

Guru's Guide to Email Marketing 2012

Email marketing programs continue to deliver immediate and easily measurable results. What's holding you back?



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Email marketing continues to be popular with marketers around the world because it's still one of the most effective forms of marketing used today.

Email marketing programs are quick to deploy, offer immediate and easily measurable results, enable advanced customer segmentation and personalization, integrate well with other online and offline marketing and deliver a high return on investment.

But achieving optimal results from email requires experience, careful planning and advanced technology. We've created this guide to be your definitive resource for advice on all things email marketing related. The guide includes tips for:

- Reviewing past email marketing programs
- Building your email opt-in list
- Developing effective creative for your email campaigns
- Increasing the deliverability of your email messages
- Analyzing email marketing program metrics
- Integrating email with other marketing channels and platforms, including social and mobile
- And some handy checklists that you can use for quick learning

Lyris has been providing tools and advice on email marketing for more than 15 years. Our company employs leading email marketing industry experts, and we advise some of the savviest digital marketing professionals around. We hope you find *Guru's Guide 2012* useful and informative. Enjoy!

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Email Marketing Today – Statistics, Facts and Survey Results

Email marketing continues to be an exciting and dynamic space. Across industries companies are increasing their investment in email marketing because the return on investment is consistently strong. In fact, email marketing outperforms every other channel on ROI and averages an impressive \$44.25 for every dollar spent.

(Source: DMA, 2011)

It's so effective because virtually everyone in the online world uses it. The high penetration rate means that it's a great way to reach customers at a low cost. And because it's a direct sales driver, the returns are very strong.

In this section you'll find recent statistics, facts and survey results that will help you evaluate what's happening in the marketplace and what opportunities are out there to improve your email marketing performance.

Email User Statistics

- The number of email accounts worldwide is expected to increase from 3.2 billion in 2011 to nearly 4.3 billion by year-end 2012.

(Source: Radicati Group, 2012)

- Investment in email marketing is estimated to grow from \$1.3 billion in 2012 to \$2 billion by 2014.

(Source: Email Marketing Facts and Statistics, 2011 - 2012)

- By 2014, consumers will receive an average of 9,000 email marketing messages annually.

(Source: Forrester, 2011)

The Impact of Mobile and Social

- 88% of people check their email daily via a mobile phone.

(Source: Return Path, 2012)

- The number of mobile shoppers will reach 72.8 million in 2012.

(Source: eMarketer, 2012)

- 78% of organizations are incorporating social media into their email marketing programs.

(Source: MarketingSherpa 2012 Email Marketing Benchmark Report)

- Email newsletters that include social sharing buttons have a 115% higher average click-through rate (CTR).

(Source: GetResponse, 2012)

Conducting an Email Marketing Review

This guide provides a wealth of hints, tricks and suggestions on how to increase the effectiveness of your email marketing programs. Before you start, however, it might make sense to get a good picture of where your campaigns are today by conducting an email marketing review. This review should include an analysis of key performance metrics, a look at any recipient feedback or surveys, a review of your website analytics, a comparison against internal and relevant external benchmarks, and a review of your creative treatment and content.

Once this is complete, you can use what you've learned to map out an improvement plan for your email marketing programs using the information in the guide. The steps for an email marketing review are listed below.

STEP ONE

Analyze Key Performance Metrics

Your first step in the email marketing review process is to develop a spreadsheet that contains your email marketing program results from the past 6–12 months. The idea is to review a broad sample size to extract reliable and meaningful analysis. Once this report is complete you will have established your benchmarks and identified the best and worst-performing message for each metric.

What metrics should you include in your report? Depending on your business, we suggest the following:

- Conversion rate – number of orders, transactions, downloads or actions as a percentage of the total number of email messages delivered
- Open rate
- Click-through rate
- Click-to-open rate – number of unique clicks divided by the number of unique opens
- Bounce rate
- Delivery rate – number of email messages sent minus the number of email messages that bounced
- Unsubscribe rate
- Referral rate (“send-to-a-friend”)
- Net subscribers (number of subscribers plus new subscribers) minus (bounces plus unsubscribes)
- Subscriber retention (number of subscribers minus bounces minus unsubscribes divided by number of subscribers)
- Percent of orders, transactions, downloads or actions of emails sent or delivered
- Total revenue generated as a direct result of the email program
- Dollars invested per email sent or delivered

Once you've pulled your metrics, take a look at them based on the following factors:

The Priority Based on Objective and Industry

What are the most important metrics for your email marketing program? If you are a retailer, it's probably things like conversion rate, number of orders, average order size, etc. For newsletter publishers, it might be net subscriber growth, referrals and open rates. For companies sending corporate newsletters, it could be click-through percentages on specific recurring topics, links and subsequent conversions to information or demo requests. The key, however, is that you determine the critical measures of success for your email marketing program.

Consistency

Were your key metrics consistent within a certain percent range? If your open rates varied significantly then you might have experienced delivery issues or used confusing “From” addresses or subject lines. Wide variances in click-through rates would likely suggest that the relevance of your article topics, products, offers or content varied significantly. Take a moment to look for spikes or valleys in your metrics. If the lows or highs vary dramatically, then there is likely a lesson – positive or negative – to be learned from this data. An off-the-charts conversion rate,

for example, would suggest that a promotional email fired on all pistons – timing, subject line, design, offer/price, product relevance, website content, etc.

Message Metrics Variances

What if you have a combination of great and disastrous metrics resulting from a single email marketing campaign? For example, you might have a low open rate, but a very high click-to-open rate. This can happen when you have a subject line that didn't appeal to the recipients, a delivery problem or if you recently changed your "From" address but still provided highly relevant message content. If this is happening, test a new message that addresses the problem you identified and see what results you get.

STEP TWO

Review Recipient Feedback, Surveys, Website Analytics and Sales Statistics

If you have a way for your email recipients to provide you with feedback, review the responses you've received throughout the year and look for both positive and negative comments. If you receive little feedback, you may not be making it easy for readers to provide it or haven't established a personality that motivates your readers to comment.

Auditing social media channels is a great way to learn about what people are saying about you. Take a look at the last few months' worth of posts about your company on Twitter, Facebook and other social media sites where you have a presence, or where customers and prospects may be commenting about the types of products or services you offer. Is there anything you can learn from these comments? If you've conducted subscriber surveys, now is a good time to review those results. What were the key actionable findings you can address in the coming year?

Last, analyze your website statistics. What type of content are your visitors most frequently accessing on your website? Which product categories does your audience visit most? Which earned the most orders and revenue? How can you use this information to improve email marketing?

STEP THREE

Compare to Internal and Relevant External Benchmarks

If your organization produces more than one email newsletter or campaign, see if other email marketers – partners, colleagues or vendors – would be willing to share their data so you can benchmark key metrics. Even if the information you receive is not detailed, you can learn a great deal by taking a look outside of your company. You can also research any available "industry averages" to compare to your specific results.

STEP FOUR

Review Creative/Content

Next, pull together samples of recent email messages, including subject lines. Compare the email content to the metrics and see if you can identify which approach drove the best results. Look particularly at:

- **Subject Line** – length, tone, style and whether you included a company or publication name

- **Layout/Format/Length** – Did you change formats? Did you switch from full articles to teasers? Did you try longer, more detailed copy versus short, breezy messages?
- **Content Style** – Do some newsletters or email messages have more personality than others? Is your style full of humor, or do you just present the facts?
- **Segmentation/Personalization** – Did you send special messages that had a higher level of personalization or were more narrowly targeted than others? Were the results significantly different?

STEP FIVE

Review Competitors' and Best Practice Examples

Finally, pull together samples of email messages from your competitors as well as samples of your favorite newsletters and email campaigns. What things knocked your socks off? Was it the subject line, design, personality and style of writing, or great approach to offers? Is there anything that you are inspired to try in your own campaigns?

Conclusion

Taking the time to assemble all of this information, conduct your analysis and reflect on the “big picture” can be a big step towards increasing the effectiveness of email programs. That learning, combined with the suggestions in this guide, should put your email marketing campaigns on a positive and sustainable trajectory.

Building Your Email Opt-in List

The most important factor in successful email marketing is the list. No matter how good your offer or creative, if you don't have a good list, you won't get the response you want. The good news is that building an effective email opt-in list can be as easy as 1-2-3.

Successful list building requires a combination of:

- Ongoing retention efforts
- Self-sustaining programs
- New name acquisition

Using a layered approach allows you to more successfully and efficiently optimize your opt-in list growth through diversification. This approach consists of:

- 1. The Foundational Layer** – This is your current, in-house opt-in list. Your goal should be to retain subscribers, sustain response rates and minimize churn.
- 2. The Auto Pilot Layer** – This layer is comprised of list-building devices that work to grow your list with minimal ongoing effort or expense.
- 3. The Supplemental Layer** – This challenging layer includes the execution of specific programs designed to provide short-term growth spurts to your list.

All three layers work synergistically to grow your list and reduce attrition. By skillfully establishing priorities and programs using the tips and techniques in this guide, you can maximize your time, resources and effectiveness.

The Foundational Layer

In companies that have an established email marketing strategy, the current opt-in list is typically fairly large. For businesses getting started in email marketing, there is usually less with which to work. Regardless, the size of your list and your email marketing expertise does not preclude you from this undeniable fact: List attrition (or churn) is your biggest enemy. And with an average email list attrition rate of 25–30 percent, the problem can be staggering if you're not actively adding new subscribers. While some list churn is inevitable, email marketers have many tactics at their disposal to minimize it:

- **Don't absorb uninterested prospects.** It's amazing how many companies skirt this golden rule. Single opt-in requires subscribers to send a subscription request before they are added to a list. This is usually done via a "Subscribe" checkbox on a form that collects fundamental contact information. This will greatly reduce list churn and increase response because your list is built from interested and engaged subscribers who have told you specifically that they want to receive your email.
- **Implement double opt-in.** A double opt-in process involves sending a confirmation email to subscribers to complete their registration. This asks subscribers to verify their intention to receive your email communications. At the same time, it assists in determining the accuracy of the email address, helps to keep you in good sender standing and builds strong early engagement.

Double opt-in has long been considered an email marketing best practice, but is showing signs of becoming less relevant as email marketers become more adept at managing their subscribers. That is to say, if you are handling single opt-in optimally, you don't really need a double opt-in program. At the same time, for some businesses, implementing a double opt-in program is still a best practice, for instance: if you are a high-volume sender of promotional messages; you operate in a very competitive market where the fear of malicious opt-ins is very real; or, if your email is heavy on content, such as an e-newsletter, since this implies a greater commitment to actually opening and reading your email.

- **Create high-quality, relevant content.** What you send to your email opt-in list can significantly impact list churn. Make sure your content is relevant and engaging. Further, the quality of your email content should be above what is available from other sources in order to keep subscriber rates high. For instance, if anyone can cut out of the newspaper one of your company's 20 percent off coupons, then the coupon sent to email subscribers should deliver more than that, like 30 percent off or free shipping with an online order.
- **Segment.** To maximize response and minimize churn, segment your database and develop relevant content geared toward each segment's particular needs and interests. As with all direct marketing, the more you treat your email subscribers like individuals, the more engaged they will be. Ideally, segment your list based on customer demographics and behavior.
- **Set your contact rules and stick to them.** Provide value in every send and develop a plan to ensure you can deliver on the value you originally promised – and on what your opt-in subscriber expects. If subscribers signed up for a weekly newsletter you pitched as "chock full of tips and tricks," you must deliver on that promise in each and every edition, and you must send the newsletter every week.
- **Be consistent with your communications and your brand.** You can build a positive online reputation by delivering value on a regular basis. If you are sporadic in your email marketing sends (every week for two

months, then nothing for two months), subscribers may opt out. Use consistent design (including your logo) that aligns with your brand. Once you deliver consistent communications that reflect your brand, your online reputation will grow and your subscribers' loyalty will grow along with it.

- **Keep it fresh.** This may seem contradictory to the recommendation above, but if your email campaigns are so similar that your audience doesn't realize that you've sent new content, you may have gone too far. Several times a year, take an objective look at your graphics, your newsletter content and your email offers. Are they looking stale? Incrementally test new elements within your campaigns and see if there is an uptick in response or decrease in opt-outs. However, if you plan a major redesign or repositioning – for example, a new title or a completely new graphic look for your newsletter – consider announcing the change via email before you implement it to reduce the risk of subscribers opting out of what they think is a new communication from your organization or unwanted communication they did not opt in to.
- **Test, analyze and optimize.** Many email marketers are so busy deploying campaigns that they forego analyzing their results. To be a smarter email marketer, make it a habit to analyze each of your campaigns before executing future campaigns. This analysis will enable you to streamline your communication to provide more value for recipients and therefore, less churn.

The Auto Pilot Layer

The next component, the Auto Pilot Layer, provides a big bang for the buck by providing a high-yield, low-effort way to continuously add new subscribers. To get started, determine where you have the most opportunity to reach your target subscriber audience, both in the online and offline worlds. Examine each location where you communicate with your existing or potential customers – your initial contact, your nurturing campaigns, your sales process and beyond. Make sure that each of these touch points provides an opt-in opportunity to receive additional offers or communications from your company. Online touch points that you can leverage for opt-in include:

- **Landing pages** – Do your landing pages offer an opt-in for future communication in addition to a way to respond to a current campaign? Is this opt-in opportunity simple to accept – like a checkbox? Does this opt-in point explain the benefits of subscribing?
- **Confirmation pages** – Once recipients have confirmed their order or completed their download, provide them with a link on the confirmation page to subscribe to future communications.
- **Your website** – Your website is the most straightforward source of auto pilot growth potential. It sits there every day collecting and directing incoming visitors. For this reason, many email marketing experts state that websites are the single most important method of growing email opt-in lists. Use your Web analytics solution to identify the most trafficked areas of your site so that you can create opt-in opportunities where your visitors will most likely notice them.
- **Social and mobile marketing campaigns** – While these can also be stand-alone marketing programs, be sure to maximize their value by making an opt-in offer part of your message. For both audiences, if they're engaged with you on their phone or through social media, they very well may be interested in hearing more from you via email.

Offline touch points that you can leverage include:

- **Your sales team** – Encourage and incentivize your sales team to collect opt-in names via phone, email communications and in person. Develop simple ways for the sales team to collect and submit opt-in names, such as an online form that automatically adds the subscriber information to your database.

- **Your customer service and support representatives** – After successfully resolving a customer issue, have your customer service representatives pitch the value of ongoing product and service updates from your company and ask for the opt-in. Again, make it easy for them to collect and submit the subscriber information.
- **In-store handouts/flyers** – Provide handouts or flyers – especially those with coupons or special offers – to customers with an offer to opt in.
- **Sales receipts** – Provide an opt-in opportunity on customers' sales receipts. Headlines like "Sign Up and Save" or "Receive a Promotional Coupon" along with the URL work well for gleaning opt-in names.
- **Point-of-sale materials, hang tags, advertising and brochures** – At any point where you "touch" your prospects, create an opportunity for them to opt in. Make sure that the opt-in URL as well as the benefits of opting in are prominently featured.
- **Events and tradeshows** – While at a tradeshow or event, either hand out flyers with the opt-in address or have a method in your booth to gather opt-in names.

The Supplemental Layer

Maintaining your current opt-in list and continuously and automatically adding subscribers are both important, but sometimes you need to jump start your list growth with larger bursts of new subscribers. This is where the supplemental layer comes in handy.

A supplemental list growth program is usually a single point-in-time program to gather opt-in names. For example, it may be a single email to a third-party opt-in list instead of an integrated campaign with multiple touch points to your own database.

Unlike foundational and auto pilot programs, supplemental list growth programs typically require media investment. Therefore, it's best to test your way into these types of programs to mitigate risk and make the most of your investment. Some options for supplementing your opt-in list include:

- **List rental** – List rental has long been a staple in the email marketing world. However, the name is a bit misleading in that it gives the impression that one takes physical possession of a list, which is not the case. The most reputable and highest performing lists are those that a list broker or list owner uses to send email messages on your behalf (commonly referred to as "blind mailings" or "dedicated email"). List rental works well when the list is specifically targeted to your audience and is rented from a reputable provider that follows list maintenance and opt-in best practices.
- **List barter** – This is similar to list rental but usually requires little to no financial investment. Find partners who offer complementary products or services and work with them to trade the deployment of blind email messages to each other's lists (if your privacy and opt-in policies allow for such an exchange). Keep in mind, however, that as beneficial as it might be to send email campaigns to a bartered list, it's important that your lists and your partners' lists aren't emailed to the point of fatigue.
- **Guaranteed lead programs** – These are primarily developed to drive business-to-business leads. In guaranteed lead programs, the publisher of a website or newsletter guarantees to provide your company with a specific number of leads/responses at a set price (say, \$100 cost-per-acquisition, or CPA, for a maximum of 100 leads/responses). Often, you provide an ad or HTML email to promote offers like white papers, collateral or discounts that the publishers promote on their sites and via additional programs, such as banner ads in newsletters or email sends. Unlike list rental or barter, guaranteed lead programs ensure that you receive a known quantity and quality of leads because the vendor guarantees those results.
- **Paid search engine marketing** – With paid search engine marketing, you can buy your way onto a higher ranked search engine page than your organic (unpaid) search would otherwise provide. Your paid advertisement should

promote a compelling offer related to your chosen search terms and be one that drives opt-ins (e.g. a free guide or coupon).

- **Mobile marketing** – Though mobile opt-in lists must be kept separate from email opt-in lists, there are ways for mobile to drive email marketing results. Use your mobile marketing campaigns to promote a mobile-only incentive for those respondents who opt in to your email programs as well. Send mobile subscribers the email address or URL to opt in along with a special offer if they do.

Conclusion

By properly adopting this layered approach, your company will build the solid subscriber list so critical for email marketing success with the lowest possible budget expense. This strong foundation, combined with refined content, improved deliverability and integrating email with other programs will generate better ROI.

Subject Lines that Get Results

Fifty characters could be all that stands between you and the success of your next email campaign. Why? Because 50 characters is all the space you have in a typical subject line – to catch the attention of your reader, entice them to open your email and take action. With so much at stake, marketers need a quick and proven reference tool for developing subject lines that get the desired result: opened emails.

Let these rules be your guide.

Rule 1: Read the Newspaper

If you want to develop subject lines that result in higher open rates, look through your local paper. Headlines usually highlight a story's most important point with brevity, while taking the audience into consideration. Use that approach to make your subject lines short and intriguing enough to compel your subscribers to read your emails.

Subject lines should clearly state what your readers can expect from your email, what's in it for them and what you want them to do as a result of the email. And your subject line must stand out from others in your customers' crowded inbox in the most relevant way. Emulating the headlines from newspapers can be a good starting point in the development of subject lines.

Rule 2: Focus on the Objective

What is the objective, or end goal, of your email marketing program? In most cases, your end goal is not necessarily high open rates, but rather to have subscribers take a specific action. Determine what that one action is and make sure your subject line will achieve your objective. For instance, if your goal is for recipients to purchase from your online store, don't use a subject line that is informational in nature. Instead, use a clear call-to-action that emphasizes their opportunity to make a "must have" purchase.

Learn from past campaigns by looking at subject lines in emails that were associated with the highest number of conversions. Or if you drill down into your analytics, you might find additional clues, such as an email with a relatively low open rate but a high sales-per-order rate. That could mean something in the subject line strongly appealed to a narrow segment of your list. You could then test variations of the same type of subject line with other audience segments.

Rule 3: Leverage the “From” Address

The “From” address tells the recipient who sent the email, and the subject line sells the recipient on opening it. So take the time to consider the best use of the “From” address, based on the goal of the email and the audience that will receive it. What name or email address gets the highest response?

Some basic guidelines:

- If it's the first time you have emailed a specific audience, use a “From” address that creates a sense of familiarity and/or credibility with your potential readers. They may not be familiar with your company or brand, so you will want to use a brief “From” address that includes your company name as well as the general purpose of the email, such as: Acme Health Experts. Coupled with a compelling subject line, this approach can generate higher open rates than a “From” address of “Acme, Inc.”
- If the “From” address lists your company name, you don't have to repeat it in the subject line, which frees up space there. But do consider branding your subject line with the name of your newsletter, for example, so that it will stand out in the inbox of your recipients. For instance, if the “From” address says Acme Health Experts, your subject line might say, Health Wise Newsletter.

Rule 4: Mention Key Information First

It sounds obvious, but it's important to mention the most important information first when it comes to both your subject line and the email content itself.

Some tips:

- Keep your end goal and the interest of the recipients in mind. What is it that you want them to do after reading the email and what would make them care enough to do it? If you can answer that question in 50 characters or less, you may have your subject line.
- In many cases it doesn't make sense to try to cram the offer and call-to-action into literally 50 characters. If that is the case, focus on mentioning something that makes your recipient care enough to open the email to learn more. Then use the top portion of the email to elaborate on the offer.
- Most email preview panes allow for 50 characters worth of space in the subject line area, and anything beyond that gets cut off. So make sure the cut-off doesn't occur in a crucial word, such as a price or date. One of the best ways to catch this is to send a test email message to your own account and see what it looks like in your preview pane.

Rule 5: Personalize

Personalized subject lines are a simple way to secure the interest and action of your recipients. Subject lines can be personalized based on the product or content preferences of recipients, their interests, past purchases, website visits or links clicked. Where appropriate, use the recipients' first names. When personalizing, consider the following:

- When looking at past purchases, make sure to look for patterns rather than one-off transactions. This will provide you better insight into their genuine interests. Make it easy for readers to find and update their data and preferences so you can maximize your personalization efforts.

- If you elect to include the first name of your recipients, take the time to go through the database and make sure that you actually have the first name for every record. Also make sure that the names in your database use proper capitalization, such as “Alice” instead of “alice.” If the database isn’t fully and properly populated, it’s better to not use first name personalization in your email messages.

Rule 6: Urgency Drives Action

The recipients of your email messages are more likely to act on your offer if they have an urgent reason. Where appropriate, drive urgency with messaging such as expiring offers, “first XX people” or “only X days left.” You can even create a planned series of emails with each incorporating the imminent deadline. However, don’t overuse or misrepresent deadlines as it will train your recipients to wait until the last minute to act or, worse yet, sour them to your offers entirely. But do drive urgency where it’s relevant.

Rule 7: Lead, but Don’t Mislead

While it’s important to drive a sense of urgency and develop offers that compel action, it’s even more important to maintain your company’s integrity in every outbound communication. That means not misleading your prospects and customers with the subject line in order to get them to read or act on the call-to-action in the email. Never stretch the truth in your subject line or promise more than your email delivers. Nor should you make grand claims that require compliance in order to redeem an offer but make it difficult for customers to do so, or offer one thing and deliver something different than what is described.

Rule 8: “Free” is not Evil

Yes, you can use the word “free” in a subject line, contrary to what you may have heard. People still respond to the word “free;” so, the increase in orders or other actions will almost always outweigh the messages lost to filtering. But be sure to follow the best practices listed below to minimize your email message getting caught in spam filters:

- Don’t make “free” the first word every time.
- Don’t use the word “free” in conjunction with an exclamation point.
- Refrain from spelling “free” in all capital letters.
- Test the use of the word “free” as you would any other variable – and optimize on the best test results.

Rule 9: Plan for Deliverability

There are a number of factors that affect whether your email will be delivered, and most of them are within your control. More methods for improving deliverability are detailed later in this guide, but here are a few simple things you can do with subject lines to increase the deliverability of your email marketing campaigns:

- There’s a fine line between “catchy” and “spammy.” Run your email subject line and body copy through a content checker to identify any spam-like words, phrases or construction. The content checker will tell you which types of phrases to avoid.
- Two tricks that could trip a spam filter: subject lines in all capital letters and using more exclamation points than necessary. In fact, we recommend not using exclamation points at all.

Rule 10: Measure, Test, Analyze – Repeat

There are a number of ways to optimize your subject lines and, in all cases, the easiest and most effective way to identify the appropriate method for each of your campaigns is to measure, test, analyze and then repeat that process.

In order to use data to support better decisions, you must have meaningful data to analyze. But where do you get the data? If you want to understand which of two test subject lines results in the best conversion rate, you need a way to track responses from Email A separately from Email B. That may mean assigning a unique source code to the landing page associated with each of the emails, or it may mean assigning some other unique identifier such as a promotional code. Then, compare the two sets of data to determine the results. Be sure to use a large enough sample size with each test group so that your results are statistically significant – 300 or more responses per test group is generally considered viable from an analysis perspective. And be careful to change just one variable across test cells so you can definitively determine the cause of any change in results.

Some testing ideas for your subject lines include:

- **Negative subject lines vs. neutral ones** – “We hate to see you go” vs. “Newsletter subscription offer”
- **Challenger vs. champion offers** – Test your best-performing subject line against a new challenger
- **Personalization vs. no personalization** – Using the subscriber’s name in the subject line vs. not mentioning a name
- **Mention of price or savings vs. no mention of price or savings** – Once you have results, use the metrics from each segment to determine which subject line delivered the action you wanted – the most conversions, the highest average sale per order, the highest click-through rate, etc. From this data you should be able to establish a “champion” subject line, then introduce a “challenger” and test again.

Conclusion

Yes, this seems like a lot of fuss over 50 little characters. But those 50 characters will have a significant impact on the success or failure of your email. It pays to get them right.

The Truth about Email Deliverability

The deliverability of email messages is a prime concern of most email marketers. And it should be. Without high delivery rates, the time and money spent on list building, offers and content are wasted. An email message is useless if it never reaches the inbox.

As email has evolved, deliverability has evolved as well. At its inception almost anyone who sent commercial email was tagged as a spammer. Marketers hadn’t even discussed industry standards, and Internet service providers (ISPs) hadn’t embraced email for commercial purposes, even if it was permission based.

Over time, marketers, email service providers (ESPs), ISPs, government and consumers have become more sophisticated and have implemented much-needed change. Marketers have defined (and now adhere to) best practices, consumers push back to make sure their needs are met and ESPs have become partners with marketers to improve email practices and relationships with ISPs. And there is legislation regulating email in most countries; in the U.S. there is the CAN-SPAM Act, for instance.

Ever-evolving best practices and laws also challenge email marketers to stay current. Whether you manage email in-house or outsource it, you can’t ignore deliverability.

In this section, we will cover:

- Deliverability definitions and terms
- How to manage deliverability and create a positive sender reputation
- Top 10 deliverability myths debunked

Deliverability Definitions and Terms

Here are definitions for some of the most common email deliverability terms:

- **Delivery rate:** This is the number of email messages that reach the inbox and can be attributed to a specific campaign or sender as a percentage of the total sent. This metric is an important one to watch for indications of a decline or improvement in the delivery of your email messages.
- **Unsubscribe rate:** This is the percentage of email recipients who unsubscribed from a specific list either via a link or an email response. Many factors affect this rate, such as age of list, list quality and offer content. It is important to watch your unsubscribe rates to identify spikes.
- **Content filtering:** Content filters act on the content, the information contained in the email body (like an attachment) or on email headers (such as specific words in the subject line) to either classify, accept or reject an email message. Content filtering is commonly used by companies or other organizations as a way to prevent spam from being delivered to the inbox of a recipient.
- **Authentication:** This is a method by which the recipient of an email message (both the ISP and the individual) validates the identity of the sender. This differs from content filtering in that it is an automated process and is essentially a failsafe to determine if the sender is reputable or not. If the identity of the sender cannot be authenticated, the email message may be rejected by the ISP or additional filters.
- **Hard bounce/soft bounce:** A hard bounce is an email message that was returned to the sender due to an invalid recipient address. A hard bounce might occur because the domain name doesn't exist or because the recipient is unknown or has left the company. A soft bounce is an email that gets as far as the recipient's mail server but is returned as undelivered due to an issue on the recipient's end, such as lack of space in the inbox. The best practice for managing bounces is to consistently and thoroughly conduct list hygiene.
- **Blacklisting:** In Internet technology, this refers to a list of email addresses or IP addresses of known or suspected spammers. ISPs use blacklists to determine which email messages should be filtered out before delivery to protect their customers. While there are a number of blacklists, and some are more important than others, it is imperative that email marketers keep their IP addresses and domains off these lists to ensure the highest possible email deliverability rates.

How to Manage Deliverability and Create a Positive Sender Reputation

The five building blocks of good delivery and sender reputation are:

1. Email reputation

ISPs are not required to deliver your email, and your subscribers are not required to accept it. So managing your email reputation is the most important thing you can do to ensure email deliverability. Make securing and maintaining a good email reputation your first priority by following best practices with both subscribers and ISPs.

Best practices with subscribers:

- Follow strict and consistent opt-in practices to build your list. Make sure that all email addresses are associated with subscribers who have given explicit permission for you to market to them.
- Communicate the frequency of contact at the point of opt-in so your subscribers know how often to expect to receive email messages from your company.
- Use personalization to help increase the effectiveness of your email and decrease the likelihood of it being perceived as spam.
- Ask your subscribers to add your company's "From" address to their safe senders list or address book so that these messages are delivered directly to their inbox.
- Use a friendly "From" address that is recognizable and can be attributed to your brand, for example: orders@yourbrand.com. A friendly "From" address should be used consistently to help build confidence with recipients and a positive online reputation for you.
- Make sure the content in all of your email messages is relevant to your subscribers. This is becoming more and more important, first to ensure that your recipients don't report your email as spam, but also in response to ISPs looking at reader engagement to determine if they will deliver your messages.
- Establish a single point of responsibility for maintaining your email reputation. If you haven't assigned a gatekeeper to maintain a central calendar of email deployments, your customers can receive an unintentional glut of communication all at once.
- Be careful with list rentals, barter or purchases. If you are using an outside source for email prospecting, make sure that the list is permission based and that the list owners follow all laws and best practices governing email lists.
- Follow all applicable email laws. It may seem silly to have to mention it, but following email laws will not only keep you from being fined or thrown in jail, but will also help you maintain a positive email reputation and assure deliverability of your email messages.

Best practices with ISPs:

- Build and maintain good relationships with ISPs or work with an ESP that has already established positive relationships with them. Remember, ISPs can make or break your online reputation and deliverability efforts.
- Know the technical standards for each ISP and make sure you comply. This can be a full time job as each ISP has unique standards that change with some frequency. Consider using an ESP that maintains this information for you.
- Watch your unsubscribe performance. Ideally, your company should process all unsubscribes immediately. Periodically review the process to see how quickly unsubscribes are removed from your list.
- Watch list hygiene. Keeping your list clean is a great way to ensure that you are achieving the highest possible deliverability rate. Update your opt-in list to help minimize bounce rates, undeliverable email, unopened email and unsubscribes. Remove hard bounces immediately. And review your soft bounces and "did not open" addresses every six months. Consider offering a compelling offer to re-engage these subscribers and remove those who don't respond.
- Watch spam traps — email addresses created by ISPs specifically to collect spam messages. ISPs publish them so that they can be harvested with the intention of catching email marketers who are not following best practices.

- Be aware that ISPs are reviewing open, click and response rates — and how often email is not opened or is marked as spam — as indicators of engagement. A subscriber's engagement with your email message is the primary measure used by ISPs to determine your legitimacy. This affects your company's sender reputation and ultimately the delivery rates of the email messages your company sends.

2. Email identity

Every company that sends email has an email identity that is linked to its sender reputation. In order to earn a positive sender reputation, email marketers must authenticate their email messages to show that they are actually being sent from their domain and IP address. Email authentication greatly simplifies and automates the process of identifying senders for ISPs. After identifying and verifying that a claimed domain name has been authenticated or has authorized the sending mail transfer agent (MTA), it is then possible for an ISP to send your emails through and to treat suspected forgeries with suspicion and reject known forgeries, and block email from known spamming domains.

3. Feedback loops

Feedback loops are free tools provided by ISPs to help email marketers get feedback from those who receive their email messages. When you sign up for feedback loops, you automatically receive complaints whenever an ISP's user clicks on the spam button in email messages sent by your company. Getting this feedback helps your company proactively manage complaints. By understanding and acting upon the feedback of your email recipients, you can enhance delivery, streamline content and maintain a positive reputation with the ISP. Not every ISP offers a feedback loop, but your company should sign up for all of the available feedback loops provided by the ISPs that are represented in your email list including AOL, Yahoo!, EarthLink, Gmail and others.

4. Brand reputation

The combination of who your company is, what your company does, your company's partnerships and how your company is perceived comprises your brand reputation. A positive brand reputation is essential to the overall success of your business. People do not buy the products or services of a company that has a poor reputation.

Technology and the Internet compound this issue. A hard-to-use website or poor customer service experience is enough to land your company's name on Facebook, Twitter and an untold number of blog sites in mere moments — and not at all in a favorable light. You could be flamed in social media, negative comments could come up in online search and your competitors or customers could post negative comments on the Web. The fallout from this is low response to your email messages or more spam complaints, which affect your email deliverability. This makes it harder to remove blacklist complaints.

5. The law

The United States is actually one of the most lenient countries when it comes to regulating email. Compared to other countries, the U.S. email industry relies very heavily on voluntary adherence to best practices, and the legal requirements are pretty relaxed. However, the laws that we do have are very clear. The current law, the CAN-SPAM Act, applies to all commercial messages (not transactional messages) and requires:

1. **Unsubscribe compliance** – A visible and operable unsubscribe mechanism present in all email messages that must be honored within 10 days.

- 2. Content compliance** – This includes accurate “From” addresses, subject lines and offer alignment. Each email message must have a legitimate physical address for the publisher and/or advertiser. Adult content must additionally be properly labeled.
- 3. Sending behavior compliance** – This means not using open relays or a server that is not properly secure and that allows third parties to send email. Additionally, emailers can't harvest email addresses that are taken from online postings, content on websites or through other means that bypass opt-in rules. The law further prohibits using forged email headers where the email appears to come from a server other than the actual source.

You should also be aware that there are other laws in addition to CAN-SPAM:

- 1. State law compliance** – Be aware of email laws at the state level. For instance, there are regulations in some states against sending material via email that is deemed illegal for minors. If your content is not appropriate, you must first scrub your lists against each state's Child Protection Registry prior to sending to residents there.
- 2. Country compliance** – Most developed countries have some form of email or online legislation regarding sending email to residents there. Always check these regulations before emailing to residents outside the United States. You must adhere to the laws of the country you are sending to, regardless of where you are sending from.

Conclusion

Even the most experienced email marketers know that managing deliverability can be a challenge. But deliverability is a critical element to the success of email marketing campaigns and is therefore an important area to manage proactively.

Top 10 Deliverability Myths Debunked

The subject of deliverability has inspired many myths about what will get your email into the inbox and how to manage your deliverability options. Here are some common myths debunked.

- 1. ISPs have a “bat phone” email marketers can call to resolve deliverability issues.** This has never been true, which means that if your email is not being delivered or you've been blacklisted, there isn't one easy solution. Participating in feedback loops can provide you with useful information to prevent ISP deliverability issues, and having an ESP with strong ISP relationships can make the process run more smoothly.
- 2. There is a list of magic words that will automatically get your email stuck in spam filters.** Using highly effective direct marketing words like “free” in your subject line or email content will not prevent your email messages from being delivered. The number of spam complaints about your domain, your email and online reputation as well as your company's adherence to best practices and authentication are much more important.
- 3. Permission-based marketing messages are always delivered to the inbox.** As much as 20 percent of legitimate email in the United States is never delivered. Having permission on its own is not enough to get your email messages delivered to the inboxes of your intended recipients. You must also pay attention to spam complaints and the responsiveness of your subscribers and keep your list clean.
- 4. Confirmed subscribers won't hit the spam button.** The truth is everyone hits the spam button at one time or another and for their own reasons. But those who have confirmed their subscriptions with an opt-in are much less likely to do so. Even if your list is double opt-in, relevant content and appropriate adherence to best practices is much more likely to keep email recipients from marking your messages as spam.

- 5. If campaigns are making money, your company must not have deliverability issues.** The reality is that in most cases a small percentage of your customers are responsible for the highest percentage of response and revenue generated from your email opt-in list. That means you still need to employ best practices to get the most revenue from your email marketing efforts.
- 6. Email sent at night will prevent ISPs from monitoring your messages.** ISPs monitor email messages via automated processes, and the decision to deliver is made mechanically, not by individuals. So the time of day when an email is sent does not impact ISP monitoring.
- 7. Your email service provider handles all aspects of deliverability for your company.** While using a good ESP can help assure the deliverability of your email messages, you also have to proactively manage your sender reputation. A good ESP will maintain a solid infrastructure and help you authenticate your email messages, track complaints and manage bounces properly. But only you can control your data sourcing, sending frequency and content strategy – all of which contribute to sender reputation.
- 8. It's impossible to get subscribers to add you to their safe sender list.** The benefits of asking subscribers to add you to their safe sender list far outweigh any downside. And most savvy consumers understand the benefits of receiving email messages that they have requested and are willing to do so. Be sure to include a request to be added to the safe sender list of your subscribers prominently in your email messages and consider an incentive like a discount.
- 9. Sender reputation can be monitored with seeding campaigns.** Using “seed addresses” – addresses that send an email back to you – is one of the most efficient ways to track inbox deliverability and to see if anyone is abusing your opt-in list. However, this is only a small piece of the puzzle; you still need to make sure all the other elements – authentication, feedback loops, sender reputation – are in place.
- 10. If I send more email, my results and deliverability will improve.** Engagement and overall sender/brand reputation have much more to do with results and deliverability.

Optimal Email Design Made Easy

Graphic designers are trained and experienced in what's visually appealing and draws a reader. But an understanding of good design and what works for email can be two different things. Many designers are unfamiliar with the quirks and limitations of designing for email, and it's your job to provide direction to steer them away from the common mistakes that negatively affect delivery and response. While many of the recommendations in this section are about graphics, we're not suggesting that you eliminate all of the graphic elements in your email designs. People are visual creatures, and images make a positive impact. Just be sure that your designer knows how to make graphics work for your emails and not against them.

The Top 10 Things Both Marketers and Designers Need to Know

- 1. Don't give up on graphics, but know that many of your recipients won't see them.** Many email clients block images by default. So unless users specifically turn images on – either for all emails or just one at a time – they'll see empty boxes where your images should be. You don't need to eliminate graphics, but your designer should know that blocked images are a fact of email life. When reviewing email layouts ask the designer to show two versions – one with images visible and one with the images blocked. Both need to work equally well.

- 2. Alt tag copy is an art.** An alt tag is an HTML tag that provides alternative text when graphics are not displayed. Since graphics are often blocked, why not use this as an opportunity to make the email effective without them? Many marketers settle for alt tag copy that simply tells the reader how to turn the images on. In today's environment, you can rest assured that most email users know how to do this. Instead, why not consider giving the customer a benefit to turning the image on to see what it is? Try describing the product if the image is a picture of something for sale, or selling the event or service through alt tag copy if the image is not product related.
- 3. Don't mask your call-to-action.** Because your email graphics may not be seen, it is vital to refrain from placing calls-to-action into a graphic. Let's say the "Click Now" button or phone number is beautifully displayed in an eye-catching graphic. If the recipient has blocked images, you've just sent an email with the call-to-action totally hidden from view. It's a good idea to make calls-to-action stand out using text-based HTML that's embellished with fonts, borders, colors or even background images.
- 4. Make sure the reading pane contains a call-to-action, not just graphics.** Your designer might want to put your company logo, your newsletter masthead or another eye-catching element in the top left hand corner of your email. This is what works best in traditional media like mail and print advertising. However, with the high adoption rate of preview and reading panes, the top-left section of your email might be all your readers see in their email inboxes. The preview pane or reading pane is basically the tiny portion of the body of your email that can be seen automatically, before a user opens your email, displays in full view or scrolls. The real estate varies by email client, but you usually only have two to four inches of space to tell your story and persuade viewers to open your email. Think of the preview pane as your teaser area – a place to grab the readers' attention and entice them to either scroll down or fully open the email.
- 5. Use your subject lines, sender name and "From" address to their best advantage.** In today's email-heavy environment, most recipients wade through the often overwhelming volume in their email inboxes by performing "email triage" – quickly deleting any messages that are not worth their time. They usually decide this by seeing who sent the email and what the subject line has to say. This means that the most critical design element – before readers even open your message and see what your email actually looks like – is the plain text that appears in the inbox.

There are three critical places to brand your email so that readers instantly know who you are: the sender name, your "From" address and the subject line. The sender name should include the name of your company or brand, not the name of an individual. For example, your email should come from Awesome Company or Brand Name, not Jane Doe. Some email clients display your actual "From"» email address instead of a sender name. So you should use a "From" email address that makes it clear who you are and what you do, such as offers@company.com or newsletter@company.com, not jane.doe@company.com. The subject line provides a third branding opportunity. Think of your subject line as the equivalent of an envelope teaser in postal mail.

- 6. Know what pre-headers and snippet text are and how to use them as response-oriented tools.** In the inbox, many email clients supplement the subject line with what's known as pre-header or snippet text. Here are a couple of examples of how pre-header or snippet text is used:
 - Outlook: In Auto Preview mode, readers see a short line of text directly beneath the subject line.
 - Gmail: PC users see a shaded bit of text after a truncated subject line. (Just sender, subject line and date sent show up in the Macintosh version.)

- Yahoo!: Pre-header or snippet text render as a pop-up when readers mouse over the subject line in the inbox preview on their Yahoo! home page.

This tiny but significant part of your email message can help tilt the balance in your favor when readers are zipping through their inboxes looking for which messages to open and which to delete. So where do these email clients get the pre-header or snippet text? It's generally whatever's in the first line or two of your email. That's why so many HTML emails now include a line of plain text at the very top of the message, directly above where any HTML and images begin. If you don't like this look, you can use white text on a white background to minimize design clutter and still reap the benefits of snippet text. A powerfully crafted snippet builds on your subject line and entices the reader to open your message.

7. Web-like navigation is a poor idea in today's mobile email environment. Until recently, it was considered acceptable to have a home page-like row of navigation links at the top of an email. However, with the skyrocketing popularity of mobile devices, simplicity is key. It's generally a good idea to make sure that any navigation bars appear below your primary call-to-action instead of at or near the top of your email.

8. Know what to do about Outlook 2007, Gmail and Cascading Style Sheets. Cascading Style Sheets (CSS) is a language used by designers to describe the presentation of a document that will be read via the Web or email. It's most common use is to style Web pages or emails written in HTML. Before Outlook 2007 and the increase of Gmail adoption, designers typically created an external CSS file with all the layout information for an email and then linked it in the header area of the HTML code. However, Outlook 2007, Gmail and a few other email clients changed this because they now completely ignore CSS instructions that are coded in this particular way. Your designer will need to code all fonts, colors and other details inline – also known as Inline CSS.

In other words, designers must specify formatting instructions throughout the email, table cell by table cell, paragraph by paragraph to ensure the email is viewed correctly. This is much more time-consuming than linking to an external CSS file. But it is a necessity if you want a guarantee against garbled, mangled emails arriving in your audience's inbox.

9. It is vital to test your email with different email clients for rendering differences. Once you've paid attention to these tips and think your email is designed just right, don't just assume it will render well in the real world. Different email clients, such as Outlook, Gmail, Hotmail, Yahoo! and AOL, display HTML in different ways. Your email can look great in your inbox, but look absolutely jumbled when viewed in a different email client or on a mobile device. Whenever you are launching a new email design or doing a major overhaul of an existing one, it is a good idea to send yourself test emails using the major email clients and devices your readers use. This test should examine:

- The sender name and "From" address – do they read correctly and explain who you are?
- The subject line – Is enough of it visible for it to be effective? Does it provide a reason to open?
- Snippet text – is it a true call-to-action or just mundane housekeeping?
- Preview pane – does it provide an incentive for readers to open your email? Is your main call-to-action or value proposition visible?
- Images – are the graphics appropriately placed?
- Blocked images – does your email still make sense when images are blocked? Do alt tags support with text the images your readers can't see?
- Fonts and link colors – are your fonts displaying as designed? Are your links the right color? This is a common area where different email clients display things differently based on how your designer codes your Inline CSS.

- Test all links – do they work? Outlook 2007 sometimes experiences rendering issues when links are clicked within your email, causing text around certain links to temporarily disappear or to display in strange ways. Troubleshoot any issues you find.

10. How to find the best resources for email design and implementation. With the information above, you're armed with what you need to give direction on email design so your designers can produce layouts that get attention and support your brand while also functioning properly. When choosing a designer for an email program, ask about some of the things on this list. What do you do if your designer doesn't know how to answer "How do you handle pre-header or snippet text?" or "What can you do to ensure an email is effective when images are turned off?" Find a designer who does. If your designer insists that using CSS is just fine, be wary. There are better informed designers who can and will do the job more effectively. Even with the right designer, it is very helpful to have resources to check email rendering and deliverability and to predict response with online marketing tools. An integrated online marketing tool can ensure that your marketing campaigns produce the best results at the lowest cost.

Conclusion

Good design is as important as ever to email response. Just make sure that your designer is experienced in working with email and understands what is needed.

Getting Better Email Results with Segmentation

Throughout this guide, we have touched on the importance of relevant content in email programs. Relevance is the right content sent to the right audience, which results in high response rates, delivery rates and reader engagement. Advances in email list management software and customers' increasing willingness to provide specific information about their preferences mean that email marketers can now use sophisticated segmentation in email campaigns to tailor messaging to be more relevant than ever. Now, marketers can provide different messages to many different segments of their database, using all sorts of factors that affect buying behavior. This procedure, called segmenting, allows you to create a series of highly-focused mailing lists without having to re-enter the data every time or require subscribers to sign up for many different mailing lists in order to get the email they really want.

Why You Should Segment Your List

Sure, batch-and-blast is easy. However, segmenting can help you boost the overall performance of your email marketing program because it improves both revenue and list quality:

- **Revenue:** Subscribers are more likely to open and act on mailings that more closely reflect their needs and interests. Studies have shown that you will see a greater return on your investment when you target your mailings. A campaign that uses segmentation based on past behavior, customer reported interests and statistics such as opens, clicks or conversions can bring in nine to 10 times more revenue than one in which the entire list receives the same message.
- **List Quality:** Segmenting can help you keep your mailing list fresh and engaged. For example, you can target subscribers who haven't opened or clicked in your emails for a while and try to re-engage them by narrowing

down the content to fit their interests. And for current or new subscribers, a subject line or offer that is most relevant to them will stand out in an overflowing inbox and is less likely to be reported as spam.

How Segmenting Works

You need two ingredients in order to segment effectively: relevant data and list management software that can create segments.

Typically, you can get good, actionable data by using information subscribers hand over to you when they sign up for your emails or register as a customer at your website (customer-reported data), as well as information they generate by how they act on your email messages or behave at your website (analytics data).

Customer-reported data:

- Age
- City or location
- Interests
- Motivation (How soon do they expect to buy?)
- Other mailing lists of yours that they are also signed up for
- Opens
- Clicks on links to landing or forward-to-a-friend pages,
- Contact information
- Business-to-business contact data such as company name, title, size of company or revenue

One caveat: Don't ask for too much information at registration. You probably will not have established the kind of trusted relationship with your prospective subscribers that would make them feel comfortable handing over demographic data such as household income. You can, however, create a list segment and send a targeted email inviting them to come back to your website and fill out a survey or preference page, which can collect the more useful data you need to hone messaging even further.

Analytics data:

- What they purchased or downloaded
- Which pages they clicked on, in which order, and how long they stayed on each page
- Which products they clicked on without acting on
- Products they clicked on and added to their shopping carts
- Whether they abandoned their carts
- Whether they are first-time buyers or repeat customers
- How much they spent
- Which keywords they used to find your site

Even if you don't collect much data from your subscribers through surveys and preference pages, you still have plenty of information based on their email history, such as how long they've been on your list and how often they open or respond to your mailings.

How Segmenting Non-Responders Can Increase Response and Improve Deliverability

Let's say you want to trim the dead wood from your mailing list. Segmenting can help you quickly identify your non-responders and either get them back as active customers or give you a reason to drop them from your list. To do this, send an email to anyone who hasn't opened your emails for six months or longer and invite those subscribers either to update their preferences or unsubscribe. Remove from your list anyone who doesn't respond within a predetermined time.

However, assuming the address is still valid, you don't want to simply toss it away. After all, you probably made investments to acquire it and you'd like one last chance to recoup your cost with a sale or other display of interest. Consider creating a "We want you back!" segment. Choose non-responders based on a cutoff date or period of time in which they have not been active. Create a segment of these addresses and a special message that acknowledges the lack of response and provides a special offer for re-engaging. This email can also invite them to update their preferences or their primary email address or provide unsubscribe instructions so that they can opt out.

If you get a low response – less than a 20 percent open rate and less than a 5 percent click rate – on any link in the message, you might consider removing any non-responding addresses from your database at this point. Do this especially if you receive a markedly higher number of spam complaints forwarded from ISPs. You don't want to do anything to jeopardize your sender reputation.

If you generate more positive responses, try the mailing one more time. Create a second list segment of all those who didn't respond and send one more mailing, then drop anyone who doesn't respond in a week.

Some Final Thoughts on Segmentation

Segmenting is a powerful tool, but you need to use it judiciously. Keep these two qualifications in mind when you get ready to slice up your own database:

Does this segment make sense? You can create any kind of segment you want once you have the right data but the segment should always have a clear goal that advances your email program or your company goal.

Do these mailings violate subscriber expectations? Related to the first concern, be careful not to let segmenting backfire on you. Sending additional messages, no matter how relevant, can irritate your subscribers if your messages come too often or wander into product areas that go beyond what they signed up for. And irritated customers are the ones who vote against you by ignoring your messages, unsubscribing from your list or reporting your email as spam to their ISPs. Segmenting will help you reach your customers with more targeted messages. However, it's a tool that must be used correctly to deliver its potential benefits.

Email Triggers – Automatically Rally Response Rates, Generate Sales and Strengthen Your Brand

Managing email programs can be time intensive no matter how rewarding the response rates are. Setting up each individual campaign can take a lot of staff, budget and time. One way to maximize email effectiveness is to use automated email programs as a supplement to individual campaigns – generating campaigns, results and sales like "magic." With little investment in time or money, companies can strengthen customer relationships and increase revenue through such programs.

In this section we will cover:

- The different types of automated email programs
- The benefits of trigger email campaigns
- How to start using trigger email for marketing
- Resources for setting up trigger email
- Plus, a bonus checklist: Idea Starters for Your Trigger Email Arsenal

Types of Automated Email Programs

It's helpful to understand the different types of automated email and their role in your programs:

- **Trigger Email** – A trigger email is defined as an automated email message that is set up ahead of time to be sent in response to an event or “trigger.” This trigger can be a customer action or response, an event like a date, a website update or a response to Web analytics or Web visit data. A trigger email can have static or changeable content based on targeting or defined business rules.
- **Dynamic Content Email** – A dynamic content email is one in which the content is varied based on customer behavior or customer data. These email messages take advantage of knowledge of a specific customer gathered through account preferences, response data or Web analytics. They are used to create highly individualized and targeted content. The use of dynamic content in trigger emails has been proven to increase order size, response and revenue because these types of emails are more personalized to the recipient.
- **Transactional Email** – Transactional emails are sent automatically to confirm a certain activity. Examples include reminders for appointments or events, renewal notices, order or shipping confirmations or confirmations of a profile update. While it is important to keep these messages brief and informative, they are often used for brand reinforcement, promotional opportunities and trust recognition.
- **Welcome Email** – Welcome emails are the most common type of trigger email and rank among the most important steps in the trigger email process. A recent Experian report, “The Welcome Email Report,” shows that these types of emails have transaction rates that are nine times higher than bulk mailings. Even more, they average revenue that is eight times higher than bulk mailings.

Benefits of Trigger Email Campaigns

Companies that engage in trigger-based marketing programs are yielding as much as a 400 percent improvement in response rates over traditional email campaigns. They accomplish this by matching their knowledge of customer behavior with technology that allows them to strike while the iron is hot, all without busting the marketing budget.

Once set up, trigger email programs work automatically and don't require day-to-day management. They aren't subject to delays when resources are tight or other priorities come up. And trigger email can complement broader communications like newsletters, special offers or acquisition programs. Plus, unlike campaign email, trigger email is facilitated by customer behavior. Each message is sent in response to an event or customer-initiated action. So from the customers' perspective, the messages they receive are highly relevant. This targeting pays off in higher response rates and increased customer satisfaction.

Tips and Resources for Establishing a Trigger Email Program

The first step is to develop a trigger email plan that defines what will be sent, to whom and when. Consider these important factors:

- 1. Strategize what these communications could mean to your business and what kind of response you can expect to achieve.** Don't look to trigger campaigns to reinvent your company; look at your company's strengths and capabilities to build a realistic program. Set the objectives of your program on a broad level with goals such as increased revenue, decreased attrition or increased response to campaigns.
- 2. Determine what data and data resources are available to build a program.** What segmentation, testing tools and Web analytics are available to guide your company in determining offers, timing and audience? What information do you actually have about customers' preferences and behavior? Before you decide that a birthday greeting is the basis for an ideal program, make sure you actually have customer birthday information.
- 3. Inventory all customer communication** to determine if any current transactional or marketing email messages can be put into a trigger email program. Then define and develop categories of possible trigger email content and classify by obvious or less-obvious opportunities.
- 4. Think about your recipients first.** Are the offers, timing and targeting right for your recipients? If you're brainstorming ideas for trigger email messages, consider conducting a survey of your existing subscriber base, or start a Twitter or Facebook thread to get feedback from your audience on what kinds of trigger email they would find useful.
- 5. Define the triggers to be used.** Is it customer-reported data? How about behavioral triggers like opening a new account or a change in spending or purchase habits? Also, determine if you can use your Web analytics to set triggers. Having the ability to send "abandoned shopping cart" messages or use Web visit data to personalize content can spur the development of highly effective trigger campaigns.
- 6. Set frequency rules and a contact cap.** With a complex email follow-up path, you could be sending too many emails or sending emails too frequently to your subscribers. Before you execute, ensure that if recipients follow a certain response path, the contact is reasonable. Is once a week often enough to contact them? What if your subscribers respond to three offers? Will they get three follow-up email messages? Thinking this through at the development stage is one way to assure the success of your trigger program before it deploys.
- 7. Review response and ROI figures to optimize your trigger email program.** Make sure you have a testing plan in place for each trigger and a plan to refine or eliminate any nonperformers. Decide before the very first trigger email goes out how you will measure, what testing you should put in place and what your actions will be depending on the results.
- 8. Automate, then validate.** Although the idea behind trigger email is that the programs are "set and go," review the process regularly. Test the system to make sure it is still working. And revisit any trigger email programs if your marketing strategy, product offerings or other factors change. It is very frustrating for the customer to get an outdated offer or to follow a "path" that leads to nowhere.

Conclusion

A trigger email program gives you the power to send your customers the right message at the precise moment they are most likely to act on it. Trigger programs use information already available to you to increase rate of return without putting more pressure on already strained marketing resources or budgets. Taking the time to strategically

plan and set up a trigger email program ultimately results in an automated process that doesn't require day-to-day management and adds much more value to your marketing mix.

Checklist: Idea Starters for Your Trigger Email Arsenal

Abandoned shopping cart email – These campaigns more than double the number of orders and the order size. Send an email announcing a special offer, free shipping or other sweetener to encourage customers to come back and complete their purchase. Refine these email messages by testing different offers and timing. While one may theorize that the sooner an email is sent, the better, many companies have found that timing the trigger email to go out as long as 24 or 48 hours later is actually more effective.

Win-back programs – Set up trigger email messages that include incentives for those who haven't purchased or visited your website for a while. Start with those who haven't purchased in the last three months, six months and a year. Use their purchase history to determine the right offer and then use dynamic content to easily deploy email to a wide variety of audiences.

Satisfaction survey email – Send a trigger email with a satisfaction survey after the first purchase and on a metered schedule after that. Consider offering a discount or prize for those who take the survey.

Cross-sell email – Use a trigger email to cross sell other products. Set up a trigger email whenever someone either buys or looks at a product on your site that isn't one of your top 10. The email should promote a special offer on your strongest product – and hopefully convert a visitor into a customer and a larger sale.

Add an email “punch card” for purchases – Set up a program to keep track of the number of purchases by unique customers. When customers have purchased 10 times, give them a free gift or discount coupon. Use a trigger email series to let them know how many punches they have made and to promote special offers or products to encourage them to add another punch to their card.

Customer service trigger email – For those who have contacted customer service, trigger a follow-up email asking if their concern was addressed and providing contact information in case they are still having issues.

Internal notifications – While not a customer-facing application, don't be afraid to use the trigger email functionality to communicate with your sales or customer service teams. For instance, you can set up email alerts so a sales rep can follow up to make sure all is well if a customer reviews particular content on your website or goes to a customer service page. Or, send email alerts to your PR team for follow up when reporters visit your press room.

Seasonal trigger email – If you sell sports-related products, set up triggers before championship matches to promote logo merchandise. For health care or beauty products, set up triggers to automatically remind customers to order more allergy medicine or sunscreen when the right season rolls around again. Use holidays or seasons as triggers, segmented by purchase history to create trigger email messages for relevant products and offers.

Service reminder triggers – If your company provides a service – tire rotation, software upgrades, dental checkups, furnace filter replacements or whatever – send reminders to come in or call to set the next appointment or to take advantage of special offers.

Milestone email – Offer your customers a discount or gift on their birthday, anniversary or other special day. If you market to businesses, send an offer on start-up anniversaries or on the first day a business started working with your company.

Reactivation email – If customers have not purchased or clicked through an email in more than six months, their likelihood of purchasing in the future is low. A reactivation email can promote new targeted offers or general discounts to get those customers to purchase from you again.

Drip email programs – These are regularly scheduled email messages that go out with offers or include additional content along with offers, recipes or tips. Again, use subscriber preferences or historical behavior to determine the right offers and tips for your audience.

Email alerts – Encourage your customers to modify their profiles to set up alerts when new products are in stock, when their favorites go on sale or to receive alerts when new content is uploaded to your website. These are great because they are truly customer initiated.

How Did Your Program Do? The Basics of Email Metrics

The beauty of email marketing is that it is trackable, measurable and you can test programs to improve results. Get comfortable running your metrics and spend some time interpreting them for increased email success.

- **Open Rate** – This metric indicates how often a recipient opened your email. Since so many emails go ignored, it's good to know how many got subscribers' attention. However, don't be misled into believing that every opened email was actually read and digested – in some cases, email is scanned and dumped, opened by mistake or only opened to find the unsubscribe link. Open rate is not the best indicator of email success; however, it can be a great pre-response indicator and also a great way to get results on content or subject line testing.
- **Click-through Rate** – This is a metric that lets you know how often a recipient clicked on a specific link in your email to either go to your website or to take another action. Again, it's a pre-response indicator, but it can let you know what content and actions in your email are the most attractive to the reader and give you a good idea of what part of the email was of most interest. Be sure and look at each link separately to determine the winners. Also look at the comparison of click-through to conversion or response. Did people click on your email links (showing interest) and lose it when they got to the response area? This could be an indication that your response form either asks for too much information, the offer doesn't pay off as promised in your email or that somehow you lost the reader's interest.
- **Conversion or Response Rate** – This is absolutely the most important metric. All email has a call-to-action, and this data answers the question, "Did recipients convert to the action you wanted them to take?" Did they sign up for a subscription? Make a purchase? For most email marketers, the question about whether or not someone purchased is the most important metric of all.
- **Unsubscribes and Spam Complaints** – The unsubscribe metric is becoming less important over time. Since consumers are getting so overwhelmed with email, many don't even take the time to unsubscribe or report email as spam. So in most cases, you'll find that those people not interested will simply delete your email without reading it. But watch this metric for spikes that could indicate that your content is off base. And any spikes in spam complaints can adversely affect your deliverability so it's important that you pay attention and take action to avoid this.
- **Bounces** – This is a deliverability metric and can help you keep watch on how current your email opt-in list is. Soft bounces – a full mailbox or server that is down – are temporary, and hard bounces – mailboxes that are no longer in existence – are permanent. Delete any hard bounces, and if an address provides a soft bounce over time, remove it. Keeping an outdated list means that you are relying on a skewed picture of your email universe and also can affect your reputation with ISPs over time.

Tying Web Analytics into Email

Successful email marketers make reviewing analytics a priority. They know that the best programs come out of learning from the email results of past executions. What's more, Web analytics, when gathered and used properly, can be an additional low-cost pot of gold for email marketers. Using Web analytics in addition to email metrics can provide a better understanding of the behavior of website customers. This section will discuss the key Web analytics that should be reviewed, how to use them in relation to email marketing and the benefits of doing so.

Key Web Analytics Definitions

The term "Web analytics" refers to the process of analyzing the behavior of website visitors. The effective use of Web analytics enables a business to attract more visitors, improve their experience with the website, retain or attract new customers and increase the dollar volume each customer spends. Here are a few key Web analytics definitions that are important to email marketers:

- **Page:** A unit of content on a website
- **Page View:** The number of times a page was viewed overall
- **Visits or Sessions:** An interaction by an individual with a website consisting of one or more requests for a page view. If an individual has not taken another action (typically additional page views) on the site within a specified time period, the session will terminate.
- **Unique Visitors:** The number of inferred individual people (filtered for spiders and robots) within a designated reporting timeframe with activity consisting of one or more visits to a site. Each individual is counted only once in the unique visitor measure for the reporting period.
- **Search Marketing Analysis:** Analytics that determine which paid keywords and organic terms generate traffic and conversions. Analysis can even drill down to the page visited (by keyword) and can then map the keywords against the cost and revenue generated to evaluate the return on spend.

Web Analytics and Email

Email metrics are useful in determining success or failure of campaigns. But using Web analytics as well can give you insights into your subscriber base as a whole and how it interacts online with your company. If the objective of your email campaign is to generate sales, knowing conversion rates is important. But you can know so much more by tracking the average time each visitor spent on your site, the exit rate of visitors, where visitors left your site and where they lingered, and the pages they visited after the landing page. You'll also want to compare some of these metrics against how much money each customer spent with you, so you can optimize and streamline the conversion process accordingly.

Here are a few examples of what Web analytics can deliver:

1. **Better and more robust ROI tracking.** In an email marketing campaign, you usually use some sort of entry point, such as a landing page, on your website as the response mechanism. Your email drives visitors to entry points on your website, and your Web analytics tool will track your visitors' behavior, following them throughout their visit and purchase. Email campaigns can be directly associated with costs, revenue and conversions from your visitors, and you will be able to determine the ROI of each email marketing campaign with greater precision. You suddenly have a much clearer picture and can start to quantify the level of success of the campaign.

- 2. Better email creative.** One of the hardest things to determine is link placement within your email. Should a certain item be placed above the fold, below the fold or on the side? Web analytics can help you determine which link placement location yields you the highest ROI. You might find that a link in your email footer is generating a large amount of traffic to your home page, even though it was not your main call-to-action. Perhaps placing that link above the fold will produce even more traffic, perhaps not. Web analytics data can help you track results so you can test all sorts of placement scenarios to find your champion.
- 3. Effective segmentation of prospects.** Every email marketer wants to send the right offer to the right prospect. Use Web analytics reports to drive your content and offers. When prospects place orders in a shopping cart without checking out, send them an email with a coupon to spur purchase. Be patient; these campaign variables might take some adjusting, but you'll see results over time.
- 4. Integration with other sources of information.** For example, offer a special deal to visitors who have made two purchases in the past year or who have referred five friends to your website. Pulling this type of data together allows you to paint a more complete picture of your visitors and better target your email campaigns and offers.
- 5. Improved diagnosis of problems.** For example, an email campaign might have a great click-through rate but a poor conversion rate. Segment that campaign and look at navigation to determine whether visitors: a) were distracted into peripheral areas of the site, b) found their way to other resources like white papers or c) simply left in the middle of the conversion process. This can help determine if you need to refine site design or campaign messaging. Or it might reveal that visitors are interested but not yet ready to buy, which could lead you to refine your offers.

How to Get Started Using Web Analytics in Email Marketing

For those who are already using some type of tool to gather website visitor data, you have a solid starting point for using Web analytics to energize and optimize your email marketing. Here are some steps you may want to use to drive decisions about your email marketing campaigns:

- **View the data on most-visited pages** – This will tell you the areas of your site that are most interesting to your visitors, which can help you determine content and offers.
- **Check out the length of time spent on pages** – This is an indication of whether the content on specific pages held the interest of visitors and met their needs. The implication being that the more time visitors spend on a page, the more the content resonated with them.
- **Review shopping cart abandonment rates** – If your visitors often fill their carts and do not make a purchase, you may need to change the offer or messaging in your email, or add a specific end date to create urgency.
- **Review response to forms** – While this data capture point isn't isolated to Web analytics, it's noteworthy. If you use forms to generate leads, you can also use the data captured in the forms to profile those same visitors over time.
- **Get close to your Web team** – If your company does not yet have an easy-to-use Web analytics tool, your Web team will pull reports for you or show you how to pull them. This data can be complicated to understand in the beginning, and you'll need their help to make sense of it.

- **Make sure to call out Web analytics as a key to your ROI reports** – You'll want to plant the seed with your management that Web analytics are keys to better business decisions and to accurate ROI reports, because eventually you will want your company to invest in a marketing tool that includes integrated Web analytics. Start writing those business cases and emphasize the successes.
- **Start researching new tools, tips, tricks and resources to improve your knowledge** – Compare usability, reporting and management of data. Really scope out your options. Find out how Web analytics data can be exchanged among your other systems. It might make more sense and be more valuable to choose a Web analytics tool that is already integrated or can easily communicate with your other applications. In email marketing, getting more information is always helpful. Using email and Web analytics to maximize your learning will result in much more successful and profitable campaigns. If you don't currently have one, consider getting an email solution that provides analytics and automatically ties the learning in so your campaigns will be more effective.

Integrating Email with Other Marketing Channels and Platforms

High-performance marketing organizations are starting to pursue “integrated marketing” as a miraculous tonic to improve return on investment. As with all integration, doing so will help email become more effective. This section discusses what organizations can do to integrate email with other efforts and what the benefits are. Traditionally, integrated marketing has been described as an approach to branding and creative whereby a company would make sure its print campaigns aligned with its TV spots and that the TV spots aligned with direct mail campaigns. As online marketing has become increasingly important, this definition has come to also mean that the corporate website, email campaigns, banner ads and other online channels and platforms all tell the same story as a company's offline content.

This may be the goal, but often, behind the scenes, nothing is integrated. Different marketing teams, tools and processes are used to create, deliver and measure all these different types of marketing deliverables, even if the deliverables themselves manage to look and sound consistent. In practical terms, the solution to this problem means taking a more integrated approach to messaging and creative, integrating sales and marketing processes to increase response and efficiency, integrating different marketing technologies and opt-in processes and methodically measuring success across all marketing and business metrics to guide budget and resource allocation decisions.

Integrated Marketing: Worth the Effort...

- **For demonstrating marketing's contribution to the bottom line** – C-level executives are increasingly demanding meaningful business metrics that equivocally demonstrate the relationship between marketing campaigns and sales revenue and that accurately forecast sales performance. By integrating back-end systems and processes, marketers can turn data that's currently trapped in multiple marketing applications into actionable information for the entire company.
- **For generating more leads, and more high-quality leads** – Marketers are no longer applauded when they generate leads in bulk. Sales wants highly qualified prospects that are more likely to turn into paying customers, and they expect marketing to deliver. Integrated marketing helps determine which lead sources are producing the most engaged recipients, by leveraging Web and email analytics and other integrated tools to perform more granular analyses of results from email, mobile marketing, social media, pay-per-click (PPC) ads, banner ads and other tactics. The goal is to identify which campaigns produce prospects who take the desired conversion actions versus those who merely produce “traffic”.

- **For producing more consistent, cohesive campaigns** – With so many different ways to touch customers and prospects – and so many different marketing silos working on all these different types of tactics – companies require more visibility into who is doing what and greater collaboration within and across teams.
- **For streamlining workflow with integrated marketing tools** – When different types of marketing technologies become part of a single, integrated toolset, process automation naturally occurs, and marketers are able to lessen the time spent reviewing data and reconciling information. For example, an integrated system can automatically add Web analytics tracking codes to email links and PPC landing pages, a repetitive task that would have otherwise been performed manually. Tasks that require human intervention, such as putting the right logos or a link to social media on an email template can also take less time since the asset-management system is now a part of the same tool that generates the creative.

Barriers to Implementation

Integrated marketing has great potential to solve marketers' toughest challenges, but it's not a quick fix. First, companies must overcome endemic organizational and technological challenges. They may have silo marketing functions that don't typically interact, data that's housed in multiple tools and owned by different functions, and difficulty measuring ROI for multi-channel marketing programs. These can all present barriers.

Marketing in a vacuum: Companies may have a person or team that specializes in email marketing, a search engine marketing guru, someone in charge of social media and mobile marketing, and a team that focuses on PPC keyword buys and Web analytics. There may also be a separate data analyst or group that pulls together marketing metrics and reports for senior management, an online agency and a traditional ad agency, creatives who develop art and copy, and the list goes on and on. Even in small-to-midsize companies, marketers may have little day-to-day interaction with colleagues who handle radically different types of tasks. At large enterprises, the potential for disconnect is even greater. Different business units may have completely separate marketing departments, different types of marketers may be located in different geographies and IT may "own" the website instead of marketing.

Chasing down data: Then there is the data. Online marketing dangles a tantalizing promise of measurability and accountability in front of marketers since it tracks user responsiveness in a way that offline channels simply cannot match. For example, marketers can easily discern how many users opened an email campaign or clicked on a Google pay-per-click ad, but they can only guess at how many users turned the page to a magazine ad or actually read a direct mail piece. Still, marketers have been largely unable to turn the wide range of available marketing data from their various online programs into useful, meaningful metrics that promote better decision-making. That's because different pieces of data are held in different tools that barely talk to each other, if they talk at all.

For example, an email marketing application has valuable information about what subscribers responded to which offers, but unless the email marketing and Web analytics applications are integrated, marketers can't discern exactly which email subscribers made a purchase versus the ones who left the landing page without taking action. Similarly, the person reading a PPC bid management report might know that keyword A generated heaps of traffic and cost the company only \$.56 per click – a real bargain. A few desks over, the Web analytics person might come to the conclusion that keyword A visitors are four times as likely to immediately exit the site as the average visitor – a real waste. And last, how do you calculate ROI on truly integrated marketing?

Measuring across channels: The realities of silo teams and silo data access become even more pronounced when it comes to multi-channel campaigns. How can organizations calculate the overall ROI of a holiday marketing campaign that includes social media, a text ad campaign, multiple email campaigns, several banner ads, numerous keyword buys, new branding that necessitated a website redesign, a direct mail piece and a couple of miscellaneous tactics no

one even bothered to track? Even doing an imprecise analysis of this type takes work. The person doing the reporting might have to gather information from several people, from marketing to sales to accounting; run reports from 2–5 different marketing technologies; and spend hours (if not days) crunching numbers to create pretty tables, graphs and charts that look “scientific.”

But the actionable data and analyses that can drive true ROI optimization are still missing. Did one email campaign actually produce better leads than the others – not just a bigger response? Did the increased PPC traffic correlate to increased sales – or simply strain the budget? How does one compare apples (low cost tactics like email and banners) to oranges (higher cost tactics like PPC and brand advertising) to determine which gets a bigger slice of next year's marketing budget? Most marketers try valiantly to make decisions based on merit and metrics, but limited access to truly meaningful data means they have to trust their “gut feelings” more often than not.

What are some solutions for making integrated marketing a reality today? To start with, it's important to get all of those responsible for marketing in the same room at the same time. Include your marketing team, creative team, IT and the agency. These communications can start to break down barriers between silo organizations in simple ways. The next major marketing push, be it around a product launch, the holidays or an important event, can be an important catalyst that drives changes to the planning, budgeting, tracking and launch processes.

For example, companies can:

- Bring together all the major stakeholders in the same room during planning meetings to find opportunities to work together more effectively.
- Align the various creative teams that are working on all the different pieces of the marketing program to make sure everyone adopts a similar look and feel.
- Assign specific accounting and tracking codes for the campaign in question that records all the related marketing expenditures by project code, not just by line item or type of tactic, making it easier to calculate ROI for the entire campaign.
- Start shifting roles and responsibilities within marketing, so that more people have an eye on the “big picture.” In other words, feet-on-the-street marketing personnel are often too busy running toward the goal of getting all their tactics out on time to worry about overall effectiveness. But someone needs to. The initial changes need not be drastic, cost a dime or disrupt everyday activities. Baby steps are more than okay.
- Next, implement a right-sized integrated marketing solution. Analysts and industry pundits classify these tools in a few different ways, referring to them as “marketing resource management,” “enterprise marketing management” or “multichannel campaign management” solutions.

Conclusion

High-performing companies are vigorously pursuing integrated marketing – an approach that's all about end-to-end, closed-loop campaign creation, execution and analysis. Once implemented, integrated marketing holds tremendous promise for streamlining marketing processes and providing meaningful insights into the ROI payoff for cross-channel marketing programs. It is well within any organization's grasp to move down this path, and companies are advised to move swiftly – before their competitors do.

Bonus Checklist: 10-Point Email Checkup

Hopefully this guide provided information, tools and ideas for your email campaigns that you can implement right away. But even with a new focus on strategy, list building, content creation and analysis, there are still tactical things that you should periodically check to ensure email programs are working. See how well your email program performs against these essential diagnostics:

- ✓ **Test your opt-in process to make sure it works and to see how it functions from the user's reference point.** Take a minute to walk yourself through your opt-in process, especially if it has been a year or more since you designed or tweaked it. Your first questions: Do all the links work? Do they send you to the pages you expect, such as a registration or confirmation page? Next, how many clicks does it take to complete the opt-in, including clicking a confirmation link in a follow-up email? Usability rules say the fewer clicks required, the more likely the user will complete the process. Two clicks is ideal, three is reasonable and four or more means you're more likely to see users abandon the opt-in. Be sure and do this for all working opt-in points including your main opt-in page and all landing pages that are active on your site.
- ✓ **Check in with the person monitoring all incoming mailboxes.** It makes sense to automate your email marketing or newsletter program to reduce the need to supervise opt-ins, opt-outs, registration changes, targeting and segmentation. However, remember that there are human beings behind the email addresses on your list, and they're capable of just about anything. That includes not following directions for opting in, opting out, sending feedback or otherwise contacting you. That's why you need to designate someone, either in your department or in your company's IT department, to monitor all email mailboxes associated with your outgoing messages to watch for misdirected opt-outs, complaints and comments. Most especially this includes the email address you use to send your messages. No matter how many times you tell people not to reply to messages or how easy your feedback or unsubscribe process is, subscribers are going to hit "reply" anyway. Someone must monitor that mailbox to catch and route personal replies. If you haven't designated someone, now is the time to do so. If you have, check in often and find out what type of traffic and feedback is coming in.
- ✓ **Review message content, design and performance across platforms and email clients.** The way your email is received has definitely changed in the last 12 months, and it will continue to do so in the future. When was the last time you tested your email message to make sure it renders correctly across all email clients? You may regularly check test messages in your inbox, but have you checked them in Outlook, on a Mac, in AOL, Yahoo!, Hotmail and Gmail? And don't forget, you have to add in mobile devices and smartphones, which don't handle HTML and rich text well. If you use an email solution provider to manage your email programs, it might offer a testing service that can do this for you automatically. If not, take the time to check it yourself. If your emails don't look exactly like you want, change your designs so they work more effectively.
- ✓ **Optimize both ends of the email relationship.** When was the last time you looked at your unsubscribe rate – and the reasons for unsubscribes? New names grow old quickly on the typical mailing list. Interest, as judged by opens and clicks, starts to drop off as early as the first couple of weeks after opt-in. You need to act fast to get newcomers engaged enough to continue opening your messages and clicking on your offers. It isn't enough to nurture newcomers. You also need to do more than just say good-bye to people leaving your list, especially if they take the time to unsubscribe properly instead of merely fading away or hitting the spam complaint button in a misguided attempt to quit. Although you must stop emailing as soon as someone asks to unsubscribe, you should confirm the unsubscribe in a follow-up email or on the landing page. Include in it a link to a short exit survey, directions on how to re-subscribe if the unsubscribe was a mistake and maybe even an offer to sweeten the pot. This learning will help you refine strategy for the future.

✓ **Review all co-registration sources and monitor by source to see how they perform.** Co-registration, in which you cross-promote your email offerings with third parties, can be a fast and inexpensive way to build your list, especially if you don't have a lot of resources. However, co-registration has two big downsides. First, you can't always control what other businesses listed along with you in the co-registration deal do. Second, the people who sign up for your program may not be as motivated as the ones who sign up directly. Examine the opt-in page to see what other companies and offers are being listed with you. Make sure the registration page still works and contains your branding, that the permission level has not changed and that the registrations are properly being fed into your database.

You also need to monitor how well these names perform and whether they are responsible for more than their share of either business or problems, such as bad addresses and spam complaints. Segregate the names into a sub-list and compare them on key metrics with your general database. If the numbers are bad, discontinue the co-registration partnership.

✓ **Test all links in all email messages, transactional as well as commercial, especially your unsubscribe link.** One of the key provisions in CAN-SPAM, the U.S. law regulating commercial email, is that you must include a working unsubscribe mechanism in each commercial email message. As simple a step as unsubscribe might be, check each time to make sure your process is working. Don't get lulled into a false sense of compliance. You should test every link in every campaign message you send to make sure each one works. More than one time is even better, since things do break down. Follow the unsubscribe process through to the confirmation. Using a seed address, one that's on your list specifically to track rendering and deliverability, unsubscribe the address and take every required step to complete the process. Then, check the database to make sure the address has been either deleted or moved to an internal do-not-email list.

✓ **Review your deliverability.** Emails that are well targeted with great creative and compelling offers don't do your company any good unless they are actually delivered. When was the last time you reviewed your rate of delivery? Test your content against spam filters and see how many of your emails are blocked. If you aren't pleased with the results, optimize your email for inbox delivery by creating good headers, writing content that doesn't look like spam and cultivating good industry relations. If your current email solution doesn't have a component to rate your delivery success and help your company avoid spam filters, consider finding a service that can analyze your content and help you improve deliverability.

✓ **Review message frequency and sending schedule.** Are you sending too frequently, or not often enough? This is a hard call to make, because it's often not clear whether you would gain ROI by increasing mailings by one or two a month or lose it because you would aggravate recipients into unsubscribing, hitting the spam complaint button or going into hiding to escape you. Regardless, it's time to review your email program's performance over the last 12 months.

If you're sending less frequently than weekly or even bi-weekly, your list might be going to sleep in between sends. Consider stepping up your frequency by one or two mailings in a cycle to see if it will bring you added revenue. While you don't want to lose subscribers, you also don't want to leave money on the table. Understand that you have to be careful when you move mailings up beyond the level you promised subscribers. Moving from a weekly to a daily schedule could create irritation, but moving from a monthly schedule to bi-weekly might not have the same effect. How will you know? Test first and watch both the positive indicators – opens, clicks, conversions, sales, order size per sales, etc. – and the negative ones, such as spam complaints and unsubscribes.

✓ **Keep your list clean with periodic removal of inactive addresses.** It's true: half of your mailing list, maybe even more if you don't email it often enough, has gone inactive on you. They're still out there, but they aren't opening, clicking or buying. And you need to either clean out the dead wood or find a way to wake them up. First, you need to find out how many addresses have not responded in a certain time period. Segment your database by addresses that generated no clicks or opens in six months. Create a special message inviting recipients to opt in again, update preferences or take advantage of a special offer. After a period of time, go back into the segment and delete any address that hasn't responded.

Review your Resources

Do you have the right partner for email marketing? One that can also help you integrate email with Web analytics, social media and mobile marketing and enhance delivery? And one that can provide content and support for you to continue learning about email marketing?

Consider learning more about Lyris. We offer tools such as a Blacklist Checker for Email that can enable your company to determine if you are blacklisted with any of the seven major service providers. We also offer free HTML templates and basics, a Content Checker that can flag and correct email content issues before you send, plus white papers, Webcasts and more.

For more free email and online marketing tips and best practices, please visit www.lyris.com/resources/.

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Lyris, Inc. is the global digital marketing expert, delivering the right blend of technology and industry knowledge to help businesses achieve value with their email marketing campaigns. Through its in-the-cloud integrated marketing suite, Lyris HQ, and reliable on-premises solutions, including Lyris ListManager (Lyris LM), Lyris provides customers the right tools to optimize their online and mobile marketing initiatives and deliver quantifiable ROI.