Email Best Practices:

Proven strategies and tactics for success

The most powerful marketing channel

Email marketing is one of the most cost-effective marketing channels available. It's easy to get distracted by the latest social media platform and take for granted the tremendous value of a group of people that have already shown interest in your business.

Why have so many marketers flocked to email? There are many reasons. While many would cite it's comparatively low cost as a primary motivator, those who have used email marketing successfully have learned that it is quite possibly the most effective direct marketing tool to date.

Email makes it extremely easy to personalize communications and segment offers by customer type and behavior. It can be deployed far more quickly than more traditional forms of marketing communications. In addition, it is extremely measurable, allowing marketers to collect and analyze data, and then refine their efforts.

In this whitepaper, you will learn the email best practices needed to implement an effective marketing plan. Topics covered include:

- **Starting With Clear Objectives**
- **List Management—Building and Segmenting Your List**
- **Compliance**
- **Outbound Strategies**
- **Testing and Measurement**

Start with clear objectives

Developing a successful email marketing program begins with a focus on the objectives. While that may seem obvious, too many marketers leap into email without clearly defined objectives. It then should come as no surprise that they never achieve more than a vague sense of their efforts' success or failure.

With email marketing, the technology's performance is so readily measured that failing to track it becomes a costly waste of resources. Determining exactly what to track depends on the specific objectives. Perhaps the organization wants to increase visits to its website. Maybe the goal is to secure actual purchases of products. Or, it may be to encourage prospects to download more information to guide them through the purchase process. Once the objective has been identified, it's only a matter of pinpointing the metrics related to that objective. If the

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goal is website visits, the metrics may include the number of click-throughs from links in the email. If it's product sales, raw numbers (coded by source) would be a good choice.

No single metric works best for everyone. The key is to identify those that will best allow you to set goals and evaluate your program's performance. You also have to determine the time periods for which you'll gather and compare those metrics. Are you interested in daily performance? Week-to-week comparisons?

You can also set up metrics that allow you to compare the performance of specific campaigns or approaches. For example, you can measure to see whether emails that include discounts perform better than those without.

The key to success: The list

Email marketing is most effective when you're sending relevant messages to people who want to receive them. In addition, since email marketing began, there has been an expectation on the part of recipients that they need to give you permission to contact them through the channel. That expectation is reflected in regulations passed in both the U.S. and the European Union (more on that later).

The most common concept related to permission is what's known as "opt-in," in which a recipient has to agree to receive emails before they can be sent. In most cases, a consumer fills in a subscription or permission box on a website, provides an email address as part of a sweepstakes entry, or checks a box when conducting business online with the organization.

Some marketers have tried to use an "opt-out" approach, in which they believe that it's okay to send as many emails as they want to a consumer until that consumer says he or she doesn't want to receive them (essentially the model that traditional direct mail marketing follows). However, opt-out emails tend to irritate consumers and may violate laws. In addition, reputable email marketing service providers such as Delivra will not work with organizations that take the opt-out route.

A "double-opt-in" process is even better at ensuring list quality. With that approach, before someone's name is added to the mailing list, they receive a confirmation email, usually with a link that needs to be clicked. If the organization doesn't receive that confirmation, they won't add the name to the list.

Just as important as a procedure for adding names is the way that "unsubscribes" will be handled. The best way to do this is to include an unsubscribe link in every email. Clicking on that link takes the email recipient to a page that allows them to verify that they want to be taken off the list. Some organizations include a question that asks why the individual wants to be removed, so they can determine whether there are flaws in their programs. However you handle

unsubscribes, be sure that you remove the individual's address quickly — definitely before your next email.

List management is an ongoing process that helps you ensure that your list is accurate and useful. In addition to prompt removal of unsubscribes, pay close attention to bounces and other problems. If you see multiple bounces of emails heading to the same domain, or with multiple emails being handled by a particular ISP, the problem may lie with the recipients' mail server. For example, the server may have incorrectly identified your mail server as a source of spam. Or you may discover that an email bounced because the address was misspelled. Keeping your list clean and up-to-date will keep your program running efficiently.

Building your list

Tip

Look for every opportunity to capture email addresses.

One of the most common questions about email marketing is how an organization can build its mailing list. For most organizations, the key is to make acquiring email addresses a regular aspect of contact with customers and prospects. Most organizations do not begin with a large list, but they are amazed at how the list will grow over time.

Start with the email addresses that you already have acquired from customers and prospects. If they haven't already given you permission to email them, set up some kind of opt-in program. Let them know exactly how you plan to use their email addresses, and what you expect to send them. Give them an easy way to say, "Thanks, but no thanks."

Going forward, look for every opportunity to capture email addresses. When dealing with prospects, ask if you can send them information by email. Offer a giveaway of some sort, and put opt-in information on the sign-up screen or entry form. You can also direct customers to a sign-up form landing page through your invoices, direct mail or other forms of customer contact.

Segment for effectiveness

Tip

Email is one of the most personalized marketing channels you can use.

Email is one of the most personalized marketing channels you can use, making it even more effective at communicating with customers, prospects, and other stakeholders. You can make it most effective by segmenting your email efforts.

It's as simple as breaking your entire list of customers and prospects into smaller groups that share common characteristics. Those characteristics may be based on demographics, on behavior, on the

nature of their business or relationship with your organization, or any other factor that may differentiate them from others on your list.

For example, suppose you operate an online retailer that serves outdoor sporting enthusiasts. That's a very broad universe. If you drill down into your customer base, you'll find that you can divide customers into groups by the primary interests. Some prefer biking while others may prefer fishing, camping, and so forth. And, of course, some enjoy multiple activities. Within those groups, you can perform additional segmentation. Those who enjoy fishing may be divided into freshwater and saltwater enthusiasts. Among bicyclists, you'll have everyone from extreme mountain bikers to people who enjoy a slow cruise through the local park. Some campers will trek to wilderness settings, while others bring the comforts of home with them.

You can also segment based upon interaction with your emails. In addition to seeing who opened your email, you can determine who performed particular actions, such as clicking on specific links.

The potential for segmentation is limited only by your imagination and the amount of information at your disposal. Some of the most common approaches include:

> **Basic Demographics**—such as gender, age, location, and size of company.
> **Engagement**—reflects how recipients react to your emails.
> **Source**—address, referrals, search engines, promotions, and other means.
> **Lifecycle**—how their email address was acquired and how long they've been on the list.
> **Occupation**—both the type of work performed and the level within a company.
> **Employer**—by company size or industry.
> **Technology**—segment by platforms recipients are using.
> **Value**—relate to recipient, such as average order size and number of products purchased.

As you create your email marketing program, consider how your audience might be segmented, and how you'll go about acquiring that data. One example might be a brief survey about areas of interest that are part of your opt-in program.

Don't be labeled a spammer

One of the most misunderstood aspects of email marketing is spam. Organizations may assume that because they are legitimate and are sending out emails on legitimate subjects, they're safe from being tagged as spammers. Sadly, that's not the case.

As the volume of spam has increased, services and software designed to protect email users have become more aggressive. It's all too easy to have your emails identified as spam, and that

can lead to situations such as your mail server being blacklisted—which can effectively put you out of business online.

Both the United States and the European Union have strict anti-spam laws in place, and any organization that uses email as part of its marketing mix needs to develop a working familiarity with the laws. Given that the Internet has no borders, and that you may not be sure if you have any emails traveling to EU countries, it's important to become familiar with both laws.

In the U.S., the 2004 CAN-SPAM Act provides for penalties of $250 per violation, up to a maximum of $2,000,000 for repeated offenses. Generally speaking, organizations can stay compliant if they:

- Don't "harvest" email addresses from the Internet or generate them via a "dictionary" process for commercial mailing purposes.
- Don't send commercial email via a computer for which they don't have proper authorization to use.
- Don't falsify or obscure the header information in commercial email messages.
- Include a valid postal mailing address and a functioning opt-out mechanism in every commercial email message.
- Don't continue to send email to a recipient who has opted out of an email list.
- Include a warning label when sending any adult content (e.g., sexually explicit material).

The law from the European Union focuses primarily on ensuring that email messages are sent only to those people who opt-in, and that the sender's identity be accurate and clear.

High-quality email marketing service providers have a thorough understanding of spam and can provide advice to help their clients avoid problems. In addition, they maintain working relationships with Internet service providers and anti-spam organizations to ensure that their clients' emails are perceived as legitimate communications. That's one of the key advantages of working with an ESP, instead of going it alone.

Keep in mind that each spam filter works differently, and it's possible that a particular filter could incorrectly identify one of your messages as spam. Common triggers include words like "free" and "save," subject lines and messages typed in all upper-case letters, and emails with many addresses in the "to" section. Some email programs allow users to label incoming mail as spam and send that message back to their ISP, so someone who doesn't want to receive your emails may actually create a problem for those who do.

(Please note that Delivra's staff is not legal experts and we offer this information with no implied or express warranties; it is for informational purposes only. We encourage all of our clients, customers, and website visitors to speak with their own legal advisors to understand how email legislation may apply to their businesses in particular.)

When & how often

Some self-styled email experts will tell you that the only way to achieve success is to send your emails at 10 a.m. Tuesday. Or maybe it's 4 p.m. Friday. They'll give you a convincing rationale, but we don't buy it. There's no perfect time, and no magic answer.

You see, no two organizations are exactly the same – and nor are any two lists of email addresses. What works great for one group may be a terrific disappointment for another. If the folks in your audience need information on Monday morning to plan for the week, that's when you want to email them. If they're wildly busy from first thing in the morning until 3:00 p.m., late afternoon is probably a better choice.

Make your initial decision based on your knowledge of your audience. Then conduct tests to determine whether you've made the right decision. If you notice higher open rates and click-throughs when you send emails at a particular time of day, that's probably the right time for you. Good email marketing software gives you the data needed to determine your most effective times and messages.

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You may even want to ask recipients when they sign up. If a substantial number of them indicate that they'd prefer to receive emails on Friday mornings, you'd be crazy to send them at other times.

How often should you send? However often it takes to stay top-of-mind with your audience without irritating them – and not so often that you run out of relevant content. As long as the recipients believe that what you're sending is worth their time, they'll make the time to read your emails. But if you start sending emails that don't interest them – or if your content makes it clear that it's just an exercise rather than a genuine effort to share something worthwhile – they'll ignore you and start unsubscribing.

If your email marketing service provider's system allows you to segment by engagement, you can tailor messages to groups of recipients who react the same way. For example, if you know that a recipient nearly always opens your emails and clicks through to key links, that recipient is probably pretty happy with your organization and your messages. But if a recipient hasn't been opening messages or showed an interest in any of your links, you may need to pique his or her interest. One way is to send a special email that includes some kind of inducement for action, such as a discount or a free gift.

Creating effective emails & increasing engagement

Every time you send out an email, the recipient has a series of choices. Is he or she interested enough to open it, or will it receive a quick delete? Once it's open, will it be scanned quickly or read thoroughly? Is there any reason to click on the links? And what impact will all of this have on the recipient's impressions and opinion of your organization?

For many email marketers, one of the primary goals is increasing the open rate of emails, which reflects the percentage of recipients who actually open the email. As the number of emails increase, busy recipients are becoming increasingly selective about which emails they will open and which they will ignore.

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The best way to ensure that your recipients open and engage with your emails is to consistently send them relevant content. But having great content won't help you if recipients don't see a reason to open your emails in the first place. That's where aspects such as design and carefully crafted subject lines come into play.

HTML or Text

Over the history of email marketing, there has been a gradual shift to HTML (or more graphical) emails from simple text. However, some recipients still prefer text emails. For example, many people who read most of their emails on handheld wireless devices with small screens may find graphics-rich content difficult to read. The best way to approach this issue may be to design your email communications both ways, and give your recipients a choice of formats.

Compelling Subject Lines

Your subject line is often the make-or-break item that determines whether a recipient will read your emails. That's particularly important for web-based email clients like Gmail that display the sender, subject line, and little else. You should include something that will be of interest to the recipient, or that will intrigue him enough to open the email. Don't make subject lines misleading, or your reputation will suffer.

Who's It From?

Make sure your emails are coming from a recognized source, whether that's a name your recipients would recognize, your organization's name, or both. Cryptic sender names or email addresses like "noreply" may make your message appear to be spam.

Peeking Inside

Some email clients include a preview of emails that appears when the user mouses over the subject line in the list. Others block images from appearing. By designing your emails with these

points in mind, you may able to make enough of your relevant content visible so that the user will have reason to read further.

The Personal Touch
Few things capture a recipient's attention as well as his or her name. Sending emails with the recipient's name in the subject line (or in the first line of copy) can create big increases in the number of recipients who read your messages.

Universal Design
There are more email clients than ever before (including handheld wireless devices). That means the message you design for one email client may be difficult or impossible to read in another. It's a good idea to test your emails in as many different clients as possible to ensure that they are readable. A high-quality email marketing service provider will have the capability to perform that testing.

Testing and measurement

The ready availability of data about your email marketing makes it easy to refine and improve your efforts. By incorporating a "feedback loop" into your program, you can analyze the performance of each email and determine which strategies works best.

Savvy email marketers are always testing new ideas, whether that's a new format, different types of offers and incentives, time of day, and other factors. Suppose you have a list of 100,000 names, and you want to offer a discount to build sales during your slow time of the year. How much of a discount should you offer? You could create a test email to 5,000 of the names that offered a 10 percent discount, and a second email to another 5,000 names offering a 20 percent discount. Once you receive the results, you'll know what to do with the balance of the list. For example, if there's no appreciable difference in response between the two segments, you can roll out the 10 percent discount.

Other things you can test include subject lines, how and where links are presented within your emails, types of content, how graphics are handled–the list is endless. Each time you conduct a test, you strengthen your understanding of your audience and what appeals to them. Ideally, that should help you increase performance with every email.

Another simple technique is to send surveys out to your entire list, or to a representative sample. While you may not receive many responses to a survey, the answers and comments you do receive will give you insight into your stakeholders' opinions of your program and organization. (It's generally considered polite to offer them something in return – perhaps a special discount.)

We hope this has given you some ways to launch or refine your current email program. If you have any questions about email marketing, stop by our website at **www.delivra.com**.

About Delivra

Based in Indianapolis, IN, Delivra has been providing email software and professional services for more than 13 years. Delivra helps businesses and organizations execute effective email marketing campaigns by providing dynamic software and professional services – from full out consulting engagements to help when you need it in areas such as: Design, Production, Deliverability and Testing. Voted one of the 2011 Best Places to Work in Indiana and one of Inc 5000's fastest growing companies – Delivra partners with business and organizations across all industries and verticals and truly opens its doors each and every day to put the customer first. To learn more about Delivra visit **www.delivra.com** or call 866.915.9465.