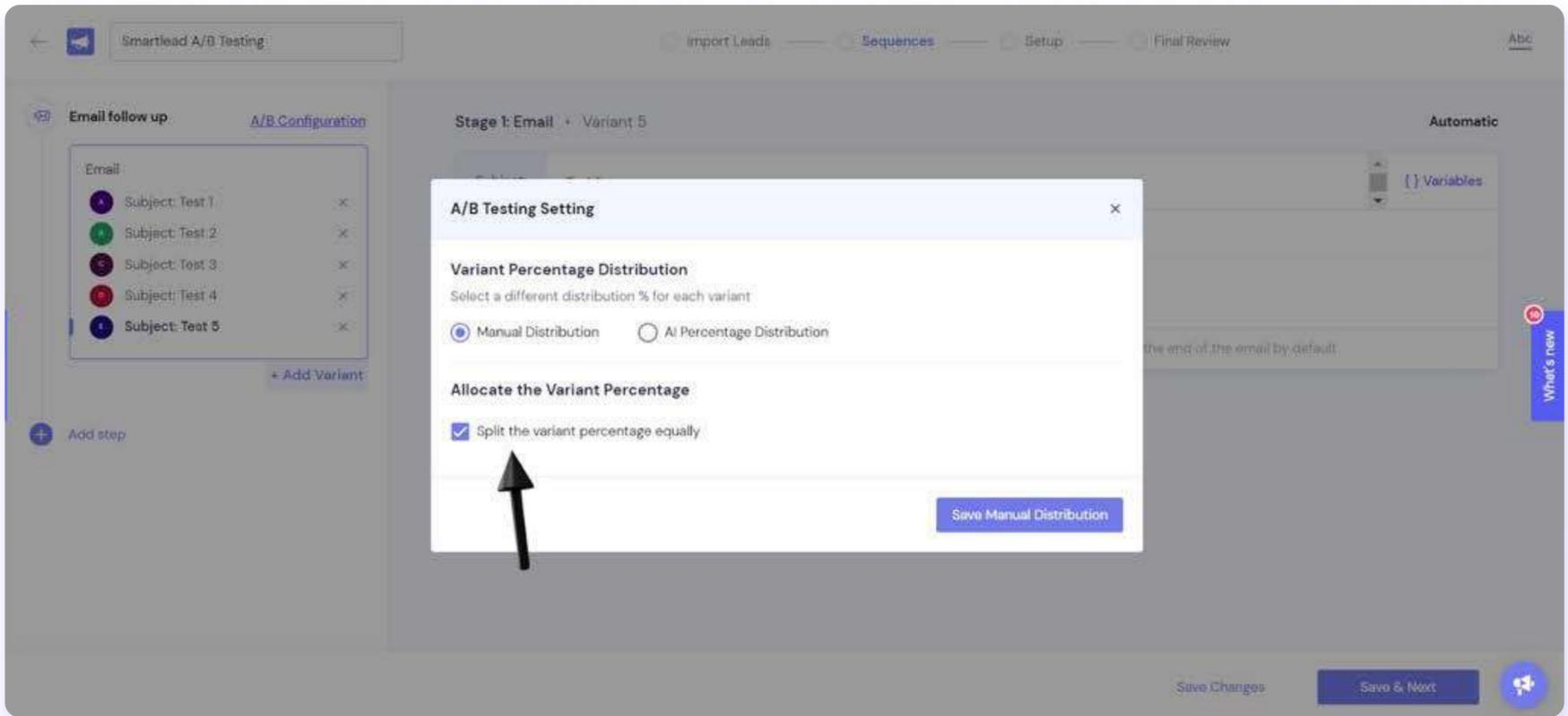


## 2 Manual Distribution with Variant Percentage Allocation

This A/B testing settings in Smartlead allows you to manually set the percentage distribution for each variant in your A/B testing campaign. You can choose up to 10 variants, ensuring a minimum of a 10% pool for each to effectively determine the best-performing variant.

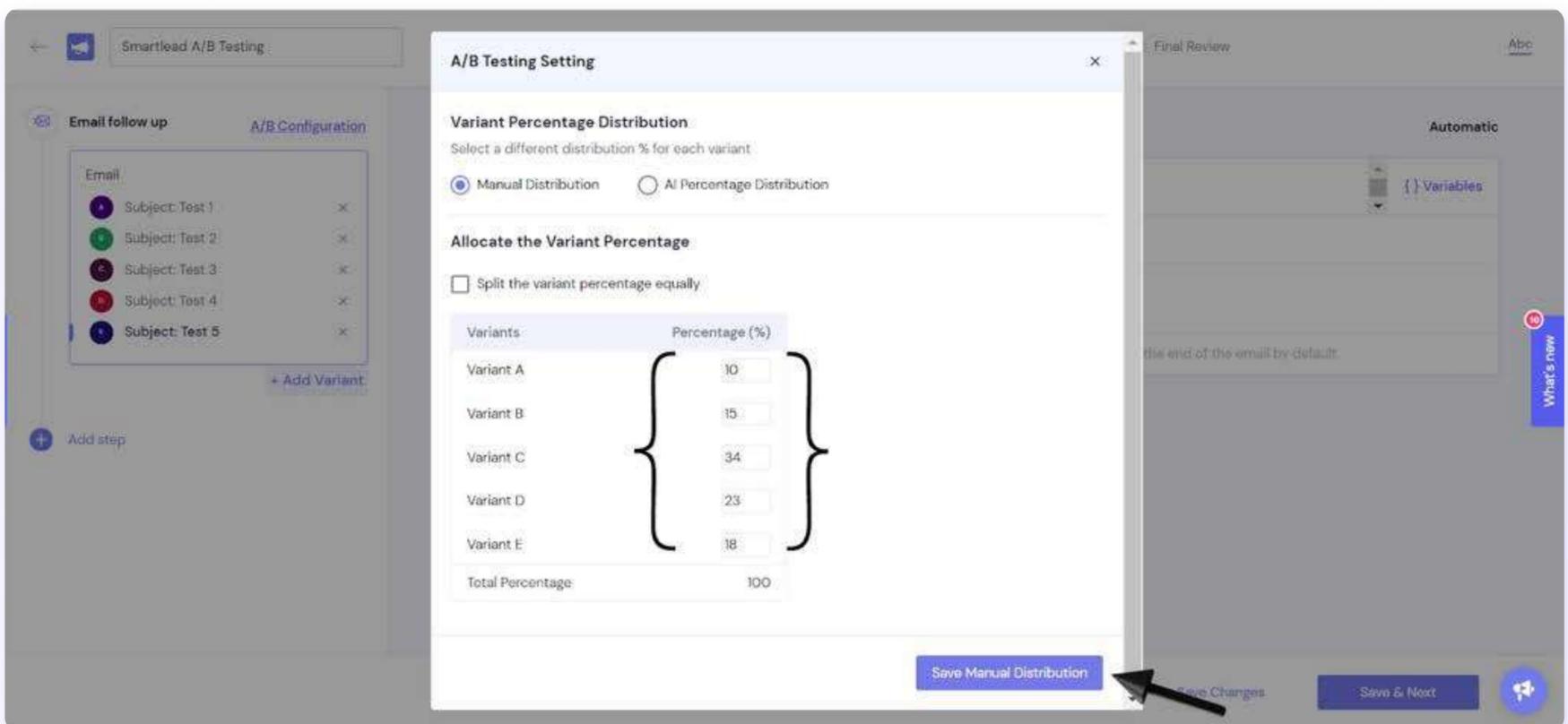
To do this, click on the “A/B Configuration” button like the previous step, once you’ve added the variants.

Next, there will be a popup “A/B Testing Settings”.



Keep the default setting “Manual Distribution” and click on “Split the variant percentage equally”.

Now, manually set the percentage distribution.



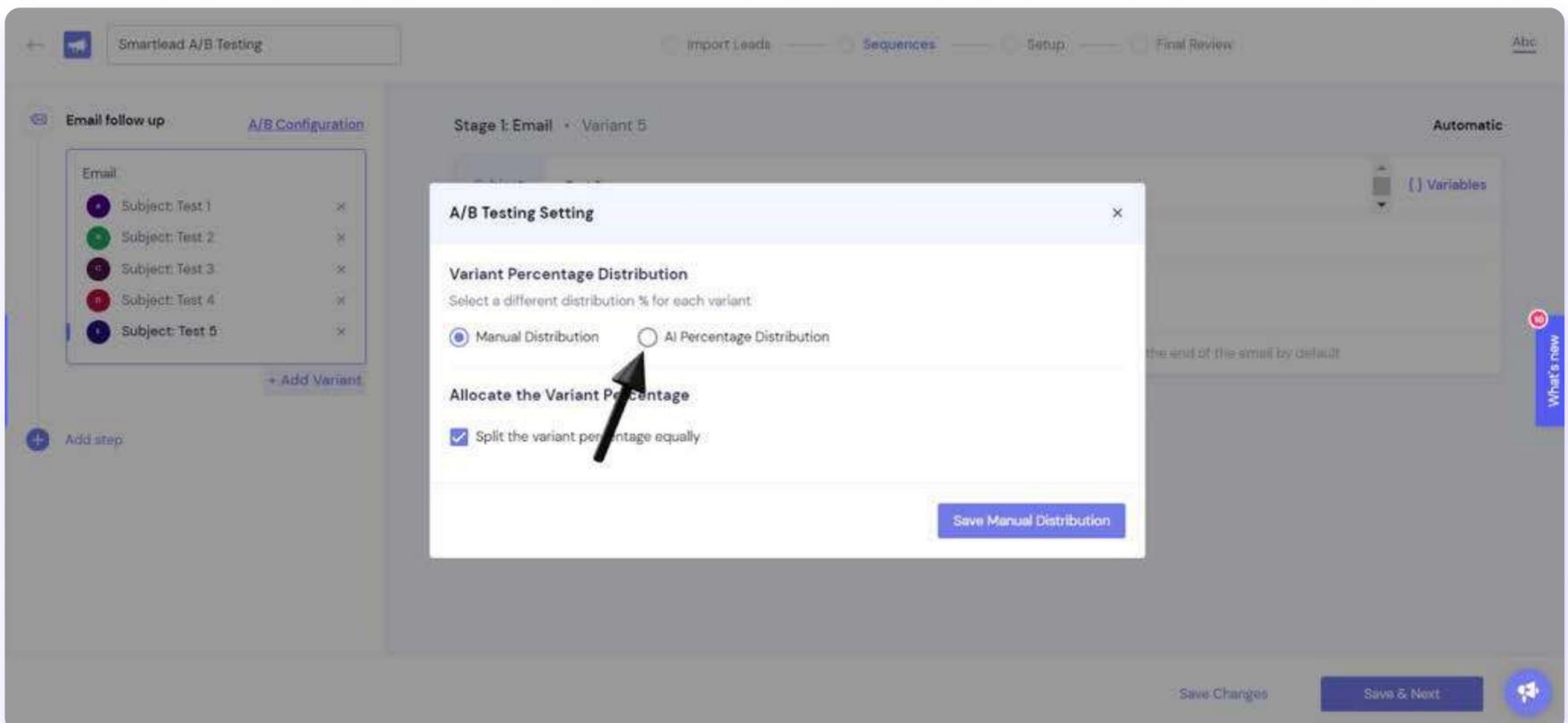
And click on “Save Manual Distribution”.

### 3 AI Percentage Distribution

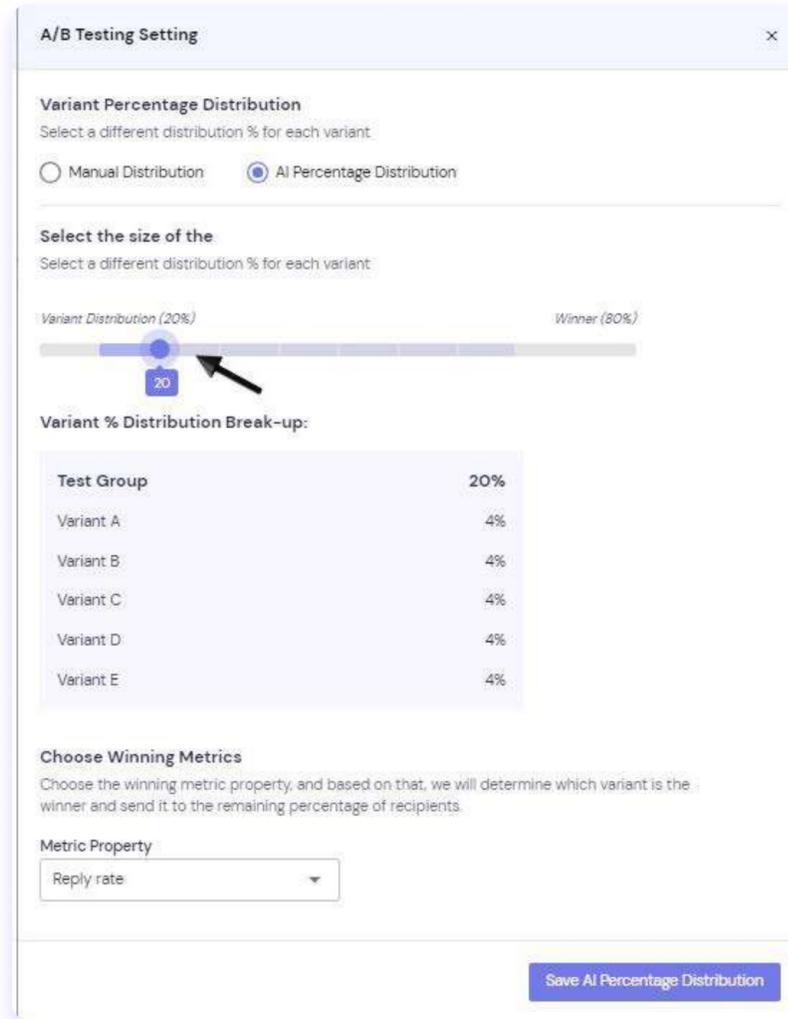
In this setting, you need to add the winning metric (Reply rate, Positive Reply rate, Click rate, or Open rate) that matters for the campaign. Based on this selection, Smartlead will determine which variant is the winner and send it to the remaining percentage of recipients.

**\*\*\*Lead Sample Percentage:** The percentage of the uploaded lead list you want to be used for testing variants.

To do this, go to the “A/B testing Settings” and click on “AI percentage Distribution”.

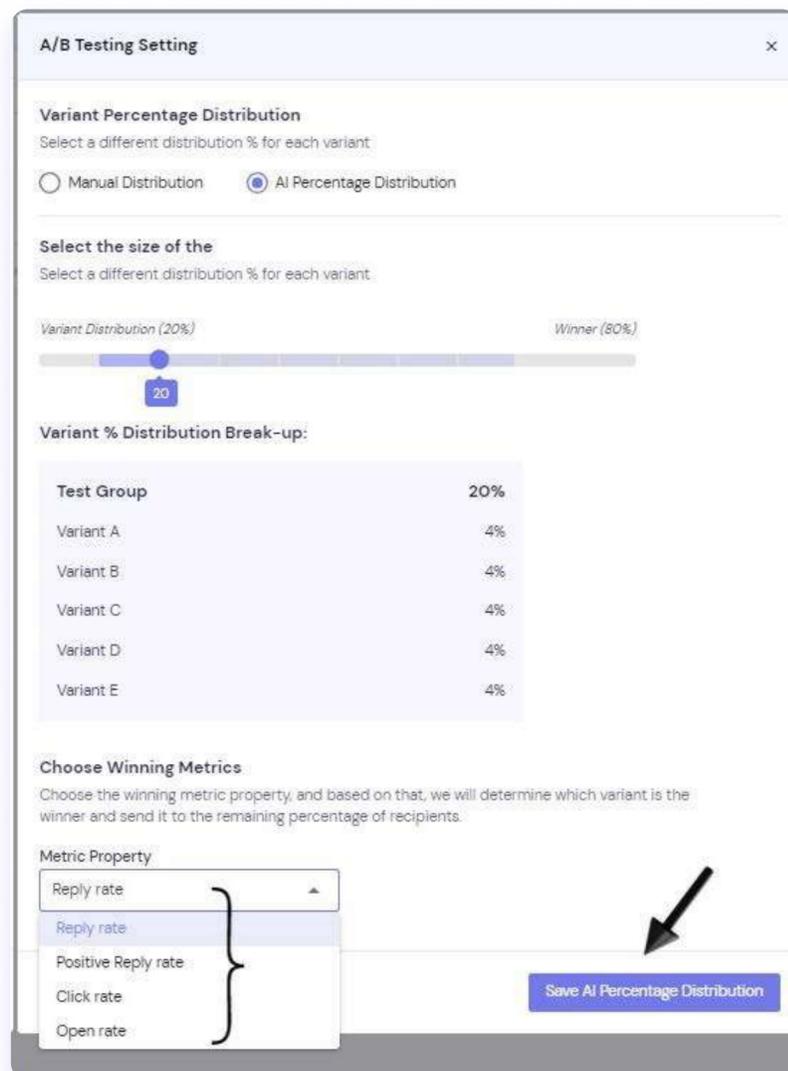


Now, from the bar, choose the desired variation distribution percentage from 10% to 80%.



Now, under the “Choose Winning Metrics”, choose the desired metric for the campaign. And click on “Save AI Percentage Distribution”.

And you are done. Launch the campaign, monitor performance metrics, and use the findings in your campaigns strategically.



# 7 Launching a Campaign



**Disclaimer:** This section is for readers who've done the technical setup and warm-ups, created lead lists, and have the email copy ready. Launch an email campaign only when you're done with the above-mentioned processes. It's only convenient if one follows a particular order.

As the whole point of creating an email infrastructure boils down to launching killer cold email campaigns, we're going to look at some tips before the instructions.

Please note going forward, the steps are suitable for sending 10,000, 1000, 5000 emails, or any other email volume you want.

## Tips

- Send only 36–50 messages per day from an email address.
- Create only 3 mailboxes per domain and 5 to 10 domains per workspace/tenant.
- Rotate mailboxes monthly. For example, if you've 6 domains–A, B, C, D, E, F (1 domain= 3 mailboxes). In the first month, use three domains (A, B, C). In the next month, use the other three domains (D, E, F) while the domains A, B, C will be on break during the second month.
- Move all unsubscribed leads to the global DNC to stop sending any messages in the future.
- Maintain a bounce rate of less than 3%.
- Don't track all the sent emails. Track only 1/10th of the sent volume.
- Attach your unsubscribe link in the header tags even if it's added in the email body.
- Never send cold emails to personal Gmail account`

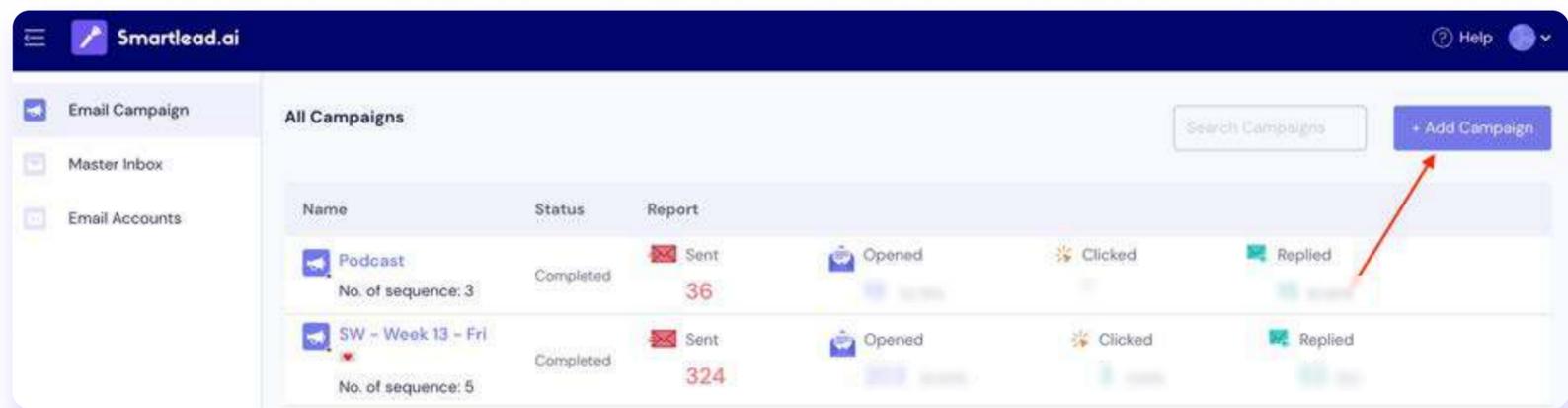
For instance, when sending 10000 cold emails, send 9000 in 1 campaign without tracking and the rest 1000 with tracking. It allows you to see which mailboxes are performing better or not better without affecting deliverability too much.

Follow the below instructions to launch a cold email campaign with Smartlead.

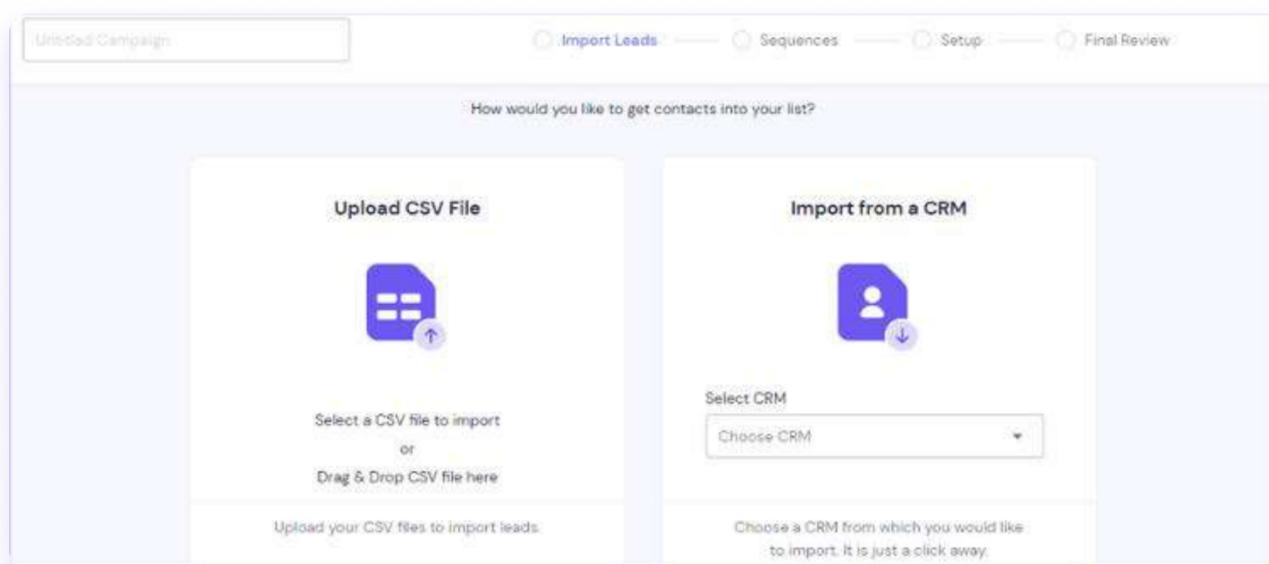
## 1 Upload the Lead List in CSV Format

Organize the downloaded lead list on a Google sheet or Excel doc using various columns to segment it properly.

Now, log in to the Smartlead app and click on the 'Email Campaign' section from the navigation menu.

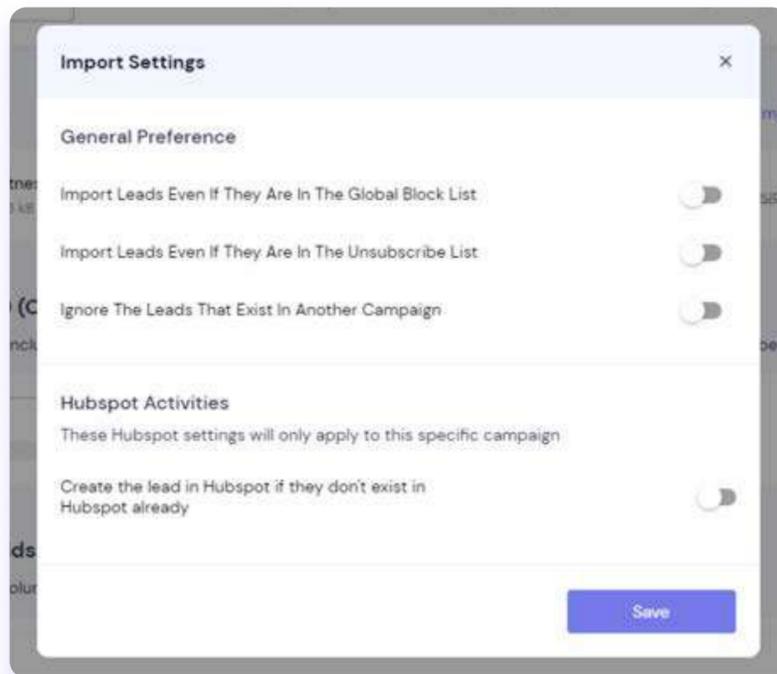


On Smartlead, you can either upload the lead list as a CSV file or import it directly from your CRM.



Once you upload, there will be a pop-up on the screen as shown below. It will have 3 options:

- Import Leads Even If They Are In The Global Block List
- Import Leads Even If They Are In The Unsubscribe List (of previous campaigns)
- Ignore The Leads That Exist In Another Campaign



## What is Global Blocklist

Global blocklist allows you to block an entire domain or particular email address to prevent specific leads or entire organizations stop receiving further emails from your organization.

For example, you can block:

abc.com (all the email addresses associated with that domain)

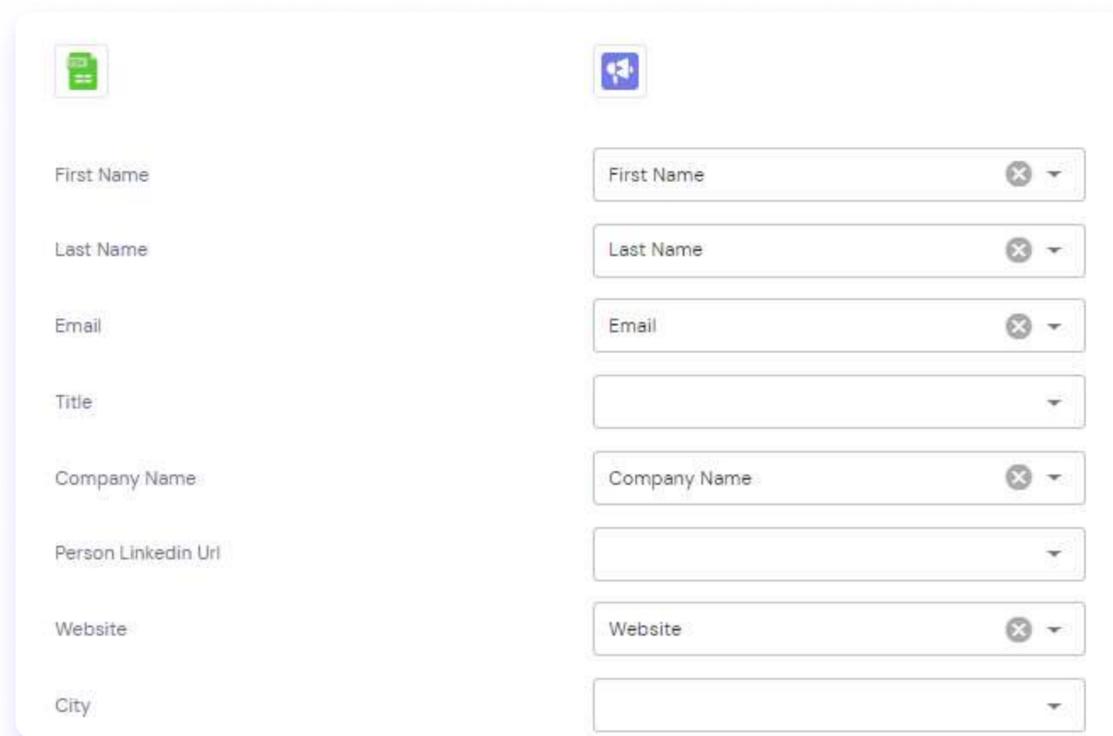
marc@abc.com (particular email address)

Marketers use the global blocklist for regularly bounced-back email addresses, leads who have requested opt-out from your mailing list, and/or competitors. With Smartlead, you can activate the DNC list even during an ongoing campaign.

Also, note that Smartlead's Global blocklist can be client specific or account level. Using the blocklist can bring a lot of flexibility in client management.

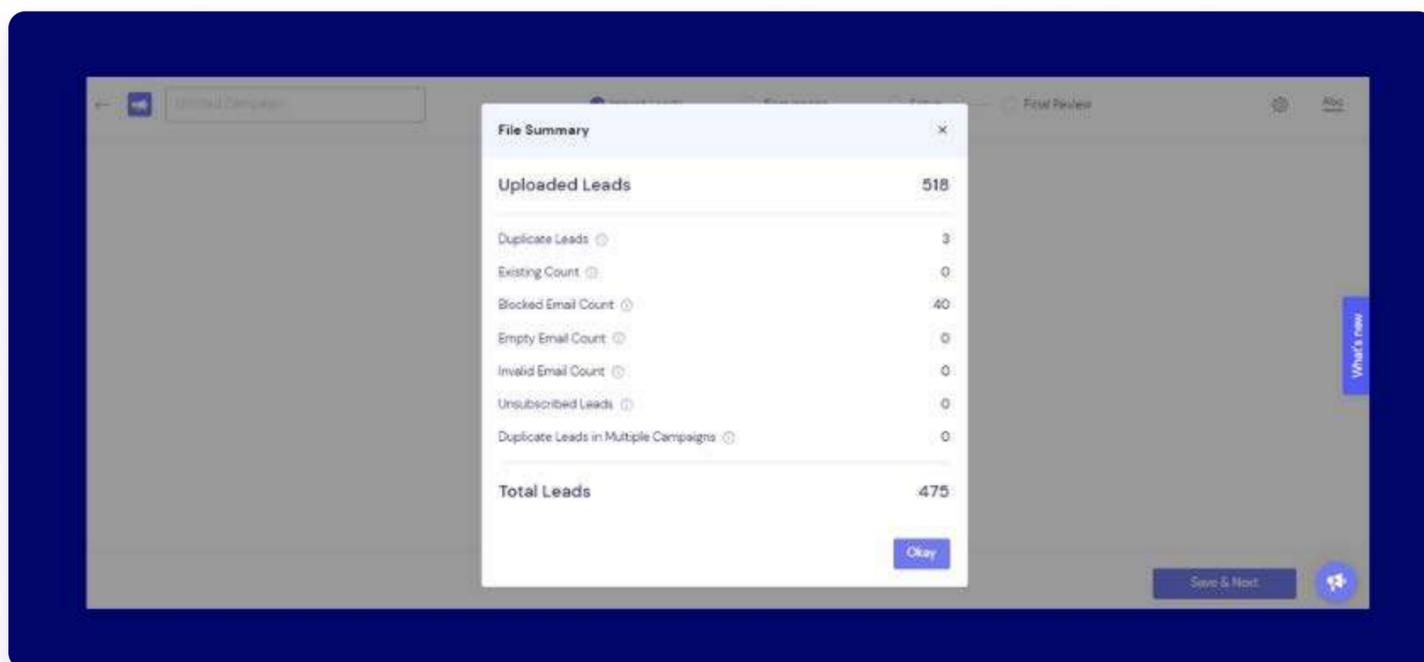
Read [How to Add Leads/Domains to the Global Blocklist](#) to learn more.

## 2 Map the CSV Columns



Next, connect each CSV column to the right dropdown option.

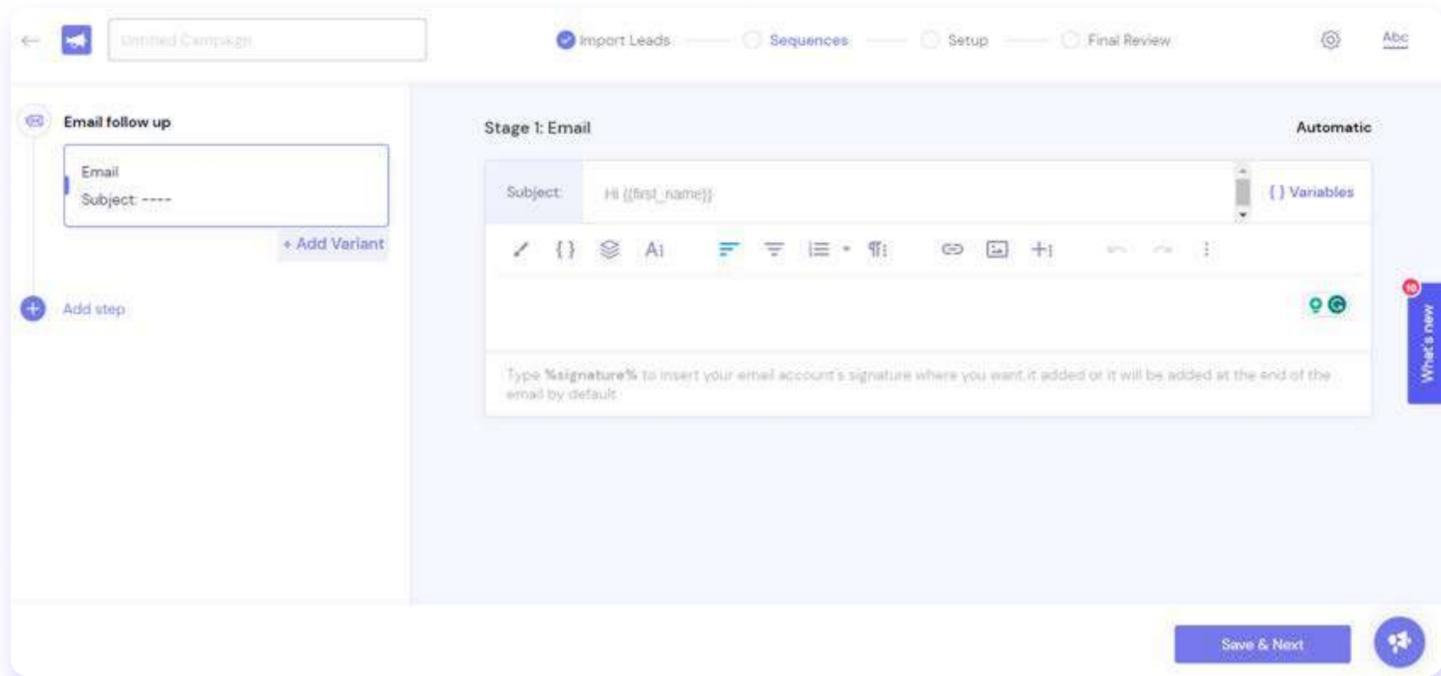
Afterwards, you will see a pop-up with a summary of the contact list, as shown below.



This summary is extremely crucial for bulk email outreach. Go through it and see if anything needs your attention.

### 3 Write the Email Sequence

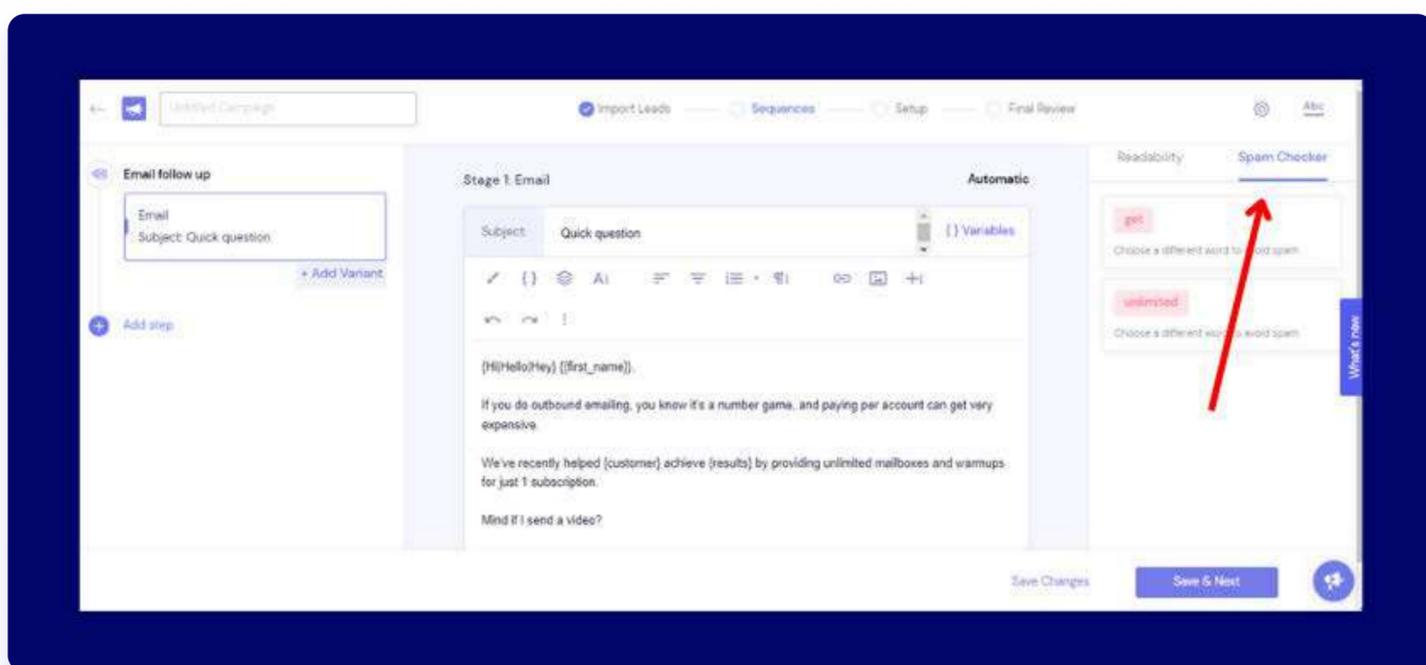
Once you click “Save & Next”, you will go to the next step—sequences.



This is where you write the email body, subject line, and set the follow-ups for your cold email campaign.

When writing the email body, check out the “spam checker” section on Smartlead. It will show the words or terms that are likely to alert spam filters.

Go through the results and improve your email copy accordingly.



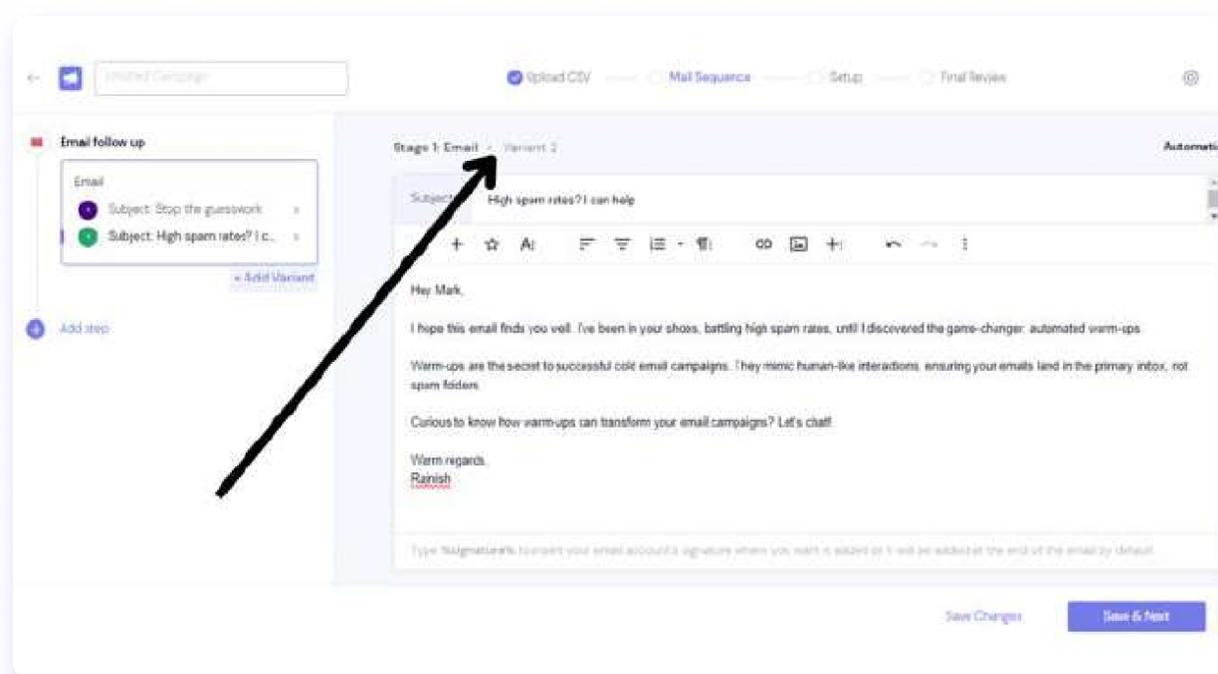
## 4 Add Variant – A/B Testing

A/B testing allows you to test different subject lines, different email copy, different opening lines or call to action analytically to see which combination of the subject line + body + offer gives you the best positive reply rate.

To A/B test in Smartlead, click on the “add variant” option as shown below.



If you want to test just the subject lines, you can keep the same email content in both variants. But to test opening lines, CTA, or email body, create a different version of the same email in the next variant (variant 2) as shown below.

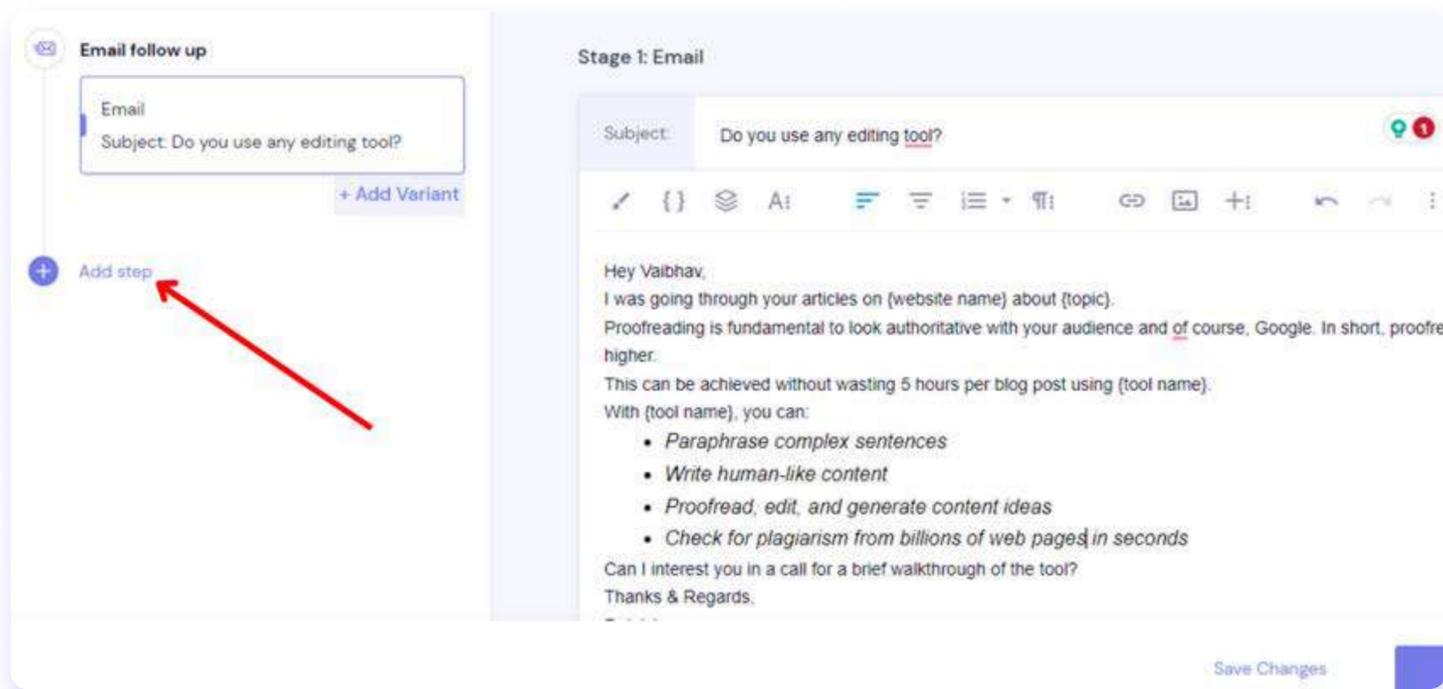


If you don't want to set follow-ups, click on “Save & Next”. For follow-ups, read the next section.

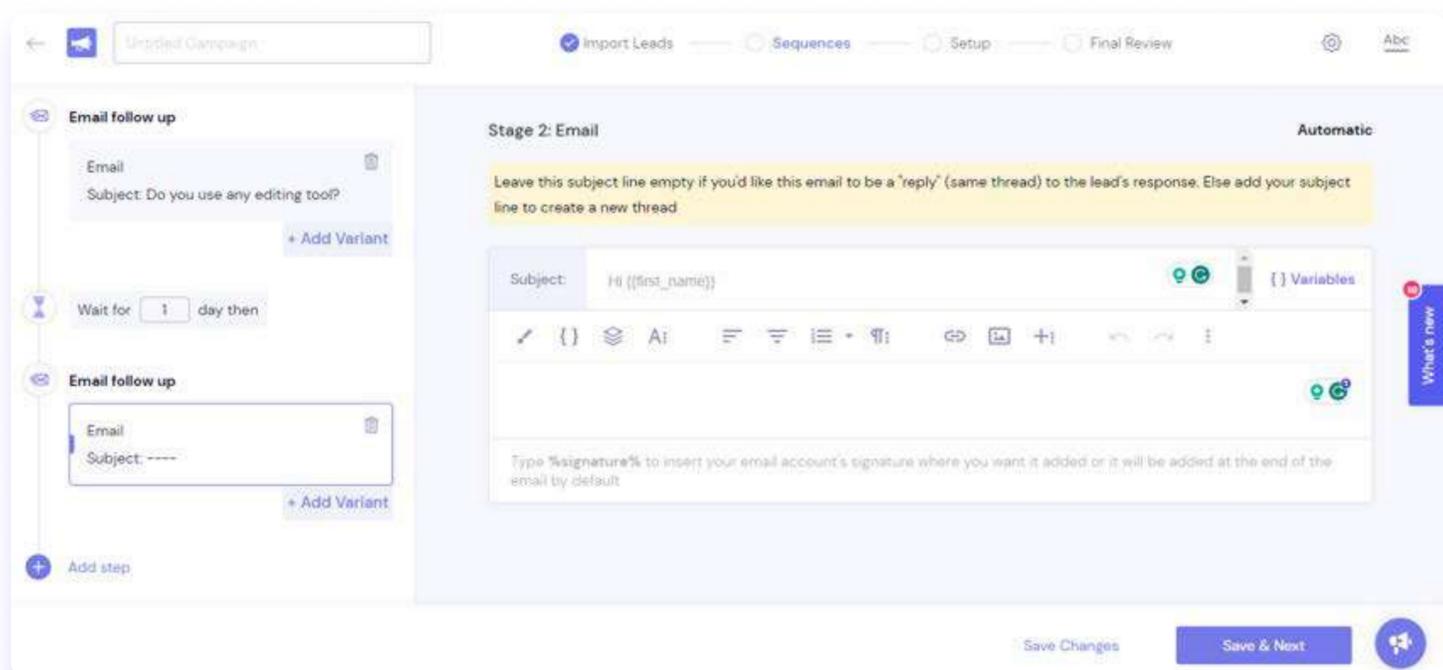
## 5 Set Follow-Ups

Even though you're sending bulk messages, it's important to follow up to get the best results.

Click on the "Add step" option as shown below to set follow-up emails.



We recommend sending the first follow-up email in the same thread as of the cold email.

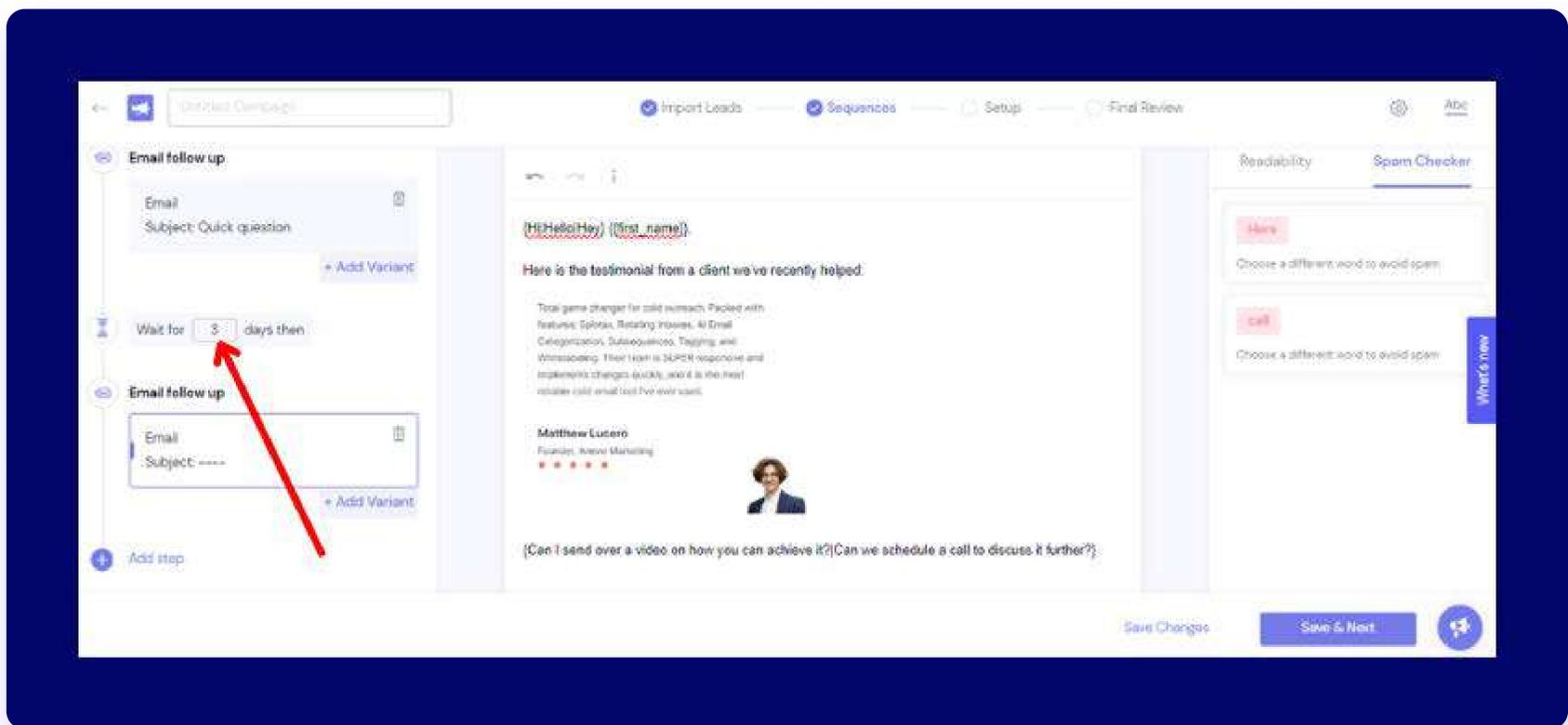


Set a maximum of 3 follow-ups. Send the second follow-up in a new thread with a revised offer in case of no replies.

Set a healthy interval between each follow-up as shown below.

At Smartlead, we follow the below routine.

- First follow-up – 2 days after sending the cold email
- Second follow-up – 4 days after sending the cold email
- Third follow-up – 5 days after sending the cold email

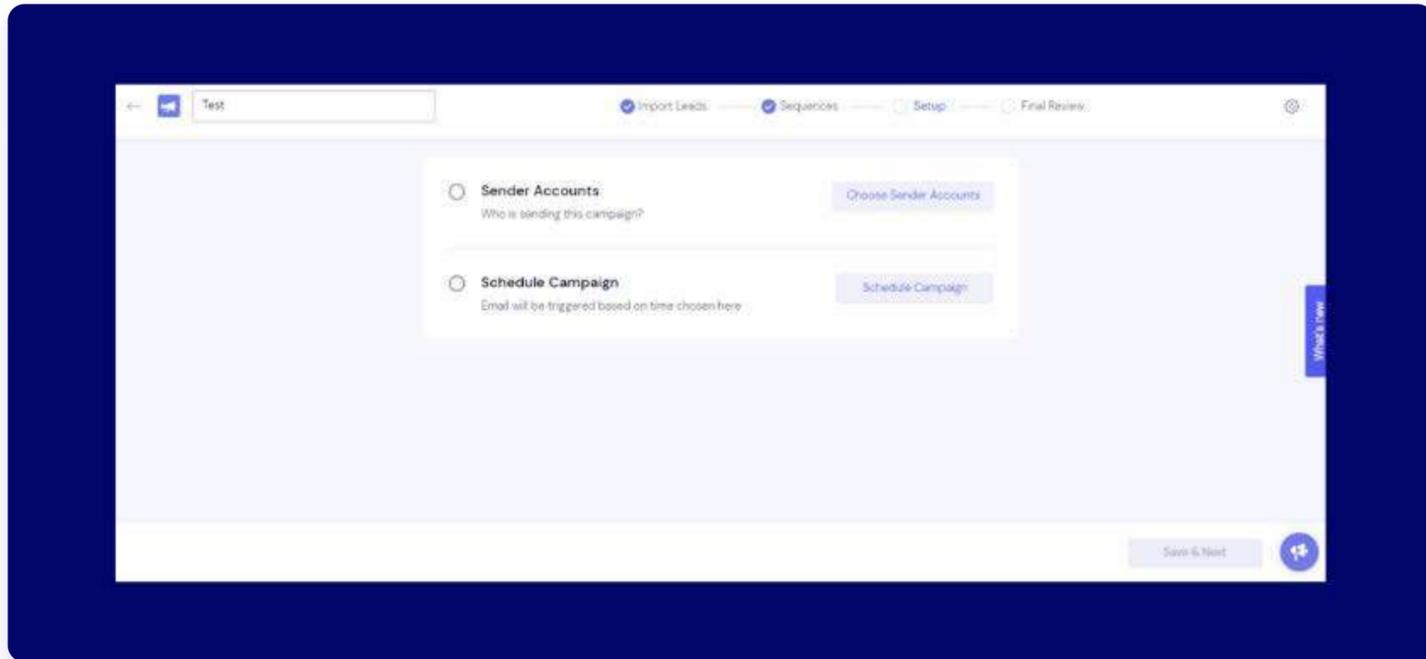


Click “Save & Next” to go to the next step.

## 6 Choose Sender Accounts & Set Campaign Settings

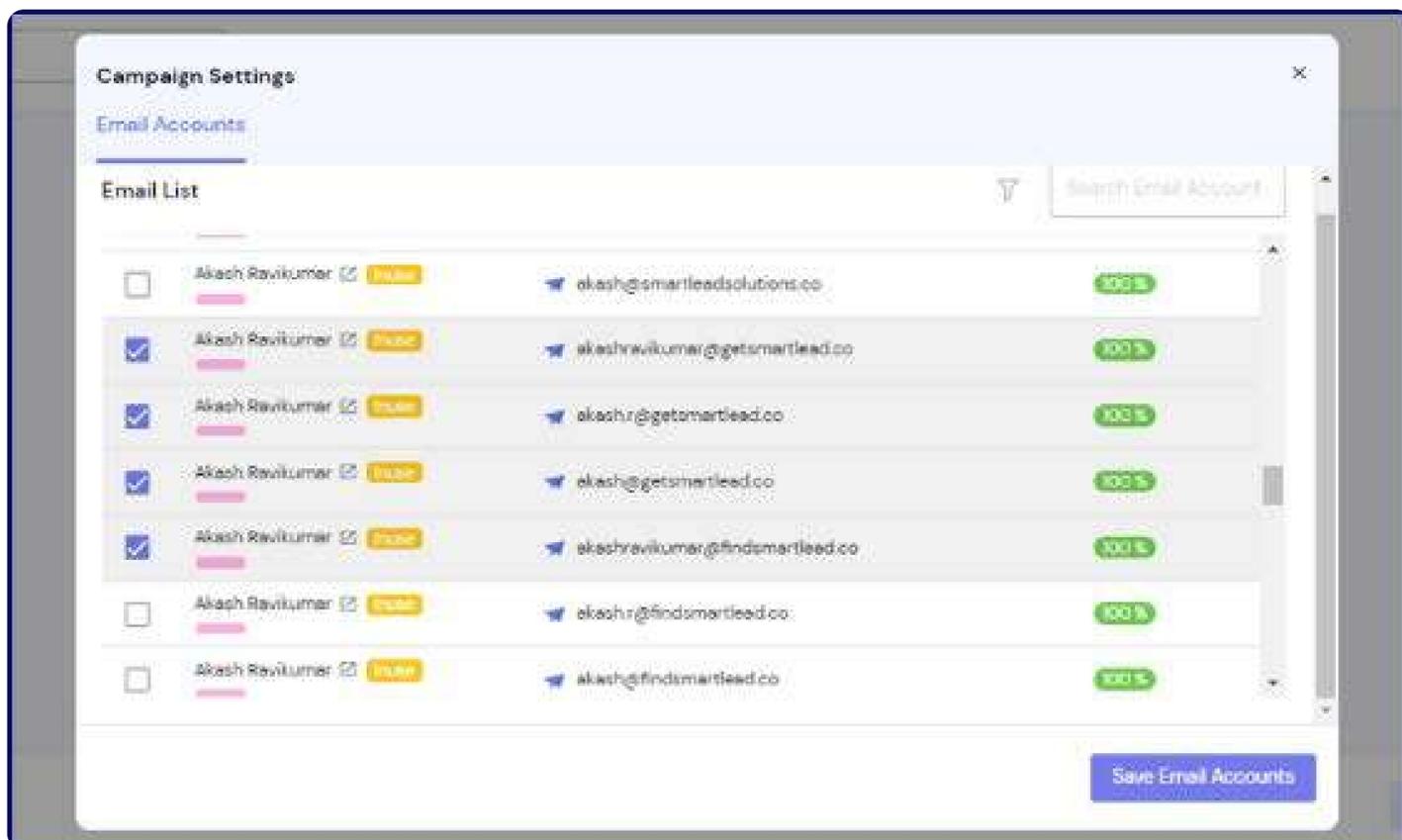
Once done creating the email sequence, choose the email accounts you want to send from. Divide the total number of emails with 50 to get the approximate number of email accounts you need.

For example, you need **200 email accounts to send 10,000 messages.**

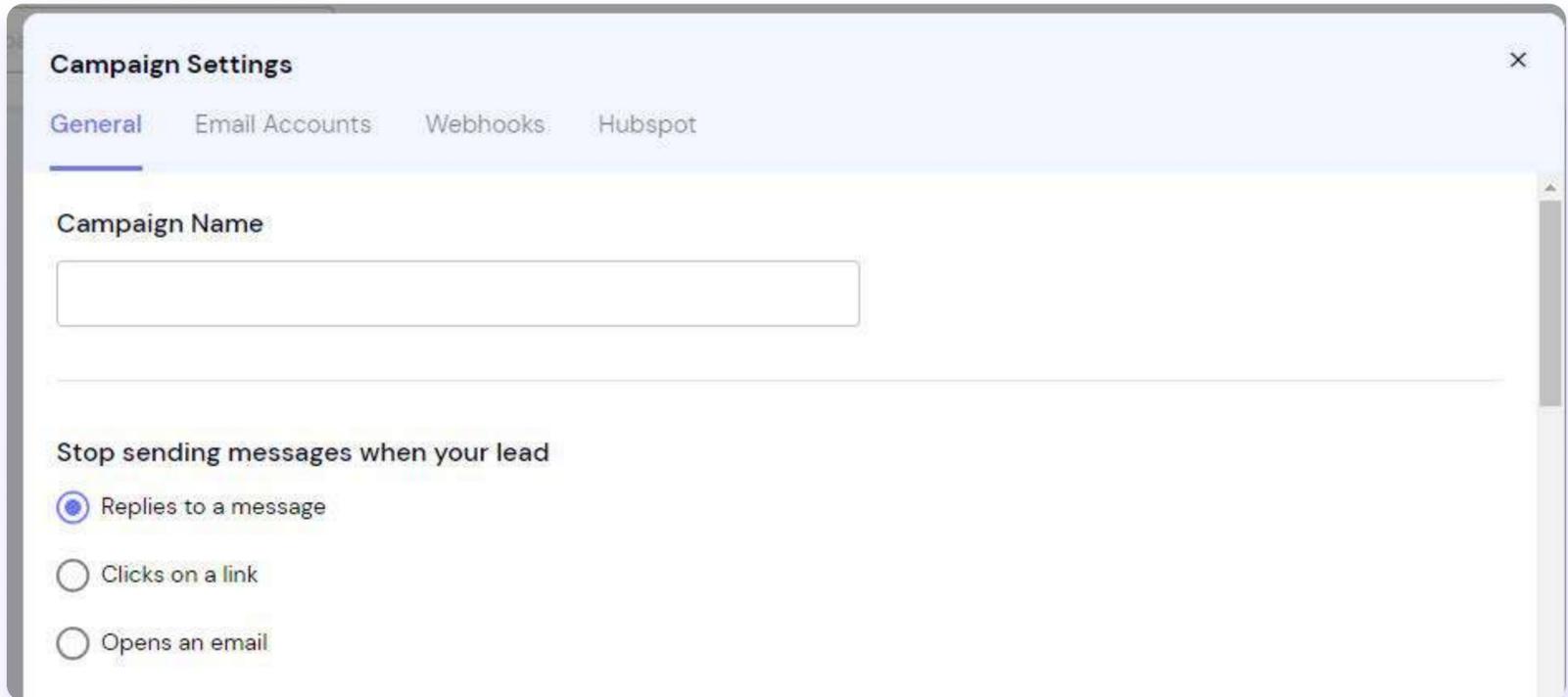


### Tip

Always create more email accounts than you need. Keep 70% of the mailboxes in rotating campaigns and 30% in backup just being warmed up. This way, if any of the mailboxes get blacklisted or blocked, you can use the backup. It will help reduce down time.



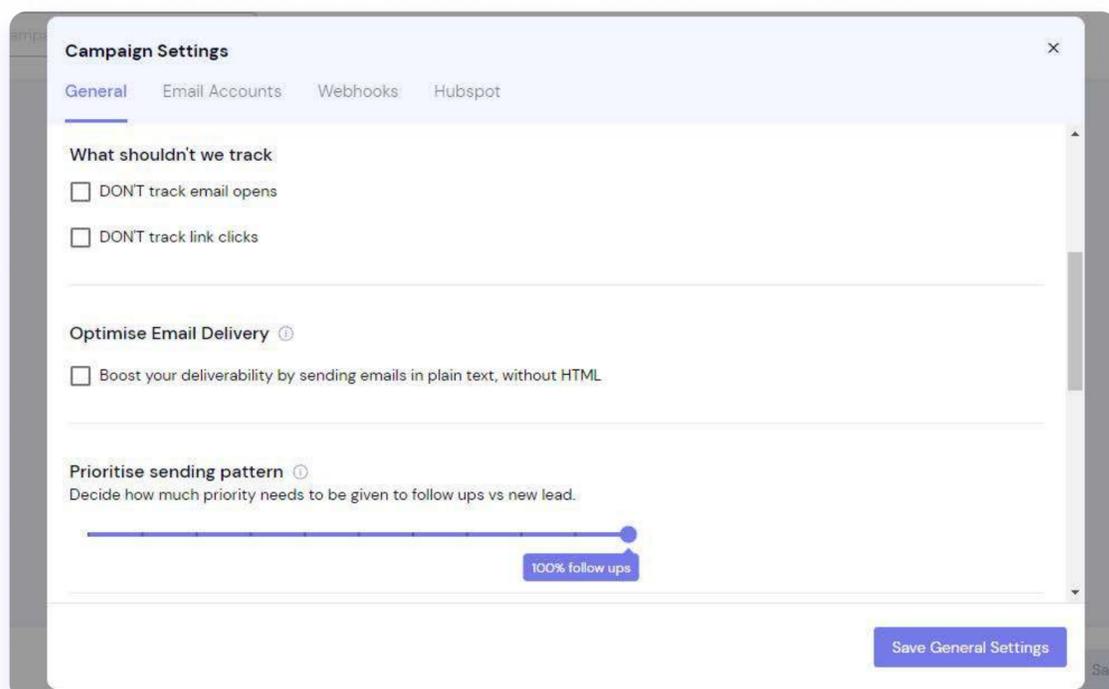
Once you have selected the email accounts, go to the campaign settings button on top right. Give a campaign name so that you can come back to it easily.



Next, choose options under “What shouldn’t we track”. As advised above, send only 1/10th email volume with tracking. Send the rest of the emails in a separate campaign without tracking.

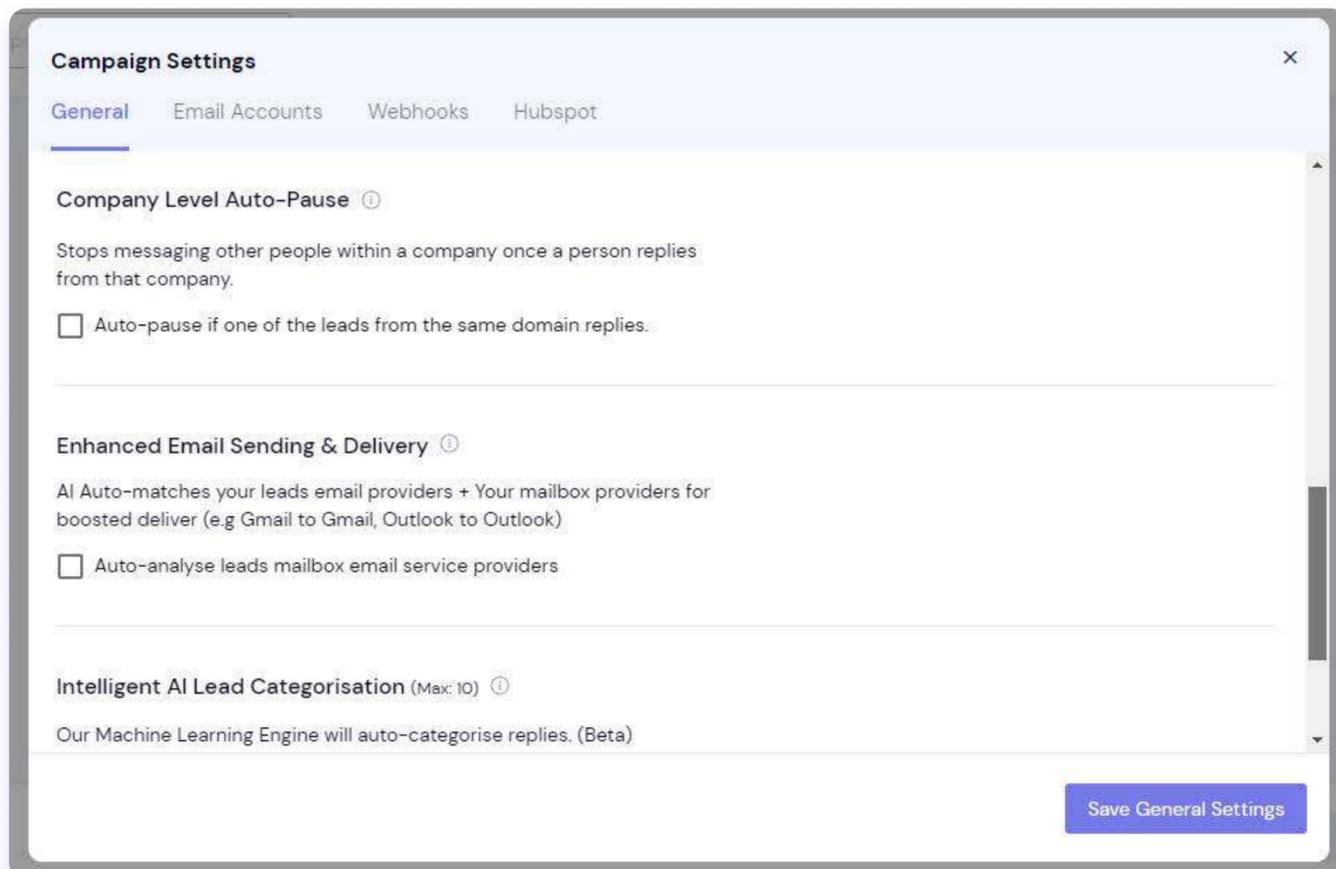
To stop tracking, click in both the boxes.

Next, click in the “Optimize Email Delivery” box to send plain text emails (recommended).



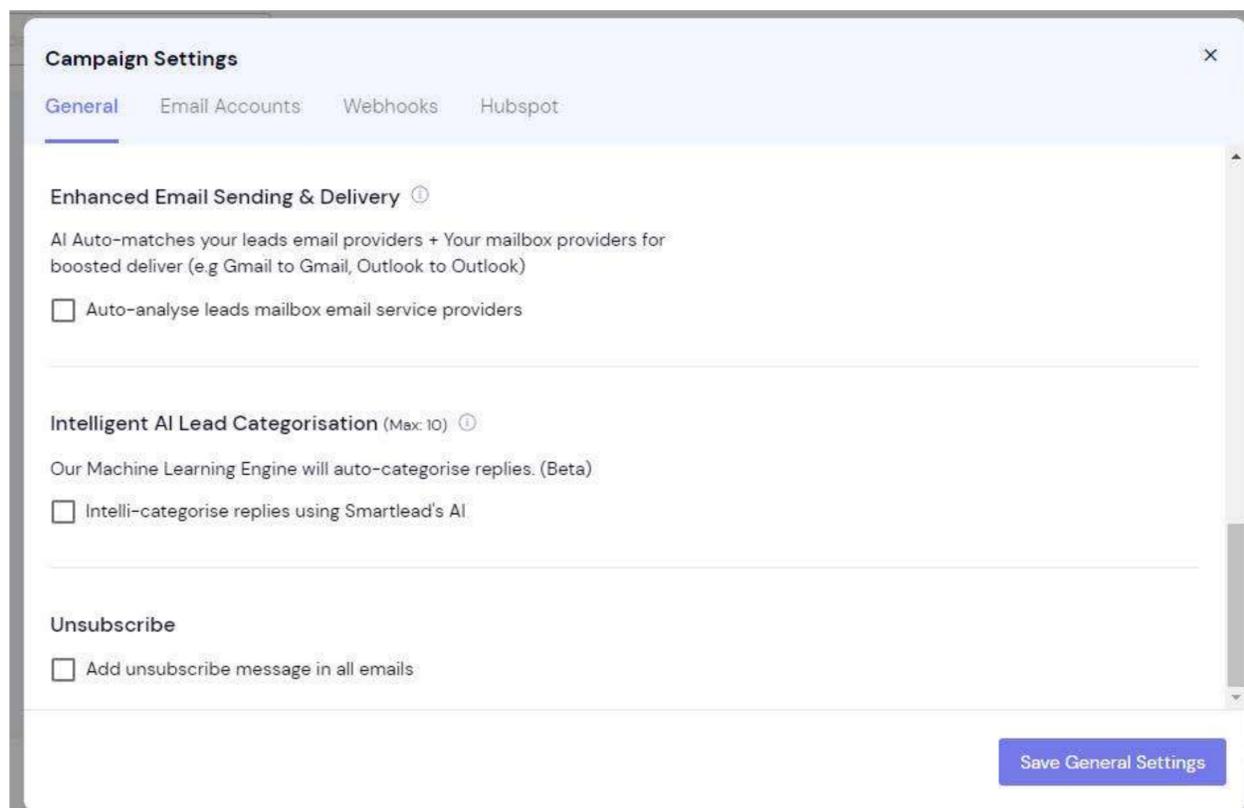
Next, click on the “Company Level Auto-Pause” box. It will stop sending emails to other people within a company once a person replies from that company.

Don’t forget to tick the “Enhanced Email Sending & Delivery” box. It’s crucial for high deliverability rate and low spam rates. Clicking this box will make the AI auto-match your mailbox providers to your leads’ ESP, (e.g Gmail to Gmail, Outlook to Outlook).



Next, click on “Intelligent AI Lead Categorisation” and “unsubscribe” boxes.

The AI lead categorisation function works by default with 3.5 CGPT and GPT4. This option will enable the AI to read a lead’s reply and categorize it. You can choose 5 to 10 categories.



Click on “Save General Settings”, and you’re done.

That’s it. You’ve launched a campaign successfully. Now, sit back and check the analytics dashboard in Smartlead.

## How to Get Out of Blacklists

Cold emailing is a complex process. Sometimes, despite following every DOs and DON'Ts, one might see a sudden drop in email deliverability and receive bounce-back messages for valid email addresses or high spam rate. In such scenarios, there are chances that their email account/domain is blacklisted.

### How Do You Know If You Are on a Blocklist?

#### Use Online Blocklist Checkers

Start by exploring blocklist checkers available on blocklist management websites. For instance, you can visit websites like **Spamhaus**, **Spamcop**, **Passive Spam Block List (PSBL)**, **Invalument**, **SenderScore**, **Barracuda**, etc.

For instance, Spamhaus offers an IP address and domain name lookup tool. You can check whether your IP address or domain is blacklisted by entering your IP address or domain name into their checker.

#### Leverage Email Service Providers

Your email service provider (Outlook, Gmail, etc.) can help you identify if you are listed on any blocklists.

Many ESPs, such as Mailgun, offer blocklist monitoring services. These services automate the process of checking whether your IP address or domain has been blacklisted across multiple blocklists.

#### Pay Attention to Error Messages

When you send emails to your contact list and see error messages bouncing back, that's your point of concern. Error messages contain valuable information regarding blocklist issues. These messages indicate blocklisting and may include a URL or reference to initiate the blocklist removal process.

## Monitor Regularly

You can prevent your email address or domain from being blocklisted only with regular monitoring. Blocklist status changes due to various factors, including the quality of your email content and the behavior of your recipients. However, it is essential to maintain email hygiene best practices to stay away from blocklists altogether.

## Removing Your Email from Blacklists

Getting your email removed from a blacklist or blocklist is essential to ensure your emails reach your recipients' inboxes instead of being bounced or marked as spam. Here's a step-by-step process to understand and remove your email from blacklists:

### Diagnose the Problem

Getting your email removed from a blacklist or blocklist is essential to ensure your emails reach your recipients' inboxes instead of being bounced or marked as spam. Here's a step-by-step process to understand and remove your email from blacklists:

### Identify the Blacklists

Use online email blacklist lookup tools such as MxToolbox, ZeroBounce, or DNS Checker to identify which blacklists have listed your domain or IP address.

### Assess the Severity

Determine the severity of the blacklisting. Check whether your email is listed on a single blacklist or multiple ones. Understanding the extent of the problem is crucial.

## Understand the Reason for Email Blacklisting

Investigate why your email is blacklisted. Common reasons include

- a sudden surge in email sending volume
- high spam complaint rates
- poor email list hygiene
- spam-like content
- or suspected malware.

## Address the Root Cause

Before requesting removal, address the root causes of the blacklisting. This step is crucial to prevent future blacklisting.

- Review your sending practices to ensure compliance with anti-spam regulations.
- Analyze the quality of your email content, avoiding spam triggers in subject lines and content.
- Implement email authentication protocols (SPF, DKIM, DMARC) to authenticate your emails.
- Review your email infrastructure and security measures for vulnerabilities.
- Monitor recipient engagement and act on low engagement rates.
- Set up feedback loops to identify problematic campaigns and recipients.

## Request Delisting from the Blocklists

The process for delisting varies for each blacklist. Here are steps for some common ones:

- **Spamhaus:** Visit the Spamhaus website, enter your IP address or domain in The Blocklist removal center, and follow provided instructions.
- **Microsoft:** Visit the Microsoft delisting portal, fill out required information, and submit for review.
- **Proofpoint:** Look up your IP address at their Dynamic Reputation IP Lookup portal or contact Proofpoint's support team.

- **Barracuda:** Visit Barracuda's delisting portal, complete the form, and submit it for review.
- **Cisco/IronPort:** Visit their website for instructions or contact their support team.
- **Invaluent:** Visit their website and follow provided delisting instructions.
- **Spamcop:** Visit the Spamcop website and follow their delisting instructions.
- **SURBL:** Follow the instructions on their website or contact their support team.

### Submit Delisting Requests with Relevant Information

When submitting a delisting request, provide all necessary information requested by the blacklist vendor, such as your IP address, domain name, and evidence of corrective actions taken.

Few blacklisting services may accept donations for delisting, however, we do not recommend it.

### Monitor and Follow Up

After submitting the delisting request, monitor the progress. Regularly check your email deliverability to ensure your emails are no longer blocked or marked as spam.

Delisting processes can take time, so be patient and follow any additional steps required by the blacklist vendors.

By following these steps and addressing the root causes of blocklisting, you can improve your email deliverability and maintain a positive sender reputation.

## Inbox Placement Testing

Performing inbox placement tests is crucial for understanding how email providers treat your messages.

The results of inbox placement tests show you the percentage of emails that reaches recipients' inboxes, lands in junk folders, or goes undelivered.

This testing helps in identifying the exact reason behind your deliverability issues, if you have any.

**The popular tools for inbox placement testing are InboxAlly tool, GlockApps, or ZeroBounce Test, Validity (Everest), etc.**

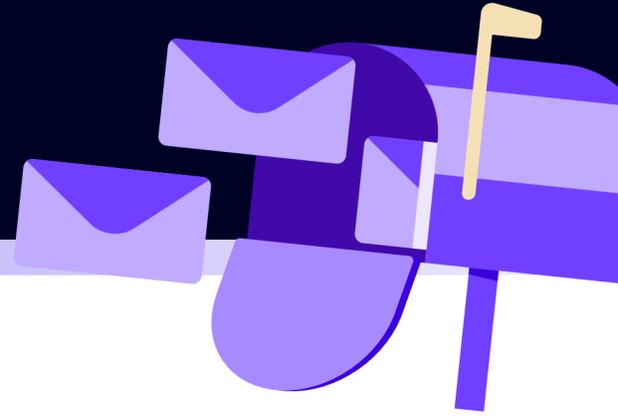
Inbox placement testing tools generally evaluate the below metrics to assess email deliverability:

- **Inbox Placement Rate (IPR):** Measures the percentage of emails that reach the primary inbox, providing an overall view of your email deliverability.
- **Spam Score:** Identifies the percentage of emails that land in the spam folder, helping you understand and address potential spam issues.
- **Placement Across Different Inbox Categories:** Shows where your emails land, such as the Primary Inbox, Promotions Tab, Social Tab, or Spam Folder, providing insights into how different mailbox providers filter and categorize your emails.
- **Email Authentication:** Helps ensure proper email authentication, such as SPF and DKIM, to improve inbox placement across various mailbox providers.
- **Engagement Metrics:** Some tools may provide insights into the engagement metrics of your emails, helping you understand how recipients interact with your messages.

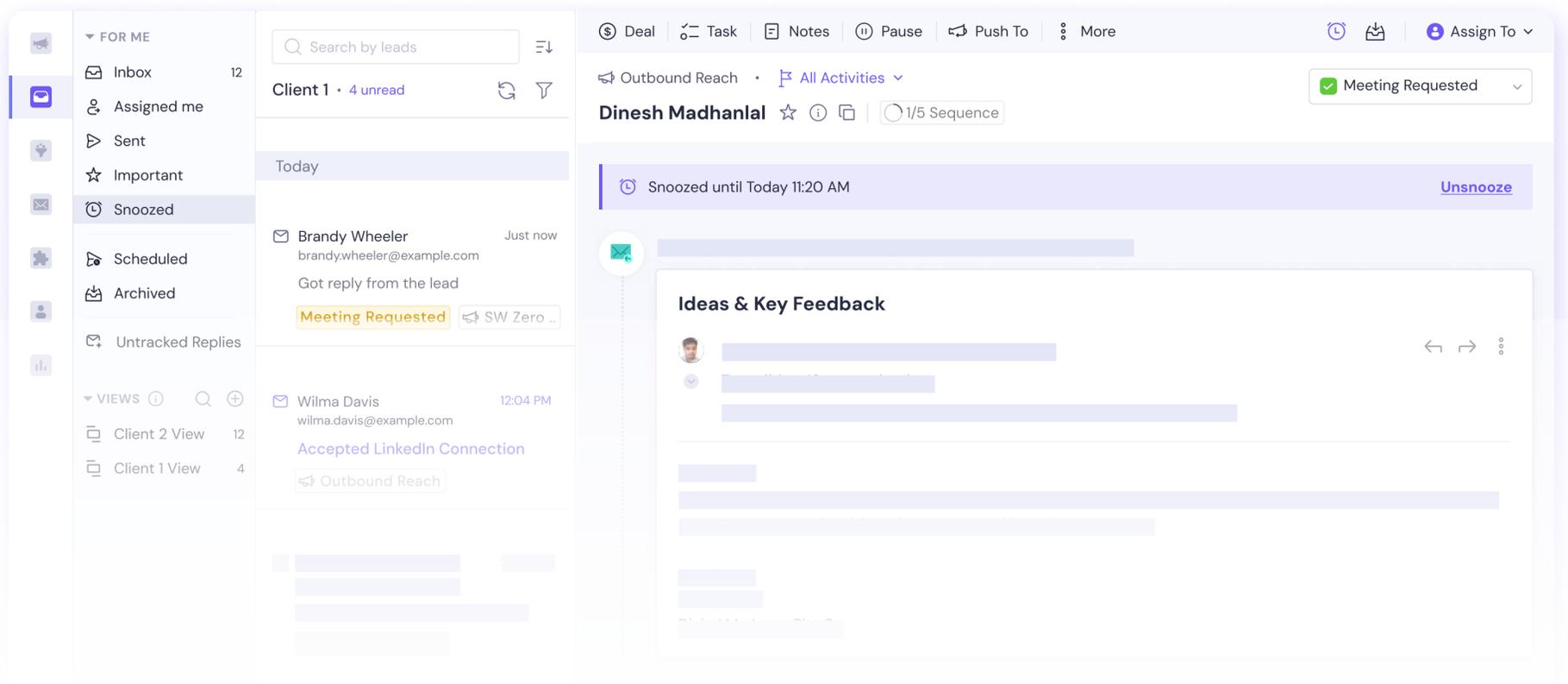
Read [How to Test Your Email Campaigns Daily on Auto-Pilot](#) to automate setup using GlockApps.

# 8

# Manage Leads and Emails with Master Inbox



The Master Inbox in Smartlead allows you to manage all email accounts from one place, read email responses in real-time, organize your inbox with filters, and navigate through categories like Inbox, Sent, Important, and more.



Master Inbox serves as a comprehensive tool for setting the infrastructure of team management and workflow. Here's how its various features contribute to this:

**Threaded Replies:** All email exchanges with a particular lead are organized into threaded conversations within Smartlead's master inbox. This feature allows users to view the entire history of communication with a lead in a single thread, promoting better understanding and context retention.

**Task Assignment:** Within Master Inbox, users can assign tasks to specific team members directly from the inbox interface. This feature ensures clear delegation of responsibilities, facilitating efficient task management and accountability.

**Notes and Collaboration:** Team members can collaborate seamlessly by adding notes to leads directly within the inbox. This creates a shared workspace where team members can exchange insights, updates, and important information related to leads and campaigns, fostering collaboration and knowledge sharing.

**Custom Views and Filters:** Custom views and filters allow teams to organize and prioritize leads based on various criteria such as client, team member, or campaign tags. This enables teams to focus on specific segments of leads, ensuring that each team member is working on tasks aligned with their expertise or assigned responsibilities.

**Real-time Updates:** With real-time email replies and notifications, teams can stay updated on lead responses and communication activities instantly. This ensures that team members are always aware of the latest developments and can respond promptly to leads, minimizing response times and enhancing customer engagement.

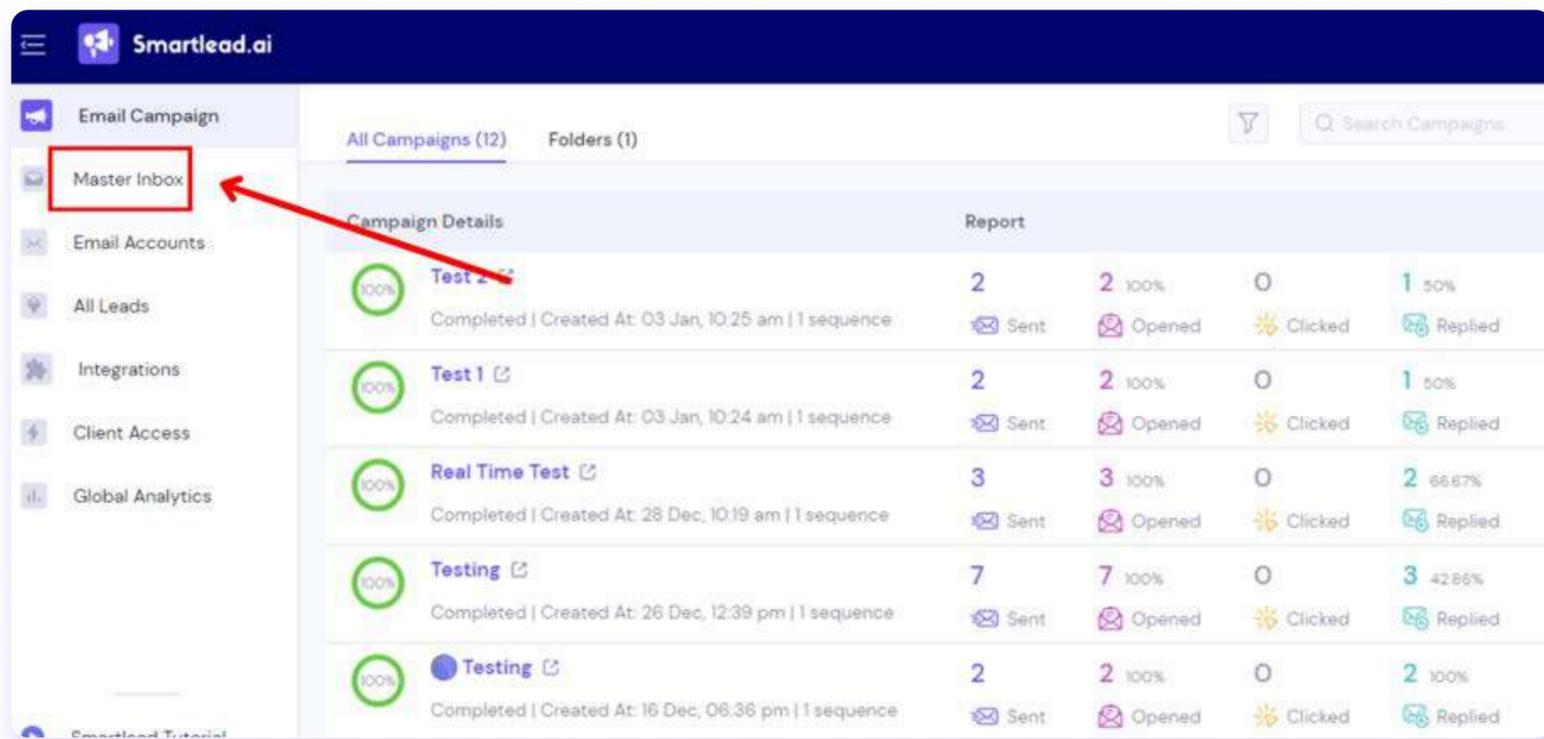
**Keyboard Shortcuts:** Master Inbox's keyboard shortcuts enable users to perform various actions quickly, such as assigning leads or adding notes, without the need for manual navigation. This boosts efficiency and productivity, allowing team members to accomplish tasks more rapidly and effectively.

**Team Member Assignment:** The ability to assign leads to specific team members ensures that each lead is managed by the most appropriate team member. This streamlines workflow by reducing duplication of efforts and ensuring that leads are handled by individuals with the relevant expertise or responsibility for a particular campaign.

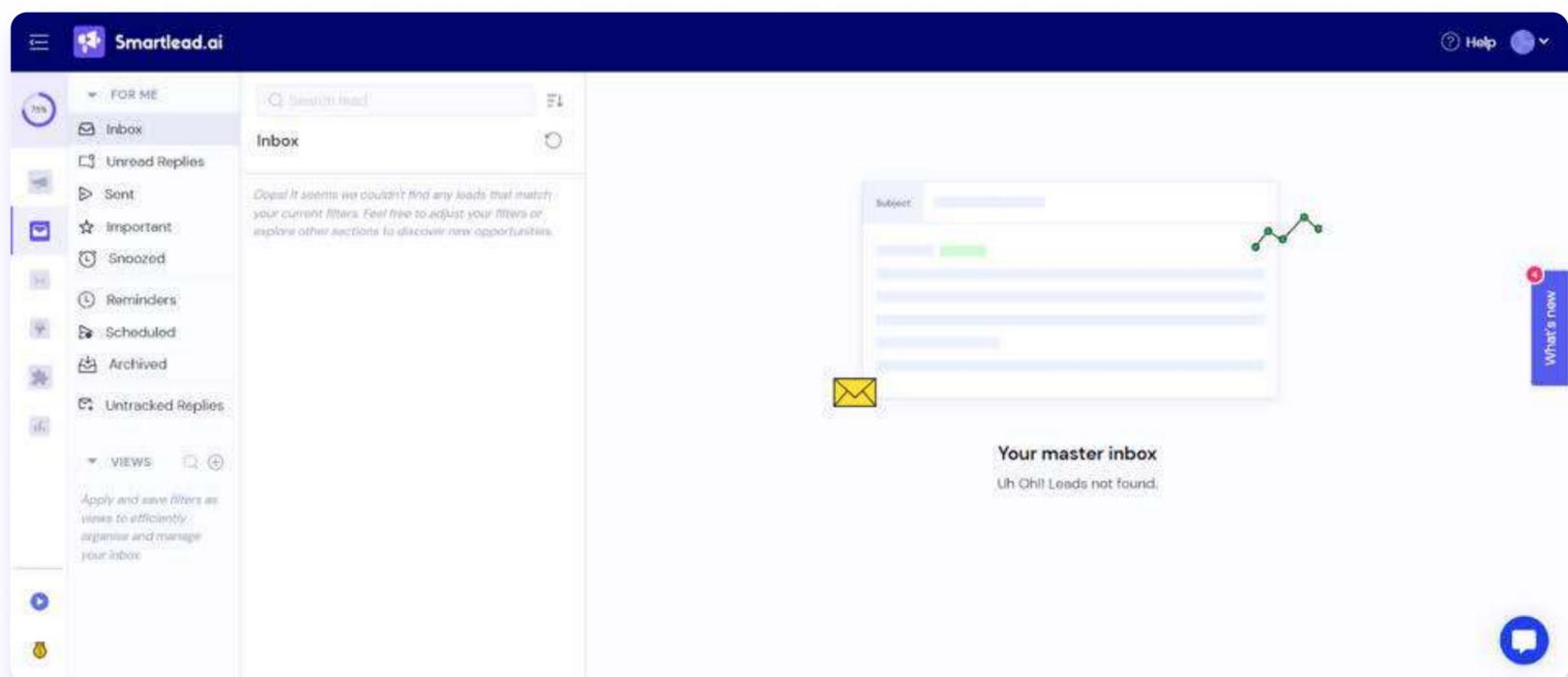
**Sidebar Navigation:** The sidebar in Master Inbox provides easy access to different sections such as Inbox, Sent, Important, Snoozed, Reminders, Scheduled, and Archived. This intuitive navigation enhances organization and allows team members to quickly locate and access relevant information, improving overall workflow efficiency.

**Attachment Handling:** Master Inbox allows users to add attachments directly to email conversations within the inbox interface. This simplifies the process of sharing files and documents related to leads or campaigns, facilitating smoother collaboration and information exchange among team members.

To check out the master inbox in Smartlead, click on “Master Inbox” from the main menu on the left of the screen.



Here’s the full view of the master inbox:



Further resources master inbox's features:

- [Real-time email replies in the Master Inbox](#)
- [Sidebar](#)
- [Views](#)
- [Master inbox Attachments](#)
- [Keyboard shortcuts](#)
- [Team member assignment](#)
- [Tasks and Task reminders](#)
- [Note creations](#)
- [Pushing leads to new campaigns](#)
- [Threaded replies](#)

# Conclusion

The only difference between marketers who succeed in cold emailing and who don't is a well-built email infrastructure and persistency.

An email infrastructure consists of answers to questions like how many domains to create, how many emails to send from each domain, how to do the technical setup, how many days to warm up, how many versions to A/B test, etc.

Creating an infrastructure is all about creating a framework, an easy roadmap to follow that will improve deliverability and help you reach your target. But following an infrastructure doesn't mean staying away from experimenting.

In an interview with Smartlead, Daniel Fazio, the cold email wizard, said:

*"I do hundreds of split tests over and over again until I find the one thing that works. It's an order of magnitude better than everything else in it."*

Consider building an email infrastructure as building an engine. Set the infrastructure to experiment your way and find what clicks with your potential customers. That's the secret behind successful cold email campaigns.

All the best for your cold emailing endeavors!

**Smartlead Revenue Team**



Convert Cold Emails To Consistent Revenue.

Scale your outreach confidently with unlimited mailboxes, unlimited warmups, a limitless multi-channel infrastructure, and a unibox to handle your entire revenue cycle in one place.

[www.smartlead.ai](http://www.smartlead.ai)