

DIRECT RELATIONSHIP / LEARNER SYLLABUS

Email marketing. Run it internally.

An email list is only the start. Use AI to build the private customer record, relevant campaigns and response process one operator or a small team can run at scale. Keep records portable and decisions in your hands.

2-Day Intro · Days 1-2

Create a targeting brief, starter private CRM, reusable prompts and a reviewed email campaign. You direct each task and review every result.

5-Day Intensive · Days 3-7

Build a tested workflow for infrastructure, research, personalization, email campaign preparation and response tracking. Arrive with an Intro-equivalent brief and CRM.

10-Day MasterClass · Days 1-10

Complete Intro and Intensive, then build coordinated AI teams in the exclusive 3-day Capstone. Leave with a reusable operating system, operating manual and 14-day action plan.

2 + 5 + 3 = 10.

Intro and Intensive are available separately. Intensive does not include Intro. The Capstone is included only in the full MasterClass.

How the classes work

Live online. Full Course: 6 hours per class day, including breaks. Crash Course: 2½ hours per class day, with more independent practice. Cohort dates, exact session times, time zone and tuition are to be announced.

Bring a laptop, browser, basic data-entry skills, and a business, consulting offer or customer acquisition goal. Use an approved sample if your accounts or data are not ready. Software access and any separate subscription costs must be confirmed before enrollment.

DAY 01 / INTRO

Define your email strategy and customer record

Connect your offer to the people it can help. Map an email marketing cycle your team can manage, from the first campaign brief to the next customer conversation.

1.1 Map the customer relationship

Follow the campaign from audience selection through email, reply and follow-up. Identify what your team needs to control at each stage.

Practice result: A clear map of the email marketing cycle.

1.2 Define the audience and offer

Identify the customer need, the value of your offer and the useful next step you want to invite.

Practice result: A focused campaign brief.

1.3 Build your private CRM

Bring customer context, contact preferences and next actions into a private record your team can access, maintain and export.

Practice result: A starter private CRM with an approved sample.

Your completed work

A campaign brief and a private customer-record foundation.

Review checkpoint

Explain how your team keeps the customer context and next action accessible when a service changes.

DAY 02 / INTRO

Prepare a relevant first email campaign

Turn customer research into useful email conversations. Work on the relevance of the message and the response you are inviting.

2.1 Understand suitable customers

Research a small approved sample. Connect each potential customer to a current need and keep the supporting evidence visible.

Practice result: Reviewed customer context.

2.2 Build the email conversation

Prepare an opening email and a thoughtful follow-up. Give each message one useful purpose and a clear next step.

Practice result: A reviewed sample email campaign.

2.3 Review and improve

Check the facts, relevance, tone and customer preferences. Improve the instructions you use to prepare the next campaign.

Practice result: A reusable message brief and review checklist.

Your completed work

A researched and reviewed email campaign pack.

Review checkpoint

Explain why each message is relevant and how the recipient can respond or decline.

DAY 03 / INTENSIVE DAY 1

Prepare the environment your team controls

Build on an Intro-equivalent brief and private CRM. Understand the responsibilities behind reliable email marketing and the checks needed before live activity.

3.1 Establish operational control

Map your domain, mailboxes, customer records and team access. Define how to keep records portable and how to recover work when a provider changes.

Practice result: An ownership and continuity checklist.

3.2 Review campaign readiness

Check the environment, sending readiness and review responsibilities. Keep unresolved issues visible before approving a campaign.

Practice result: A readiness record with a clear owner for each open issue.

Your completed work

A documented email environment and readiness process.

Review checkpoint

Show who controls access, how records are backed up and what must be resolved before sending.

DAY 04 / INTENSIVE DAY 2

Build a qualified campaign audience

Turn a broad target market into relevant, reviewed campaign records. Grow the audience without losing track of quality, context or contact preferences.

4.1 Select relevant prospects

Review audience fit and contact quality. Avoid duplicate records and keep exclusions visible.

Practice result: A qualified sample campaign audience.

4.2 Keep customer context current

Add the business context that makes the email useful. Route missing or uncertain information for review.

Practice result: A repeatable research and record-maintenance process.

Your completed work

An audience-building workflow connected to the private CRM.

Review checkpoint

Trace why a record belongs in the campaign and how an exclusion is respected.

DAY 05 / INTENSIVE DAY 3

Create emails that earn a response

Connect audience context to a useful message. Keep your team in command of the claims, tone and timing as preparation scales.

5.1 Connect the need to the message

Translate reviewed research into a relevant email, credible proof and a practical next step.

Practice result: A message framework and approved examples.

5.2 Review at campaign scale

Organize draft preparation and human review. Hold unsupported claims and unclear messages for correction.

Practice result: A tested email preparation and approval process.

Your completed work

A repeatable way to prepare and review relevant emails.

Review checkpoint

Explain the evidence behind the message and demonstrate how an unsuitable draft is held for review.

DAY 06 / INTENSIVE DAY 4

Coordinate email delivery and follow-up

Bring approved emails into a controlled campaign. Keep the timing, activity and response handling visible to the people running it.

6.1 Prepare a controlled sequence

Plan the email conversation, review points and follow-up conditions. Respect customer preferences and stop further campaign messages when appropriate.

Practice result: An approved sample email sequence.

6.2 Connect the campaign to the record

Run a controlled test and bring campaign activity back into the private CRM. Check that completed actions are not repeated.

Practice result: A campaign activity record and tested handoffs.

Your completed work

An email campaign your team can inspect, pause and manage.

Review checkpoint

Demonstrate a reply or opt-out stopping further campaign follow-up.

DAY 07 / INTENSIVE DAY 5

Turn replies into a working relationship

A list becomes useful when the team can respond. Connect email activity, customer replies and next actions into an orderly daily operating process.

7.1 Manage the conversation queue

Identify replies needing attention, assign responsibility and make the next useful action visible. Review meaningful campaign outcomes.

Practice result: A response queue and campaign review view.

7.2 Test continuity and recovery

Run a normal campaign and a disrupted one. Recover the context and resume appropriate work without repeating completed actions.

Practice result: A tested operating procedure and improvement list.

Your completed work

A connected process from campaign preparation to customer follow-up.

Review checkpoint

Show how another team member can continue a conversation using the saved customer context.

DAY 08 / MASTERCLASS CAPSTONE DAY 1

Coordinate the email marketing team

Bring audience research, message preparation and campaign operations together with clear responsibilities and human review.

8.1 Give each team a clear outcome

Assign the research, message and operations roles. Define what each role delivers and who approves it.

Practice result: Team briefs and a responsibility map.

8.2 Connect handoffs through the private CRM

Keep the context, review decisions and next actions visible across teams. Return incomplete work for correction.

Practice result: A shared handoff and review process.

Your completed work

A coordinated email marketing operating plan.

Review checkpoint

Show that every handoff has enough context and a named next owner.

DAY 09 / MASTERCLASS CAPSTONE DAY 2

Test the complete customer journey

Put the coordinated system through realistic campaign activity and changing customer context before expanding it.

9.1 Run a complete cycle

Move an approved sample from campaign brief through relevant emails, response handling and the next action.

Practice result: A traceable end-to-end campaign run.

9.2 Handle changes without losing control

Test changed customer information, an unavailable connection and a reply during follow-up. Recover the work with the customer context intact.

Practice result: An exception record and recovery review.

Your completed work

Evidence that the team can run and recover the complete process.

Review checkpoint

Trace a changed record across the workflow and show that dependent work is reviewed.

DAY 10 / MASTERCLASS CAPSTONE DAY 3

Demonstrate the system and hand it over

Leave with a system your own team can run, review and improve. Make ongoing control part of the handover.

10.1 Document the operating responsibilities

Record who manages customer data, campaign decisions, responses, access and continuity.

Practice result: An operating manual with named responsibilities.

10.2 Rehearse launch, pause and recovery

Demonstrate a controlled campaign and how to pause or resume it with current context. Check the customer-record export and recovery process.

Practice result: A tested launch and continuity checklist.

10.3 Plan the next cycle

Review the outcomes and identify practical improvements to audience fit, email relevance and response handling.

Practice result: A capstone demonstration and 14-day action plan.

Your completed work

A complete email marketing operating system and internal handover.

Review checkpoint

Demonstrate a normal case, a disrupted case and a portable customer record, then explain the next improvement.