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# HANDBOOK

## Email Marketing Second Edition

Research-based strategies  
for accelerating email  
marketing performance

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# Email Marketing Handbook: Second Edition

Research-based strategies for accelerating email marketing performance

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## Email Marketing Handbook: Second Edition

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## FROM THE AUTHOR

Email is an evolving communication channel, moving from its direct mail origins, to a digital tether tying together diverse marketing tactics. Email has matured in stride with Web and search marketing tactics to track user behavior and corroborate its contribution in revenue generation. The media's ability to measure its influence on conversion has helped raise marketing's leadership role in organizations. The data collected has enabled brands to create robust customer profiles and in conjunction with marketing automation, deliver more targeted and well-received content to their customers and prospects.

Nonetheless, this may be more of a survival tactic, than an enlightened transformation. Today's buyers are cynical of marketing messages, especially when pushed upon in the form of "chest-thumping" commercials, dinner-interrupting robo-calls, or junk email that clutters their inboxes. Technology has empowered consumers to bypass broadcast media, dictate their preferred communication channel, tailor their inboxes to their personal definition of junk mail and share their experiences with countless like-minded shoppers.

The trend towards "servant" marketing focuses on creating opportunities to invite customer engagement, rather than tearing the door down. This strategy uses the both user-submitted and behavior data, to provide meaningful guidance in a manner that reveals a brands humility, transparency and desire to improve the lives of its community members. As this strategy matures, the attention shifts from individual tactic metrics, to overall engagement metrics uncovering the total time spent actively participating with the brand.

My discussions with email marketers during Summits, surveys and workshops have given me the chance to witness their passion and drive for developing stronger subscriber relationships. It has been a privilege to discover and share best practices with this group of email marketers. If you are choosing to read this, you most likely to share in their traits of innate creativity, curiosity and ingenuity required to be successful in an industry that thrives on continuous improvement.

The second edition of this handbook is written to encourage calculated iteration within your email marketing program. Whether you are new to email marketing or a seasoned veteran looking to add a wrinkle in your lifecycle campaigns, our process breaks down the actionable steps to improve the accuracy and effectiveness of your email communications. It starts with identifying how to aid the subscriber at each funnel stage, and finishes with the safe arrival in their inbox. Actually, in the spirit of innovation the process is never quite complete, as the journey ends and begins with testing and optimizing your email campaigns.

We understand how quickly things change in the marketing community. As you experiment and make new discoveries, please feel free to share your findings on [MarketingSherpa's LinkedIn](#) group. There, we can continue this conversation and share both our challenges and successes.

Sincerely,



W. Jeffrey Rice  
Senior Research Analyst  
MECLABS Content Group



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# INTRODUCTION

Today, marketers are under more pressure to amplify brand awareness, deliver qualified leads, and increase online transactions, even as the numbers of communication channels exponentially expand and marketing budgets tighten. Complicating matters further, marketing strategies have shifted from command and control methods to more open and inclusive tactics.

In this network model, a brand is no longer separated from the conversation; rather it is expected to participate. These discussions are not scripted, rather organic and free flowing. Many marketing mavens find it difficult to communicate concisely in a world of multitasking and always-on-the-move consumers whose attention spans perpetually shrink. Nevertheless, the old adage, “Tell me and I forget; show me and I remember; *involve* me and I understand,” still rings true today.

As marketing practitioners adapt to this changing landscape, many of their traditional tactics will need modifying to flourish. The task to build a healthy ecosystem in which community members spontaneously interact and share valuable information requires that all the communication points are linked, transparent and not easily manipulated. Fortunately, email marketing is well-suited to integrate with a multitude of existing and emerging communication channels to deliver precise value in this ever-evolving environment.

To accelerate email and their overall marketing performance, marketers must overcome obstacles to work synergistically with a variety of communication channels and data centers to assist the customer along the path to purchase. This is reflected in the recently published *2012 Email Marketing Benchmark Report*. Marketers from Fortune 500 companies to small “mom-and-pop” stores told us the email marketing processes in most need of improvement were:

1. Using email for funnel optimization
2. Integrating email data with other data systems
3. Achieving or increasing measurable ROI
4. Integrating email with other marketing tactics
5. Growing and retaining subscribers

## ACCELERATING THE SPEED AND ACCURACY OF EMAIL MESSAGES

To help you survive and thrive in this marketing ecosystem, we have uncovered the best practices to give your organization the sustenance to increase the speed and accuracy of its email communications. Inside MarketingSherpa’s *Email Marketing Handbook: Second Edition*, you will find the latest research, charts and case studies for elevating email marketing effectiveness. The chapters are arranged to quicken your email marketing program’s iteration development.

The worksheets and exercises included are designed to help you prioritize and fine-tune your message when adding lifecycle communications or promoting the latest mobile app. Our goal is to have this handbook become your trusted resource for executing meaningful email communications.

The content of this handbook is based on eight years of research from surveying more than 10,000 marketers and numerous interviews with practitioners to document their successes (and, at times, failures) for our case studies and how-to articles. Additionally, the frank conversations with attendees at Summits, workshops and various online media platforms have provided insight into the latest email marketing

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### **Handbooks**

*MarketingSherpa handbooks provide research-supported best practices for improving the performance of marketing programs, and to provide a curriculum for self-instructed and professional career advancement training programs. Handbooks include case studies, processes, best practices, worksheets and data to support recommended practices.*

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challenges. Students' candor has directed our research into mobile design, social integration and the endlessly evolving ISP strategies for user-friendly and spam-free mailboxes.

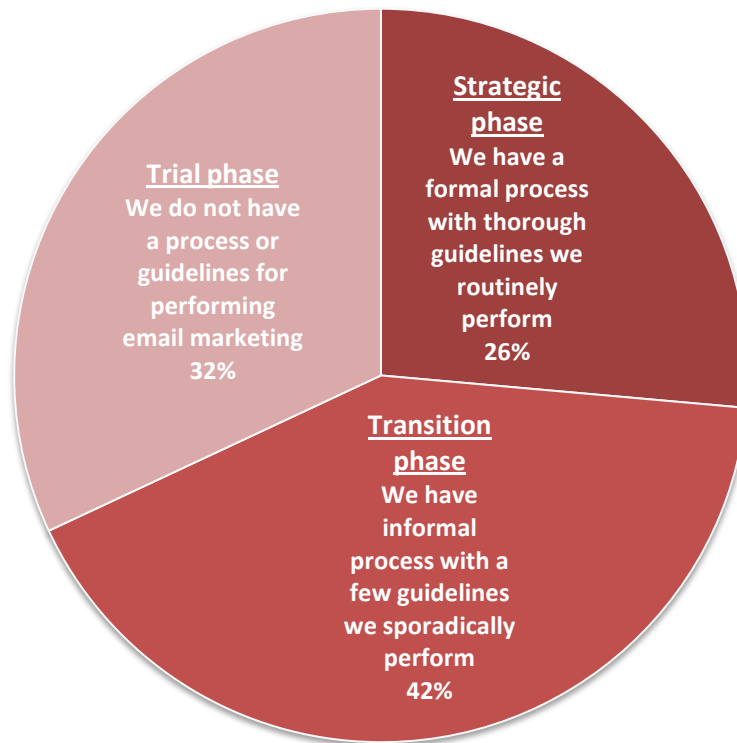
## ASSESS YOUR EMAIL MARKETING MATURITY

At the core of our research is the documentation and examination of proven processes of successful marketing departments. Best practices and sales and marketing intuition are not enough to build strong relationships with customers. Rather, it takes a measurable and repeatable methodology by which people, process and technology are aligned to effectively engage customers from introduction to conversion.

MarketingSherpa segments its email marketing benchmark data into three maturity phases: *Trial*, *Transition* and *Strategic*. This practice enables researchers to examine the differences in email marketing performance by organizations in each phase of maturity, and demonstrate the benefits of improving email processes.

Each phase characterizes how systematic an organization is in its approach to email marketing. The process it uses to plan, execute, measure and report on email marketing programs determines an organization's maturity phase. Instituting formal and repeatable email processes has been a priority for marketers for some time. While many firms have made progress, the following chart shows there is more work to do.

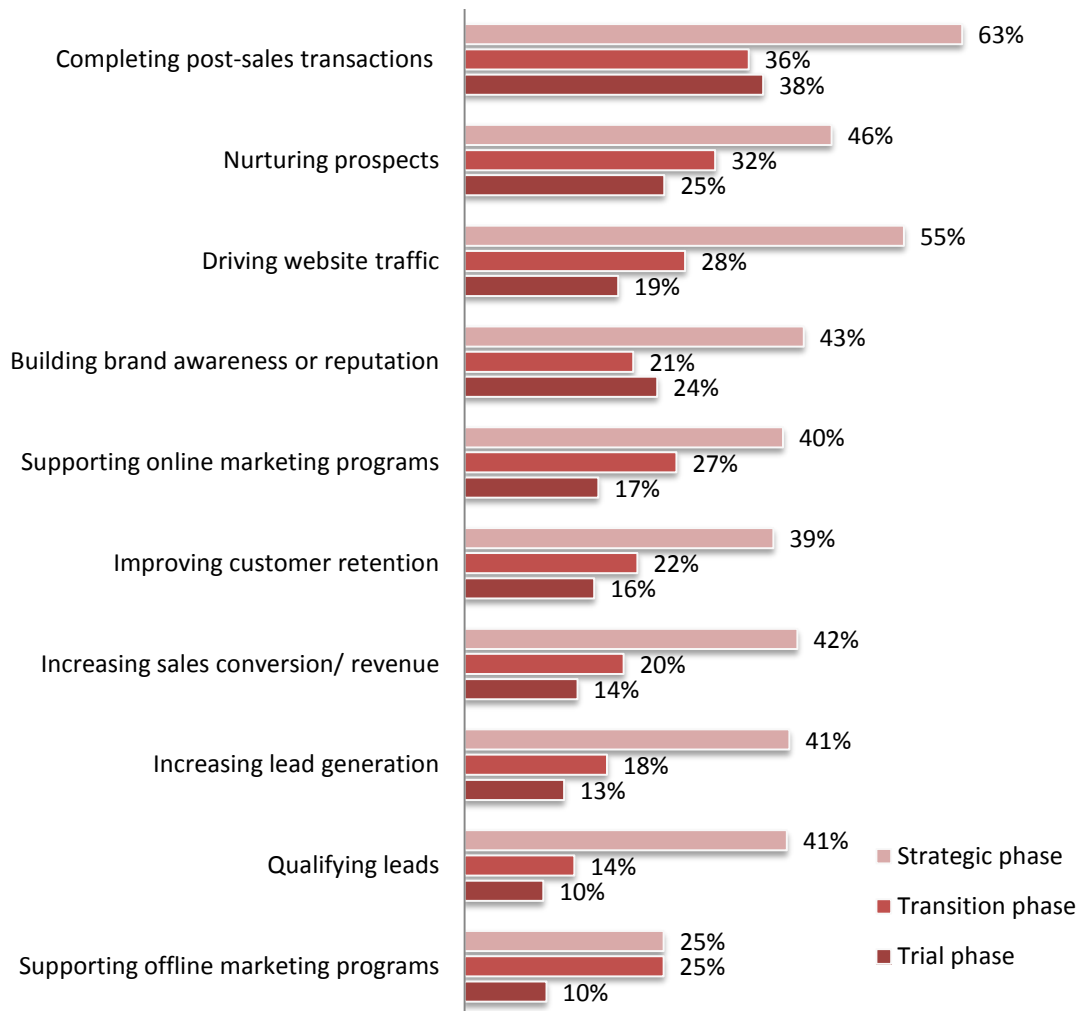
CHART: OVERALL EMAIL MARKETING MATURITY ASSESSMENT REVEALS OPPORTUNITY FOR IMPROVEMENT



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

MarketingSherpa’s 2012 *Email Marketing Benchmark Report* made a clear correlation between the phase of an organization’s email marketing maturity and the effectiveness of its email programs. The following chart demonstrates organizations in the Strategic phase are twice as likely to find email effective in driving website traffic, increasing lead generation, qualifying leads, improving customer retention, and *most importantly*, increasing sales revenue in comparison to their Trial phase foes.

**CHART: CMO VIEW OF EMAIL EFFECTIVENESS ON BUSINESS OBJECTIVES BY ROI MATURITY PHASE**  
 Q. How EFFECTIVE is email marketing at achieving the following business objectives for your organization?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

Effectiveness is a key difference between organizations in each phase of email marketing maturity. Email is clearly more effective at achieving the objectives of organizations in the Strategic phase than it is for organizations in less mature phases. This disparity creates a sound business case for investing in the necessary marketing education and training to advance from your current phase of email marketing maturity to the next.

## COMPLETE YOUR EMAIL MARKETING MATURITY ASSESSMENT

Before we begin to discuss refining email marketing processes, it may be helpful to conduct a quick assessment to determine your current processes. This will enable you to identify the current strengths and weaknesses in your execution.

To complete the worksheet, circle one number in each row that corresponds with the column heading that *best describes* the process you use for each tactic. For example, circle 5 in the first row if your organization has a formal, documented process with thorough guidelines that is routinely performed for overall execution of list generation campaigns. If your organization has not begun to formulate a process for this tactic, circle 1. After circling one number in each row, subtotal each column and combine columns for your total score. Matching this score to the phase shown in the bottom row will determine where your organization is now in the email marketing maturity lifecycle.

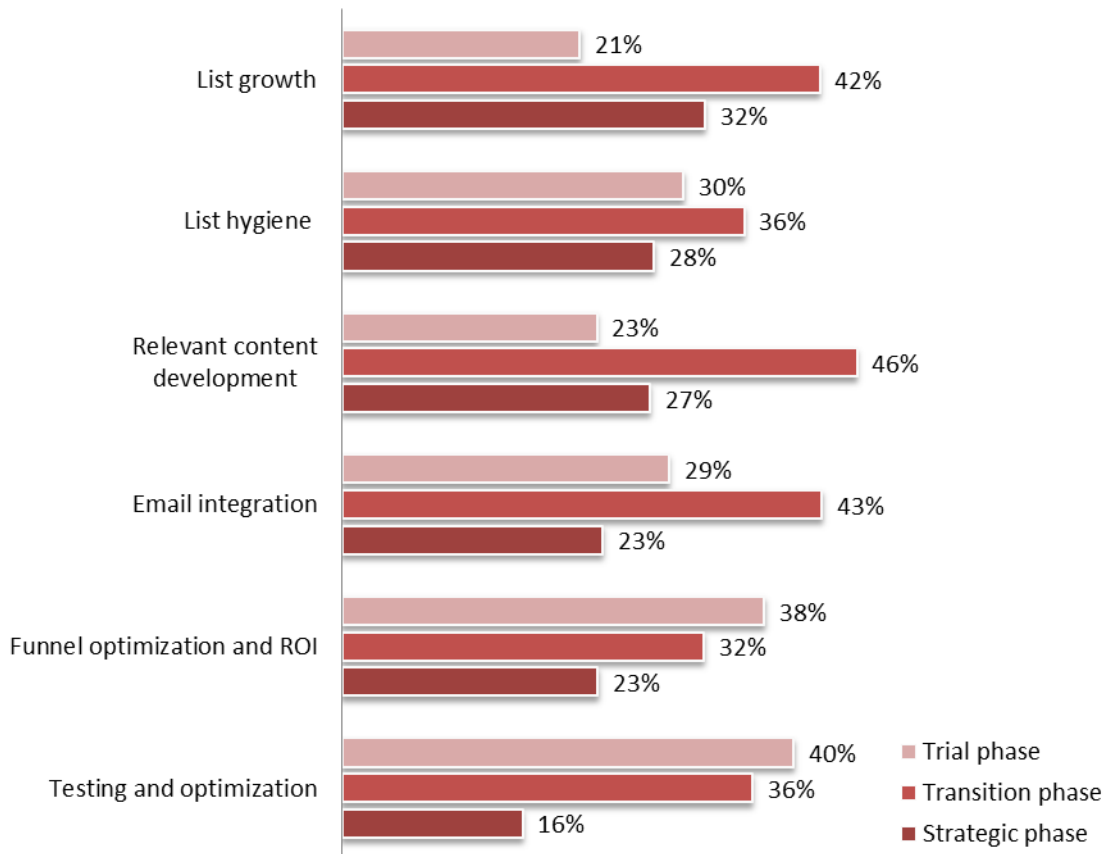
<b>Email Marketing Maturity Process Benchmark</b>	Organization does not have a process or guidelines for performing email marketing.	Organization has an informal process with a few guidelines it sporadically performs.	Organization has a formal process with thorough guidelines it routinely performs.
Tracking email's impact on the Marketing-Sales funnel and ROI	1	3	5
Integrating email with other marketing tactics	1	3	5
Creating relevant messages (content, segmentation, timing)	1	3	5
Building a list of subscribers	1	3	5
Maintaining list hygiene and monitoring deliverability statistics	1	3	5
Testing, analyzing and optimizing email communications	1	3	5
<b>Subtotals</b>			
<b>Total</b>			
<b>Email Marketing Maturity</b>	Trial Phase: 6–10	Transition Phase: 12–18	Strategic Phase: 20–30

To delve deeper into the statistics, we separated these six protocols found in most email marketing processes. How does your organization compare to this benchmark chart?



**CHART: LIST GROWTH FOUND TO BE MOST ADVANCED EMAIL MARKETING PROCESS**

*Q. Please select the statement that best describes the process your organization uses to plan, execute and measure the performance of the following activities.*



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

The chart above reveals marketers are most likely to have strategic processes in place for list building and list hygiene maintenance. The intuitive philosophy of “the money is in the list” may drive more organizational processes to ensure a healthy list of quality and active subscribers.

The complexity of reaching a target audience with meaningful messages is moving firms to find more repeatable processes to create relevant content and join conversations across multiple communication channels. These two areas are most prominent in the Transition phase.

Marketers in the Trial phase of testing and funnel optimization have a tremendous opportunity for growth. Implementing testing procedures can quickly enhance the effectiveness and efficiency of an email program. While optimizing email to have a greater impact on the Marketing-Sales pipeline will enable email marketers to justify the channels value to an organization.

The analysis of mature email marketing programs allowed us to uncover barriers preventing subscriber engagement and identify keys to successful communications. We will share the email best practices throughout this handbook. Keep in mind, the steps identified are interrelated, so even small improvements in one area will positively influence the others. For instance, the steps taken to build a quality subscriber list will pay dividends in your ability to create engaging content and ensure reliable delivery.

## BUILD A PERFORMANCE STRATEGY TO BEST ENGAGE CUSTOMERS

As we mentioned earlier, adhering to best practices is only a starting point. Your subscribers are constantly interrupted by advertising messages and may even be experiencing email fatigue. It will be a combination of your insights, innovation and systematic dedication to continuous improvement that will determine the email strategies implemented to best engage customers on their terms.

## USE YOUR INSIGHTS TO FACILITATE CONVERSATION

Every customer is an individual with unique preferences. Each of the marketing tactics in your arsenal has distinct qualities, and it is your job as a marketer to tailor them to your audience. Again, best practices are a good place to start, but do not discount the breadth of knowledge you already possess from your customers, your products and the competition. Your company's core values and brand voice will also guide you in manufacturing meaningful communications.

## TAKE RISKS TO BUILD UPON BOTH CURRENT AND NEW APPROACHES

Email marketing is a mature and trusted tactic, as reflected in MarketingSherpa's *2012 Email Benchmark Report*, which notes that 73% of companies recognize that email either currently produces or will produce ROI, and are increasing their email budgets in 2012.

As marketers, we strive for alignment with our sales team. On some days, we will need to evangelize the latest marketing tactics to meet a customer's preference. At other times, we will defend the current e-marketing strategy, urging colleagues not to add one more link, picture or offer in communications by explaining there is a high price to pay for clutter.

These are the moment-to-moment judgments of knowing when to innovate and when to be risk-averse. Only you know what is best for your company. Investigating different approaches to try to outperform your current marketing initiatives is essential. When we actively seek out key performance indicators and which areas need improvement, upholding our strategy will be easier.

## CREATE AN ENVIRONMENT OF IMPROVEMENT THROUGH TESTING

The idea is that you will continuously experiment in small increments, moving from best practices, to customization and testing, and then repeat the process. The goal is not perfection, but rather ongoing improvement — giving you the freedom to try new tactics while meeting your ship dates.

As this email process is formalized and repeated, a culture of testing and optimization will cultivate to enable you to go beyond best practices, and truly understand what works best for your community, organization and customers.

Again, the course structure encourages the expansion and iteration of your email marketing campaigns. Our process starts with identifying how to aid the subscriber at each step in the path to purchase and is never quite complete as the journey ends with testing and optimizing the message. Please find a quick summary of the six stages to accelerate your email marketing performance below.

## MARKETING SHERPA'S SIX STEPS FOR ACCELERATING EMAIL MARKETING PERFORMANCE

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### Identify impact and purpose

Email provides instant feedback on campaigns success from open rates, and clickthroughs that marketers crave. The movement of the customer towards conversion in the Marketing-Sales pipeline is the true measurement of success. In this section, learn steps to assess and prioritize placement in the path to purchase where email can have the most impact on your bottom line. You will better able to demonstrate the value of your email marketing programs to C-suite and senior leadership.

### Integrate email with other marketing tactics

Combining email with other tactics in your marketing toolkit can create positive synergy and tangible benefits to your entire program. The two most frequently discussed marketing topics are social media and the fast adoption rates of smartphones and tablets. Learn the evolving best practices to leverage the power of social media for sharing content and generating list growth. Develop email messaging strategies to meet the new requirements on smaller screens and for mobile lifestyles.

### Create relevant content

In this section, learn the three keys to relevancy; contagious content, segmentation and real-time communications. First, align your internal resources to churn out content consistently and recognize opportunities to streamline processes. Next, combine available data found in your CRM, social CRM and accounting software with your email database to identify opportunities to help customers. Finally, establish processes that allow communications to be sent at their peak of pertinence.

### Maintain and grow quality lists

In this section, learn how to develop a strategy to build a quality list of brand evangelists for your company based on your resources and target audience. Examine your current subscribers. Discover if they are engaged and receiving email *they* determine relevant. Design a robust preference page including opt-down options, and even ask recipients to unsubscribe. Then turn your attention to adding new subscribers with a mix of offline and online tactics right for your brand. We'll teach the latest methods to systematically grow a core group of fervent fans.

### Monitoring list hygiene and deliverability statistics

All of a marketer's effort will be for naught, if their messages do not reach the recipient's inbox. Understanding your relationship with ISPs and how your reputation affects your deliverability success is the first step. Next, take strategic action on your methods for handling complaints, list hygiene, relevant content and sending permanence to protect your reputation. Maintain best practices from diligent lead capture to legal compliance. Implementing repeatable deliverability processes will give you an edge in the ever-changing email landscape. As new regulations roll out and webmail providers enhance their filters to prioritize emails in their customers' inboxes your team will keep pace.

### Test and optimize

Well-intentioned marketers read business books, watch webinars and attend seminars to keep up to date on the latest marketing trends and best practices. While this can generate new ideas or reinforce old convictions, the only way to truly understand what works for *your* organization and *your* customers is to continuously test and optimize your email messages. In this chapter we will outline the process, including testing methodologies and preparation practices. In addition, discover which email messaging elements are most popular and effective to trial.



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# CHAPTER 1: EMAIL'S SPHERE OF INFLUENCE

## EMAIL IS ESSENTIAL TO YOUR SUCCESS

Today marketing strategies are built on content creation and distributing information to consumers by their preferred communication channels. Brian Carroll, Executive Director of Applied Research, MECLABS, sets the litmus test for relevant content, as “Anything emailed should be valuable to the consumer *even if they never buy.*” Ensuring the delivery of this content has never been more important.

Email is a mature marketing tactic, effective at building long-term customer relationships. Consumers find receiving an email is as easy as picking up the phone. Comforted when they receive a confirmation email from a recent purchase, most buyers anticipate updates for the lifespan of the product. This creates an opportunity for companies to nurture and maintain their relationship with the customer.

Email is an increasingly important component in the retention marketing mix. The ability to integrate behavioral data with CRM, social CRM or marketing automation software to segment and facilitate personalized communications only strengthens the value of email marketing.

As social media and mobile marketing tactics continue to mature, expect email marketing to find a niche in formal communications. Email provides a larger canvas to thoughtfully express your point of view than updating a Twitter status, and in some cases, it carries more of an official tone than social media communications.

Consumers like being able to save a copy of a written document from a business and save the environmental expense of sending it through traditional direct mail. Email delivers these private discussions in a safe and secure way. Additionally, most people are familiar with email, and enjoy choosing when to read and respond at their leisure versus the urgency of a ping, text or instant message.

## GAIN TRUST WITH PERMISSION-BASED EFFORTS

For more than a decade, permission-based marketing — the delivery of anticipated and personalized messages to individuals who asked to receive them — has been the foundation of email marketing. This concept goes further than complying with the CAN-SPAM Act. Permission marketing is the act of respecting a person's most valuable asset ... time.

By keeping its promise and delivering helpful tips gradually over time, a business earns the trust of its recipients. Building a long-term, profitable and scalable permission strategy is now the aim in the emerging fields of social media and mobile marketing. Now, the permission companies' requests come in the form of likes, follows and mobile download applications.

## ENGAGE PROSPECTS THROUGHOUT THE REVENUE PIPELINE

Email communications continue to be an important function in qualifying and identifying prospects entering the Marketing-Sales pipeline, and this is especially true in the B2B channel. By assigning content assets with key takeaways and progressive calls-to-action, organizations have the ability to use marketing automation assets to monitor responses, refine messages and build momentum to turn prospects into buyers.

The prospect's open and clickthrough activity powers email's data-driven campaigns. These behavioral actions are equivalent to the prospect raising his or her hand to move on to the next phase in the buying process. The secret to email's success is in its ability to react to these micro-conversions and deliver targeted information in timely fashion.

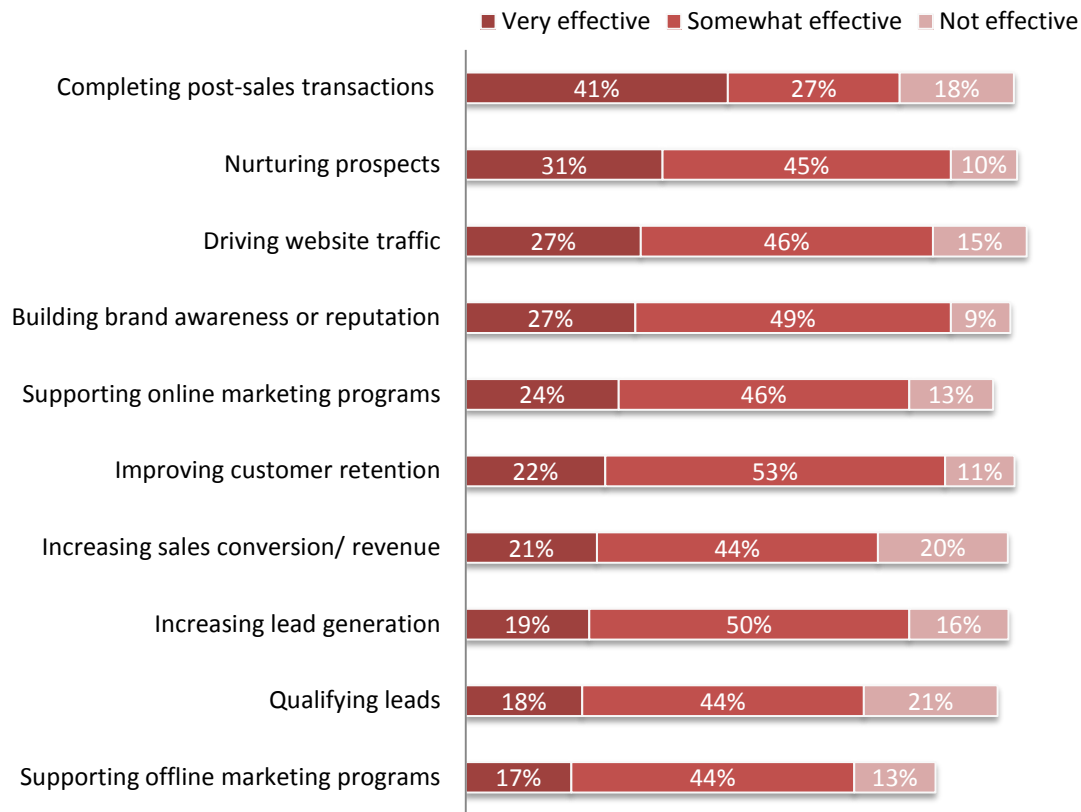
Email marketing is well-suited for carrying custom content to a prospect to aid in making an educated purchase. Communications may include rich product descriptions, photos, videos, success stories, testimonials, incentives and even enticing calls-to-action. The messages sent engage the customer, providing positive experiences that demonstrate its value proposition and encourage readers to take action.

## USE EMAIL TO HELP ACHIEVE OTHER MARKETING OBJECTIVES

Marketers find email to be reliable and measurable, and for some it can demonstrate a return on investment. When setting your email marketing objectives, emphasize effectiveness. Email marketing is very efficient at achieving a number of quantifiable business objectives such as increasing website traffic and nurturing prospects. The chart below, taken from the [MarketingSherpa 2012 Email Marketing Benchmark Report](#), reflects these statements.

### CHART: CMO PERSPECTIVE OF EMAIL EFFECTIVENESS ON BUSINESS OBJECTIVES

Q. How effective is email marketing at achieving the following business objectives for your organization?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

Email marketing allows for the use of timely and dynamic content in a number of elements, including subject line, content, images and call-to-action, which may contribute to its perception as a highly effective tactic. Additionally, email provides a method to measure key performance indicators and test various components for continual improvement. Email marketing can also be very cost effective in comparison to other outbound marketing tactics such as direct mail, making it an attractive addition to any marketing plan.

Please note that in business and consumer channels, there are significant differences in how email is used and the objectives email most effectively achieves. B2C marketers are more likely to use email as part of their e-commerce strategy to increase sales and build brand awareness. Conversely, B2B marketers find success using email to increase lead generation and nurturing prospects for a complex sale.

## DEMONSTRATE EMAIL'S VALUE AS A BUDGET-FRIENDLY TACTIC

Marketers are often selling both inside and outside their corporations. Building relationships with IT, Sales, Product Development and Executive Management is crucial to their success. Making time to educate these departments on the latest trends and practices, you will earn trust and gain confidence.

Demonstrating the power of email to affect real-time challenges and news events can help them appreciate the tactic's value. An ally to document your case can be your Email Service Provider (ESPs) and/or Marketing Automation (MA) companies, which are evolving into Revenue Performance Managers (RPMs). The derived data from a consumer's gestation from a prospect to a qualified lead and finally customer, allows organizations to monitor and learn from the events leading to a conversion.

Finance can be a prized champion for email marketers. This may sound strange and counterintuitive, as marketing departments traditionally have to fight for every budget dollar. However, email's proven ability to quantify results can tip the scale in a chief financial officer's decision, as compared to newer tactics like social media that are more difficult to calculate.

In fact, in its *"Power of Direct"* (2011) report, the Direct Marketing Association found email marketing brought in \$40.56 for every dollar spent on it in 2011, compared to search's return of \$22.24, Internet display advertising's return of \$19.72, and mobile's return of \$10.51. In addition, commercial email was expected to drive \$63.1 billion in sales in 2011, up \$5.3 billion in 2010, and the DMA projects email to drive \$67.8 billion in sales in 2012.

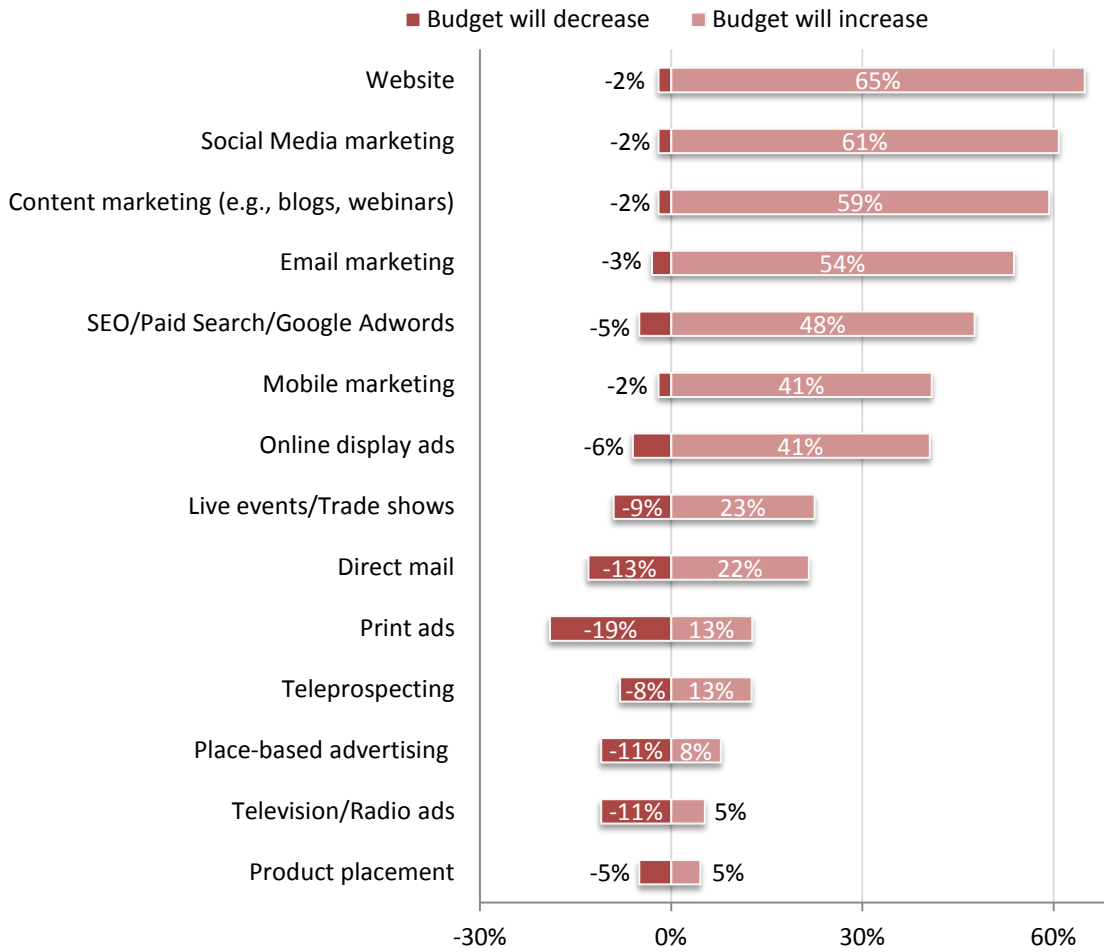
## SELL EMAIL'S VALUE TO THE C-SUITE

The data drawn from email campaigns is vital to the reports marketers present to Executive Management to win support for projects. To ensure accuracy, invest time in your department's employees to develop a deep understanding of the metrics. In addition to your own information, it can be helpful to supplement your position with broad market trends.

MarketingSherpa's *2012 Email Marketing Benchmark Report* found 26% of organizations perceive email as a tactic that produces a return on investment and believe the budget should increase liberally. Another 47% were confident that email would eventually produce ROI, and believed the budget would increase conservatively.

Perception is one thing, but what happens at budget time? Executing strategic email marketing campaigns can justify further investment based on their high ROI in comparison to other tactics in the marketing arsenal. As the next chart shows, this viewpoint allows executives to increase email marketing budgets over other marketing practices.

CHART: ORGANIZATIONS INCREASING AND DECREASING MARKETING BUDGETS - THE IMPACT ON TACTICS  
 Q. How do you foresee budgets for the following marketing tactics changing from 2011 to 2012?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

The shift from outbound to inbound marketing tactics continues in the projected budgets for 2012. Online tactics such as websites, social media, search and email marketing are used most often to attract prospects into the Marketing-Sales funnel through shared content. The majority of organizations are increasing these budgets by more than 40%, with very little decrease.

New to this exclusive group is mobile marketing. Mobile marketing is in the early stages of widespread implementation, but the change in consumer lifestyle combined with the channel’s ability to interact with a customer on the run creates an opportunity ripe for investment and email can contribute to the channels success.



## INTEGRATE MARKETING COMMUNICATIONS WITH EMAIL

Today, effective marketing naturally interacts with consumers as they go about their daily lives. Marketers must use a combination of channels the recipient permits or is willing to be interrupted by to communicate. It is about a multichannel approach of both online and offline mediums. These channels may include outdoor, in-store, online or mobile advertising. No single channel will be the “silver bullet” that impacts a sale. Rather, success is achieved when tactics work in conjunction with one another.

As discussed earlier, email is emerging as the dominant digital channel, not for its pizzazz, but for its ability to roll up its sleeves and tether tactics together. Email is evolving in this new marketing ecosystem. Traditionally, email is used in push tactics — exemplified in the distribution of daily deals. However, email newsletters can be a “pull” strategy when share buttons are embedded, enabling bookmarking, linking to blogs, and reissuing on social media sites. This evolution is evident from our 2012 Lead Generation Benchmark Survey, in which nearly a quarter (23%) of marketers surveyed classified email as an inbound tactic.

### ASSESS YOUR MARKETING MIX

Over the past year, we have seen how Share-With-Your-Network (SWYN) buttons have been adopted and how the rapid growth of smartphones are forcing many email marketers to reformat their email to ensure it renders clearly. However, it will take more than adding buttons and changing layouts to maximize email’s potential.

The task requires strategic execution for email to truly harmonize and amplify an organization’s integrated marketing plan. This leads marketers to enquire how best to use email as a cohesive agent in a brand’s marketing plan to expand and connect with their audience. If you feel frustrated, you are not alone — 43% of marketers in our *2012 Email Marketing Benchmark Report* cited that integrating email with other marketing tactics was a significant challenge.

We will discuss the process more in Chapter 4. It will begin by looking at email’s position in the buying cycle. Can you reengage shoppers after they have abandoned their carts? Are your transactional emails capable of adding recommended purchases? Will adding fuel to a viral fire by promoting your latest YouTube video, blog post or upcoming trade show event gain you more attention? Do you give your loyal evangelists another platform by including their social media testimonials in your emails?

When you start to look at all the places email can cross-promote, and cross-pollinate the consumer during his or her path to purchase, you will be inspired.

### AUTOMATE MESSAGES TO GENERATE QUALITY CONVERSATIONS

We know that “push” promotions are no longer received as well as “pull” marketing tactics. Advertising may interrupt and grab post-modern consumers’ attention, but they do not blindly trust the brand. Instead, they conduct extensive research on the Web to make educated purchasing decisions.

One of the advantages of participating in multiple communication channels is the massive amount of information collected. Marketers can use the surplus of data to better understand their customers’ habits and expectations up and down the funnel. With that knowledge, organizations can adapt their IMC strategies and build content targeted at the needs of the customer at each stage of the buying cycle.

This customer climate creates an opportunity for marketers to leverage the behavioral data gathered from various online and offline sources to send meaningful messages with the use of marketing automation (MA) tools. The goal of marketing automation is not to increase the volume of conversations, but rather the quality. By sending customer-centric communications at the time in which they are likely seeking assistance dramatically increases conversions and revenue growth.

SECTION SUMMARY: EMAIL'S SPHERE OF INFLUENCE

Please take a few minutes to complete the assessment for this section.

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1. Name at least three reasons why email marketing is a dominant tactic.

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2. What business objectives do CMOs feel email is effective at achieving?

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3. Which type of marketing tactic budgets is growing, online or offline?  
*(Can also be interpreted as outbound or inbound marketing tactics)*

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*If you were unable to answer any of the above questions, please review the previous sections before moving on.*

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CHAPTER 1 NOTES

CHAPTER 1 NOTES

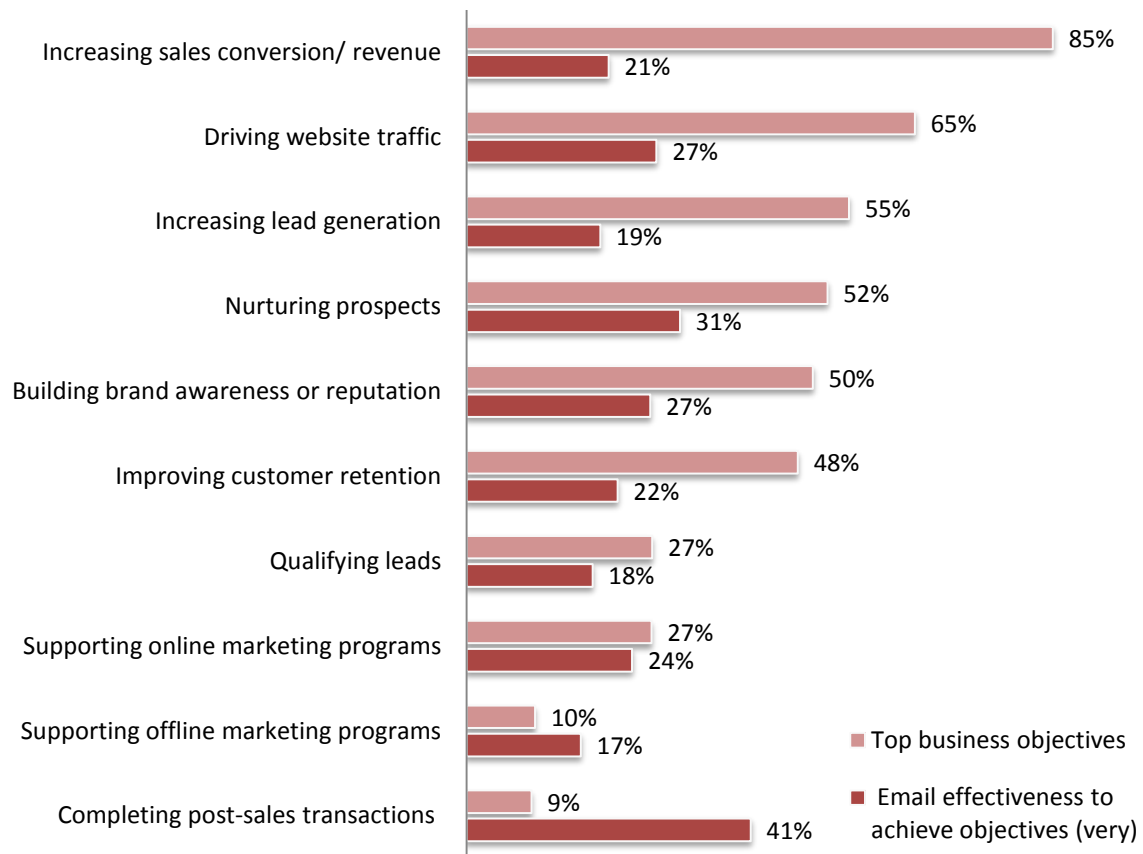
## CHAPTER 2: IDENTIFY IMPACT AND PURPOSE

Whether you are in the early stages of creating an email marketing plan, or a seasoned veteran looking to add a new wrinkle into your lifecycle campaigns, the first step is to identify where email communications will have the not only the biggest impact on your firm’s business objectives, but where you can best serve your customers in their search for a solution to their problems.

This exercise takes both an objective eye and compassionate view to administer. As marketers, we too often lean on email’s gift to communicate urgent messages in an efficient and cost-effective manner. We deploy this tactic without always thinking through the strategy. In this chapter, we will explore when and where to install email campaigns to accelerate and enrich customers’ journeys through your Marketing-Sales funnel.

### USE EMAIL TO BENEFIT TOP BUSINESS OBJECTIVES

CHART: CMO VIEW OF THE LINK BETWEEN EMAIL’S EFFECTIVENESS AND ITS TOP BUSINESS OBJECTIVES



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

The process starts by asking yourself and your team the question: Which business objective(s) is email most effective at achieving for *our* target audience? The chart above compares CMOs’ top business objectives with how they rank email effectiveness for each goal.

The exercise reveals email is more effective at achieving several business objectives than increasing revenue. Email excels at executing business objectives that lead up to the ring of a register, including driving website traffic, building brand awareness and nurturing prospects. Email also meets the after-sale goals of improving customer retention and completing post-sale transactions.

Remember relationship marketing is not a single event, rather an ongoing process that requires effort to provide thoughtful and engaging conversation. The entire buying cycle must be a branded experience.

## SELECT EMAIL'S PLACEMENT IN THE MARKETING-SALES FUNNEL

After determining which type of email messages can have the greatest impact on your firm's objectives, the next step is to look at placement within your Marketing-Sales funnel. Combining email data with your Web analytics, CRM or social CRM will enable you to profile your customers, their buying habits and your current communication touch points. This holistic approach will enable you to identify gaps and segment niches where value can be added, resulting in more impactful exchanges with new and existing customers.

Most likely, you have multiple buyer personas, acknowledging every buyer has unique habits and processes when conducting a sales transaction. In addition, each organization's ability to segment data differs. Only 39% of organizations surveyed in our *2012 Email Marketing Benchmark Report* said they could segment their email database by customer location in their Marketing-Sales pipeline.

However, our research found as marketing teams mature, they are more likely to communicate with subscribers throughout the customer's lifecycle. For simplicity, let's break them down the cycle into five stages— Prospect, Nurture, Activate, Retain and Refer — to examine the types of email messages used to help the customer along on the path to purchase and become a brand advocate.

## PROSPECT TO MAINTAIN AND GROW RELATIONSHIPS THROUGHOUT THE SALES CYCLE

Organizations collect email addresses through a number of marketing channels whose priority is sales conversions, not acquiring new subscribers. Online media buys for display, mobile, search and social, alongside those for offline sweepstakes and in-store promotions, can generate an abundance of new leads. Engaging these prospects before they are ready to purchase is vital in keeping a brand top-of-mind and ensuring it will be one of the finalist in the selection process. The manner in which a company communicates when a sales transaction is not imminent speaks volumes to its credibility and brand truth.

When a company gives guidance, shares valuable information and helps make life or a job easier, it can emotionally connect with a consumer and make an enduring positive impression. Newsletters, welcome emails and nurturing campaigns are excellent opportunities to lay the foundation of trust in building long-lasting relationships with subscribers.

### ESTABLISH THE CONVERSATION WITH WELCOME MESSAGES

A welcome email is the first message sent, usually on an automated basis, to a new opt-in after their email address is added to a subscriber list. Our research finds 63% of organizations send triggered welcome emails. A welcome message series refers to a multiple, sequential number of emails sent after opt-in.

The importance of this email message cannot be understated. For some consumers, this will be the first two-way conversation they will have with the brand. Hopefully, it will be the first step in transitioning from fan to customer to brand evangelist.

The first 30 days after enrollment for many businesses is the most critical in capturing and winning over a life-long customer. Timely and relevant emails are well-suited for communicating a brand's values and personality during this incubation stage. However, if the prospect has a less-than-engaging, or even poor, customer service experience the chance to recruit a loyal customer may be lost.

Building a relationship is a two-way street, as businesses are getting to know their new subscribers. Some organizations will send welcome email messages from a separate IP address. Taking this precautionary step will catch any unknown users or bad addresses. This will help with your deliverability reputation, as those incorrect addresses will not affect your main IP's sender score.

Welcome messages can be categorized in three ways: Double Opt-in, Single Opt-in and a Welcome Series.

### Double opt-in

A double opt-in welcome email is one that requires the new list subscriber to confirm they want to be on your email list. By taking the time to confirm an opt-in's desire to receive emails you will be creating a higher quality list with less spam traps and bounces.

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*50% of organizations respond to a new subscriber immediately*

*- MarketingSherpa 2012 Email Marketing Benchmark Report*

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The aversion to this strategy is that you may collect fewer addresses compared to a single opt-in registration. To minimize the impact, send out the confirmation *immediately* after they have signed up to receive email communications from your company.

The sole aim of this first email is to have the new subscriber click on the confirmation link. The copy in both the subject line and body should make it clear that the confirmation link must be clicked to receive any email from your business. In an effort to reduce a subscriber's concerns, remind him or her that your company will not send any unrequested information. Keep in mind, not every subscriber immediately completes the double opt-in process. You may have to send a one-time reminder email.

In preparation for creating a double opt-in welcome message, create a process to check for bounces to see if they are salvageable. They may have made a typo or their inbox could be full. Jack Hogan, CTO at LifeScript, found there are more than *500 ways to misspell yahoo.com*, from yahoo.com to yahoo.com. Do everything possible, even if it is not your mistake, to fulfill your first promise to the opt-in.

### Single opt-in

A single opt-in welcome is sent *immediately* after an action is taken to sign up for an email or set of email communications. The single opt-in welcome should include five key messages:

#### *Cite Source*

First, the welcome email must remind the new subscriber of where and how they opted-in to your list. This must be written concisely and clearly throughout the message. If they registered from a source other than your landing page or website, be sure to acknowledge it. Acting transparently will gain the trust of the new subscriber and hopefully build an affinity to your brand rather than the third-party site.

If they enrolled during the purchasing process, share with them why they are getting this email from your company. You may write, "Thank you for your recent purchase at ABC Company. During checkout, you clicked to receive monthly updates from us." By acknowledging specifically how, when and where they signed up, you will reduce the new subscriber's anxiety and keep them on your mailing list.

#### *Deliver value*

Secondly, you want the email to set the tone of future conversations. Start with a sincere "thank you." Like in most relationships, manners matter. The words selected must support your brand's voice and successive messages meet the subscriber's expectations. The value demonstrated in the email will build a bridge for them to open future emails. Again, the aim is start a relationship that turns prospects into customers and

evangelists, so give more than is expected. You want new subscribers to look forward to receiving the next email and sharing.

Each business provides value differently. With increasing demands on their time, it is common for marketers to repurpose existing evergreen content into their welcome messages. If the subscriber opted-in to receive a newsletter, they may be provided with a link to a back issue or a “best of” issue. Choosing to provide practical tips, how-to strategies or a product guide will immediately establish your company as a helpful resource. These become even more effective when the message is delivered via video link, webinar or podcast. For some offerings, a discount or coupon as a special thank you for signing up is also beneficial.

#### *Set explicit expectations*

Ideally, during registration, the expectations of what the subscriber will receive were clearly communicated. Confirm in your email the content and frequency, and give them a link to your privacy and unsubscribe pages. If they change their mind, providing a link to unsubscribe will reduce complaints.

#### *Harvest additional data*

Welcome messages have a higher than average open rate, making this an opportunity for marketers to obtain more demographic and preference data on the subscriber. Most opt-in registration landing pages make few requests as possible, usually limited to name, email address and if B2B, company name. In creating a link to your Preference Center, you will collect more data to better customize your emails and offers to the subscribers' desires.

Be sure to tell them your intentions, the more information they give, the more tailored your emails will be to them. Ideally, this page ought to encompass both online and offline communication preferences. To make the request more inviting, follow the lead of New Zealand wine manufacturer, Little Beauty and politely ask the subscriber the events and offers they would like to be invited. Include a large call-to-action button with friendly copy, such as “Tell me more about yourself.”

#### *Whitelist to ensure content and message delivery*

Even as ISPs place more focus on reputation to determine deliverability, whitelisting is still a good practice, especially in welcome messages. Whitelisting occurs when a subscriber asks their ISP (Hotmail, Yahoo!, etc.) to send emails from a specific organization to their inbox. As a tapering priority, the request for whitelisting can open up prime real estate at the top of your emails, where these messages are commonly placed. As more subscribers read their emails on the small screens of mobile phones, the priority is delivering relevant content quickly, to ensure content is read. These routine messages can be placed at the footer of the email.

#### **Welcome series**

Welcome series email messages are ideal for big-ticket B2C products and services, and B2B purchases with complex sales process and multiple decision makers. The goal of the series of communications is to move the subscriber quickly from “kicking the tires” to an educated buyer with a deeper understanding of the product, service and solutions it can deliver. Packaging the emails as a four-part series or five-week educational course can make them more enticing to the subscriber and foreshadow future email messages.

The exact number of welcome emails is based on your company's sales cycle. The number of emails and the time between each send should be tested. Retailers such as REI have been known to have more than 10 in their series; others may have as few as three. More important than the number of email is the singular focus of the messages. During the welcome campaign, do not send any other promotional emails to dilute the introduction to your company. Here are three types of welcome email campaigns that have proven success.



### *Education*

For many buyers, they have a want but don't know exactly what they *need*. Others have unanswered questions and concerns that a company needs to address before they invest their money or time. A well-crafted series of educational emails that address the prospects fears with metrics, testimonials and third-party data can help overcome these objections. The gift of data will empower the recipient to better represent your company to the unseen committee included in the decision process.

### *Entertainment*

For other consumers, data points do not move them to purchase. They would prefer an emotional connection that makes them relate to the brand. Share current customers' funny and candid stories about the challenges they faced before using your product or service. If targeted correctly, these stories may address their pain points and make them feel akin to your tribe of patrons.

### *Transition*

B2C marketers have successfully built welcome campaigns around some of life's biggest milestones: birth, graduation, marriage, first home, pregnancy, anniversaries and retirement. The predictability of these life-transitioning events gives firms with related products and services an advantage on being able to send timely and relevant messages. B2B marketers can use these same tactics when communicating about evolving technology whether it is computer systems or manufacturing processes.

Segmentation is critical if you have more than one source for registration. Slicing your new subscribers by their entry point into your system is advised. As most of the content in the emails will be evergreen, creating a variety of campaigns targeted to different demographics or sources is worthwhile.

Investing in a group of opt-ins from a specific webinar, sweepstakes or in-store purchases will only create campaigns that are more relevant. Those that have purchased your product will be interested in your return policy or member benefits. Likewise, a subscriber who attended a webinar on accounting software will be interested in your offer of a whitepaper on changes to the new tax laws.

Welcome messages capitalize on a new subscriber's interest in your brand's communications. As mentioned before, they are essential in turning a prospect into a lifelong customer.

## CASE STUDY: HOW MICROSOFT USED TRIGGERED EMAIL TO INCREASE OR 800% AND CTR 2,100%

Case Study ID: #CS32080

Location: MarketingSherpa Member Library

Summary: This case study looks at how Microsoft implemented a multi-stage, months-long triggered email series to improve engagement and educate new B2B Office 2010 customers. Find out how they increased open rates by 800% and clickthrough by 2,100%.

### CHALLENGE

When engaging prospects in the sales funnel, a multi-piece email strategy is a key part of lead nurturing. Once that prospect becomes a customer, email probably becomes a more personalized exchange between the company and the client.

The need for an organized set of email sends is no longer necessary, correct? Think again. Applying a nurturing strategy to existing customers can be an effective way to improve customer satisfaction, and increase repeat business by educating the customer on a potentially complex product that users might not be utilizing to its fullest extent.

Jamie Bothwell, Senior Product Manager, Microsoft, Office Division, said that after the release of Office 2010, using a combination of product usage data and “voice of the customer” surveys, the company realized there was a drop off in usage activity and satisfaction. This occurred immediately after B2B customers purchased the product from the Office website.

She said, “When asked to explain why, customers told us they were having difficulty learning the new product and wanted more step-by-step instructions on new features and how to get started.”

In response to this information, the Microsoft Office Relationship Marketing team created a multistage triggered email campaign that closely mirrored a typical email lead nurturing effort to address the concerns of new customers.

In this article, find out how Microsoft executed an email campaign on new Office 2010 customers to engage and educate them, and achieved dramatic increases in open and clickthrough rates, along with teaching something new about the product to 80% of program participants.

### CAMPAIGN

The email list for this effort was compiled from people who purchased Office 2010 directly from Microsoft on its website, and was specifically geared for B2B users of the software. The marketing team did not use this effort to market to consumers.

For this effort, Microsoft mapped out a calendar for the entire initiative with the program’s email sends triggered by certain customer activities. The program began with the first trigger — purchase of Office 2010 on the Microsoft website — and once the entire series went to action, customer behavior within the program triggered/or did not trigger additional elements of the campaign.

The heart of the effort was multiple levels of educational content that Office customers would receive based on their engagement with the program.

### **Step #1. Establish guiding principles for Marketing**

The entire effort was built around five guiding principles:

1. Put the customer at the center of everything
2. Foster authentic and personal relationships
3. Improve relevance through better targeting
4. Help the customer get value right away
5. Engage customers in the conversation

With those points in mind, after the initial feedback from customers expressing problems in learning how to use the new product and knowing that those customers simply were not using their new purchase, Marketing knew the fourth principle — helping the customer get immediate value — was not being met.

The new initiative was designed around using the other principles to meet the goal of providing immediate value for the new customers.

### **Step #2. Plan the effort to be relevant to the customer's needs**

“The program consists of two parts,” Bothwell explained. “A 'getting started' section and an 'ongoing usage section.’”

The program also involved three key elements:

- Actions were based on how long the customer has been in the program
- Targeted messages were integrated with other marketing pieces
- The program included re-targeting based on customer behaviors

All email sends included a call-to-action to visit landing pages with content specifically tied to the email message.

For example, the first email send in the “getting started” section of the effort sent the recipient to a “getting started” landing page that served as the homepage for a microsite dedicated to that part of the program.

The email sends were also reinforced by targeted ads on the landing pages and microsites program participants were sent to.

- Build the program around real people

The “ongoing usage” section of the effort was essentially an educational outreach (see steps four and five for more on this section of the program). To meet principle two from above — foster authentic and personal relationships — this educational content consisted of messages and instructional videos from actual Microsoft employees, not outside talent.

Bothwell stated, “The decision (to use actual employees) was made in the original strategy creation for the program, based on the importance of developing an ongoing relationship, literally, between Microsoft and our customers.”

She added, “We featured employees who actually work on the products they are discussing.”

### **Step #3. Begin with a “welcome” email series**

The “getting started” piece of the effort includes three emails, a landing page tied to the initial email that serves as homepage for the welcoming microsite, and targeted ads on the Microsoft Office website.

“A few days after a customer purchases Office from one of our online stores, they receive the first of three ‘getting started’ emails that thank the customer for their purchase and introduces some of the most notable new features in the product,” Bothwell explained.

Here is the “getting started” section from the customer’s perspective:

- Within a day or two of making the purchase, the customer receives the welcome email
- The welcome email includes a call-to-action that leads to the “Getting Started Center” microsite
- Targeted advertising on the Office homepage begins
- Two days after the welcome email, a second email is sent
- One week after the second email, the final email of the “getting started” section is sent

Bothwell said, “The goal of this section is to welcome users and get them using the product they just purchased.”

### **Step #4. Educate the customer with rich product-information content**

The “ongoing usage” section began at the start of the month after the “getting started” section was complete.

This section dove into each of Office 2010’s four applications:

- Word, Excel, OneNote and PowerPoint

Each application was featured for one month at a time. Like the welcome section, the “ongoing usage” program involved email with a call-to-action tied to a specific landing page and targeted advertising for the featured application on the Microsoft Office homepage.

Every email in the program “came” from an actual Microsoft employee who was involved in that application; the landing pages featured instructional videos from that same employee.

The Microsoft employee serving as the presenter contributed to the email copy to ensure the message had their “voice.”

“The personality of our employees comes out strongly in the creative — especially in the videos,” said Bothwell. “Showing customers that Microsoft is more than a behemoth corporation (and that) the employees who work on the products are interested in helping users get the most out of Office.”

The targeted advertising for the featured application, such as Excel, began a few days before the first Excel email was sent.

The goal of the targeted ads and email was to get the recipient to the dedicated landing page featuring educational content on the highlighted Office application.

- User behavior triggers additional email

This program included a behavioral aspect in that if the customer opened the email and visited the landing page to view the video, they would receive additional email. If not, they did not receive any more email until the next application’s cycle began at the start of the next month.

Bothwell stated, “The goal of this section is to drive usage of the new features and increased satisfaction with the product.”

#### **Step #5. Re-target users who engage with the effort with increasingly challenging content**

After the initial email, users who engaged with the campaign by opening the mail and visiting the landing page would receive an additional email with information on a feature of the application, such as “charts” in the Excel portion of the effort. Targeted ads also featured “charts” after this engagement to correspond with the email message.

If the customer continued to show engagement, their next visit to the Office website would present them with targeted ads leading to a landing page featuring another application feature. Those ads would be followed by a second, and final, email in the re-targeting effort.

“For each application, we developed three levels of content of increasing difficulty so we could deliver more information to the users that expressed interest, and not bother users who were not interested,” explained Bothwell. “If a user engages with the first Excel email, for example, they will receive another email on a more advanced topic within Excel.”

The entire program from welcome, to education on each application, lasted between four-and-a-half to five months.

#### **RESULTS**

Bothwell offered three key learnings from the campaign:

- Taking a long-term approach worked by optimizing the user experience by layering new elements to the marketing effort over time
- Helpful content in the form of step-by-step articles and videos built on the customer relationship and improved customer help and support
- Using actual employees who understand the product was very effective in personalizing the experience for the customer

She mentioned one point to keep in mind when reaching out internally for marketing content is there are some limitations to this approach, such as turnover or employees being relocated within the company.

The results for the effort include:

- 800% improvement in open rate
- 2,100% increase in clickthrough rate
- Open rate 50% above what Microsoft considered the industry average
- Website videos achieved 63% completion rate
- 66.6% of program participants tried a new feature

And after reviewing user outcomes, the team found that 80% of participants “learned something new.”

## NURTURE SUBSCRIBERS TO MOVE THEM TOWARD CONVERSION

### LEAD QUALIFICATION MESSAGES

Similar to a welcome series campaign, nurturing or sometimes called drip emails are sent on an automated basis, based on a subscriber's action (e.g., ad click, product inquiry) with the aim of keeping the recipient engaged and moved closer to making a purchase.

Nurturing emails take you a step closer in developing relationships with the customers. The first article in the MarketingExperiments creed is *"We believe that people buy from people; that people don't buy from companies, from stores or from websites; people buy from people. Marketing is not about programs; it is about relationships."* This is important for all marketers to remember, as you get to know the prospect you will simplify and tailor your messages.

A nurturing email is personal, brief and specific in a matter-of-fact kind of way. It emphasizes education and minimizes branding. In most sales situations, your company is just one of a few the subscriber is considering. Filling communications with too much promotion and hype can be a quick turnoff.

In a few short sentences, quickly guide them to your actionable content and leave them wanting more. The transparent and conversational dialogue will demonstrate your expertise and get you closer to becoming a trusted advisor.

Executing these email campaigns will require you to work closely with co-workers outside of your department and create a cross-functional crew. Before reaching out to Sales or IT, do your homework. Start by identifying the leaders with the most influence. You may be surprised the individuals with high-profile titles may not have the greatest impact on decisions. This can be accomplished by sitting in on sales conference calls or by paying attention to which causes team members are advocating in company meetings.

Do not discard employees that are negative and adverse to change. By being open to listening to their gripes, you may learn how to address fundamental process challenges.

### Recruiting allies

With this information, the next step is to build a rapport with these influencers. Take interest in their ideas and solutions for the challenges the organization faces. Share business books and articles that will aid in their endeavors. Support their initiatives to improve company process that you agree with. Taking these actions, you will demonstrate your commitment to the firm, and gain an ally for your marketing plans.

Please note the recruitment of allies goes beyond a sales force, for some marketers it will be earning the respect of leaders in the IT, e-commerce or customer service departments. IT can be especially helpful with their technical ability to properly scale projects while maintaining the company's security measures.

When IT understands Marketing's goals, it can select only the relevant data and toss the rest, creating greater efficiencies throughout the organization. When each department works on tasks that play to their strengths, a mutual respect is revealed and true teamwork becomes evident.

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*74% of organizations send  
nurturing email campaigns to  
develop stronger relationships.*

*- MarketingSherpa 2012 Email  
Marketing Benchmark Report*

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**WORKSHEET: RECRUIT A MARKETING-SALES ALIGNMENT TEAM**

Please take a moment to identify three key influencers within your organization, their concerns, and the actions you can take to show your support.

Key influencer	Key concerns	Strategies

**Agree on the path to purchase**

Having created a Marketing-Sales alignment team, reviewing your company’s Marketing-Sales funnel is the ensuing step. Does everyone agree with the road map? How about the profile of buyer and their anticipated actions? Achieving support for the customer persona will make it easier to discuss the steps and hurdles the buyer must overcome.

Questions relating to the prospects biggest challenges, priorities and worries ought to be discussed and settled. Examining the buyer’s mindset will identify the point at which he or she is handed off to Sales, customer service or a landing page. Setting the expectations of when the transition from Marketing to Sales will be is invaluable in creating future harmony between the teams.

**Set goals and objectives**

Next, decide the nurturing program’s purpose. For a B2B company, it may be having the subscriber take an action that requires a salesperson to respond, while for a B2C firm, the objective will be to grab a virtual shopping cart. No matter the goal, having a clear objective will enable you to strategize and execute a successful campaign.

**Define “qualified lead”**

To many marketing initiatives end up with leads that abandon purchase pages too quickly or tell salespeople who follow up, they are not ready to buy. Together Marketing and Sales must come to a consensus on the definition of a lead. This is not an easy task. A universal sales lead will clearly state and prioritize the degree of sales readiness. It will have been qualified and the next action steps laid out making it easy to assign responsibility and accountability within the firm.

Here is an example for a website consultancy organization:

*“Our organization considers a lead to be sales-ready once they have indicated interest by opening and clicking through on multiple emails, visiting our website multiple times and downloading multiple whitepapers. Sales-ready leads also must indicate their interest in engaging with a salesperson by checking off a box on our lead forms that says 'please have a consultant contact me.' If this option has been selected without ample activity, the lead is still considered sales-ready. Marketing will generate 300 sales-ready leads each month, and the sales team will close 10% of those leads within three months.”*

**EXERCISE: DRAFT A UNIVERSAL LEAD DEFINITION**

Now that you understand its importance and have familiarized yourself with a sample universal lead definition, it's time to draft your own. Please use the space provided below:

**Create content**

Having an agreed upon customer persona, path to purchase, goals and definition of a qualified lead will make a content creators job a lot easier. The nurturing program can consist of 3–20 emails. Each will contain valuable, actionable information demonstrating how your company can help solve the subscriber's challenges and concerns. Avoid disjointed emails at all cost. The messages should build off one other, just as a natural conversation would evolve. Map out a decision tree and build content based on how the subscriber responds to each message. Allow the subscriber's behavior to dictate how the conversation flows.

Again, the goal is micro-conversions that lead to a purchase decision. Learn how an online gaming vendor communicated at crucial steps in its conversion funnel in the case study, [“Triggered emails that target the conversion funnel boost revenue.”](#)

Please note, nurturing and lead qualification campaigns require consistent feedback from both Sales and Marketing to discover what's working, and what isn't to iterate the process successfully.



## CASE STUDY: ANTI-NEWSLETTER STRATEGY NURTURES \$1.5 MILLION IN LEADS IN 4 MONTHS AT CITRIX

Case Study ID: #CS32065

Location: MarketingSherpa Member Library

Summary: One way to grow an email list is to focus on valuable content and encourage your current list to share it. For this strategy to be successful, two elements have to be in place: the content has to be worth sharing, and it should be very easy to share by the email recipient.

Many B2B marketers send an email newsletter to coax prospects into engaging with Sales. The marketers at Citrix, however, abandoned the newsletter format last year. The team now focuses on sending targeted offers for premium content in a program that is half-automated and half-manual.

“We used to send out a quarterly newsletter for certain products that was more of a catch-all for all our content. It had multiple calls-to-action and very little response,” says Baxter Denney, Manager, Database Marketing, Citrix Online.

“We used the newsletter in concert with our content offers, so we did not stop one and start the other, per se. But we found that the multiple-offers format did not perform well at all. With one clear call-to-action, the response rate is much higher,” Denney says.

So Denney's team took what many might consider a radical step — it killed the email newsletter. Emails are now delivered in an automated series, as well as a house-file program, which nurture leads for Citrix's enterprise software and services. Leads receiving these emails generated more than \$1.5 million in revenue at Citrix from April through July 2011.

The Citrix team used five key email tactics to achieve their results:

### **Tactic #1. Route and segment new leads**

Citrix uses a variety of lead sources:

- Sponsored webinars
- Organic search
- Paid search
- Database purchases
- Third-party email partnerships

“We cast a pretty wide net to the kinds of folks that are coming in,” Denney says.

With a high-volume of diverse leads, Denney's team immediately scores them, determines their segment, and primes them for Citrix's email program. The team on-boards new leads in three ways:

- Send when ready

The team direct-routes any incoming leads it determines ready to talk with a salesperson. This determination is based on information known about the leads (such as their source and contact information), which is compared against the team's sales-ready criteria.

“If they meet our sales assignment criteria, then we'll actually send the initial message on behalf of their assigned rep,” Denney says.

- Segment regular leads

Most people who enter the team's database are either not ready to talk to a salesperson or have not provided enough information to make that determination. These leads enter Citrix's nurturing program and are segmented by their product of interest and customer profile, or persona.

The team maintains roughly 11 personas for the six products in Citrix's GoTo brand. Their titles include project manager, sales manager and others. These leads will receive content-targeted offers based on their persona's attributes and product of interest.

New leads the team cannot determine a persona for will receive emails that are targeted only to their product of interest.

- Send welcome email

New leads first receive a welcome email. This auto-responder thanks recipients for their interest in a Citrix product and provides links to additional resources. This email helps set expectations and provides more content if recipients want to engage immediately.

**Tactic #2. Automated emails for new leads**

People entering the database will first receive a two- to three-email series offering content from Citrix. These automated emails include:

- Personal salutation
- Banner mentioning the product of interest
- Free content offer
- Short description of the content
- Image of the content
- Two links and one button to download

The email message and the content offered are customized for each segment. For example, a project manager receiving emails about Citrix's online meeting software is offered a third-party whitepaper on managing virtual teams. The content is designed to be high-quality and "evergreen," so its value will not greatly diminish over several months.

These emails do not typically feature sales-oriented calls-to-action, such as to attend a product demo or contact an account manager. Their goal is to familiarize a person with Citrix's products, provide helpful content, and build interest in talking with a salesperson.

- Timing

Leads receive one email each week for two to three weeks before finishing the series.

- Updated each quarter

The team updates the content offered in these emails every three months, replacing any items that have underperformed or gone stale. The team also changes offers and messages between these reviews if they are performing poorly, and routinely tests the emails' layouts and messaging.

"It requires a lot of effort to stay on top of it and make sure you're sending out the good stuff," Denney says.

Regularly updating these emails ensures new leads are not offered stale content, and that the program's response rates remain strong.

### **Tactic #3. Timely offers for all other leads**

Any lead that finishes the first series without being sent to Sales, opting-out, or purchasing, is moved into the team's general house file. This program continues nurturing leads using the strategy described above, but with the following key differences:

- Not automated

The house-file emails are not pre-programmed in a series. They are created and sent to each segment on an ongoing basis. This gives the team more flexibility to integrate messages about recent headlines, new products, upcoming webinars and other time-sensitive information.

“There are folks on my team whose job is to work with the campaign managers to figure out what offer they want to send that week and set everything up,” Denney says.

- Content shift

This program continues to offer evergreen content, but also integrates offers that are sales-oriented, such as offers for Citrix's webinars and whitepapers related to Citrix's products. This content is used to entice nearly sales-ready leads, gather their information, and determine if they should be passed to a salesperson.

### **Tactic #4. Request detailed info when appropriate**

The team uses a variety of measurements to determine when a lead is sales-ready. The information is often gathered when a lead fills out a form to download content offered in an email. The team uses two different forms for this task:

- Long form

This form collects contact information from leads, as well as sales information such as:

- If their company uses a related product
- When they are planning to purchase
- The person's role in purchasing

This form typically offers content that is product- or need-specific, which interests people nearing a purchase decision, Denney says. The team collects this information to find out if the leads are ready to go to Sales, and to select the right salesperson.

- Short form

The team uses a shorter form when offering “softer” content that is less sales-oriented, such as the content offered in its automated series. This form has half as many fields as the longer version, which makes it less cumbersome to fill out, and its conversion rates are roughly 10% to 20% higher than the long form's, Denney says.

“We don't want to scare folks away from engaging. We don't want to make it harder for them.”

### **Tactic #5. Send a full profile to sales**

Once a lead meets the team's criteria, a profile is automatically sent to Citrix's CRM system and assigned to a salesperson. The salesperson can use a dashboard to view the lead's basic information and see every engagement the lead has had with Citrix.

Information in the profile includes:

- Lead source and date of entry
- Emails opened and clicked
- Whitepapers downloaded
- Webinars attended
- Information provided through online forms
- Information the team appended to the database (if applicable)

This rich profile empowers the salespeople to calibrate their approach and maximize their chances of closing.

“It gives them all of the information they need. So when they pick up the phone, they should feel confident that the person is ready to talk about the product and potentially buy,” Denney says.

- Quality and volume challenges

Citrix's lead nurturing and qualification system is efficient and sophisticated, which has fostered several challenges. For example, the system can generate a daunting number of good leads.

“We're hitting our revenue and sales targets, but we never want to get to the point where sales teams can't respond to leads because they just have too many,” Denney says.

Because of its sophistication, the system cannot always be easily adjusted.

“One of the projects I am working on now is to build a model that is more flexible and allows you to dial-up and dial-down quality, and therefore quantity, to adjust to market conditions,” Denney says.

## **RESULTS**

“This pretty much drives all our lead nurturing or demand management,” Denney says.

- Strong response

The team's automated nurturing emails are the clear winner in terms of average response metrics:

- Automated nurturing emails from April through July

- 1.70% CTR
- 1.57% response rate (content downloaded)

Manually-sent house-file emails for the same period

- 0.65% CTR
- 0.62% response rate

Stronger sales

The tables turn when looking at the total business nurtured by the two programs:

Manually-sent house-file emails from April through July

- \$1.3 million in sales from leads nurtured

Automated nurturing emails for the same period

- \$250,000 in sales from leads nurtured

Combined, these two email programs have nurtured leads resulting in more than \$1.5 million in revenue in four months.

“Keep in mind, our sales cycles can be anywhere from three to six months for the larger deals, so we might not see the results of our marketing efforts materialize until another quarter or two from the first offer sent,” Denney says.

Segmentation proves effective

The team's use of customer personas to segment its list and target offers has also proven effective. The metrics below compare the average response rates for the team's persona-targeted emails and its general emails in two product categories.

Product: GoToMeeting

- General Emails: 0.93% response rate
- Targeted Emails: 3.94% response rate
- Difference: +324%

Product: GoToAssist

- General Emails: 1.14%
- Targeted Emails: 2.97%
- Difference: +161%

The screenshot shows an email newsletter from GoToMeeting Corporate. The header includes the GoToMeeting Corporate logo and a phone number: 1-800-372-6207. The main subject is a webinar titled "How to Change Hearts, Minds and Actions" featuring Guy Kawasaki. The text includes a call to action to register for a complimentary webinar, a quote from Baxter about changing hearts, minds, and actions, and a list of topics attendees will learn. It also mentions a bonus for 125 lucky attendees who will receive a copy of Guy Kawasaki's book "Enchantment: The Art of Changing Hearts, Minds, and Actions". The email is signed by Mike Mansbach, VP & GM, and includes the Citrix Online logo and website information.

**GoToMeeting<sup>®</sup> CORPORATE** Questions? 1-800-372-6207

**How to Change Hearts, Minds and Actions**

[Register for This Complimentary Webinar](#)

**Baxter:**  
It's one thing to change yourself, but to effect change in the world around you, you have to get other people involved in the process – which isn't always easy.

Join this live webinar to hear Guy Kawasaki, co-founder of Alltop.com and founding partner at Garage Technology Ventures, explain how enchantment enables you to influence people's hearts, minds and actions to bring about voluntary, enduring and delightful change.



*Guy Kawasaki*

**Attendees will learn how to:**

- Know when enchantment is necessary.
- Achieve likability and trustworthiness.
- Overcome resistance.
- Enchant your boss and people who work for you.

\*Bonus! 125 lucky webinar attendees will receive Guy Kawasaki's new book *Enchantment: The Art of Changing Hearts, Minds, and Actions*.

[Register for the Webinar](#)

Please forward this to colleagues who might be interested in learning more.

Best regards,  
  
**Mike Mansbach** | VP & GM

**Citrix Online**  
A division of Citrix Systems, Inc.  
[www.citrixonline.com](http://www.citrixonline.com)

**GoToMeeting Corporate Live Webinar**  
**Title:** How to Change Hearts, Minds and Actions: Guy Kawasaki Speaks on Enchantment  
**Date:** Wednesday, August 24  
**Time:** 9 AM (PDT) / 12 PM (EDT)  
**Speakers:** Guy Kawasaki, author of Enchantment  
Christine Lagorio, Senior Editor, Inc.com

[REGISTER](#)

## ACTIVATE YOUR SUBSCRIBER BASE

Once an email subscriber has a good understanding of your brand's products and services, the next step is to give them a meaningful incentive to take action to buy. Up until this point, you have kept your promise to deliver timely and relevant messages, on their terms. Communications are direct and address their desires. Now is the time to make an offer – one that makes them feel like they belong to your “exclusive club” and get something they cannot find anywhere else. Here are a few examples of incentives that work.

### FIRST TO SEE

Today we live in an age of a self-publishing media. As individuals, we have the power to break news via our check-ins, posts, and photos. Being the first to share news with our family or colleagues is very important to some people. A company's ability to turn these marketing mavens into a tribe of brand evangelists will be a key to their success.

### LIMITED-TIME DISCOUNTS

Exclusivity and urgency have always been a successful duo in direct marketing. The limit of time moves readers to take action, if they find the discount significant.

### E-COUPONS

Groupon, LivingSocial and other daily deal sites have created a resurgence in e-coupon offers. The companies combine exclusivity and urgency with a sharing feature. Groupon sends its members one daily offer for a discounted product or service in their local community. The twist is that a certain number of members (set by the retailer) need to purchase the offer before it can be redeemed. This creates an incentive for members to recruit others to join in on the purchase.

This strategy builds off the popular “Friends and Family” discount. The special offer promotes the recipient of the coupon to invite family members and friends go shopping. The email subscriber feels good sharing the discount and their family member may feel some peer pressure to join them.

New coupon technologies are emerging. One ESP, MailChimp, created a QR Code reader application for their customers. The application allows storeowners to scan the QR code whether it is printed out or on their smartphones. The coupon is connected back with the subscriber's database to check its validity and then records the transaction. These technology advances will only make coupons easier to send, track and redeem.

One helpful hint is to test a set dollar amount versus a percentage discount for roughly the equal the savings. For some, the \$50 off coupon has produced significant gains over a 15% off discount. Many readers find the set dollar amount more tangible and easier to comprehend.

### BEHAVIOR-BASED PERSONALIZATION

Businesses that send out weekly or monthly offers will collect data on which deal enticed their readers to clickthrough to the product or service. This information can be used in the subsequent email to shape the offer. For example, a sporting goods retailer sends an email offering a discount on NFL hats, and the subscriber clicks on his favorite team. The following week the retailer leads the email off with a discount on his favorite team's sweatshirt.

As marketing automation (MA) and email platforms become more technologically advanced and integrated, new opportunities for behavior-based personalization arise. Marketers can set up complex rules to send highly customized emails based on the fly from rich data it collects on each subscriber. This may include external factors such as local weather, iconic institutions or traditions based on IP address geography. Likewise, internal factors based on the subscriber's previous actions or user experiences can generate emails that work like a personalized recommendation tool.

## GEO-TARGETING

Direct marketers have always relied on a customer's ZIP code to tailor offers relevant to his or her location. Email marketers adopted this practice and it is now common to ask for ZIP code during the registration. Technology improvements have led some organizations to rely on their ESPs or MAs ability to segment based on a person's IP address that updates more frequently whenever an email registers an open or a click.

With the fast adoption of smartphones, check-in coupons are increasing in popularity. Smartphone users can use social media sites Facebook, and Foursquare to check in at a retail location. Chipotle restaurants for instance would email a coupon for a buy one burrito and get a second one free on the next visit. Email can play a key role in a delivery of location-based coupons to spur transactions.

## WIN BACK

In monitoring a subscriber list, you will eventually detect inactivity with some list members. In fact at the MarketingSherpa Email Summit 2011, Per Caroe of Lyris reported that on average, about 70–75% of your email list is inactive. Worse yet, in its *2011 Email Engagement and Deliverability Study*, Responsys Inc. found that 54% of companies were sending to subscribers who were inactive for more than three years.

Attempting to reactivate these existing or potential customers is just as important as the steps to acquire them in the first place. A win-back email campaign can boost brand connection and clean out the dead wood to boost your deliverability reputation.

The first step is to identify non-responders who have not opened your emails or clicked the embedded links for a period of time. The criterion in which an account is deemed inactive depends on the frequency emails sent and a firm's business cycle. A florist may not be concerned if emails go unread in August but will be concerned with dormant subscribers in the months leading up to Valentine's Day and Mother's Day. Search for the "why" behind the dormancy. For some subscribers, they just wanted to sign up for a sweepstakes, or choose to read emails as text and not triggering a recorded metric.

The reported inactivity could also be an unresolved deliverability issue. Other times, email recipients are responding nicely, just not through email; choosing to use the phone or conduct an in-store purchase. Focus on the segment that does not feel you are meeting their expectations. Not only is this group most likely to report a complaint, but these are subscribers who are looking for different content and offers. This segment provides an excellent opportunity to survey and test new concepts.

Recently, the frequency in which companies reach out with win back campaigns has become shorter and evolved into an ongoing practice. Google Priority Inbox and ISP's reliance on engagement metrics for delivery reputation are driving this trend.

Finally, write the message in a straightforward manner. Simply say, "We missed you" or "thank you," and give them an incentive to connect, offer the chance to update their profile (opt-down) or easily unsubscribe. The incentive should be reasonable and not outlandish. You do not want an idle subscriber to reengage solely for the special offer; otherwise, you will be in the same situation a few months and have started a bad communication cycle. When deciding on an incentive, select a tangible gift rather than a chance to win promotion. Our case studies have found that a guaranteed \$10 gift card outperforms a chance to win one extravagant gift.

## ADDRESS ABANDONMENT WITH CAUTION AND RESPECT

### Abandoned cart emails

Triggered emails, in response to an abandoned shopping cart, form or webpage provide some of the highest ROI. In the case of abandoned shopping cart, the bargain hunter partially filled an online cart but for whatever reason chose not to continue the transaction. A triggered (sometimes called “remarketing”) email can be automated to get shoppers back on the purchase path and capture lost sales.

Write and send abandonment emails cautiously. You do not want to make the potential customer feel “big brother” (or “sister”) is watching. Rather, provide a helpful service and alleviate their buying concerns with a friendly reminder. Review and test your email copy, offer and timing to find the sweet spot for your campaigns. Most companies send between 24 and 72 hours after a cart has been abandoned. Here are a few tips to get you started:

1. Personalize the message. Use all the dynamic content you have available. Ideas include the recipient’s first name, images of the items abandoned in the shopping cart and a deadline when the cart will be emptied.
2. Add links to product reviews of items left in the cart.
3. Display security icons to demonstrate your site is safe for online transactions.
4. Provide links to your return policy.
5. Make it easy to contact the customer service department with online chat or 1-800 numbers.
6. Offer an incentive to purchase now. An example is free shipping.
7. Present unsubscribe links.

These tips will ensure the nature of the email is reassuring to the recipient. Our research finds only 11% of marketers carryout these campaigns. Many have shied away from including an offer in fear that this policy would train customers to abandon their carts in hopes of receiving a better deal. Test this hypothesis out with your customers, you may find the benefits of increased sales outweigh any negatives.

In fact, research by the Conversion Academy supports the strategy’s effectiveness as they found on average 21% of abandoners reengage and buy. Moreover, abandoners will spend 55% more on purchases than non-abandoners. Learn more from these two case studies: [“Back-in-stock alert emails achieve 22.45% conversion rate”](#) and [“Triggered emails recapture 29% of abandoned carts.”](#)

### Abandoned site browse or search

These tactics can also be used for browsed webpages. Web analytics can determine prospects that spend more than the average time on certain pages, creating an opportunity to target your audience with highly specific content. The message should be broader and softer than an abandoned shopping cart email.

As these customers have browsed but not yet put anything in a cart, the images of the products should encompass a category. There is less reservations for marketers to share offers to incentivize an immediate purchase.



## HOW TO: 6 TACTICS TO LEVERAGE SOCIAL CHECK-IN TO GROW EMAIL LISTS AND IMPROVE ENGAGEMENT

How-To ID: #HOW32073

Location: MarketingSherpa Member Library

Summary: See six tactics that exploit the synergies between check-in and email programs, and allow you to increase opt-ins and better understand your audience, reaching them with relevant offers as they engage with your brand.

Through check-ins on mobile devices, the online and offline worlds have collided. This collision is a boon for marketers, allowing them to see customer behaviors and activities that previously existed beyond their sight lines.

Check-ins not only make visible what customers or prospects do when they're not online, but also when they're not engaging with your brand. When people opt-in for your location-based service program, they are extending an invitation into their lives.

Adam Steinberg, Segment Marketing Director – Social Media, Silverpop, said, "It is like saying 'Please deliver me offers based on where I have checked in.'" Even if customers are not at your venue, the opt-in signals that they will welcome offers if they're anywhere near the location.

Given that people typically use smartphones for check-ins, SMS may appear to be the logical delivery channel for these offers. Email, however, has several advantages.

"Most consumers are still a little uncomfortable being marketed too frequently via SMS," said Loren McDonald, VP Industry Relations, Silverpop. "Consumers feel proprietary about that little icon that lights up when you are expecting your teenage daughter to text you when she's coming home."

SMS also limits the number of characters and doesn't allow for graphics. McDonald felt "it's not the greatest environment" for high-quality, compelling promotions. Email is typically a fundamental part of the marketing infrastructure. Therefore, marketers have the necessary email resources to more readily push out check-in triggered messages and offers.

Foursquare, the most prominent of the myriad location-based services, makes a game of checking in and sharing location. Users compete against "friends" to see who earns the most points in a week. The application also awards 'mayorships' for the most days checked into a particular venue.

In June 2011, the company website celebrated reaching 10 million users. Search Engine Watch reporter Rob D. Young wrote the article, "Yeah, that's 1,000% annual growth." Two months later, Foursquare founder and CEO Dennis Crowley announced on Bloomberg TV that users were checking in three million times per day – up from two million, just six months earlier.

When you take advantage of location-based services, your email program is not only a delivery vehicle for offers, it's also a beneficiary of the visibility gained through check-ins. The six tactics below show you how to make the most of this growing trend -- from driving more opt-ins to your email programs, to increasing email relevance, to driving physical traffic to your locations.

### **Tactic #1. Deliver check-in rewards and offers via email**

Marketers use lures such as loyalty reward points, contests and sweepstakes to incentivize customers to opt into check-in programs, via the likes of Facebook or Foursquare. Sending rewards, offers or win notifications via email entitles marketers to collect addresses as part of the sign-up process.

Of course, people don't easily divulge their email addresses. "So the rewards and the offers have to be compelling enough that people are engaged, or intrigued, or greedy enough to relinquish their email address," said Shaila Ittycheria, former Director Local, LocalResponse.

Retailer Tanger Outlets launched a check-in campaign in the beginning of October to differentiate itself, and drive business to its stores for the holiday season. Customers opted in through either Facebook or Foursquare.

After their third check-in, they were entered into a sweepstakes for a \$500 shopping spree and they received a voucher for a \$10 gift card via email. With two more check-ins, customers were enrolled in a drawing for a trip to Paris and they were emailed a second \$10 gift card voucher.

Since the program included a reward sent via email, people supplied their email addresses during sign-up. After six weeks, approximately 5,000 had opted in.

Location-based services are also useful for building B2B email lists. Companies can create check-in programs for seminars and trade shows. Every person who checks in is entered into a drawing for a prize, such as an iPad, and email notifications are sent to the winners.

### **Tactic #2. Use check-ins as triggers**

With “right time, right message” as a basic tenet of email marketing, it’s hard to imagine a more fertile opportunity to send people an offer or coupon than when they have just checked into your business.

“The intent and the timing are clearly signaled by the check in,” said McDonald.

Check-ins also create opportunities to communicate with customers when they’re not in your store, but nearby, which is a great time to send a special offer. Depending on specifics, Steinberg has seen redemption rates anywhere from five to 20% on offers sent out in these situations.

To put this in perspective, NCH Marketing Services Inc. reported H1 2011 redemption rates for grocery coupons acquired through in-store handouts at 3.1%, and through “away from store” handouts at 2.5%.

More aggressive marketers can also deliver offers and deals when they see customers check in at a competitor’s location.

In the hotel or hospitality industry, check-ins allow businesses to offer additional services. Steinberg suggested, “Imagine if your hotel, when you land and check in at the airport, sends a message like, ‘Welcome to Atlanta. Would you like dinner reservations tonight?’ or ‘I know you like to exercise, would you like me to book a yoga class for you?’”

Triggered check-in-emails change the tone and texture of email programs. Messages are transformed from general blasts to more personal, one-to-one experiences.

### **Tactic #3. Refine segmentation with behavioral data**

Check-ins are a window into your customers’ lives, enabling a deeper understanding of where they go and what they do. By analyzing check-in data you can determine which customers frequent high-end restaurants, who is loyal to locally owned stores, and who shops at the mall on a weekly basis.

This kind of information helps marketers determine the most suitable promotions and items to feature. For example, a car manufacturer might market a specific car model to people who frequent child-oriented activities, whereas frequent nightclub patrons might receive a different offer. Marketers can also determine which customers are most loyal to their brands. Of this group, savvy marketers will delve deeper, identifying people who share more often. This opens up possibilities to engage differently with the loyal segment, and to send more viral content to valued sharers.

Alternatively, Tanger Outlets' loyalty sweepstakes enabled the retailer to analyze check-in data to see who opted in, but never checked in at their stores. They are planning an email campaign to retarget people who showed enough interest to sign up for the program, but didn't visit a store.

On the B2B side, if you use check-ins to track who attended your events and seminars, you can apply the data to scoring prospects, and align email messaging accordingly.

#### **Tactic #4: Extend the definition of check-in**

Traditionally (if we can even use that word for a concept that's only evolved in the past few years), check-ins are an explicit act of using a location-based application to identify where you are. The term "soft check-in," which is an "implied" check-in from social media such as Twitter and Facebook, is now emerging.

For example, if someone Tweets they just finished eating a "Bloomin' Onion", it's a pretty good assumption they are dining at Outback Steakhouse restaurant chain. And, of course, there are the more obvious Facebook or Twitter posts such as "Standing in line to see Breaking Dawn", the next movie in the Twilight series of films.

Using a natural language filtering algorithm that extracts presence extends the number of check-ins marketers can exploit to engage with people and acquire customer information.

Ittycheria said, "We process over a billion check-ins a month. And roughly 70% of that is the soft/natural language check-ins."

It has become second nature for social media users to constantly share their thoughts, activities and habits.

"In this space, there is so much data," said Ittycheria. "We could call it a generation of narcissists. People put out where they are, what they're doing all of the time."

This sharing generates a treasure trove of data, which can be used to market to people in a way that makes them feel heard, instead of feeling as if their privacy has been violated.

The language filter can be tweaked for a specific goal. For example, a major cell phone carrier wanted to identify people who were complaining about one of its competitors. Anyone who met the criteria for this soft check-in received a response via Twitter offering to cover any cancellation fees imposed by their current carrier, along with a \$100 credit.

Although the initial communication channel was Twitter, there was customer engagement that the cell phone carrier may never have encountered through other channels.

You don't necessarily have to acquire an email address as part of the opt-in process for the check-in, or initially use email to engage with a check-in. If responses to the check-in are compelling and personal enough, Ittycheria believes prospects will willingly sign up for emails because people react favorably to being heard and having their feelings acknowledged.

People are usually hesitant to give up an asset as precious as their email address. "But the moment they reach me with a very contextually relevant offer that I'm excited about, that whole mindset walks out the door," Ittycheria said.

#### **Tactic #5. Minimize opt outs**

With check-in programs, where customers essentially invite a business or a brand into their lives, it's important not to abuse the privilege. And it's perhaps even more important to be careful with soft check-ins, because the target audience has not yet opted into a program.

Below are several ways to avoid fatiguing customers:

- Limit how often you respond to a check-in

Even if someone is checking in every day, that doesn't mean they want to hear from the company every single time. You may want to set a limit on how many emails you want to send within a given time period and how long between emails.

For example, you may want to limit the number of emails to three per week, but you want at least 24 hours to elapse between each one.

Tanger Outlets only sends an email after the third and fifth check-ins. Since the email contained a voucher, it has been well-received.

If a third party is sending offers on behalf of the brand, it's good practice to ensure this party also limits the number of offers it sends.

- Make it easy to opt out

If a third party is sending the offer on the brand's behalf, give people the option to opt out of any offers from that third-party provider as well as the brand.

For soft check-ins, keep these points in mind as well.

- Make the check-in response clear

Make sure recipients understand why a brand or a business is communicating with them. This is easy to do by referencing the original post or Tweet that implied a check-in and prompted the response in the first place.

- The business or brand needs to be the responder

Even if a third party is handling the process, the response needs to appear to come from the business or brand itself.

- Maintain a high contextual overlap

If it's not absolutely obvious that the soft check-in is a relevant fit, err on the conservative side and don't respond to it.

#### **Tactic #6. Promote your check-in program to your existing email audience**

With all the benefits that come with a well-designed check-in campaign, it makes sense to leverage all available channels to promote it. Since email is the universal messaging channel and probably the most powerful way to reach your customers, it only makes sense to develop this new channel using it.

Tanger Outlets leveraged its Tanger Club email list to announce its check-in campaign to its most loyal customers. Of the people who opened the email, 8% clicked through and 49% of those converted.

The image shows a screenshot of an email campaign from Tanger Outlets. The header includes navigation links: FIND YOUR LOCATION, GET YOUR COUPONS, BUY GIFT CARDS, JOIN TANGER CLUB, and FIND BRANDS. The main content features a woman in a black dress and the text: "It's Chic to be Spotted at Tanger SHOP MORE & GET REWARDS!". Below this, there are two "Check in" options: "CHECK in 3 times" (Get a \$10.00 GIFT CARD & a chance to WIN a \$500.00 Shopping Spree!) and "CHECK in 5 times" (Get a \$10.00 GIFT CARD & a chance to WIN a Chic Fashion Trip to Paris!). A "HOW TO PLAY!" section lists: 1. Simply register at tangeroutlet.com/checkin, 2. Check in with Foursquare or Facebook upon arrival at any Tanger Outlet Center, 3. Limit one check-in per day. There is a "GET STARTED" button. A "WE REMEMBER" section mentions "9-11-2001 • 9-11-2011" and "HELP US SUPPORT THE FAMILIES OF SEPTEMBER 11™". A "LIKE US ON FACEBOOK" button is also present. The footer includes "Get Connected. Stay Connected. great deals on the go" and "TANGERSTYLE PREFERENCES Tell us how you prefer to receive your exclusive offers so we can customize just for you." with a "GO" button.

## RETAIN CUSTOMERS BY REASSURING THEM OF TRUST

When building a lifetime customer, communication does not end after the sale is completed. Consumers remain anxious making online purchases. They like to see the order was processed and when it is likely to arrive. Receiving timely and informative communications will aid in a business meeting or exceeding their expectations.

These updates can be opportunities to encourage them to share a positive experience with friends or colleagues. Having recently purchased a product, these customers are fully engaged and primed to buy additional goods and services. How do you keep the communications relevant and helpful without abusing the trust you have earned? Here are a few types of emails to try:

### TRANSACTIONAL

The U.S. Federal Trade Commission defines a transactional email as one that facilitates an agreed-upon transaction or updates a customer in an existing business relationship. Examples of these emails include bills, receipts, statements, password confirmations, out-of-stock notices, whitepapers and online chat transcripts. A simple rule of thumb is to think of a transactional email as one that you would send to a customer as a service even if there were no promotional message included.

The CAN-SPAM Act covers emails whose primary purpose is to advertise or promote a commercial product service, making transactional emails exempt from most of the acts provisions. However, MarketingSherpa recommends reviewing your plans with legal counsel. In addition, consider sending transactional emails from a dedicated IP address. These emails contain critical business information and you do not want your promotional email IP address to affect the delivery of these messages.

Due to their content, transactional emails are more likely to be opened and clicked on, resulting in higher conversion rates. This makes transactional emails some of the most powerful messages in your toolbox. Our research agrees, as we found that 48% of organizations deploy automated transactional emails. Even more compelling is that 61% of firms in the strategic phase deploy transactional communications.

To maximize their effectiveness meet with all of the departments in your company that makes contact with customers. Examine these touch points with the Purchasing, Finance, IT, Marketing, Sales, Customer Service and of course Legal departments. It may surprise you the amount of messages to customers that are available to add relevant content.

New to adopting this practice are brick-and-mortar retailers. Case in point, Macy's will ask if you would like to have your receipt emailed to your address. This simplifies the return process for both parties and eases the customer's chore of storing and finding the receipt. In addition to the benefit of being environmental friendly, it gives the Macy's an opportunity to ask the shopper if they would like to opt-in to their emailing list. When the receipt is delivered to the shopper's inbox, there is a Macy's website navigation bar across the top to entice the recipient to purchase again.

No longer will simple plain-text transactional emails reflect well on your brand. These critical communications should not take a back seat to other promotional email campaigns, and ought to be keenly overseen by your marketing department. As these communications are becoming common, customers expect the receive confirmation within seconds of their purchase, be personalized and convey the brand's value and voice.

See how a health and wellness retail marketer pulled more sales from product recommendations by adding them to order confirmation emails in this case study "[Cross-sell in confirmation emails: 111% higher conversion rate.](#)" Here are a few suggestions for the layout and composition of a transactional email.

## Composition

*Subject Line* – Write to relate exclusively to the transaction.

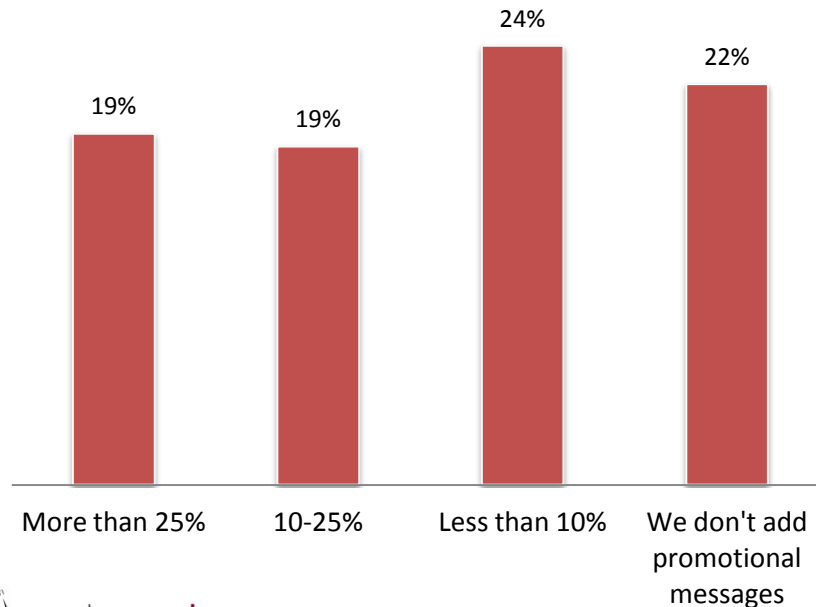
*Branding* – Include corporate logo for quick recognition. In addition, include links for customers to return to your site and follow you on social media sites where you actively participate.

*Copy* – More than 75% of the overall email should be dedicated to relevant order information. Display the details of the order and shipment at the top of the email. Your company's contact information should be easily accessible if the customer has any questions or concerns.

*Up-sell and Cross-sell* – Dedicate a small portion of the email to future purchases. Adding *personalized* recommendations based on their recent order or browsing behavior can help make your next sale. Advertising special offers or a rewards program can further cement your customer's loyalty. In addition, don't assume these buyers have opted-in to your other email communications, ask them to opt-in to your emails, and follow your company on appropriate social media sites.

### CHART: ONE-FIFTH OF MARKETERS ARE NOT MAKING THE MOST OF THEIR TRANSACTIONAL EMAILS

Q. *Approximately what percentage of transactional email copy does your organization dedicate to promotional messages? (e.g., product recommendation, opt-in registration)*



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

MarketingSherpa does not recommend that promotional content exceed 25% of the overall email copy. We found 19% of marketers surveyed reported they go beyond this best practice.

*Signature* – Adding a signature at the bottom reinforces the perception email is a personal communication medium. If there was a sales person involved in the purchase, acknowledging their involvement or adding a note from them will only make the email more meaningful.

## ACTIVATION

Companies that sell memberships, subscriptions and licenses that end after a certain period will want to implement an activation email campaign. MarketingSherpa discovered nearly a quarter of organizations send automated activation email messages encouraging subscribers to use their new purchase. Engaging consumers sooner than later will build the relationship quicker and make renewing the membership easier.

For example, Verizon Wireless spent millions of dollars helping new customers acclimate to their new phones. Most of the expense came in the form of inbound customer service phone calls from customers unable to set up their new smartphones. The complexity and variety of phones Verizon offered made it difficult for customer service reps to answer all the new users' questions and help them get the most out of their phones. Verizon implemented a six-part welcome email series with answers to the most frequently asked questions. The result was a 5% decline in the number of support phone calls and more importantly customer satisfaction increased.

## RENEWALS AND REORDERS

In the months leading up to a renewal date, a series of triggered emails can be sent to work in conjunction with your sales team efforts to retain customers. Personalize the emails with content that cites past usages of the service, and any business relationship the consumer may have with your sales reps or customer service agents.

If you sell a finite product or service such as a water filter or oil change service, reorder reminder emails may be ideal. Sending triggered emails based on a customer's previous order can be a helpful service to provide to your customers. Include the expiration date of the product or service to make the consumer aware of their upcoming need. Send along a special offer to help retain their loyalty.

## SPECIAL OCCASION

Lifetime events such as birthdays, anniversaries, childbirths and holidays are easy special occasion event emails. Subscribers like to receive special offers to commemorate these dates in their lives. To stand out, try to create clever promotions that are relevant to the consumer but also your brand.

Department stores that have bridal registries leverage this special time in their customers lives very well. During registration they ask for the couples email address and wedding date.

A few weeks after the wedding, the store sends a congratulatory email with discounts on any item not received from their registry.

Over their lifetime together, the couple will receive more happy anniversary e-cards and messages with updates on sales or discontinuation of their china or bedding set.

## PRE- AND POST-CONSUMPTION

In the travel and event business, the anticipation leading up to and the recollection of memorable moments can be just as important as the event itself. The days immediately after a purchase are a great opportunity for marketers to capitalize on the warm feelings created. This may involve reminders to make hotel or dinner reservations before the event or offers afterwards to purchase professional photos.



## ENCOURAGE CUSTOMER INTERACTION THROUGH REFERRALS

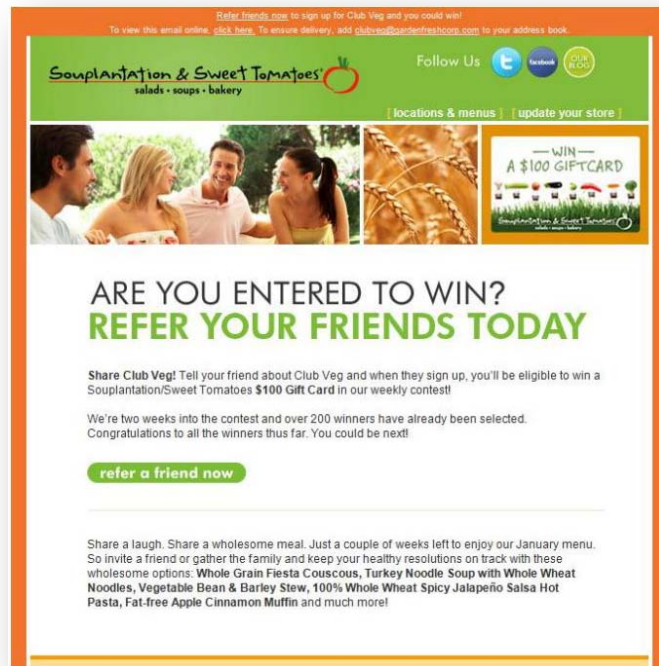
After successfully assisting a subscriber through the customer lifecycle and keeping your promises, presumably he or she is happy with your brand. One thing that every salesperson knows, but as marketers we sometimes forget is to ask for a referral. Ideally, make requests throughout the subscriber's experience starting at the registration of the email program, continuing to inquire within the valuable content provided in newsletters and concluding when he or she makes a purchase by asking in the confirmation email.

By asking them frequently during each stage of the customer's lifecycle you will make it habit for subscribers to think of who can benefit from the brand's content and may even bring other decision makers and influencers into the conversation. A best practice is always to specify the type of referral you seek, make it easy to share and reiterate to the subscriber the benefits of helping a friend or co-worker.

A great example of a referral program is from Souplantation & Sweet Tomatoes restaurant chain, the Silver award winner of [MarketingSherpa's 2012 Email Awards](#) for Best List Growth Campaign. The campaign was built around incentivizing existing loyal email members to refer a friend through a variety of channels: email, social media and in-store. Each week, all 118 locations would randomly select a winner who referred a friend to receive a \$100 restaurant gift card.

By encouraging customers to assist in growing the company's future this acquisition strategy brought in more than 77,000 new subscribers, doubling the chain's monthly average for opt-in registrants. It can be easy for organizations to forget their loyal customers when looking to attract new prospects. The fact management had enough confidence in its brand to trust clients to refer friends, and in turn reward those clients, speaks volumes on how Souplantation & Sweet Tomatoes values its customers.

To see how a consumer electronics company sent an automated email to encourage new customers to refer their friends and contacts read this MarketingSherpa case study "[Triggered email nets 75% of referral program signups.](#)"





## HOW TO: 3-PART TRIGGERED SERIES GENERATES 53% CLICK-TO-CONVERSION RATE

How to ID: #HOW31909

Location: MarketingSherpa Member Library

Summary: Check out a three-part triggered email series this company used to remind customers to replace worn out air filters and other parts. Fifty-three percent of the customers who arrived on the website made a purchase.

Nothing lasts forever. The products and services you sell will likely need updating, repairing or replacing someday. Customers may return for their maintenance needs, but they could turn to a competitor or forget maintenance altogether. To stack the odds in your favor, and to help customers, you can send reminder emails when customers need them most.

Housh Inc., for example, has an online branch of its business that sells indoor air quality products. The humidifiers, air cleaners and other appliances periodically need new filters or other parts to operate at peak performance. For some of Housh's websites, the replacement parts are the primary products sold.

"The [replacements] include furnace filters and humidifier water panels and related consumable products. For a healthy home environment, people need to replace and updated these on a regular basis, but they are often forgotten," says Larry Zimmer, General Manager, e-commerce, Housh.

In response, the marketers at Housh launched a three-part triggered email program to remind customers when their filters needed to be replaced. The emails were scheduled to send when customers' filters were expected to wear out. Housh launched the program on three sites:

- DiscountFurnaceFilter.com
- DiscountHumidifer.com
- HomeComfortDepot.com

The program generates about \$2 for every email sent. For a recent 30-day period, 53% of customers the program drove to the sites made a purchase. The percentage for each of the three triggered emails:

- Email #1: 35.7%
- Email #2: 63.3%
- Email #3: 63.89%

Here are four tactics Housh's marketers used to set up the program and make it a success:

### **Tactic #1: Estimate when parts are replaced**

The marketers first had to understand the best times to offer customers replacement filters. By timing their offers correctly, the marketers could increase the relevance of their message and increase the customers' propensity to buy.

But filters have a range of times for which they can be used. Some will last six months and others will last two years. Furthermore, some appliances come with packs of replacement filters. The challenge for Housh was to understand when each customer's filter needed to be replaced.

Rather than assuming when customers should replace their filters, the marketers measured when customers ordered replacements. They calculated each product's average reorder period and the statistical confidence level for each average.

These averages illustrated the time customers typically waited to reorder a filter. By timing triggered emails based on these averages, the marketers hoped to suggest the right product, to the right customer, at the right time.

### **Tactic #2. Override some of the averages**

Some people use filters beyond the manufacturers' recommendations, stretching every last bit of use from them. Other people can be overly cautious and replace filters before its necessary.

Looking at the average reorder periods for Housh's filters, the marketers realized they had customers in both camps. Some filters with 365-day lifespans had average reorder rates above 400 days. At least one filter had a suggested lifespan of 700 days and an average reorder rate of 531 days.

Housh's marketers wanted to suggest a filter be replaced before it started to fail. This would help customers' appliances operate as efficiently as possible.

"While our website names describe 'discount,' our focus is really on building and maintaining a high-quality indoor air environment," Zimmer says.

With this in mind, the marketers manually adjusted the timing of the emails for some products to more closely correspond with the manufacturers' suggestions.

### **Tactic #3. Setup a triggered three-email series**

Housh included about 120 replacement parts in the program across three websites. A countdown started each time a customer purchased one of the parts or an appliance that used it. The countdown was based on the replacement period the marketers had calculated for each product and each appliance's filter.

Once the countdown ended, Housh sent the first of three triggered emails in the program. The emails were sent from the website from which the customer purchased.

- Email #1: The reminder

The first email almost exclusively included information about the product along with some information to ease customers' anxiety about purchasing from the company.

The email's header image featured the websites' logo, a money-back-guarantee emblem, and a note that the company ships to Canada.

Other features of the first email:

- Three top navigation buttons: About us, Testimonials, Contact Us
- Large headline: "Just a reminder: It's time to reorder!"
- Large product image
- Brief product description with price
- "Reorder Now" button

After clicking the product image, description or button, customers were brought to the corresponding product page on the website.

- Email #2: The incentive

Customers who did not purchase after receiving the first email received the second email three days later. The email was nearly identical to the first, except it offered free shipping.

The email emphasized free shipping in the following areas:

- Subject line (described in tactic #4)
- Large headline: “Reorder your filter today & receive free shipping!”
- Discount code next to button

The conversion rate for visitors brought to the website from this email is 77.3% higher than that of the first email.

- Email #3: The last chance

Customers who still had not purchased received the third and final email five days after receiving the second. Again, it was very similar to the previous emails, but had these differences:

- Subject line emphasized “last chance” (described in tactic #4)
- Large headline: “Last chance to reorder & receive free shipping”
- Discount code next to button

The conversion rate for visitors brought to the website from this email is 79% higher than that of the first email and 1.4% higher than that of the second email.

#### **Tactic #4. Make the emails more relevant**

The most significant challenge to email marketing effectiveness is targeting recipients with highly relevant content, according to the MarketingSherpa *2011 Email Marketing Benchmark Report*.

The marketers set the timing of the triggered series to make it as relevant as possible to customers' products and needs. The program also automatically added information about the products to make the emails more relevant.

Here are two examples:

- Subject lines

Each email had a customized subject line that included the customer's first name and filter or part name. The subject lines of the last two emails also mentioned the free shipping incentive. Here are examples from each email:

- Email #1: “Bill, have you checked your Lennox H/C HCF 16-10 MERV 10 Replacement Filter 16' x 25' x 5' - X6670? It looks like it's time to reorder!”
- Email #2: “Bill, get FREE Shipping on your Lennox H/C HCF 16-10 MERV 10 Replacement Filter 16' x 25' x 5' - X6670 when you reorder now!”
- Email #3: “Bill, LAST CHANCE to receive Free Shipping on your Lennox H/C HCF 16-10 MERV 10 Replacement Filter 16' x 25' x 5' - X6670!”

- Product information

Each email featured a large image of the exact product a customer needed. They also featured a short description of the product, its price, and links to read more and order the product from Housh's website. All of these details gathered inside a branded email from a company the customers knew contributed to the emails' relevance.

## INCORPORATE EVERYDAY EMAIL CAMPAIGNS -ALONG THE WAY

There are a few types of email campaigns woven into every stage of the Marketing-Sales funnel:

### NEWSLETTER

An email newsletter can be defined as content distributed to subscribers by email on a regular schedule. Content is seen as valued, editorial in and of itself rather than primarily a commercial message with a sales offer. The newsletter gives you the opportunity to share insights into your company and marketplace. Done well through storytelling it can reveal your brand's personality.

This is more important today with the tools built into Gmail and Hotmail, which automatically places newsletters into folders or allows quick email filtering based on its format respectively. To stand out newsletter publishers must keep the content relevant. Setting up an editorial calendar and segmenting the readership are two ways to preserve a fresh newsletter.

Learn how a specialty grocer kept its newsletter fresh with the help of its passionate employees in this case study titled [“Short ‘staff selection’ posts become most-clicked content, increase offline sales 10%.”](#)

However, organizations need to keep an eye on the changing preferences in how their target audience digests information and adapt. There are more channels at your disposal to ease email's burden including blogs, SMS and social media. Our research found that 7% of organizations had discontinued an e-newsletter in favor of a blog and RSS feed. The good news is that the majority of organizations cited the current state of their e-newsletter as either staying the course or flourishing.

### VIRAL VIDEO

Using email to fan a fire you set with a company blog, video or special promotion is a good tactic to quickly spread and keep top-of-mind for consumers. Video, especially for B2B marketers, is particularly powerful. The opportunity to explain a complex product or service in a demo is valuable in establishing you as a thought leader. Actually, Attivio, a B2B firm that sells enterprise search and unified information access (UIA) solutions used email to promote its video and saw a [300% increase](#) in traffic to their website.

The addition of video has proven to increase email open and clickthrough rates substantially and with advancements in HTML5 it is increasingly possible to view videos within the inbox on a several email clients and devices. With the increased dependence on mobile communications and the plethora of apps, consider designing your email videos to be able to open with a link to a website from a desktop or from an app in a smartphone.

### PUBLIC RELATIONS

Email can be effective in quickly sharing company news and events with your customers, prospects and media.

### Crisis management

David Meerman Scott, author of *Real-Time Marketing & PR* and *Newsjacking* wrote a post for MarketingSherpa's blog. In the piece, he gives the reader a situation: Imagine a huge company announces it is to acquire one of your competitors. It hit the wires five minutes ago. What do you do now?

Here is an excerpt from the blog post.

How about writing a blog post about it in real-time? Then how about sending an email right away to all of the contacts in your database who you know are customers of your competitor?

That's what Joe Payne, CEO of Eloqua did when Oracle announced the acquisition of Market2Lead, a company that is also in the marketing automation arena.

I'm on the Eloqua advisory board and was having dinner with Joe, other advisory board members, and the Eloqua management team on May 24 in San Francisco when this went down.

Joe checked his BlackBerry and saw that the announcement had just been made.

The Oracle announcement contained only a North Korea style one-paragraph announcement. So Joe realized that there was a tremendous opportunity RIGHT NOW to write a blog post and define what the announcement meant.

In his post, "Oracle Joins the Party," published a few hours later, Joe said (in part): "I expect Oracle's entry to make a major difference in the attention paid to this sector. It's going to open marketers' eyes, and, as a result, expand the market. This is exactly the type of movement this industry needs. You see, the potential market for lead management systems is less than 10 percent penetrated."

Eloqua's CEO now owns the soundbyte!

Can you see what Joe did? Oracle announces an acquisition but provides almost no details. The media is hungry for something to say and someone to quote. Bingo, a Google search pops up Joe's post and now reporters, analysts, and bloggers have an authority to cite in their stories.

As a result of this real-time market commentary, Eloqua became an important part of the resulting stories in *InfoWorld*, *Customer Experience Matrix*, *PC World*, *Customer Think*, etc.

Now, when people want to learn about this transaction, they find Eloqua in the discussion. If you're an analyst coveting the market category or an existing customer of Market2Lead or are evaluating marketing automation platforms, Eloqua becomes someone you should consider.

Now is when the email kicks in. The marketing team at Eloqua queried their prospect database for any company in the sales cycle that was either an existing or a potential customer of Market2Lead. Each of those people then received an email, which was sent from the email address of their sales rep, pointing out the real-time blog post that Eloqua's CEO Joe Payne wrote. The sales rep customized these emails:

***Subject: Transition program***

***Hi Jim,***

***I wanted to check in because I see you are using Market2Lead. It's been quite an exciting week for Market2Lead and Oracle with the acquisition announcement. No doubt Oracle's arrival at the party will bring increased attention to the sector. You see, as an early adopter of Marketing Automation, you're one of the less than 10 percent of organizations who are recognizing the value it brings to your business.***

***Not surprisingly though, we've had a lot of calls over the last few days from many nervous clients as Oracle only acquired Market2Lead's Intellectual Property (IP), not their customer contracts. As the leader in marketing automation, Eloqua is interested in helping you transition to a platform that will allow you to continue to do great marketing. We are offering Market2Lead clients a transition program consisting of a free SmartStart onboarding program and a six-month, money back guarantee on all subscription fees.***

***The Eloqua team is committed to helping you make a smooth transition.***

***Let me know when you have 10 mins to chat. You're not alone!***

***Best,***

***Sales Rep Name Here***

***Eloqua***

Amazingly, this Eloqua email was often the first that the customers of Market2Lead were hearing that their vendor had been acquired. Again, Eloqua owned the sound bite because they were first.

Many of those sales prospects then contacted their sales rep to learn more and soon deals started to close. The first signed customer as a result of this effort was Red Hat, a Market2Lead customer who chose to switch to Eloqua resulting in a \$250,000 deal.

I'm constantly amazed at what real-time communications can do. Had Eloqua waited several hours to act, the moment would have been lost.

An immensely powerful competitive advantage flows to organizations with people who understand the power of real-time information

## MARKET RESEARCH

Surveys and polls are great tools to gain more knowledge on your subscriber base, especially on the content they desire. Conducting online surveys is relatively inexpensive and easy. Having subscribers engage takes more effort. Readers want to know their input will help determine a brand's future decisions and get instant feedback on the results.

Technologies are advancing to allow polls and surveys to show results in real-time inside the existing email message. As consumers demand for instant results increases, look for these technologies to become more prevalent.

In the following MarketingSherpa Blog excerpt, Daniel Burstein explains how a B2B marketing automation company used real-time guerilla marketing tactics to take advantage of a fellow B2B company's large advertising spend through the use of email and a survey.

*"A few of my colleagues read that Salesforce.com had purchased commercial slots during the Super Bowl (XLV) halftime show one week before airtime. We were impressed that Salesforce.com would invest millions of dollars to promote Chatter.com via a medium dominated by B2C companies," remarked Shonal Narayan, Manager, Marketing Programs, Marketo.*

“Having this prior knowledge, we debated amongst ourselves if this [email send] was a good investment. Feeling compelled to ask what other marketers would think about the ad, we came up with the idea of a poll right after the ads aired live, so it was still fresh in people’s minds.”

There were two landing pages to confirm to recipients that the poll voting had been captured, one for the “yes” and one for the “no.”

Narayan’s team followed up with a results email the next day to everyone that participated in the poll. It drove people to a landing page that encouraged people to Tweet. The landing pages for the initial email send were also redirected to the results URL, so anybody clicking the initial poll email after the results were sent would see the results from the poll.

Keep mobile in mind when leveraging a consumer event, keep in mind that your B2B audience likely doesn’t have a bulky gray Dell on their lap when engaging in the activity.

“[We] ultimately decided to use a single-click poll embedded within the email to make it easy for the people viewing the email on their mobile device. Just a simple ‘click yes or no’,” Narayan said.

The results: Marketo, B2B Super Bowl advertising win

“We conduct many A/B tests, and we’ve found that Sunday emails (especially P.M. sends) do not perform well. However, this campaign did particularly well. We wanted to give a buffer after the halftime ads had been shown, so I scheduled it to send at 5:40pm PT,” Narayan said.

Here are the results from Narayan’s team:

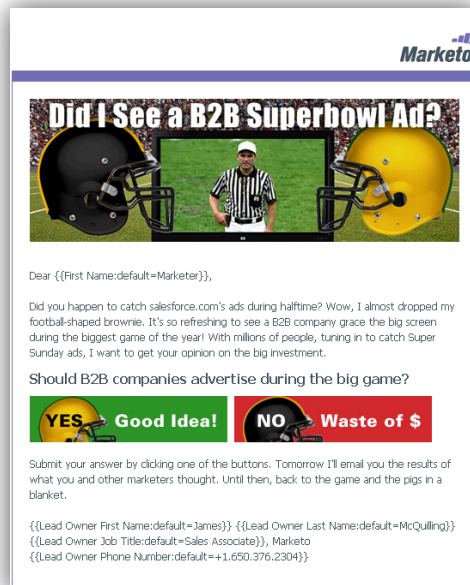
Email sent to more than 20,000 marketers in the US and Canada.

13.5% open rate, yielding a 16.5% click to open rate.

More than 680 responded to the poll (which is more than the initial click performance reveals, indicating that marketers were forwarding the email on to colleagues and friends)

And the results of the poll itself? ...In the end, 63% agreed that B2B advertising is a good idea.

#### EXAMPLE: MARKETO B2B SUPER BOWL EMAIL



**WORKSHEET: PRIORITIZE BUSINESS EMAIL TACTICS**

Please take a moment to score your proposed email project based on the following criteria.

**Strategic Value** - How does this tactic affect the company’s goal? 1= Very important 5= Not important

**Expected ROI** – What is this tactic expected ROI? 1= Very high 5= Very low

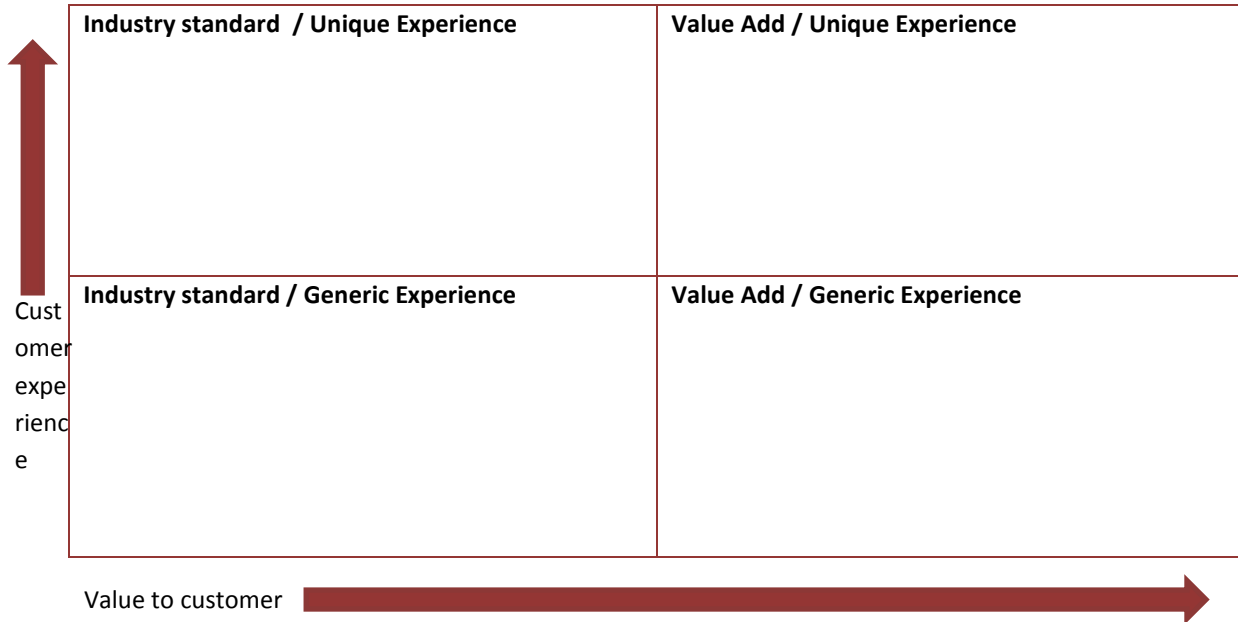
**Difficulty** – How difficult is this tactic to execute? 1 = Not difficult 5= Very difficult

**Overall Priority** – Average score of three criteria. The lower the score, the higher the priority

Proposed Email Tactic	Strategic Value	Expected ROI	Difficulty (time, effort, expense)	Overall Priority Ranking
Example: Shopping cart abandonment	1	1	5	2.34

**WORKSHEET: PRIORITIZE CUSTOMER-FOCUSED EMAIL TACTICS**

Please take a moment to plot your proposed email project based on the following criteria.





SECTION SUMMARY: IDENTIFY IMPACT AND PURPOSE

Please take a few minutes to complete the assessment for this section.

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1. Name four key message points should the welcome message deliver.

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2. Before creating a nurturing campaign, name four topics to discuss with your sales force.

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3. Name at least three email incentives to initiate a purchase.

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4. Please indicate true or false for the following statement. The CAN-SPAM Act covers transactional emails.

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*If you were unable to answer any of the above questions, please review the previous sections again before moving on.*

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CHAPTER 2 NOTES

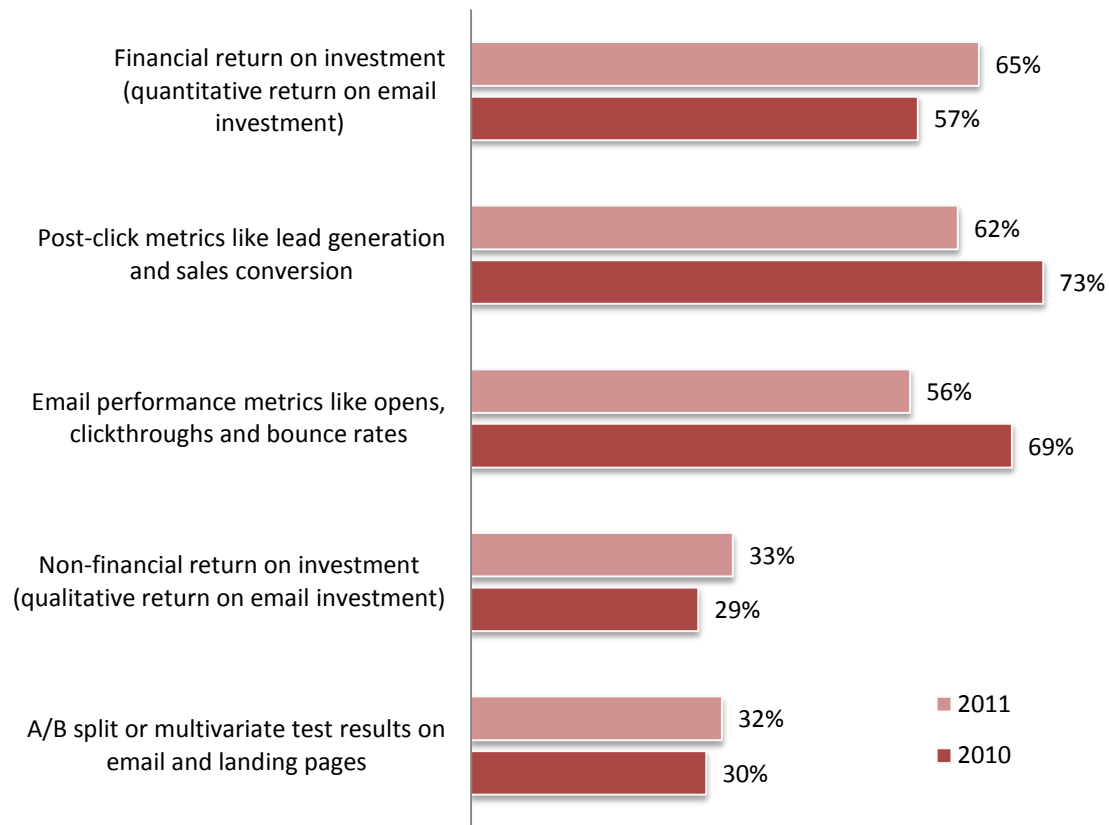
## CHAPTER 3: MEASURE AND REPORT RESULTS

Today’s business environment has shifted from leaders asking employees, “What have you accomplished this past quarter?” to “What have you sold in the last five minutes?” Every employee, in every department is now responsible for creating an engaging customer experience and contributing to the firm’s bottom line. Consumers heightened expectations for an authentic relationship in which companies recognize, understand, and solve their challenges, enable marketing and IT departments to have a larger influence on a firm’s success.

With this responsibility, marketing teams are under more scrutiny to be accountable for every dollar spent on marketing initiatives. It is not easy endeavor to update cross-functional teams and earn budget approvals from the C-suite. Marketers must maximize all of their business and intra-relationship skills to accurately measure and report results to reap the recognition and rewards they desire.

Unfortunately, the task is not getting any easier, our research found a shift in the factors CMOs use to determine the business value of an organization’s email program. In the past, post-click conversion and email performance metrics were sufficient. Today, CMOs presume email to provide a financial ROI.

CHART: CMOs SEEKING FINANCIAL ROI TO DETERMINE EMAILS VALUE IN 2011



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

This request will be difficult to fulfill for a majority of firms, as 68% of marketers do not have a method for quantifying email marketing ROI. It is disappointing, but not surprising, that almost seven of 10 marketers do not have a method to measure ROI.

It is daunting for many organizations to find the right balance for maintaining control of the data, identifying outcomes, and having the resources required to manage the process. We will discuss this in more detail later in the chapter.

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*Increasing measurable ROI because we lack the available data to determine what a lead is worth, and proper tracking throughout the sales cycle to see where it originated.*

-Marketer insight on challenges

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## PLAN WITH THE END IN MIND

A marketer’s worst nightmare is sitting at a table with top management, unprepared to review a marketing campaign’s results. The CFO asks, “What is the optimal marketing mix to maximize revenue?” The VP of Sales fires the question “How the campaign made a positive impact on the lifetime value of the customer?” and all your Marketing team can respond with are “feel-good” impressions. Brand awareness, the percentage of opens and the email database size will not help a marketer justify advertising expenses.

Obviously, no marketer wants to be in this position. The only way to avoid such a scenario is to think like your C-suite and decide how you will measure results *before* launching the campaign. This proactive approach allows you to design a measurement strategy, and tweak it as your final campaign comes to fruition. The planning process takes into consideration the limitations of your database technology and human resources.

The sophistication and volume of data available has grown, however you want to be reasonable on what your team can track and deliver. Seek the input from a variety of sources including finance, sales, IT and Web analytics team members.

### WORKSHEET: IDENTIFY KEY STAKEHOLDERS TO ALIGN MEASUREMENT STRATEGIES

Please take a moment to identify the key influencers within your organization, their concerns, and the necessary metrics they will require to support your email-marketing program.

Key influencer	Key concerns	Measurement
Example: Carrie Cash, VP of Sales	Qualified leads	# of prospects who ask to be contacted by sales

After completing this exercise, schedule a short meeting with each decision maker to confirm conjectures.

## STRIVE FOR EFFECTIVENESS AND EFFICIENCY

Shape your metrics and KPIs for measurements around business outcomes to make it easier to discuss two of top management's favorite topics: Performance and profitability. The first step is to consider your company's goal, customer profiles and sales cycle.

As we discussed in Chapter 2, placing email into your Sales-Marketing funnel, and measuring the outcomes, can best demonstrate email's effectiveness. Map out the entire lifecycle of your customer and see when and where email marketing has the biggest impact on conversion and brand loyalty. Look at the entry points for high-potential and high-value customers. Can you increase their conversion rates earlier in the sales funnel? Are their messaging points available to prevent leakage in the later stages of the pipeline?

In addition, this exercise will allow you to see clearly how marketing interacts with other departments such as sales, customer service and IT. Set out to analyze email's performance at each stage and glean insights on how to improve operations to increase profitability and productivity.

## PRIORITIZE

CRM, sCRM and marketing automation software have provided businesses with more opportunities to measure and monitor marketing performance. While the instant feedback nature and large scope of information can be enticing, it is not wise to immerse yourself in all of the data. Marketers must prioritize what and when to measure based on their brands goals and resources.

Let the John E. Jones quote, "What gets measured, gets done" steer your selection process. As you establish expectations for what will be measured, remind yourself to only collect data that you and your team will act upon. Be prepared to respond to both positive and negative information, as constant pursuit of performance improvements will have a positive effect on your team's morale.

## EMPHASIZE TEAMWORK

Marketing – and specifically email marketing – teams rely heavily on other departments to thrive. Construct measurements that highlight the collaboration between departments. Whenever possible, celebrate and recognize winning contributions and temper losses. One example is to show the flow of visitors to your website, the portion that clicked to enroll into your email program to be nurtured and how many were passed on to sales to close.

Work with other departments to get their buy in and to ensure you are shining the spotlight on the correct people and processes. We also recommend you speak with your finance department to make sure you are using the same ROI formulas to calculate and report your measurements.

## SWAP SHOPPER STORIES

Graphs, charts and elaborate statistics are more effective when presented in the context of your customer's experience. Telling true shopper tales will give emphasis and meaning to the numbers. Executives will be excited to learn how the information connects the company's goal and the individual customer. Another benefit, storytelling brings to life your team's passion and enthusiasm for helping customers.

Incorporating these four factors into your measurement strategy will overcome one of email marketing's biggest, yet most rarely discussed, obstacles – interpersonal challenges with cross-functional teams.

Understanding the goals, celebrating success with all that are involved and succinctly demonstrating email's value to the organization can help conquer this challenge.

Be inspired by Philippe Dore, Senior Director, Digital Marketing, for the ATP World Tour. He got the ATP's executives excited with his team's email strategy to sell tickets for professional tennis events. The overall email campaign generated about \$1.5 million in revenue.

"We have our CMO talking about email marketing and subject lines," Dore said.

## METRIC SELECTION

Identifying what to measure and understanding its purpose for communicating progress and impact on objectives is the first step. Next, decide which metrics fit your strategic requirements. Again, make certain the metrics chosen are actionable so your team can consistently make improvements and gain necessary budget approvals.

The majority of organizations track delivery, open and clickthrough rates. ESPs and MAs easily provide this response data in their campaign reporting systems. As an email marketing program matures and become more complex, marketers seek post-click metrics like conversions and revenue per email.

The next chart shows organizations in the strategic phase of email marketing maturity are significantly more likely to track many performance indicators. These metrics stretch from the most fundamental delivery, open and clickthrough rates to the more sophisticated revenue per email and response by list segment.

Please note, these metrics do not always tell the whole story and can be fallible. For example, open rates are commonly misinterpreted as a measurement dropping in stature. Open rates are unreliable because they only apply to HTML emails which rely on tracking pixels to signal an "open", and if the email client blocks images or viewed in a preview pane the message will not be recognized as open.

Open rates are better served to evaluate trends and look for spikes in the numbers. A jump or slump in your open rate justifies an inspection of your subject line, send times and any other off-line initiatives to find a reason.

For many marketers the goal of an email is to get a click. Moving the subscriber to take action to visit a landing page or make an offline task represent success. This is why CTR is often used to measure an email or newsletter's effectiveness. However, be conscious in how CTR is calculated, again due to the "open" tracking technology the 75 unique clicks may not be from the 200 people who "opened" the email, there may have been many more subscribers that read the message in the preview pain or text format.

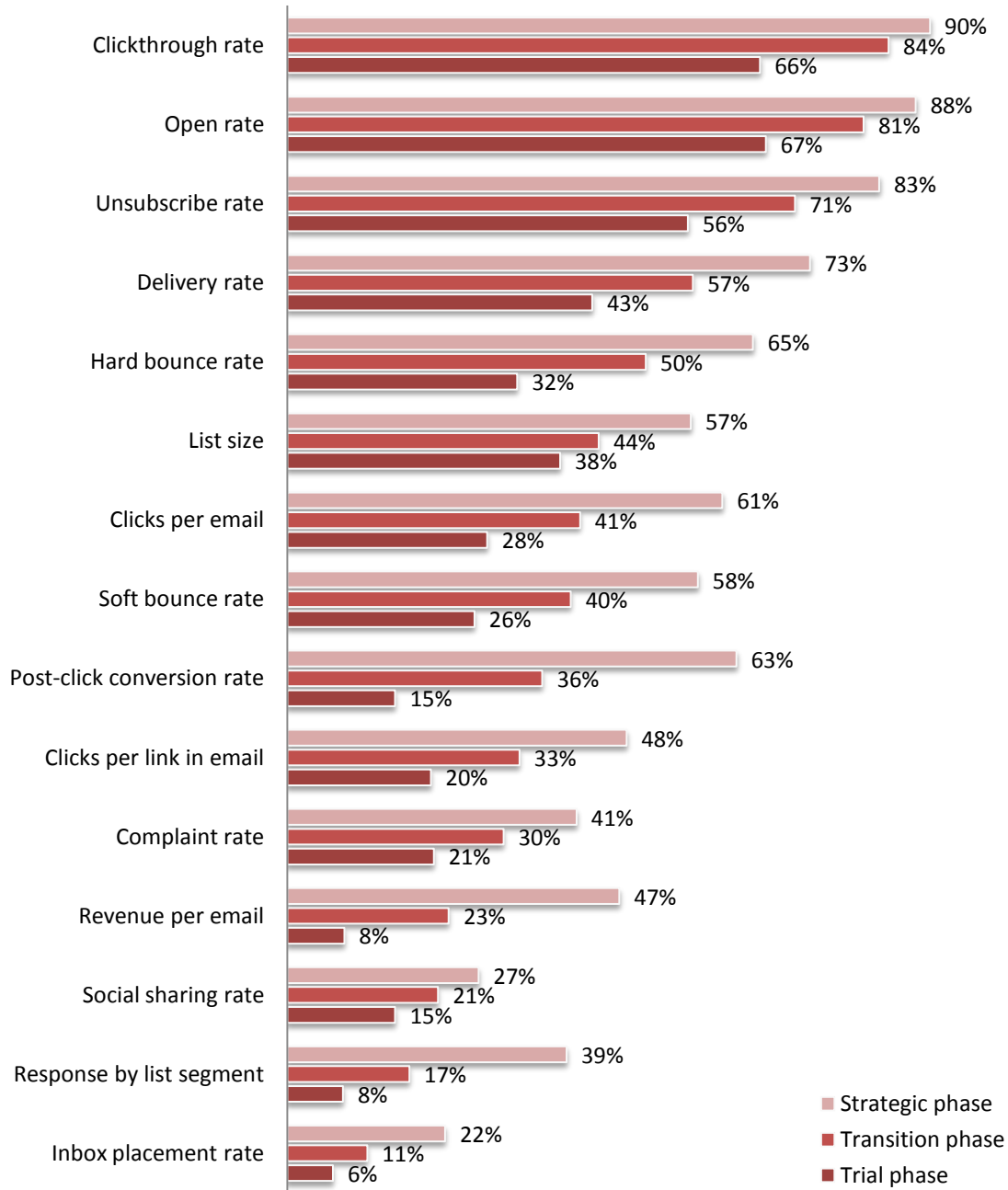
When reviewing the results of your campaign, go beyond metrics and try to understand the link between the message and receiver. For instance, open may exceed CTR if your subject line peaks the subscribers interest, but does not match the value in the email, thus they do not click.

Conversely, if the subject line is narrowly written for loyal recipients and not for wide consumption, few people will open the message. However, those brand evangelists who do, will click through and CTR will exceed open rate.



CHART: EMAIL MARKETING METRICS TRACKED, BY ROI MATURITY PHASE

Q. Which of the following email marketing metrics does your organization track?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

One frequently asked question is “What is inbox placement rate?” Return Path defines Inbox Placement Rate (IPR) as the percentage of sent email that actually arrives in the subscriber’s inbox. In addition to subtracting undeliverable and bounces from email sent, IPR calculations subtract the number of messages placed in the spam or junk folder as well as ones gone missing due to ISP blocking tactics.

## COLLECT AND BENCHMARK STANDARD METRICS

The metrics provided by your ESP, MA or IT department can be helpful for benchmarking your results and spotting trends. Collecting this data will enable you to make improvements to the execution of your email campaigns.

Important information to document on every campaign is the name, subject line, send date, send time and total number of subscribers mailed, total bounces, soft bounces, hard bounces, net email sent, unsubscribes, opens, unique opens, clicks, number of links in the email and social sharing. Below are some additional key calculations.

### **Total Bounce %**

Denotes a proportion of total emails reported to bounce. ( $\% \text{ of bounces} = \text{Total Bounces} / \text{Gross email sent} \times 100$ )

### **Net Email Sent**

The actual number of emails valid for attempted delivery equals the gross emails sent minus the hard and soft bounces.

### **Net Email Sent %**

Represents a proportion of the list eligible for delivery. ( $\% = \text{Net emails sent} / \text{Gross emails sent} \times 100$ )

### **Unsubscribe %**

Signifies a proportion of attempted sends that choose to unsubscribe ( $\% = \text{Unsubscribes} / \text{Net emails sent} \times 100$ )

### **Opens per unique**

Average number of times an email is opened as a function of singles email subscribers who opened messages.

### **Open rate %**

Expresses a proportion of email opened once or more from all attempted sends ( $\% = \text{Unique opens} / \text{Net email sent} \times 100$ )

### **Clicks per unique**

Average number of times an email is clicked by those who clicked on at least one link. To figure divide the number of clicks by unique clicks.

### **Clickthrough rate (CTR)**

Proportion of clicks in relation to all emails sent for the campaign. ( $\text{Unique clicks} / \text{Net emails sent} \times 100$ )

### **Click-to-open rate**

Indicates the proportion of email openers who click once or more on an email ( $\% = \text{Unique clicks} / \text{Unique opens} \times 100$ )



## TRACK YOUR MATURE METRICS

As email-marketing strategy matures, it looks to incorporate the entire path to purchase and the other tactics it interacts with. The ability to track and measure these tactics depends on the database technology provided by your CRM, sCRM, ESP, MA, IT team, or deliverability vendors.

However, there are some measurement tools within your grasp with the use of Web analytics. Adding Web analytics code to your emails allows you to analyze the behavior of visitors to your landing page or website. As the visitor moves to other pages, lingers on the current page or leaves entirely, the Web analytics will follow them through to hopefully a purchase or signal contact with a salesperson. Work closely with your team to capitalize on Web analytics capabilities.

Below are some recommended metrics to track:

### NEW SUBSCRIBERS

Email lists are always churning, adding new members and saying goodbye to others. With the focus firmly on building quality lists, this is an acceptable reality. However, you do want to monitor your growth and look for successes.

#### **Opt-in rate of new website visitors**

Watching the opt-in rates for new website visitors can be beneficial to understanding how well your newsletter value proposition is in line with your website and the needs of the potential customers. For many marketers, acquiring an email address on the website is the first step to have a two-way conversation and begin a relationship.

#### **Opt-in registration abandonment rate**

Marketers' challenges are always with effectively communicating the value of their email subscriptions and the number of required fields during opt-in registration. Monitoring closely potential subscribers that do not complete the form can uncover insights on how to improve the registration process.

### CONVERSION RATES

Email marketing campaigns are designed to have a relevant conversation with the reader to introduce, educate, entertain, reinforce brand loyalty and entice a reaction. The actions taken after reading the email whether its visiting a webpage, going to a brick and mortar store or calling customer service, drive conversion rates. Only you know the exact single intention of the email, but whatever it is, measure it.

#### **Macro engagement metrics**

As we will discuss later in this handbook, the activity an email spurs is now an important factor for ISPs to determine how messages are delivered to subscribers' inboxes. The one time clickthrough or conversion rates captured will not give you a holistic view of the engagement level of your email program. To spot trends and gauge the overall health of your list and messages compile a number of email metrics and create a score card.

These KPIs may include open, clickthrough, delivery, unsubscribe, and spam complaint rates. David Daniels, CEO of The Relevancy Group, suggests a three point scoring system, where 1 = below your benchmark avg., 2= within 2% of your benchmark avg. and 3= 2% or more of your benchmark avg. The higher your overall score, the better you and your team are doing.

## RETURN ON INVESTMENT (ROI)

The equation  $ROI = (\text{Profit} - \text{Investment}) / \text{Investment}$  seems simple enough. However, there are challenges to meet on multiple fronts. First, understand how your CFO factors profit and investment. Make sure you both are on the same page before you search for your data. Second, capturing the exact chain of events from the email sent to the sale can become a hornet's nest. Are all the behaviors and actions tracked back both on and offline like website visits, Google searches and in-store visits? Don't be discouraged, even estimates can be helpful. Making assumptions and using the same formula to calculate results can give you a general direction of your performance.

## Lifetime value (LTV)

A customer Lifetime Value (LTV) is the expected revenue created from a shopper over their lifetime as a customer. After you have calculated the average profit and lifetime of an email subscriber, you can proceed. The problem  $LTV = \text{Average Age} \times \text{Average Profit}$  is easy to solve but quickly can become more complex if you choose to segment your products and customers.

## Dollar value of an email address

If you know the dollar value of an email address it will be easier to get approval for acquisition expenses. Calculate by dividing the overall revenue generated from your subscribers by the average number of people on your house list.

## COMMUNICATE RESULTS

Analyze and present the data compiled in a manner that is meaningful to your organization's stakeholders. Benchmarking and trend analysis are two commonly used tools for effectively communicating results.

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*"Champions don't become champions in the ring – they are simply recognized there."*

## BENCHMARKS

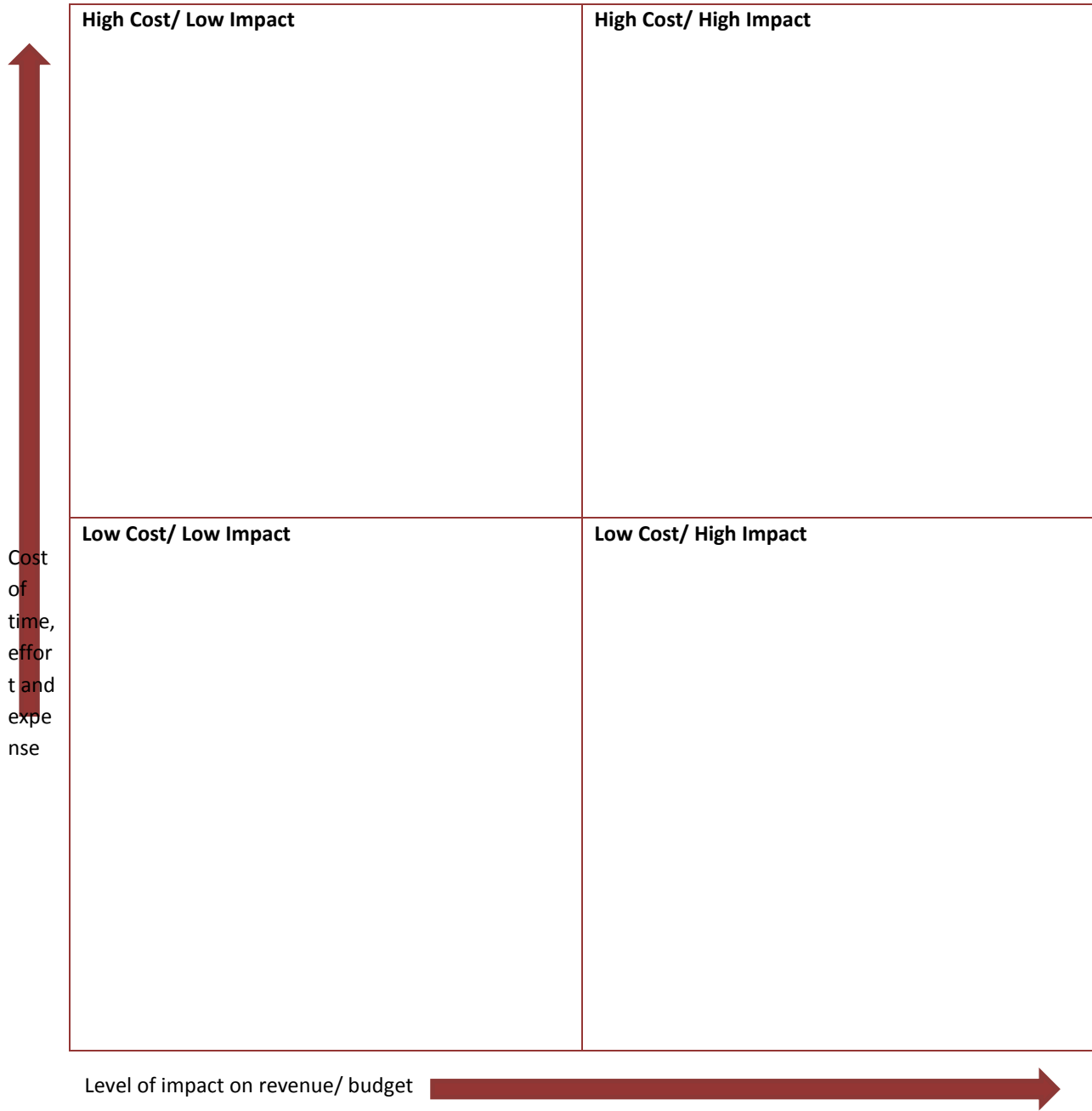
-Author unknown

MarketingSherpa, MAs and ESPs routinely publish industry benchmark reports on the state of email marketing. The intelligence gathered helps brands compare its performance and practices against organizations similar to their companies based on industry and size. These benchmark reports may open the reader to new methods, ideas and practices to improve performance. In addition, the data helps isolate problem areas and identify strengths to maintain.

With this information, management can prioritize improvement areas and raise performance expectations. Creating and reporting internal benchmarks on an ongoing basis can keep a team focused on goals, while filtering out the noise from the latest marketing fads.

However, most companies face the constraints of time and resources to collect and report on the data collected from their marketing campaigns. To assist in the prioritizing which metrics to track, please use the template on the following page to plot out your strategy. You may choose to alter the impact range depending on the goals of your strategy. In some cases, you will be trying to decide on the most critical metrics for measuring subscriber engagement. While other circumstances you will want to select the metrics that will best show email's ability to contribute to revenue generation.

WORKSHEET: PLOTTING MEASUREMENT STRATEGIES



**SECTION SUMMARY: MEASUREMENT AND RESULTS**

Please take a few minutes to complete the assessment for this section.

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1. Name at least three topics to discuss before deciding what email metrics to measure.

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2. Why are open rates unreliable?

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3. Why is calculating ROI a challenge for many firms?

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*If you were unable to answer any of the above questions, please review the previous sections again before moving on.*

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CHAPTER 3 NOTES

CHAPTER 3 NOTES

## CHAPTER 4: INTEGRATE EMAIL INTO THE MIX

The 24/7, Internet mobile society in which manic marketers continuously battle for consumers' increasing shortened attention span can be overwhelming. Consumers no longer sit and watch television, but rather multitask; surfing the Web, paying bills and Tweeting about the latest show they are "watching." Outside the home, consumers are bombarded with disruptive messages on their path to purchase from radio commercials to digital billboards, and finally in-store advertising.

Successful marketers create intimate customer profiles and build integrated marketing campaigns to target their distinct audiences. Email marketing is routinely a key element in these campaigns designed to mirror buyers' experiences across multiple channels and move them through each stage in the Marketing -Sales pipeline. The trick is to successfully link and keep the message consistent across multiple platforms.

A fun example is CareerBuilder's promotion of its 2011 Super Bowl commercial. The week leading up to the big game, CareerBuilder sent an email announcing the much-anticipated "return of the monkeys" to their advertising campaign.

In the email, they posted a link to the TV ad in which people who "liked" CareerBuilder's Facebook page could preview the ad before the rest of the world did on Sunday.

To be successful today, marketers have needed to change their paradigm from a straight path to purchase to a rotary or English roundabout where traffic may enter and leave the roadway at a number of different locations including email, search, and social media.

Respecting an individual's communication preferences and delivering branded experiences to create conversion opportunities is a significant challenge. So much so that in our *2012 Email Marketing Benchmark Report* 64% of marketers reported a great need of improvement for integrating email with other marketing tactics.

This was surprising for a tactic many recognize as the "glue" for many digital strategies including mobile, social media and website. The good news is that 35% of these marketers rank email integration as a top priority in the next 12 months.

From the chart on the next page, you see that as marketers we have a way to go in effectively integrating email into both on and offline marketing programs. The challenges may be unique as each company, nonetheless common roadblocks include: internal channel silos, data management, and resource bandwidth.

Teams that focus on the data and media they can segment and automate will innovate quickly.

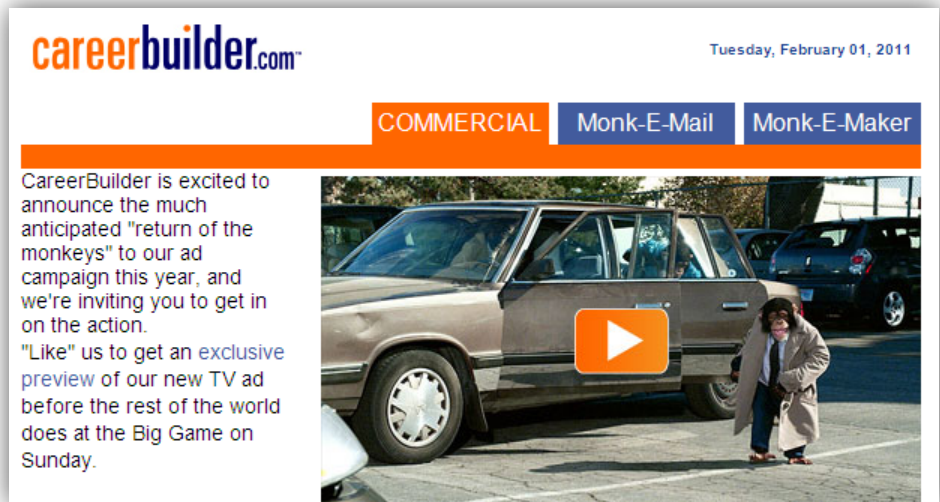
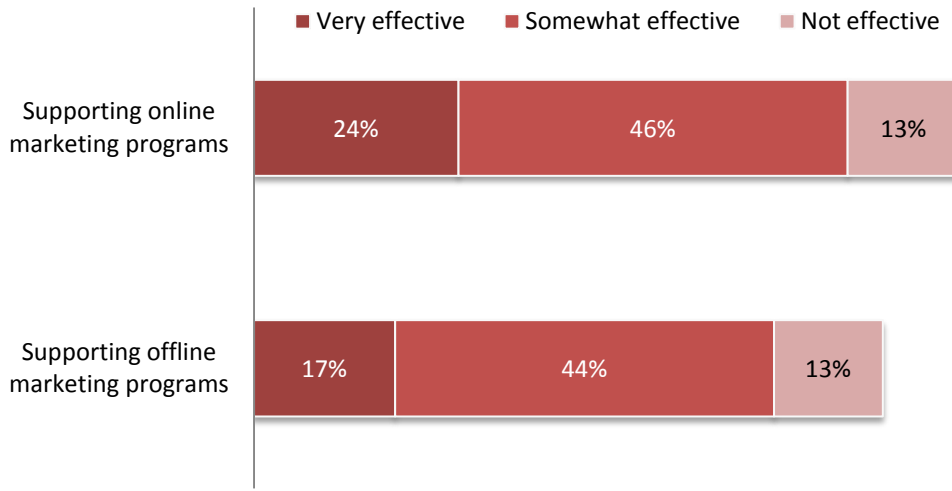


CHART: THE EFFECTIVENESS OF EMAIL MARKETING AT ACHIEVING BUSINESS OBJECTIVES  
 Q. How effective is email marketing at achieving the following objectives for your organization?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

Optimistically, with new technology like Google Analytics’ Multi-Channel Funnel feature which allows data experts to go beyond the last touch to see other channels that assisted in conversions, marketers receive the feedback they need to develop more effective campaigns.

The two hottest trends in marketing are social media and mobile. Let’s take a look at each, and how including email marketing can make these tactics flourish.

## MAXIMIZE THE IMPACT OF SOCIAL MEDIA ON EMAIL

The debate of which tactic will survive (social media vs. email) has quieted. Email proponents have been reassured by the success of daily deal sites like Groupon, with its once-a-day email offer for a lone local merchant. Meanwhile email opponents continue to watch Facebook’s newest applications. The latest allows business pages to receive private messages from their fans on the social network. Having weathered the storm our attention now turns to maximizing the impact of these potent communication channels.

However, email has faced negative consequences due to the rapid rise of social media. Consumers’ personal inboxes are overcrowded and are looking for ways to simplify. Android mobile phone users can access an app to create a single message stream in a unified inbox, allowing users to read social media messages, email and text in one common place.

Gist operators can look up their contacts, read all of their recent email conversations and review their colleagues’ LinkedIn, Twitter, Facebook or blog posts. Hotmail clients can quickly use a social media tab to filter messages to only allow the user to see social media updates. These inbox solutions now impact how email messages are constructed to ensure delivery.

Rather than focusing on the drawbacks, let’s spotlight the synergy created by email and social media. We already know an email address is the common thread across all social networking sites. You can’t sign up without an email address. What’s key is the ability to measure the engagement levels of the consumer using these mediums together. The MarketingSherpa 2010 Social Media Marketing Benchmark Report found that 75% of daily social media users said email is the best way for companies to communicate with



them, compared to 65% of all email users. In addition, 49% of Twitter users said they made an online purchase because of receiving an email compared to 33% of all email users.

The report's findings are in step with an ExactTarget's Subscribers, Fans and Followers 2010 series of studies, which found that 93% of online consumers are email subscribers. The most insightful indicator may be that six out of ten online consumers start their day by checking email, versus roughly one in ten with Facebook.

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*Individuals who use Facebook and Twitter at least once a week are 38% more likely to open email promotions.*

WhatCounts Whitepaper –  
Lifecycle Email Marketing

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## SOCIAL MEDIA'S POSITIVE INFLUENCE ON EMAIL

### AUDIENCE GROWTH

Social networking empowers your email marketing efforts by building a new group of prospects. Deciding to follow or friend someone takes just a click of a button; it is a low-risk action for people, yet an entrance for a brand to start a conversation towards convergence. Whether an e-newsletter is hosted on a company or ESP website, a link to a Web version of the e-newsletter can be created and posted on the brand's Facebook, LinkedIn or Twitter page.

Sharing email content on social streams expands its reach and opens the door for followers to learn more about your products or services. This passive awareness makes for an easier transition from casual communications on social networks to email, a communication channel that enables a brand to send the right message at the right time, turning conversations into conversions.

### INCORPORATE THE CUSTOMER'S VOICE

Email has always prided itself on being a two-way communication channel and social media can enhance this positive trait. Your product or service endorsements, reviews or ratings can be captured and used as content for the next targeted email message. As we know, opinions of fellow customers have a larger influence on a prospect's buying decision than any brand claim, and you can select the most applicable commentary to educate your buyer.

In addition, you may be able to identify brand advocates who share your coupons, emails, videos or whitepapers with their followers. As we will discuss in Chapter 5, listening to how these evangelist speak, share and direct your brands message can provide invaluable information for future marketing endeavors. This feedback has reminded many organizations of the importance of personal conversations in which you do not talk *at* a subscriber, but rather *with* them. Today, the audience drives the tone – and they expect the messages to have a human touch, reflecting the brand's personality.

### CLARIFY THROUGH COMPETITION

Social media, mobile and location-based marketing are the hottest marketing tactics, forcing email to defend its position and find ways to contribute to their success. As mentioned earlier, email can affect key strategic objectives in the buying cycle. To compete, email marketers must use all available analytics and metrics to demonstrate influence on brand awareness, revenue, cost savings and customer retention.

The multitude of choices for social media and mobile marketing may cause marketers to be more selective in terms of when and how they install email campaigns into the marketing mix. Email began as an effective strategy for direct marketing, became a standard practice for brand awareness, and now is evolving into a reliable inbound tactic.

With the plethora of ways to communicate, email campaigns will be more personal, intricate and ultimately successful when marketers prune their messages and lists to only devoted subscribers who find value and a mutually-beneficial relationship with the brand.

## PREPARE INTELLIGENTLY

For copywriters and marketers who serve several masters, writing in 140 characters or less has prepared you for the eventual shift from desktops to mobile smartphone screens, which have less room on which to write. Email copy will still be more robust than a status update, but the copy will need to be shorter to view on a smaller screen. B2B marketers dealt with this for a while with decision makers using Blackberry devices.

As digital marketers continue to focus on short-burst messaging that connects with moving targets, the data collected on the various channels can be used for optimization. For instance, the best times for email opens may be used to schedule Facebook updates, and Tweets can be used for email subject line tests.

## LEVERAGE THE POWER OF SOCIAL MEDIA

Incorporating social media can be a valuable tool in bringing your community together. Marketers have a range of options to mix social media and email marketing. The easiest approach is to add a link to your Facebook, Twitter or LinkedIn page. This supports brand awareness goals, but falls short in viewer participation. Others have found adding status updates effective for creating a fresh and timely feel to the communication. Highlighting social content from Flickr, Twitter and YouTube, and using the graphic elements of talk bubbles, author photos and large quotation marks can give a voice for evangelists to endorse the brand. In-kind provide a link to their blog to reinforce the authenticity of the remark.

## SOCIAL SHARING BUTTONS

Share-With-Your-Network (SWYN) buttons function much like a “forward to a friend” link. These add-on buttons quickly become a standard practice for email marketers. Our [2011 Social Media Marketing Benchmark Report](#) uncovered 55% of organizations include social sharing buttons in email and 88% found it not a difficult task. However, only 10% of organizations found this to be an effective strategy. While best practices are still emerging, the reality is that content not only needs to be relevant but written in an easy-to-promote manner.

In contrast, GetResponse’s *“Email Marketing and Social Media Integration Report”* revealed that email messages including a social sharing option generated 30% higher clickthroughs than emails without any social sharing links. Messages with three or more sharing options generated 55% higher CTR.

## EMAIL SUBSCRIPTION GROWTH

In attempt to grow their audience, we have watched organizations cross-promote their email newsletters on Facebook pages and blogs. Newsletters authors discuss their progress or tease their topics before its release and even add a link to the sign up form. These have become popular practices to offset opt-outs and enroll new subscribers to increase the net size of email lists.

Some early adopters have taken the Groupon concept of offering a substantial savings if a minimum number of buyers join, and have used it as an incentive to grow both their Facebook “likes” and house email lists. Dingo Brand, a maker of dog treats, promised its first 5,000 Facebook followers a \$20 coupon redeemable at DingoBrand.com. Like Groupon, there was a requirement to reach 5,000 Facebook followers before the company distributed the \$20 coupon via email.

The contingency to reach a minimum number of “likes” compelled coupon-clippers to tell their friends and share on social networks to help achieve the goal. Incorporating the opt-in “Join my list” into Dingo Brand’s Facebook page made registration a breeze. In just three days, the dog treat maker met its goal. Better yet, monthly sales increased 22%, with roughly half of this number attributed to new customers. By establishing the Facebook “like” and email address requirements, Dingo Brand increased brand awareness and found new channels to chat with fans.

Another example is Fingerhut which set up a symbiotic relationship between email and Facebook. Fingerhut sent email messages driving subscribers to Facebook to vote for their favorite discount, which in turn would

send the winning discount via email once the polls closed. This campaign succeeded on several fronts. First engaging the subscriber to share their opinion, and then rewarding them with a discount and the gratification to be heard. Furthermore, the arrangement encouraged Facebook fans to become email subscribers in order to receive the discounts and possibly opened multiple channels of communication between the brand and consumer. Learn more about social media strategies for list growth in Chapter 6.

#### HELPFUL HINTS

##### **Share by design**

Not every email message is a fit for social sharing. Choose messages that your audience will see as relevant to pass on to their friends or colleagues. Then make the content easy to share using a format with a single purpose, simple navigation and a strong prompt to share.

Similar to email, the content must be helpful, interesting and pertinent to motivate subscribers to share and for the brand to be respected as a thought leader. What is different is that many social sites (especially Twitter) will use your email subject line as the default text when published.

Carefully consider your subject line wording; what makes it stand out on a social media feed may or may not be the same for an email inbox. In addition, Twitter has a 140-character limit for its updates, so your subject line should be shorter to allow space for the post to be re-Tweeted.

##### **Communication consistency**

Wilton, a cookware company found a different level of engagement between its Facebook fans and email subscribers. See how they subsequently targeted each group with a message based on their behavior and location in the buying cycle in the article "[5 Strategies to Grow Audiences and Design Campaigns](#)." Some businesses have followed this practice, while others write the same message across communication platforms.

This inconsistency leads consumers to crosscheck messages across channels to assess their quality and select the medium that delivers the most relevant content. Every company is unique based on its sales process, customers and objectives, so there will be no standard structure. However, it is critical that brands themselves are consistent. Don't violate a customer's trust; instead meet a subscriber or follower's expectation for what he or she will receive on each communication channel.

##### **Listen and learn**

As you open up your message to people who may not be as familiar with your company as your email opt-ins, it is vital that you listen for communication gaps. Coordinate your internal social monitoring team to keep you informed on email's social sharing influence. Make the time to read what people are posting and re-Tweeting, so that you can clarify your brand's message and address questions in future communications.

ESPs provide metrics to see how many subscribers shared an email on social networking sites, as well as how many people clicked on email coming from Twitter, Facebook or LinkedIn. Monitoring an email's viral effectiveness lets you measure the additional reach beyond the original distribution list and helps you determine what matters most to your audience.

## HOW TO: GROWING EMAIL LISTS WITH SOCIAL MEDIA: KFC'S FACEBOOK TOOL ADDS SUBSCRIBERS

How To ID: #HOW31844

Location: MarketingSherpa Member Library

Summary: Check out why the multinational restaurant chain added an email registration form to its Facebook profile and the impact that the form had on its email list. Also, see why you should track the social influencers in your email database.

Marketers from the restaurant chain KFC experimented with social marketing throughout 2010. They noticed some interesting trends around their most active online advocates, particularly those within their email database.

Compared to KFC's other subscribers, its social influencers engage far more often with the company's emails. Their overall response metrics – such as open rate and clickthrough rate – are much higher.

“Over the last five campaigns, it has averaged out to about 70% higher,” says Scott Geiser, Senior Digital Analyst, KFC.

After noticing several trends that pointed to this audience's power, Geiser and his team wanted to get more social influencers into the Colonel's Email Club. Last Fall, they tested adding an email sign-up widget directly to KFC's Facebook profile.

Now, 3% of KFC's email acquisitions come from its Facebook profile.

Here are the five steps the team took to get there:

### **Step #1. Test and prove social email marketing**

KFC experimented with social marketing last year and found quick success. One of the team's first efforts integrated email and social marketing to help launch a new sandwich, the Double Down.

“The first time that we truly used social media to our benefit, we sent out an email with just a picture of the Double Down and links to share it in social networks,” says Geiser.

With more than 12,000 shares on Facebook and Twitter combined, the message successfully generated pre-launch buzz.

### **Step #2. Define and analyze the group**

The email's success pushed Geiser to learn more about KFC's social influencers.

Geiser's team considers subscribers “social influencers” if they have ever clicked a social-sharing button in a KFC email. These subscribers have 70% higher interaction rates with KFC emails.

KFC's social audience also includes:

- More than 2.8 million Facebook fans
- More than 24,000 Twitter followers

The success of KFC's email program, the level of interaction from social subscribers, and the size of KFC's social audience led Geiser and his team to believe the test could work.

### Step #3. Create new Facebook tab

Adding a registration form to your Facebook page makes it easy for fans to sign up for your emails without having to visit your website. Also, it could help add subscribers who are more willing to share your messages or interact in other ways.

KFC's registration form rests on a tab in its Facebook profile. Creating a new tab on your company's profile is easier than it sounds. Geiser's team was able to create theirs and include the email form in less than half a day, he says.

KFC used a canned solution to create the form. But whoever builds or maintains your website should be able to handle the task.

"[Registrations] go straight into our database," Geiser says. "It's very clean."

The team tracked these subscribers separately in KFC's database to learn more about their preferences and habits.

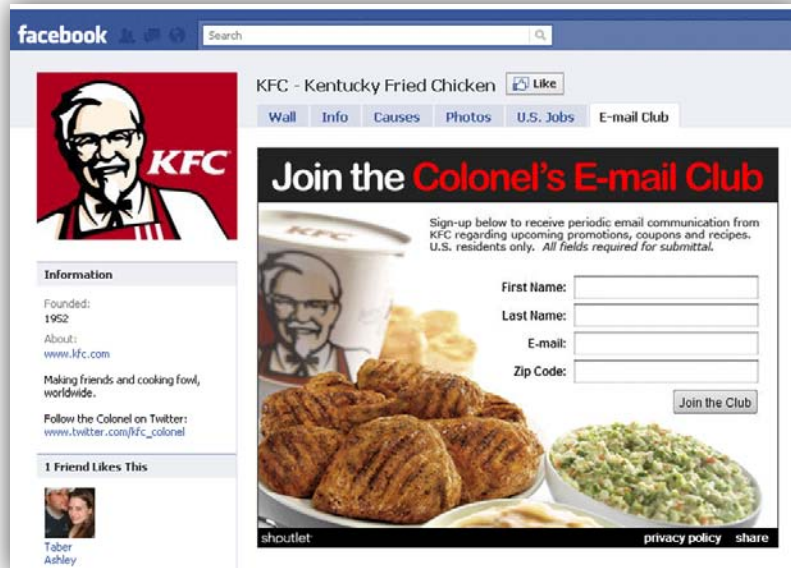
- Double check the rules

Be sure to read Facebook's terms of use with your attorney. We do not believe this tactic violates the rules – but we are not lawyers. Make sure you are handling fans' information responsibly and within the network's guidelines. It is always better to be safe than sorry.

- Warn international audience

Facebook is a worldwide phenomenon and some of your fans likely live in other countries. KFC's Facebook signup form mentions that the program was intended for U.S. residents only.

#### EXAMPLE: KFC FACEBOOK EMAIL CLUB TAB



#### **Step #4. Request very little info**

Facebook users only need to provide the following information to subscribe:

- First name
- Last name
- Email address
- ZIP code

This is far less information than KFC requested when generating sign-ups through other channels, Geiser says. The intent was to avoid overwhelming or intimidating fans by asking for too much information, and to quickly give them another way to connect with KFC.

- A single data point can be huge

One of the most powerful ways Geiser's team found to segment and target email subscribers was by location – which is why the form requested a ZIP code.

“The ZIP code alone is very powerful for us. We can do an awful lot with that,” he says.

- Can request more later

Although they have not done so yet, Geiser says the team may launch a campaign that offers these subscribers incentives for providing more personal information.

#### **Step #5. Avoid pushing fans to the tab**

Geiser's team avoided pushing KFC's fans to this tab, whether through Facebook or any other channel. This helped ensure that consumers who registered were truly interested in receiving the emails – which helped KFC keep its email response rates high, Geiser says.

This approach fit with KFC's previous approach to list building.

“We have grown our email database very, very slowly and organically,” Geiser says. “That has really paid dividends for us. We have a tremendous following and tremendous trust in the brand.”

The team's database became so valuable that, in some ways, email outperformed many other channels.

“It is the most cost-effective medium we have been able to find,” Geiser says.

## MARKET TO THE MOMENT WITH MOBILE

We have all heard the remarkable statistics that there are more cell phones in the world than toothbrushes and 40% of mobile consumers over 18 in the U.S. have smartphones, according to Mobile Marketing Association Asia and Nielsen respectively.

With this technology consumers can text or send emails to invite friends for a quick bite to eat, search for the nearest restaurant, read restaurant reviews, look at menus on websites, reserve a table and check-in to let others know their whereabouts. The behavioral and geo-location data collected in this all-in-one device creates abundant marketing and sales opportunities for marketing professionals.

Our research shows more organizations are spending money on inbound digital marketing tactics preparing to fulfill the prophecy of the “Year of Mobile.”

Knotice reported the share of all email opens occurring on mobile devices reached 20% in the first half of 2011. Yet the click-to-open rates on mobile devices lagged behind desktop views especially in the healthcare industry (12% vs. 28%). A study by Return Path, “*Mobile, Webmail, Desktops: Where Are We Viewing Email Now?*” found a drop in desktop email views over the span of a weekend, with a corresponding rise in mobile usage.

This, combined with Google’s “*The Mobile Movement*” study that finds 89% of people use their smartphone throughout the day, makes a strong case for testing and optimization of messages. As these phones become more ingrained in consumers’ daily lives and technology moves these mobile devices into the post-PC era, more trials and chances will arise for marketers to connect with their customers.

## ADDRESS NEW CHALLENGES

Marketers are always thinking about and trying to create a positive user experience. Don’t fall into the trap of believing a mobile email message is the same as traditional email, just on a smaller screen. With mobile campaigns, you are literally trying to track down and connect with a moving target. The profile for a smartphone user is more complex.

The distinction between business and personal time has blurred, making it more difficult to predict the recipients setting and mindset. This may be the reason for marketers ranking mobile the most difficult channel to integrate with email based on time, effort, and expense in our *2012 Email Marketing Benchmark Report*.

B2B email marketers have been dealing with customers on the run for some time due to the BlackBerry’s popularity. They have had to send communications to people who checked their inboxes when they were away from their desk. The recipient could be waiting for a flight, jumping into a taxi or watching her child’s basketball game. Most readers in this situation triage their inboxes - sort the most urgent messages, delete the junk and file what they need for later.

Providing the user with an enjoyable mobile experience is critical to the relationship between the brand and customer. A smartphone’s small screen size and touch capabilities influence email design. Copy needs to be brief, the format width thinner and one column, font sizes larger, and more space surrounding links to enable fingers to make contact accurately. These changes carry over to any linked landing pages.

The offers can be more playful and interactive. One example is Dunkin’ Donuts, whose email encourages interaction by having loyal customers take pictures of themselves enjoying their favorite coffees, then sharing these with Dunkin’ Donuts employees to receive discounts on their next purchase. In another campaign, Dunkin’ Donuts sent an email to its DD Perks members in the Greater Boston area, inviting them to start completing challenges and earning rewards on Scvngr at participating Dunkin’ Donuts locations.

## TAKE ADVANTAGE OF NEW OPPORTUNITIES

As people's lifestyles change their will be new opportunities for engagement. Today, consumers seem to have their phones with them every minute of the day. In fact, and Morgan Stanley reports 91% of all U.S. citizens have their mobile device within reach 24/7. This environment makes an appealing e-newsletter a fantastic way for a mobile user to kill a few free minutes of time while waiting for an elevator.

Combining email's direct marketing strength with mobile's ability to geo-target will open new opportunities for email marketers. Startups like LiveIntent and Movable Ink are paving the way; see example on the right. LiveIntent provides a service for sending variable offers in an email newsletter depending on when or where the newsletter is opened.

The amount of data regarding a consumer's location continues to increase whether shared by the user (e.g. social app, registration) or derived (e.g. GPS, IP address, photo meta-data). Brands and high-tech marketing vendors aim to maximize these geo-targeting abilities to deliver more relevant communications within privacy regulations.



Like Tanger Outlets did in chapter 2's how-to article, companies today are experimenting with location-based marketing by emailing subscribers with incentives to check in when visiting a physical location. The check-in data collected can be analyzed and used for future triggered or retargeting messages based on behavior.

## HELPFUL HINTS:

### HAVE A MOBILE WEB PRESENCE

If your email campaigns are successful, you will leave readers wanting more. Inevitably, consumers will need to link to a website or landing page. When they arrive, the page ought to be optimized for mobile use.

Start with creating mobile versions of your popular website pages. As users are "on the go," highlight the most pertinent information. For a retailer's home website, this may be a store locator, store hours, products, pricing and coupons. For many retailers, emails will have links to a landing page or blog. Format the content on these pages for mobile devices, the consumer will have a more enjoyable experience.

## RESEARCH

Mobile devices, settings and habits are windows into a subscriber's personality. Owners do not go anywhere without their smartphone. It is their primary communication and information-gathering tool, meaning it is with them for every stage of the buying process. The potential impact on your marketing strategy could be game changing. In fact, ExactTarget's "Mobile Dependence" paper cited 56% of US consumers who have made at least one purchase using their smartphone have done so in direct response of receiving a mobile email.

First, determine the ways in which your customers could use it to interact during the path to purchase. What information – and when – could make the buying process easier for the customer? Imagine checking-in with a smartphone at a home improvement box store, searching for a tool, find its aisle location, and then receive an email coupon to help sway your decision in choosing which screwdriver to purchase.



Next, establish what the target audience currently does with their smartphones during the purchasing cycle and how can you make small improvements towards your goal. This might be a challenge. In our *2012 Email Marketing Benchmark Report*, we found only 27% of marketers surveyed could segment their database by email viewing device preferences.

A great place to start is to review your website's analytics to find what types of mobile devices are accessing your site, and when they do so. Your ESP or MA may also provide you with overall mobile email open rates by device and operating system. Time of day or day-of-the-week may give insight into when your customers are using their mobile devices. Is it when they first wake up, dropping the kids off at school, or just on the weekends? Depending on your business, these could be critical to sending the right message at the right time.

This is your starting line. The more ways you can gather data on how subscribers are receiving and interacting with your content, the better. This will help you optimize the layout and timing of future campaigns. You may choose to add a mobile check box to your registration page or preference center to understand the size of your mobile constituency.

Remind consumers that this is not an SMS communication where they potentially get charged for each text if they do not have unlimited texting with their phone plan. Companies like Litmus and MailboxIQ use tracking analytics to discover whether your last email was viewed on an iPhone or BlackBerry.

#### PLAN AND STRATEGIZE

As with most emerging tactics, email marketers can expect a good amount of trial and error. Attempting to write and implement the perfect plan will leave you behind your competitors. University of Connecticut women's basketball coach Geno Auriemma says, *"Admire perfection, aspire to it, but never require it."*

This is a fitting reminder for marketers. If you fail, fail with a purpose and quickly learn from your mistakes. Setting clear objectives, small incremental goals and testing the results is critical. Don't waste resources and more importantly, tarnish your brand's reputation.

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*"43% of mobile email users check email four or more times per day, compared to 29% of those who do not use mobile email."*

– Merkle

*View from the Digital Inbox 2011*

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#### CONTENT AND CONTEXT

A common question when designing a mobile email strategy is whether or not to send only mobile-optimized messages or offer subscribers mobile only email registrations. Each organization will look at the problem differently based on their market and audience. We recommend starting slowly to discover which content is most helpful to the mobile subscriber and connects with their lifestyle.

Remember, your subscriber could be reading your email anywhere, anytime from working out at the gym to lying in bed. As you test and learn more about your audience, you can adapt your communications for peak performance. With the majority of emails still read on desktops, and some even by the most fervent mobile fans, it is premature to design all messages only for mobile.

Again, your results and analysis of experiments that will reveal the right answer for your organization. An example of a mobile-only email campaign is a travel agency sending popular scenic spots and encouraging photo sharing *while* the travelers are on vacation.

#### ENSURE AN EXCELLENT EXPERIENCE

Nielsen found the growth of the iPhone to be 10 times faster than the growth of America Online. Fortunately, marketers have responded quickly to subscribers changing viewing preferences. According to our *2012 Email Marketing Benchmark Report*, though only an average of 11% of a firm's subscribers are reading email on a mobile device, 42% are designing their emails to render properly on smartphones. Currently there are no standards across all email clients and devices to ensure emails render properly.

It is impractical to format an email for each device platform; however, after doing your research you may choose to do a few based on your audiences' viewing habits. Here are ten actions to consider for designing mobile-friendly emails.

1. **Add "View mobile edition" link.** This can be a simple solution to ensure a positive user experience. You may choose to send a traditional email with a mobile link. Another option is to send a short description with a call-to-action to click a mobile link to read the optimized email message. This could be a text-formatted message that will be easier to read for all mobile users, or an HTML email optimized for the small screen of smartphones. Unfortunately, both require the viewer to make an extra click to read the email, which may be tiresome.
2. **Narrow your email width** to around 600 pixels, using a single column format. We have learned that if an email is 640px it will render correctly iPhones at 320px. Look for a trend in creating email that is scalable in size – a feature currently available on iPhones. Using a single-column format or a grid-aligned layout with grouped sections will make the transition from PC to mobile screens easier.
3. **Increase font sizes** to be more legible on small screens. The minimum font size is 14 and titles over 30.
4. **Add space around links** and increase the size of the buttons (44 x44px) to allow fingers to touch accurately. People have a tendency to hit below the link. A good reference is the Apple Style Guide.
5. **Prioritize the use of tracking URLs.** Tracking URLs can take up several lines per screen, especially if they are reformatted from HTML into text.
6. **Be brief.** A mobile reader devotes a fraction of her attention to the task, so keeping content above the fold is even more critical for email sent to mobile devices than it is for emails sent to desktops. Requiring readers to scroll down to view WIFM message will only cause frustration. You may also consider dropping "add to your address book" requests and navigation bars from the top. Place more emphasis on the "From" address as it receives more attention in mobile device inboxes. Subject lines too must be concise and engaging as some mobile devices only show the first 27 characters.
7. **Promote scrolling.** There will be times when you will not be able to fit all of your important information above the fold. When your content overflows, use design elements to encourage the reader to scroll either horizontally or vertically. This may be done with teaser content to promote peeking. In addition, Anna Yeaman of [STYLEcampaign](#) recommends continuous vertical lines, use of diagonal lines, maps, paths, and tall photos of a stack of gifts, holiday stockings or models that draw the eye downward inviting further exploration. Be sure to test your email design on multiple devices, as each will have a different fold and you do not want your call-to-action to be cut off.
8. **Be flexible.** Design a fluid and simple layout to render well across a wide variety of devices.
9. **Consider size.** The smaller screen is not the only size constraint. Smartphones have lesser network connectivity, CPU and memory than PC's and laptops. In addition, many mobile users watch their data plans and prefer not to download images. In addition, marketer's sending a responsive design, the phone downloads all the different versions before it renders correctly on the smartphone screen. For these reasons the World Wide Web Consortium (W3C) advises mobile emails be under 20K. If the email is slow to open, you will be training your subscribers to wait to open the email on their desktops.
10. **Preview and test.** We recommend testing in-house or with new paid services that will preview email messages across multiple email client and mobile devices. This is a critical step. As with all best practices, the above mentioned recommendations are only a launching point. Be sure to walk through each stage of the mobile user experience and decision tree before you hit the send button. This preview period will allow your team to better assess possible glitches found in the mobile experience.

## HOW-TO: 5 TACTICS TO ENGAGE AND CONVERT SMARTPHONE USERS

How-To ID: # HOW32023

Location: MarketingSherpa Member Library

Summary: Check out these five tactics to help you find smartphone users, add them to your email list, and get them to convert.

As of May 2011, Nielsen Company reported that 38% of U.S. mobile phone owners use a smartphone — up from 29.7% in October 2010. On its own, this fact isn't reason enough to focus on a mobile email experience, yet the findings from ExactTarget's "Subscribers, Fans and Followers May 2011" study may convince you otherwise.

Most smartphone users take advantage of its email capabilities:

- 53% check email several times per day
- 29% check email throughout the day
- 66% check at least once per day

For the 1,427 U.S. smartphone users surveyed, email was the most effective purchase trigger as 55% take action based on emails. The survey found other communications weren't nearly as compelling:

- 41% take action based on text
- 35% take action based on Facebook
- 32% take action based on shopping apps

Despite these compelling statistics, the experts we interviewed for this article agreed that marketers have barely begun to create a mobile experience for their email audiences. The three experts are:

- RJ Taylor, Director, Product Marketing, ExactTarget
- Manny Ju, Director, Product Marketing, BlueHornet
- Chris Studabaker, Global Practice Manager, Design, ExactTarget

Most marketers do not adapt or optimize emails to accommodate the constraints imposed by a small touchscreen. Few think about how subscribers have to pinch, enlarge or scroll to read emails on their smartphones. And, even fewer exploit the unique opportunities that come with the anytime, anywhere access of mobile users.

To help you adapt email marketing for an increasingly mobile audience, these experts share tactics that go beyond the technical differences between desktop and mobile devices. They factor in the mindset, goals and motivations of smartphone users, so you can figure out how to find them, attract them, and get them to respond to your call-to-action.

### **Tactic #1. Understand your current audience**

Providing a rich, compelling mobile experience to your audience requires investment. To determine how much — or how quickly to invest, you need to know what portion of your audience will appreciate and respond to the changes you make. You might even discover they're not ready for mobile at all.

Manny Ju feels mobile emails are more naturally suited to some audiences and not so much to others. He said, "Don't make the fatal mistake of a mismatch between the mobile audience and your audience."

First, you need to discover what portion of your audience is reading your email on a mobile device.

Military.com, a military and veteran membership organization that informs and connects members with the benefits of service, has tracked the mobile phone usage of its subscriber base for more than a year.

In July 2010, 13% of its 10 million members regularly read emails on smartphones — primarily the iPhone 4. A year later, smartphone users comprised 26% of the subscriber base, with more than 60% using iPhones or iPads.

In addition to accelerating plans to update its email templates, this insight helped the Monster Worldwide subsidiary create a new target demographic for its readership — mobile users. This, in turn, generated a new revenue stream for targeted advertising. A financial institution offering a mobile banking app was the first to specifically target Military.com’s smartphone-using audience.

- Don’t overlook the value of your audience

While figuring out the size of your mobile audience is an important first step, to realize ROI, you must determine the value of that portion of your audience.

Are your smartphone subscribers the repeat buyers who account for a good percentage of your revenue? If so, then the straight percentage of users may not be the only criteria. You need to consider the total value of that population to your business.

## **Tactic #2. Strategize your move into mobile emails**

RJ Taylor has found that marketers either ignore the mobile audience, or convert everything to mobile at the expense of the desktop experience.

It’s not wise to adhere to any one extreme. Even if very few of your subscribers currently access email with smartphones, the growth trend indicates this won’t always be the case. If your audience is predominantly smartphone users, they still use a desktop for a second look at emails that interest them.

Taylor’s colleague, Chris Studabaker said, “Mobile isn’t a broad initiative that we have to do everywhere simultaneously.” Marketers can start slowly, implementing mobile for specific campaigns where it makes sense, and then grow from there.

- Identify where mobility is a differentiator

Studabaker suggested looking at the content, purpose and goal of your messages. Some of them are clearly useful for people on the go, including “day of” travel confirmations and tickets, “welcome to your mobile app” introductory notes, and daily deal coupons that require no printing.

- Apply mobile design principles

In most cases, there’s no reason to generate both desktop and mobile versions of your emails. (Note: Tactic #4 reviews the design principles that will render well on smartphones without compromising the desktop experience.)

Also, there’s no reason to create distinct versions for the various types of smartphones. As you would never create separate emails for different email applications (e.g., Outlook, Gmail, etc.), it’s best to find a common denominator and deliver a solution that works across all devices.

- Challenge current practices and test

This is especially important when it comes to send times. Mobile and desktop users have very different habits.

You may learn more about your customers’ behavior through testing and segmentation of your audience between mobile and non-mobile users in your tests. For example, if you’re marketing to business

professionals in cities with good public transportation, you may find sending during the commute works best.

### **Tactic #3. Leverage other mobile communications to build a mobile email list**

According to the MarketingSherpa *2011 Email Marketing Benchmark Report*, while 42% of marketers identified getting people to opt in as a significant challenge to email marketing effectiveness, only 6% use mobile capture to grow their lists.

Expanding your email strategy to mobile opens up new ways to expand your email list to a smartphone audience. Whether the brand represents a restaurant, retail store or entertainment venue, people respond to a call-to-action when they are there, interacting with the brand. Smartphones let you exploit that.

For example, P.F. Chang's, a chain of Chinese food bistros, invites people to join their email program in the restaurant. People who opt in by texting from their phone receive an email optimized for mobile devices, along with an offer for a free appetizer.

Smartphone apps also provide marketers an opportunity. Paper Hat Press, a small company that sells personalized children's books, built their email list of smartphone-using moms through mobile signup ad campaigns. The ads appeared in Android and iPhone apps found in the news, entertainment, health and fitness, games, music, lifestyle and travel categories.

Interested mothers opted in to email, and other social media, without having to exit the application. Within four weeks, the campaigns generated more than 13,000 email addresses, quadrupling the size of Paper Hat's existing list.

### **Tactic #4. Adjust layout for a smartphone's smaller screen**

The goal of this tactic is simplifying usability. You don't want to make your smartphone subscribers zoom in or scroll to read, or even find, your text. Nor do you want them struggling to get to your landing page because their finger can't hit the right link. The following list makes it easier for mobile subscribers:

- Use a single column of text — 320 pixels is often recommended, but based on his experience, Studabaker thinks this may be overkill, and recommends 450-500
- Increase font size — Microsoft and Apple publish recommendations, usually 16-18 pixels for body text, and 21 or 22 for headlines
- Leave enough space around buttons and links for a finger to tap them without hitting the wrong object

Code-based solutions, such as Cascading Style Sheets (CSS) or @media queries that transform emails created for the desktop into ones suitable for small touchscreens, can help you accommodate the email needs of your mobile audience.

When it comes to design, Studabaker noted that the tendency is to focus only on the inbox. He said, "We forget sometimes that our real KPIs (key performance indicators) are not how email looks in a mobile inbox, but that subscribers convert."

The design principles for email should be applied throughout the path to conversion. If the mobile email is compelling enough to engage a reader to go to the next step, then the landing page or the point of transaction needs to be just as easy for a user to read and use.

And, don't overlook basic quality assurance before you send. It always helps to check your test sends on as many mobile devices as possible.

### **Tactic #5. Adjust content for the environment**

People reading email on their phones are most likely in the midst of another activity. Email is filling a gap while they are waiting for or can take a break from their main attraction. Understanding this context should drive your approach to content.

- Tighten the focus and the copy

The way to optimize the presentation of your message is to rein yourself in. Don't try to accomplish too much in one email. For a mobile audience, pick one idea, one concept, or one offer. This not only limits the amount you have to explain, but also prevents you from obscuring or confusing the message.

While crisp writing is always an asset, it's especially important when trying to attract a mobile audience. Only convey what's essential.

Keeping emails short and succinct doesn't just make sense in terms of the context, it's also appropriate for the small screen size.

- Get the subject line and 'from' field right

Since mobile email apps do not have a preview capability, you have only the subject line and the 'from' field to capture a reader's attention — a total of 60 characters.

For the subject line, succinctness remains important, but order and placement also factor.

Chris Studabaker said, "When you start looking at how mobile devices actually display subject lines, usually the first 35 characters are the ones that you are certain are going to show up across just about any device."

The key to the 'from' field is not getting it wrong. You want it to align with your subscriber's expectations. For example, to create a more personal feel, companies send emails from a specific person. The 'from' field doesn't indicate the company, only somebody's name. If it's not familiar to your audience, this will work against you.

- Let the medium inspire the message

Manny Ju is very excited by the email possibilities for subscribers not tied to their desktop. He said, "Now email marketers have the opportunity to engage with the audience in ways they never could before."

He imagines a day when marketers combine geo-fencing technology with interactive emails. When he walks within a boundary close to a store that sells his favorite hard-to-find product, he wants to receive an email with an interactive map showing where he can buy it. If he later goes somewhere else and opens the same email, the map would automatically update for the new location.

Currently, the product's brand includes interactive maps based on IP addresses, not GPS, indicating nearby locations where it can be purchased.

But Manny's point is, if you focus on the potential of your audience receiving email anywhere, unique opportunities appear. For example, one retailer uses mobile email to explain the value of a rewards program while customers are still in the store.

In-store signage prompts people who are interested to text their email address. They then receive an email explaining the program benefits. Customers get the information they need without waiting for a salesperson to free up, and the company's marketers convey their message clearly, succinctly and accurately.

## CASE STUDY: IPHONE-TARGETED LANDING PAGES BOOST CONVERSION RATE 40%

Case Study ID: #CS32086

Location: MarketingSherpa Member Library

Summary: Mobile marketing might be new, but it doesn't have to break the bank. You can target this growing audience and its shrinking screens on a tight budget with simple tactics.

### CHALLENGE

Alex Corzo managed much of his life through a smartphone, and had a feeling he wasn't alone in doing so. As the manager of digital strategy and services at Marriott Vacations Worldwide, he thought the company's customers might also be mobile enthusiasts.

"I just shot up the idea to our analytics team and said I would really love to see what part of our website traffic is comprised of mobile devices," he says.

Corzo's team checked the site analytics for one of its popular brands, The Ritz-Carlton Destination Club, which offers luxury vacation resort memberships. Sure enough, Corzo was right. About 2.95% of traffic came from a smartphone or tablet computer.

Curious, the team used a smartphone to visit its email landing pages and see how they looked. They weren't pretty. The pages were difficult to navigate and likely costing conversions. The team needed to act before these pages pushed mobile visitors away from the company and toward competitors.

### CAMPAIGN

Corzo's team resolved to optimize The Ritz-Carlton Destination Club's email landing pages for mobile visitors. Without many resources, the team launched a pilot project to build internal support for more investment to push forward.

They took four key steps:

#### Step #1. Uncover your mobile audience

You can expect more of your audience to go mobile in the coming years (or even months). Here are some stats from comScore:

- Total website traffic in the U.S. from non-computers hit 6.8% in Aug. 2011. This traffic was overwhelmingly generated by smartphones and tablets
- Smartphone adoption in the U.S. grew more than 50% year-over-year in Oct. 2011
- 36.1% of Americans ages 13 and older use a smartphone

This presents a challenge. Mobile Web browsers have different needs than traditional browsers. There are even different needs across mobile browsers as a group. A page that looks good on an iPhone will not necessarily look good on a BlackBerry.

Therefore, you must research which devices your audience uses before you design a mobile page. Otherwise, you could create a page that renders well across every platform, except the most-popular among your audience.

Judging from third-quarter 2011 sales figures from Gartner Research, there are four primary smartphone platforms worldwide:

1. Android (Google)
2. Symbian (Nokia)
3. iOS (Apple)
4. Research in Motion (BlackBerry)

If you take Symbian out of this list, the top three smartphone platforms in the U.S. remain in descending order, according to comScore. (Symbian is much more popular in Asia. Also, Nokia recently announced plans to transition away from Symbian.) As for tablets, 97.2% of all tablet traffic in the U.S. came from an Apple iPad in Aug. 2011, according to comScore.

-Your audience is different

Don't expect your audience to mirror these stats. Your group has unique preferences, just as it has unique demographics. You need to look at your website and email analytics to uncover your group's preferred devices.

Corzo's team looked to its site analytics. Of all traffic to The Ritz-Carlton Destination Club in Q1 2010 from email marketing, 2.8% came from mobile devices. iPhone users accounted for 90% of it.

"The iPhone was astronomically the highest in terms of the actual visitations, so we decided to go ahead and optimize just for the iPhone user as a test and see where that took us," Corzo says.

#### **Step. #2. Create a pilot page for mobile users**

Many companies design inclusive mobile pages that render well for a variety of devices. Although this is emerging as a potential best practice, Corzo's team did not have the resources to design such a page.

Instead, his team targeted the overwhelming majority of its mobile audience, iPhone users, with a simple design. This would efficiently prove whether a custom page could improve results.

The team's designers first researched guidelines for iPhone-optimized pages. Check the useful links section below this article for helpful resources from Apple. Meanwhile, here are two basic considerations when designing for mobile:

1. Mobile pages are often much smaller and simpler than standard pages
2. A mobile Internet connection is often much slower than broadband

With this in mind, the team designed a bare-bones landing page that fit its budget, rendered cleanly, and was easy to use.

- Custom page for a specific segment

The team's landing page was tied to an email campaign that promoted memberships to The Ritz-Carlton Destination Club. The initial email encouraged subscribers to learn more about an exclusive membership offer. Once clicked, it sent subscribers to the team's website, which detected their device-type. Any subscribers using an iPhone were shown a custom landing page, and all other subscribers were shown a standard landing page.



Corzo's team often uses rich imagery and copy on landing pages, but it designed this page to be much simpler. This kept the project within budget while improving the experience for iPhone users. The page included only:

- Company logo
- One sentence of copy
- Online form fields, arranged vertically
- Button to send

### Step #3. Analyze and report results

The team was cheered by the campaign's results. The iPhone page had a starkly higher conversion rate than the standard page. To ensure this was not an anomaly, the team launched similar landing pages in four subsequent email campaigns and hoped for similar results. There were not disappointed.

“We saw a huge lift in the traffic and actual conversion,” Corzo says (results metrics are below).

The team could now prove that custom landing pages could increase conversion rates for mobile subscribers. The team prepared a slide deck outlining its results and presented it to the management team. After the deck made its way through the chain of command, top-level managers approved further investment.

### Step #4. Enhance the experience

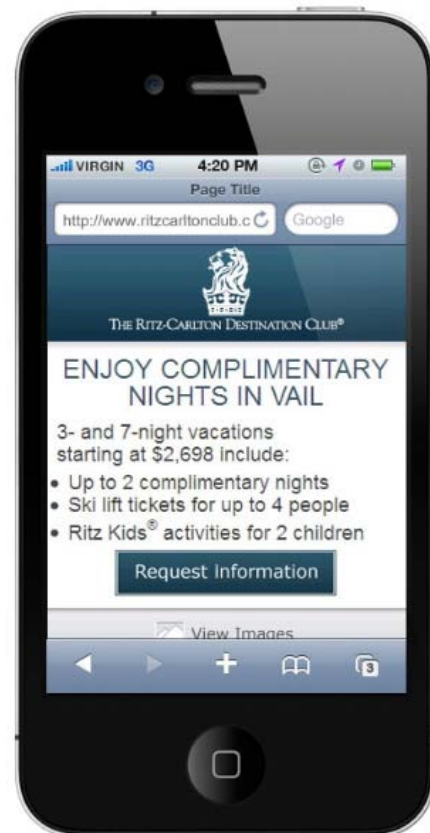
Accustomed to serving landing pages that were content-rich and visually-pleasing, the team was not satisfied with its initial iPhone pages. In response, it set out to improve them, hoping to further increase results.

The team expanded the single-page format into a three-page experience to include more information and images. In a recent example, the team sent an email offer for two free nights at Ritz-Carlton Club in Vail with a standard landing page. iPhone users who clicked the message saw a custom landing page with the following features:

- Headline, copy and bullet points
- Button to “request information”
- Button to “view images”

Clicking the first button brought visitors to a customized form page. Clicking the “images” button brought them to a customized gallery page with high-quality shots of the resort.

“We went with the assumption that a user who has more content and is able to flip through media would convert at a higher rate,” Corzo says.



## RESULTS

The team's initial stripped-down landing page for iPhone users was a huge success. Taking the five pilot campaigns in aggregate:

- 8% of all landing page traffic went to the iPhone page
- 15% of form completions came from the iPhone page
- These two metrics point to iPhone visitors converting at a higher rate

“Our typical marketing offer sees a 5% conversion rate. Our mobile landing pages for those offers saw a 7% conversion rate on average,” Corzo says.

The team saw these results in Q2 2010 and started serving customized landing pages to iPhone users in every email campaign. This brought a burst in mobile traffic, Corzo says. The site saw a 243% increase in the percent of mobile traffic generated by email marketing between pre-launch Q1 2010 and post-launch Q4 2010.

“Traffic to our website and landing pages has increased through all channels, but the email channel definitely saw the highest spike,” Corzo says.

Here's the quarter-by-quarter breakdown:

- In Q1 2010, 2.8% of traffic generated by email marketing came from mobile devices, 90% of which came from iPhone users.
- Through Q2 and Q3 2010, 5.5% of traffic generated by email marketing came from mobile devices. Of that, 60% came from iPhone users and 25% came from iPad users.
- In Q4 2010, 9.6% of traffic generated by email marketing came from mobile devices. Of that, 56% came from iPhone users, 30% came from iPad users, and 4% came from Droid device users.

- More work to do

After expanding the iPhone landing page and including more copy and images, the team did not notice an increase in conversion rates, Corzo says.

“I was surprised not to see a shift in conversion. Originally, I felt giving more information to people in the mobile environment would cause a shift, either positively or negatively; however, no substantial difference occurred,” Corzo says.

The team normally would have continued testing the page, but a company-wide reorganization put the plans on ice for more than six months. However, the team recently picked up where it left off, Corzo says. It plans to improve the page and tweak its design to render well on other mobile platforms, particularly Android-based devices.

SECTION SUMMARY: INTEGRATE EMAIL INTO OVERALL MARKETING STRATEGY

Please take a few minutes to complete the assessment for this section.

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1. Name at least two areas where social media has had a positive influence on email marketing.

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2. Is every email message right for social sharing? Please explain your answer.

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3. List at least four ways to ensure a good mobile experience.

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*If you were unable to answer any of the above questions, please review the previous sections again before moving on.*

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CHAPTER 4 NOTES

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## CHAPTER 5: PRODUCE RELEVANT CONTENT

Now that you have set your objectives, profiled your customer's needs and decided on the placement of email messages within your Marketing-Sales pipeline, the next step is to create content. There's no "one-size-fits-all" solution; the days of producing a single corporate brochure to tell your story are over. Your target audience, where they are in the buying cycle, and your resources to produce custom communications will determine the quantity of content needed.

Crafting messages that are timely, helpful and significant to the reader will undoubtedly increase open and clickthrough rates. Irrelevant emails place your brand's image, reputation and customer relationships at risk.

Relevant content is the gateway to engagement, and engagement is quickly becoming a critical component for the delivery of your email communications. ISPs like Google and Microsoft are trying to alleviate email overload by implementing engagement-filtering metrics to determine an email's place in the inbox.

Google's Priority Inbox learns an individual's model of importance and ranks the email by how likely they are to take action with the message. They do this in a variety of ways, including measuring the degree of interaction between the sender and the recipient as a percentage of their emails. Similarly, Microsoft's Hotmail tracks if a message is read and then deleted, or is just deleted. To ensure your emails are deliverable, the content must be spot-on with the needs and desires of the recipient.

We've seen the positive results of content marketing in our *2012 Email Marketing Benchmark Report*. In 2010, 65% of marketers reported that targeting recipients with highly relevant content was a very significant challenge, but only 39% agreed in 2011. We also discovered 59% of organizations planned to increase their budgets for content marketing efforts in 2012. Building a library of content that can be broken into smaller pieces and strategically scattered across multiple channels has become an effective practice.

Nevertheless, publishing expert, educational and valuable information is only one facet of executing an engaging email campaign. There are two other keys to relevancy: segmentation and timing. This point becomes clearer when dovetailed with our research findings that a little over a quarter (28%) of respondents were sending relevant email communications, sent on time to a segmented audience with a clear conversion goal. The remaining marketers surveyed were broadcasting less relevant emails. The bright side is that 69% of firms reported delivering highly relevant content was a top priority.

### EMPLOY EFFECTIVE ENGAGEMENT TACTICS

So what can marketers do to improve the relevancy of their communications? In our *2012 Email Marketing Benchmark Survey*, we set out to find what the most effective tactics were. The chart on the next page reveals the top five strategies.

Timeliness was found to be the most effective tactic to increase relevant communications. Emails sent automatically to a subscriber based on triggers like planned dates, events or behaviors are appreciated and valued by the reader. Similar to conversations around the office Keurig brewing machine, it is silly to discuss who will win the NCAA Basketball Tournament if the champion has already been crowned.

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*"Effective engagement is inspired by the empathy that develops simply by being human."*

– Brian Solis  
Author of *Engage*

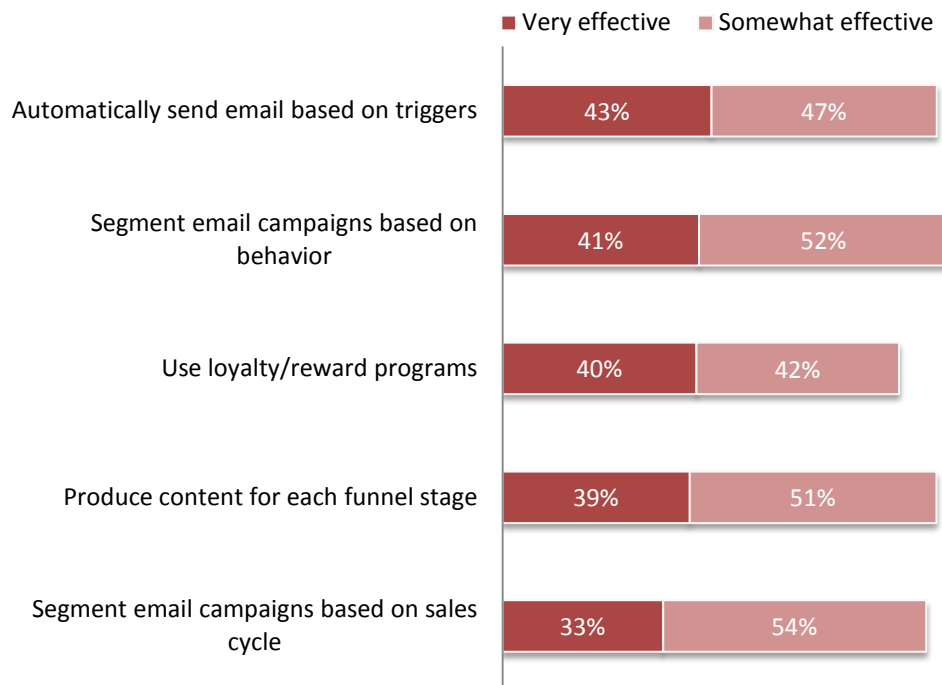
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Segmentation strategies captured the second and fifth spots. Pairing down your email list campaigns to focus on subscriber’s behavior or location in the Marketing-Sales funnel demonstrates you are paying attention to their current actions and needs.

It will be difficult to send appropriate messages to these select subscribers if you do not have a library of content that will aid them in their purchase decision process. By producing content for each funnel stage allows organizations to address suitable questions and concerns of the reader.

In addition to content, segmentation and timing, loyalty and reward programs round out the fab five of successful engagement elements. This is a common marketing practice to reinforce behaviors the brand sees as worthy of their praise. As gamification strategies like this one (i.e., use of gameplay elements for non-game applications) become more prevalent, look for reward programs, as well as surveys, trivia and games, to rise on the effectiveness scale.

CHART: TRIGGERED EMAILS TOP THE LIST OF MOST EFFECTIVE RELEVANCY IMPROVEMENT TACTICS



 Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

An effective engagement strategy is not a one-time gimmick designed to have the reader interact. Rather as Stephanie Miller wrote in her article, *“The Engagement Experience: Now Engineered by Marketers,”* “Engagement is not an event, it’s a process. When we start to think about how to create a continuum of experience for our subscribers, it guides us toward better decisions on segmentation, frequency, and cadence.”

Rather than focusing on individual transactions, concentrate on increasing the customer lifetime value over the course of a long-lasting relationship. In this new attention economy, it may mean shifting from conversion to engagement metrics — the frequency, length of time and quality of interactions.

Let’s begin by studying content creation strategies so you can earn engagement with every email sent.

## CREATE CONTAGIOUS CONTENT

Harried marketers' immediate question to ask is, "Who is going to create this content?" Having the resources to make publishing content as routine as manufacturing your product or service is a challenge. Your solution may come from outsourcing writers, hiring new employees with the skills needed, or dedicate a certain number of hours a week to the task with existing workers. The end game, however, is the same — create content that readers crave and cannot be contained nor controlled.

## HIRE A BRAND JOURNALIST

A recent trend is to hire a brand journalist who can create interesting information that serves to educate and inform consumers. This person has the skill set to uncover human interest stories that personalize your brand, giving readers revealing insights into your company's culture, products and services. Brand journalists do not write standard press releases, promotional messages or even whitepapers. Their talent lies in telling interesting stories that can be shared.

## BUILD AN EDITORIAL CALENDAR

As companies dig themselves out of the recent economic downturn, they might not have the ability to hire a brand journalist or outsource content generation. In those cases, executives will turn to their current employees. If you are in this situation, this challenge can be a real opportunity. Your co-workers know the company, products and customer needs better than any outsider.

The first step is to involve a wide variety of employees with niche specialties. In addition to their knowledge, subject matter experts bring a unique perspective valued by readers.

To manage and organize a cross-functional project you will need to set up an editorial calendar. This calendar should be in line with your marketing initiatives, building off existing promotions, events and key objectives. The production schedule should include ship dates, approval process and deadlines. The editorial calendar along with written guidelines for contributors will ensure content created is consistently and on target.

In addition to assigning content that fits your marketing plan, think up a few unexpected situations that you could take advantage to gain market share. If your competitor has a price increase or a supply shortage, having a draft of an email message will enable you to quickly execute. A word of caution: When creating an editorial calendar, be sure to set realistic goals for both the finished content as well as your writers. In the planning stages, our vision is often bigger than our ability to produce. Keep Milton Hershey's quote in mind: *"Give them quality. That's the best kind of advertising."*

## CONDUCT AN INVENTORY AUDIT

The first step is to gather all of your existing content. Start with your website, blogs, sales collateral and publicity. Look deeper into what research, presentations, interviews and community outreach you have recently conducted. Again, the more departments you include in your search, the more content you will uncover.

Next, assign each piece of content to a specific stage in the customer's buying process. Each stage will require a different conversation and a unique set of content. This endeavor will likely show you areas where you are content rich and poor. With this insight, you can quickly determine which areas you need to focus your efforts.

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*"By publishing content that shows buyers you understand their problems and can show them how to solve them, you build credibility."*

– Ardath Albee  
Author of *Emarketing Strategies for the Complex Sale*

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**EXERCISE: TAKE INVENTORY OF YOUR EXISTING LIBRARY OF MARKETING CONTENT**

Please identify your customer concerns at each buying stage and the existing content that provides support.

Buying Stage	Customer questions/ needs	Content with answers to concerns
Prospect		
Nurture		
Activate		
Retain		
Referral		

**REPURPOSE CONTENT**

So where do you begin producing relevant content for your email communications? Based on time and resources constraints, it can be valuable to look at your pre-existing content that can be recycled. With your editorial calendar in hand, identify key events that will spark ideas on when and what content to reuse.

The information found on your website, data sheets and publicity could all be repurposed for your email messages. Sharing highlights from analyst reports, extracting quotes from an executive interview with the press and interesting product attributes can be of value to your customers at varying stages in the Marketing-Sales pipeline. Manya Chylinski wrote a fun article titled [“Content Recycling: A to Z”](#) for the Content Marketing Institute, which you may find helpful with your brainstorming exercises.

We have seen this done well, repurposing blog posts for email newsletters. Dedicating a “blog corner” section to your newsletter with articles published based on their popularity determined by re-Tweets or comments can strengthen your credibility of listening to customers. Blogs conversational writing style may also be a welcome addition to the more formal fashion found in some e-newsletters.



Ultimately, the art of repurposing lies in the editor’s ability to combine existing content with the email’s purpose in a relevant way to the reader. Strive to share your company’s thought leadership and teach your readers something new. Concentrate on iterating content rather than replicating it.

**EXERCISE: TAKE INVENTORY OF YOUR LIBRARY OF MARKETING CONTENT**

We’d like you to take a few minutes to take inventory of what marketing content you have in-house that can be reformatted and repurposed for your email marketing campaign.

Make sure all of the content you choose to repurpose meets your prospects key interests, and balances the goals of your organization.

Existing content for reformatting and repurposing	
1.	4.
2.	5.
3.	6.

**LEVERAGE USER-GENERATED CONTENT**

If your brand is in the hands of the consumer, why not use their words, pictures and thoughts in your email marketing campaigns. The explosion of digital media technologies including blogs, social networks, podcasts and question/answer sites, provide a wealth of comments, testimonials, reviews and ratings for you to incorporate into your messages. These sources are in addition to the comments you may collect from your customer service department and website.

Taking advantage of these unsolicited testimonials adds a human touch to your messages. Placing user-generated content (UGC) center stage via your email platform allows your supporters to connect in a way they might not have otherwise. When consumers share common interests, they build trustworthy communities and help you promote your products.

This does not mean you cannot prompt your loyal customers to share their thoughts and opinions. We have seen auto dealerships send new car owners emails requesting they write a quick paragraph or two on Google summarizing their purchasing experience. Other companies have run UGC contests encouraging patrons to create their own radio ads, slogans and viral videos. Read more in MarketingSherpa’s case study, [“User-Generated Content Video Contest: 6 steps to generate new marketing content,”](#) and learn how the marketing team at Crunch fitness centers ran a user-generated video contest that relied on contestants to create promotional content and then ask peers to vote for their video.

As you control the content in your emails, you can shape the story and have the UGC reinforce or emphasize your key messaging points. Do not be afraid to use a well-written negative comment. Including a less than stellar comment will give your reviews more credibility and differentiate your product in situations in which it is not a good fit. Remember the following quote from Dr. Flint McGlaughlin, Managing Director (CEO) of MECLABS:

*“When a company is humble enough to admit a weakness, they immediately distinguish themselves from the competition. It opens the door for a trust relationship. The consumer is all too aware of the fact that we are not perfect. To pretend otherwise only serves to raise their suspicion. Tell them what you can’t do, and they’ll believe you when you tell them what you can do.”*

Today’s consumer relies more on fellow consumers’ opinions than the brand’s claims when making their purchasing decisions. Begin by incorporating testimonials for your product or service. Turn them into “read

customer review” links and see if they outperform other links embedded in your email. We think you will like the results.

Copyright is always a concern in the digital age. Work with your legal department to create and include your firm’s Terms and Conditions on your website, blogs and any UGC contests you implement. One solution is to allow customers to fill in a checkbox on your website feedback page, giving your brand permission to use the comments in promotional material. If your company is not comfortable delving into this area of publication, you may suggest collaborating with influential bloggers or outspoken customers to co-create content with you.

#### INCORPORATING YOUR EVANGELISTS’ VOICES

As we know, companies no longer have tight control over their brands. Rather, a brand and its voice are made up of the conversations and experience of its customers. Brand advocates are your most fervent fans in online and offline conversations. They will rave about your best qualities, but will also be the first to tell you if you do not meet their expectations. Incorporating their voice into your brand’s communications is a key for making a meaningful connection. Here are three strategies from an excerpt from *“Crafting Relevant Email Messages: How to learn from your audience”* by MarketingSherpa Senior Reporter, Adam T. Sutton:

##### **Systematically capture evangelist-generated feedback**

Customer service is often the first place evangelists turn when they want to make their opinions known, especially if they perceive a “foul” in strategy or execution. Most often, the feedback comes in the form of emailed complaints, but sometimes evangelists will contact you via phone, a visit to a store, a Web form submission or even by snail mail.

Set up a system and train your customer-facing departments (customer service, field sales and retail stores) to:

- Recognize evangelists based on attributes you've identified
- Provide feedback such as terminology often used by your evangelists, their likely industries or job titles, or their special requests (“Please make sure this comment gets to your manager.”)
- Capture both written and oral feedback
- Put in place a standard form and process for capturing feedback

If your customer service rep has recognized some feedback as coming from an evangelist, enable them to acknowledge the evangelist as a “friend” of the brand. Also, plan to respond to your evangelist's compliments and concerns as quickly as possible.

##### **Troll the Internet**

Your evangelists will not necessarily share their feedback with you directly, especially if they have a recent beef with your brand. They will blog, Tweet and use other social media to share their applause and gripes.

To find out what your advocates, customers and prospects are saying about you, you can use sites like:

- Search engines and Technorati
- Social networks such as Twitter and YouTube
- Online customer reviews

Online feedback is a true treasure trove — not only do you get unadulterated feedback, you'll find the terms people are using to describe their pain points, possible solutions, key players in your market place, and a possible source of new product ideas as well as terms for search engine marketing.

For example, Hallmark has a very private extranet for customers who are perfect for their product. They depend on the system to learn what words and topics are important to their ideal customers and use that information to invent new cards.

### **Record your evangelists on video**

As part of your research, plan to video or audio record an interview with evangelists. While presenting their written comments can be useful, there is nothing more powerful than seeing the body language, facial expressions, passions and concerns of a true fanatic.

You can use the video or audio recording to help guide your agencies and copywriters. You can also use to bolster your arguments when others suggest strategies that go against your brand. The content can also be repurposed for publishing via your company blog, email newsletter or YouTube channel.

## **CRAFT ORIGINAL CONTENT**

Having exhausted your repurposed and user-generated content, the next step is to create original content to fill in the gaps in your Marketing-Sales funnel communications. This can be a time-intensive task, so you will need to prioritize and find the most efficient production route.

Starting from scratch gives you the opportunity to send content your readers can digest with great enthusiasm and possibly share. The secret to creating contagious content is either educating or solving the email recipient's problem without explicitly selling your product. When you move away from focusing on just the product or service and toward helping the consumer, you will generate new ideas. An enchanting email experience can be charming, entertaining, and rewarding. Nonetheless, a better route to follow is the advice from MECLABS Executive Director of Applied Research Brian Carroll — *"Rather than focus on being interesting, be interested."*

### **CAPITALIZE ON THE CULTURE OF GAMING**

Athletic competition, state lotteries and video games are woven into our culture, giving millions of people daily entertainment. PriceWaterhouse-Coopers estimates video games will overtake the combined global revenues of film box office and DVDs in 2012. Games are not just for kids; the Entertainment Software Association states 70% of American heads of households play computer games, with the average gamer age being 34. Women make up 40% of the gamers, and 35% of C-suite executives play video games.

A game design's hierarchy is well-suited for email marketing. A well-constructed game has transparent rewards for each point a player earns, and when the player meets a certain threshold, they move on to the next level of achievement. Today, marketers are experimenting with giving fans coupons and reward points for social media check-ins at physical locations. Likewise, with all the available metrics, email marketers can reward subscriber's actions for opening, clicking and forwarding to a friend. Currently, for most subscribers, the triggers for receiving a coupon are hidden, but a game could create the path for the consumer to earn exclusive benefits. The clear and constant feedback in games gives a player a growing sense of accomplishment, motivation and brand loyalty.

Don't believe me? Give ["The Email Game"](#) by Baydin a shot. The application makes the drudgery of cleaning your email inbox into a fun and competitive sport. The goal is to achieve an empty inbox. With a scoring system and running clock in place, the game incentivizes you to take quick and decisive actions on your email.

### **COMPLEMENT EXISTING CONTENT WITH ADD-ON OR BONUS MATERIAL**

Round out your existing content with supplemental information. For instance, a popular e-book provides an opportunity for the author to be interviewed and reveal their top takeaways. The interview may be recorded as an audio podcast or YouTube video and shared through your email communications.

## PRACTICE THE ART OF STORYTELLING

Designing emails to be magnetic and share-worthy from the ground up will not only increase open rates but also make it easier for readers to readily share with their personal network. The best way to effectively communicate and engage today's digital audience is through the art of storytelling.

Sharing personal experiences of employees, customers or community members that relate to your overall message deepens the connection between you and your reader. Storytelling is part of humans' DNA. When we hear a well-told tale, it grabs our attention and instinctively draws us closer to the narrator. As the story unfolds, we start trying to figure out what will happen next. Yet the patient narrator leads the way, permitting us graciously to come to our own conclusion. Having felt we were active participants in the story by listening and anticipating the next plot twist, we are grateful to the wise teller of tales. These storyline elements that stir our passions are fruitful in business as well. Dynamic stories tap into and ignite a customer's imagination to dream of greater achievements, and vision a path to accomplish these goals.

Consumers rely on facts to rationalize their decisions, but real-life stories connect on an emotional level to move, touch or inspire them. Authentic stories can make even the driest data spring to life. Have you ever noticed how news articles will use a personal account of an event to draw you in, then present the facts to support the viewpoint of the subject matter?

At our B2B Summit 2011, SAP's Todd Wilms mixed interesting tidbits of information to shine a different light on SAP. His simply asked question, "Did you know SAP helps their customers deliver?" was supported by a visual slide with the following statistics:

- 72% of the world's chocolate
- 70% of the world's beer
- 82% of the world's athletic footwear

Todd changed quite a few of the audience members' perceptions of SAP.

Here are a couple of tactics to try when searching for a great story.

### **Use internal channels for find great customer stories**

Start with a small group of "listeners" to begin collecting customer stories. These early contributors will probably have several examples. Have a plan in place to thank them for their effort. This could be a simple mention in an internal newsletter, a cup of coffee or a gift card. Simplify the submission process. Post a form on your intranet or have an intern meet with them for an interview. Continue to build off each success to grow your listeners and expand each department's involvement.

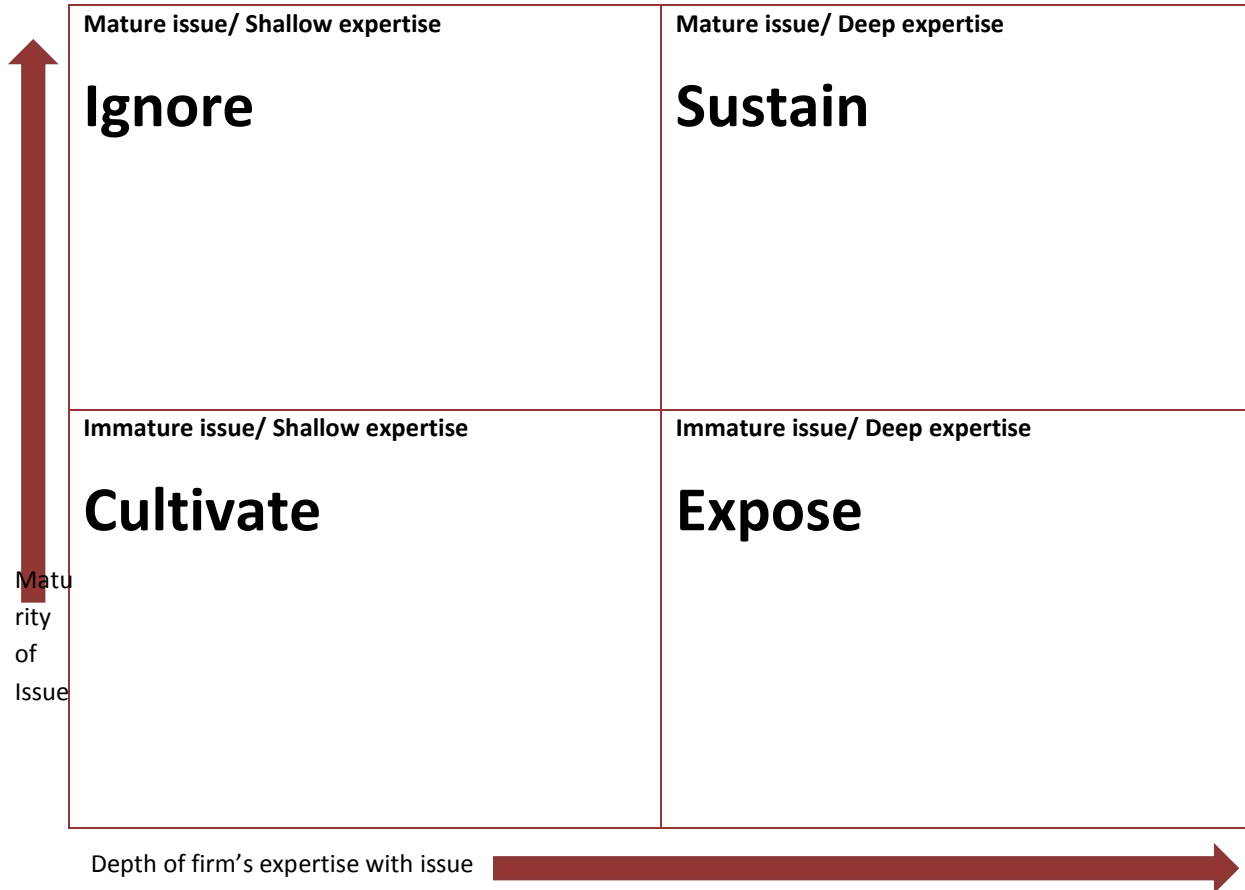
### **Ask for stories on the Web**

As you begin to email and post these stories on your website, ask the reader if they have a story idea to share. A simple link to a submission form on your public website will do the trick. Expand this concept to social networks like Facebook, LinkedIn and Twitter. Ask leading questions to invite discussions.

Remember these are your stories. Separate yourself from your competitors to find your "Blue Ocean" by sharing your company's unique insights, passions and personalities. To aid in prioritizing possible storylines use the [Content Marketing Institute's](#) Portfolio Framework by Bernie Thiel found on the following page.

**WORKSHEET: CMI PORTFOLIO FRAMEWORK**

Please assess your original content ideas based on your expertise and the markets awareness of the topic.



**HUMANIZE YOUR CONTENT**

The three tactics discussed are bound by human relationships. When you respect the reader enough to reveal your culture, demonstrate your character, share your expertise, give gratitude, speak the same language, serve their needs, and part with the spotlight, you will effectively engage your customers, community and coworkers.

The priority is sharing your expertise to become a trusted advisor. Only after you convince the reader you have the answer to his problem will he want to engage with your brand.

## HOW-TO: REFORMAT, REUSE, RECYCLE: 5 STRATEGIES TO STRETCH YOUR MARKETING CONTENT

How-To ID: # HOW31399

Location: MarketingSherpa Member Library

Summary: Your marketing content library can be an incredible resource in lean economic times. You have opportunities to repurpose, reformat and reuse that content for new lead generation campaigns.

We've collected five examples of clever content repurposing strategies that B2B marketers shared with us over the years. They include tips on generating audio and video from text, and finding new content for nurturing emails.

Tight budgets require marketers to stretch every dollar they spend. Fortunately, few investments are as elastic as the content you create for lead-gen campaigns.

Every whitepaper, webinar, client case study, video, podcast or other piece of content you create can work for multiple campaigns. The process can be as easy as recording your webinars, then using links to archived versions in lead-nurturing campaigns. Alternatively, it might require a bit more work, such as by developing a Q&A podcast with the author of a whitepaper.

The key is to examine your marketing content and find the best opportunities to repurpose and reuse what is already available. Here are five examples from past Sherpa case studies to inspire you:

### **Strategy #1. Use past media coverage as content in nurturing emails**

Staying in touch with prospects in your nurturing funnel doesn't necessarily mean developing a new whitepaper, case study or other piece of content every time you want to send an email.

You can build friendly, low-pressure, lead-nurturing emails simply by sharing a link to media coverage you have generated from public relations efforts:

- Executive interviews or bylined articles in trade publications typically cover relevant industry topics that demonstrate your industry leadership.
- Sharing an article you believe prospects would find interesting gives them a break from repeated calls to register for content or provide contact information.

For example, Matt Barker, Director, Marketing, TeleHealth Services, made the most of his team's PR strategy by recycling bylined articles they had previously written for trade publications.

Barker and his team used nurturing emails to follow up on a direct mail campaign touting one of the company's health information products. The first nurturing message offered a recap of the product line the DM campaign had been promoting, but also included a link to a bylined article citing the value of those products in a healthcare setting.

The result: A 12.5% open rate on the email — a key step in a campaign that generated more than 20 warm leads for the sales team. One deal from those leads would be enough to cover the entire cost of the program.

### **Strategy #2. Create podcasts from in-person speaking engagements**

Here's a quick, low-hassle approach to creating podcasts: record and edit any public speaking engagements by company executives, or by clients, describing your products or services.

Michael Williams, Marketing Director, Global Management Technologies Corp., made the most of his speaking gig at a major industry event. He obtained permission to record the presentation (using an inexpensive digital recorder) and turned the raw audio into a podcast using free digital editing software.

Through promotion via email and PPC ads, the podcast was heard by more than nine times as many people as those who attended at the event. Additionally:

- 16.7% of the podcast listeners were deemed sales-ready leads
- Those additional leads reduced the average cost-per-lead from the trade show by 71%

### **Strategy #3. Supplement whitepapers with audio highlights**

Whitepapers can also be a source for new audio content. Interviewing an expert author on the paper's top findings, providing an audio summary of key takeaways, or simply excerpting a portion of the paper are all ways to turn text content into a podcast.

When Paul Dunay was a marketer at the management-consulting firm BearingPoint, his team developed podcasts to use as related offers for their financial services whitepapers:

- The team wrote and recorded six- to eight-minute audio summaries of the whitepapers.
- They used active titles, such as "How to Avoid the Seven Pitfalls of ..."
- They added podcast offers on the whitepaper download page to serve as content previews.
- They promoted the podcasts by emailing their house list and posting them to audio sites like iTunes.

The results:

- Conversion rates tripled when podcasts were added to the whitepaper landing page
- Podcast listeners were just as qualified as other leads
- 18% of listeners downloaded more than one podcast

### **Strategy #4. Recycle testimonials and case studies for advertising campaigns**

It takes a lot of time and effort to find clients willing to share their testimonials. It then takes your team just as much effort to shape those stories into suitable case studies for your marketing campaigns.

Why not use as many channels as possible to drive prospects to that collateral?

Here's one approach: Angela Sanders, Director, U.S. Marketing Operations, Aon, recruited several clients to share their success stories for use in the company's booth at an annual trade show.

To prepare for the event, the team developed:

- Video testimonials from the clients
- Case studies that provided in-depth descriptions of the client/company relationship

The event was a huge success for Sanders and her team. Afterward, they realized the marketing collateral could form the basis of a new print advertising campaign:

- They created a series of client-focused advertisements for one of their regular trade magazine ad placements.
- The ads provided a brief description of how the company helped a particular client, and included a URL for a dedicated website where prospects could view the video testimonials and case studies.

### Strategy #5. Turn boring-but-necessary documents into video

Technical specifications and other product details play an important role in the later stages of the buying cycle — but they can make for dry reading. Breathe new life into old docs by converting them into videos.

Brian Ellefritz, Sr. Manager, Customer Relationship Marketing, Cisco Systems, created five-minute videos of product managers guiding prospects through the company's two- to three-page product data sheets.

Within six months, video files accounted for 21% of all product data downloads.

The screenshot shows a product page for Cisco Catalyst 4500 Series Switches. The main heading is "Introduction" under "Cisco Catalyst 4500 Series Switches". A prominent video player is titled "Most Widely Deployed Modular Ethernet Switch" and "Video Data Sheet". The video shows a man in a grey sweater pointing to a rack of switches. Below the video, there is a "Video Data Sheet" description: "Learn about the features of Cisco Catalyst 4500 Series Switches. (5:00 min)". To the right of the video is a "Compare Models" link and an image of several switch units. Further right is a "Let Us Help" section with links for phone support (877-279-6551), email, international contacts, switching discussions, technical support, resellers, and email preferences. Below that is a "Live Discussions" section for DHCP based switches, with a link to start a new discussion. The "Related Tools" section includes links for a software advisor and a power calculator. The "Related Links" section lists solutions for large enterprises, IP telephony, and wireless LAN security. On the left side of the page, there are sections for "Ordering" (with a log-in link), "Request a Price" (with a phone number and pricing request form link), "Locate a Cisco Partner" (with a partner finding link), and "Learn How to Order" (with a how-to order link). At the bottom left, there is a "Support" section with links for all support information, general information, software download, and reference guides.



## SEGMENT FOR HIGHER OPENS AND REVENUE

Targeting a portion of your email list that meets a certain criteria allows you to send highly relevant messages to qualified recipients. The tactic's narrow focus does not overwhelm readers with a bombardment of seemingly random offers, earning trust that transfers into not only higher open and clickthrough rates but also a stronger relationship with the subscriber. In fact, Lyris' *Annual Email Optimizer Report* found 39% of marketers who segmented their email lists experienced higher open rates, 28% experienced lower unsubscribe rates, and 24% experienced greater revenue.

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*"No matter what or whom we're talking about, from movies to chiropractors to books to financial planners, the consumer hankers after specialization."*

– Susan Friedmann

Author of *Riches in Niches*

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This is a strategy that marketers understand on paper, but find hard to implement. Executing complex data segmentation, behavioral targeting and multi-touch campaigns requires time and resources organizations may not have. In MarketingSherpa's *2012 Email Marketing Benchmark Report*, 65% of marketers responded that it was difficult to segment campaigns by behavior.

The good news is that marketers realize a person is not the same individual they were when they first enrolled. They may have changed jobs, developed new tastes, or have matured into a new life stage. Marketers are investing the time and effort to overcome these challenges, aided by sophisticated marketing automation, CRM, and/or ESP campaign management tools.

## SEGMENTATION STRATEGIES

As we mentioned earlier, customers expect efficient transactions, transparent conversations and truthful claims. Kick off your segmentation strategy session by focusing on your fan's full customer experience and ways she can have greater connectivity with all of your channels. Examine your Marketing-Sales funnel to find opportunities where you can automate standard messages like welcome, transactions and renewals. Concentrate on adding value at each micro-decision fork in the path to purchase. Using your customer profile data and sales cycle as guideposts, there are several ways to parcel your list. Here are a few popular suggestions to trial and test.

### BEHAVIOR-BASED

Our research revealed that 93% of marketers cited segmenting email campaigns based on behavior was an effective strategy to improve relevant communications. As noted earlier, this may be difficult but worthwhile as audience behavior can give you valuable insights into their interests, needs and duration of time spent educating themselves on your products and services. As they evaluate their available options with your organization, data management tools can collect information from a variety of customer channel touch points. In analyzing these behavior patterns, you can create more robust customer profiles and leverage the insider information for more accurate and meaningful communications.

### BRAND EVANGELISTS

Those individuals who frequently comment on your blogs, share the latest social media news, regularly purchase, recruit new customers and are first adopters for your new products and services are your most valuable customers and should receive special attention. These brand advocates thrive on consistent communications on the latest happenings with your organization. Their loyalty can be rewarded with first-to-know events, news and sales to recognize their efforts to allow them to become your marketing mavens.

### CUSTOMER MOTIVATION

Using your original customer profile as the control, you can begin to experiment and test other decision maker types and influencers.

Commonly used B2B categories to analyze a purchasing decision maker are economic, analytical and technical buyers. The economic buyer thinks like an accountant, focusing on return on investment, while the analytical buyer thinks like an engineer, wanting to know if the product or service can be a solution to their challenge. A technical buyer is practical and concerned with how the product will work within the current systems in place. The messages sent to each of these buyers will highlight aspects of the product or service they find most meaningful.

This may be accomplished by making assumptions based on a person's job title or function. An executive may have more interested in the strategic implications of your product or service, while the entry-level employee is looking for tactical efficiencies to make his job easier.

Depending on the complexity of your sales process, be careful not to be too presumptuous. The individual purchasing the product is not always the person that ends up using the product. Parents are very familiar with the scenario of their children wanting a popular toy or video game and driving to the store to pick it up. The child cannot purchase the toy, yet they are the ones who know all the features and benefits and end up playing with it. In this case, the concept can be broadened to look for other influencers on the youth. A recommendation by a family relative, neighbor or coach can shape how they perceive a product. This carries over to B2B marketplace that includes a number of cross-functional departments weighing in on purchases. Considering all of the unique buyer and influencer motivations will help you segment your data to customize your communications

## GEOGRAPHIC

Segmenting by geography can be very effective for use in real-time marketing campaigns. The example shown here will only be effective if the insurance company sends the alert message to those customers who live in an area where a winter storm just blew through causing potential ice dams on their roofs.

This type of segmentation strategy works well for store openings, live events, or when a company has geographic limitations. This proven practice continues to evolve from filtering by ZIP code to ISP and now GPS location.

## SALES CYCLE

The data collected will be more purposeful when it is matched with content that engages your customers at a specific point in the sales cycle. Remember email communications is more than sending a message; its goal is to have the recipient open the email and take action moving them to the next buying stage either online or offline. These results will determine the campaign's success.

## PERSONAL PREFERENCES

The contact information collected during registration lays the foundation for the type of information your firm can sort. Many companies will attempt to add new data by making small requests during customer dialogue through surveys, requests for content and follow-up questions to better address the subscriber's needs. Other firms encourage followers to update their preference centers to share demographic data (e.g., age, gender etc.), favorite interests and communication channels. As this information comes straight from the subscriber, it is a better approach than making assumptions based on job titles or industry. Be sure to test whether or not your clients do as they say. Many times actions differ from their stated objectives.

**ICE DAM and ROOF COLLAPSE ALERT**

Protector Group<sup>®</sup> INSURANCE

Keeping You Informed to Insure Your Success

With the winter storms we have already experienced, and more on the way we wanted to remind you of what to be aware of in regards to ice dams and roof collapses.

February 4, 2011

**Icicles hanging along the eaves of your house may look beautiful, but they spell trouble....ICE DAMS**

Ice dams form when snow on the edge of a roof melts and then refreezes at the eaves. Icicles are an indicator that ice dams are forming. Once the ice forms on the edge of the roof, it can prevent water from draining off the roof. The water can then back up underneath the roof shingles and make its way inside your home. What can you do?

**Immediate Action:**

- Clear snow and ice off the roof before it melts to keep ice dams from forming.
- If your roof is accessible from the ground, a roof rake can be a safe and effective way to remove snow from the edges of the roof where ice dams occur.
- If your roof is not accessible from the ground, a **contractor** may be able to help. Often times the cost of removing the snow, or paying someone to remove the snow for you, is less than your policy deductible should a claim occur.
- Make sure to shovel around downspouts so that your gutters can drain freely. This will prevent ice from building up in the gutters.

**Long-Term Action:**

- Properly insulate and ventilate your attic to help reduce the chances of snow melting on the roof and refreezing at the eaves.

**Please Note:** The contents in your home damaged by water that leaks through a roof, are **NOT** covered unless you have purchased the special risk coverage for your contents.

## DATABASE DRIVEN

The specificity and success of your segmentation strategy will be determined by the sophistication of your database. Look to combine all available data found in email database with your customer relationship management (CRM), social CRM, marketing automation (MA), financial software, POS data, or Web analytics. This is easier said than done, as our research indicates that 55% of organizations now find integrating email data with other data systems as the most significant challenge to reaching their email objectives. The consequence of this challenge is only one-fifth of marketers surveyed felt that their email databases were more than 90% accurate.

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*“If content is king, your database is queen.”*

– Amy Garland  
WhatCounts, Inc.

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This is not surprising with the volume, rate of change in our culture, and difficulty to integrate data. Often the reason for organizations being in this predicament is that each business unit requests the software that best suits their needs to accomplish departmental goals and objectives. As legacy solutions are forced to work with newer technology, bandaids (i.e., Excel spreadsheets) are created to make the system function.

Under these conditions, it is virtually impossible to have a seamless exchange of data across platforms and departments. The cost is inevitable issues with customers by sending disconnected messages. A patron who just complained about the 123xyz model does not want to receive an email the next day promoting deep discount on the exact same product. The message will only antagonize the disgruntled customer.

The search for available data may feel overwhelming, so break the data into these four categories:

### ENDEMIC DATA

Endemic data is data unique to a particular record. Examples are contact and demographic information. This is data you can glean from your opt-in or preference pages that subscribers volunteer. For B2B marketers, it may include company, title and vertical industry. B2C marketers may learn geographic location, age and income level.

### TRANSACTIONAL DATA

Transactional data consists of data captured during any transaction an opt-in has with your brand. Financials are the most common source of transactional data, but it can also encompass a subscribers IP address and the opt-in landing page. In addition, be sure to look for the following facts in your database.

Recall RFM:

- Recency: How recently did the opt-in transact with/purchase from your brand?
- Frequency: How frequently does the opt-in transact with/purchase from your brand?
- Monetary: Value of the customer in financial terms, i.e., money spent?

### BEHAVIORAL

Behavioral data is perhaps the most actionable of all the database information and can come from a wide variety of both online and offline sources. Website clicks, email opens, calls into customer service, and redemption of coupons at a store location are all examples of behavioral data. Finding and following behavioral data will give you new insights to better profile your customers.

### COMPUTED DATA

Computed data is the outcome when one or more variables are used to create a third variable. The resulting variable is usually expressed as a difference between two variables, or as a ratio. For example, the variable of “number of miles from a retail store” is computed data; it is the difference in distance between the customer’s and the store’s address.

Computed data can be extremely powerful in predicting outcomes, and modelers commonly use it for regression analysis. Even without complex data analysis, you can use simple ratios and differences to determine when and how to use trigger marketing campaigns to address your audience's needs.

#### INGENUITY AND DETERMINATION

Data-driven marketing campaign produces a never-ending thirst for more knowledge. Sometimes it will take some creative problem solving to overcome insufficient data or holes in your customer profiles.

In some cases, you will need to take a step back and recognize you do not have the exact data elements to proceed and to adjust the plan accordingly. This may mean moving on with data that would have been a “want” and not a “need.” Other times it may call for enlarging the focus of your segmentation strategy to include broader data points and hatch a plan to capture the required data for future campaigns.

A helpful how-to article is [\*“How to overcome segmentation challenges and deliver targeted content”\*](#) by Adam T. Sutton. In six steps, Adam shares advice from experts on everything from convincing skeptics, to selecting your first segment.

If it is not possible to integrate your systems, find workarounds or manual ways to break down the silos to share information across departments. You may be inspired by this case study, [\*“One-Two Campaign Punch Grows Email & Mobile Lists: Segmentation Delivers 40% Lift in CTR.”\*](#) Discover how one sports e-retailer grew its list while incrementally segmenting its audience.

## HOW-TO: SEGMENTING A DATABASE AND DELIVERING MORE TARGETED CONTENT

How-To ID: #HOW31957

Location: MarketingSherpa Member Library

Summary: See how King Arthur Flour gradually segmented its database, worked through challenges, and delivered more relevant content to push open and clickthrough rates to nearly 50%. Find out which challenge was the most difficult, which took the most time — and how the team overcame both.

The email marketing program at King Arthur Flour Company is the second-largest source of traffic to the baking supply brand's website. The program's hundreds of thousands of subscribers generate about 30% of the company's site traffic and online sales, says Halley Silver, Director of Online Services, King Arthur Flour.

Silver's team sends between 10 and 15 batch-and-blast emails per month, she says, where the same email is sent to the entire list. However, King Arthur gradually segmented its list during 2010 and started sending targeted content. Results have since improved.

Average metrics for emails sent to the team's overall list:

- Open Rate: 30%
- Clickthrough Rate: 27%

Average metrics for emails sent to the team's segmented lists:

- Open Rate: 35% to 50%
- Clickthrough Rate: 25% to 35%

“Compared to our full-list broadcast emails, the open rate is extremely high, the click rate is extremely high, and there are hardly any unsubscribes, and this is across all of our segmented lists,” Silver says.

King Arthur Flour did not begin segmenting its list and sending targeted content overnight. Silver's team gradually established the strategy and overcame several challenges along the way. Below, we describe the tactics she used and what her team learned while establishing this strategy.

### **Tactic #1. Build a case for segmentation**

Segmenting a list is typically not a turnkey process. There is work involved, and building the motivation to accomplish this work can help power the project through to completion.

One motivating factor for King Arthur Flour was Silver's team's desire to deliver relevant content to its niche audiences, such as subscribers interested in gluten-free baking or wholesale products. Featuring such content in emails to King Arthur's general database typically generated poor results.

“For example, the bakers who use flour are the majority of our audience,” Silver says. “When we sent them a gluten-free email, we saw they were unsubscribing.”

Such results motivated the team to pursue segmentation. The team wanted to identify specific groups within its database to send content that connected with the groups' interests. Doing so would also help avoid sending niche content to the team's entire database, which many subscribers considered irrelevant.

“In my opinion, making sure you're not sending irrelevant messages to each of your customer segments is perhaps even more important than focusing on relevant messaging,” Silver says. “By sending irrelevant messages, you run the risk of being perceived as a spammer, and your unsubscribe rates go way up.”

### **Tactic #2. Start with a single segment**

King Arthur Flour did not jump headfirst into segmentation. Instead, the team started with a single segment: subscribers interested in the brand's retail store.

Starting with a single segment helped Silver's team in the following three ways:

#### - Managing unforeseen challenges

The team was able to work through the growing pains from new strategy in a controlled environment. The team would also know what to expect when launching new segments later on, and would have a tested process for segmentation and delivery.

For example, after struggling to keep up with deadlines for emails going to the retail subscribers, Silver's team built four email templates for all emails going forward. This reduced time spent on design and revision, and enabled the team to focus more on the creative material and content that had proved to lift results.

#### - Adjusting strategy

Emails to this first segment began as a daily alert about specials at the retail store and menu options in the store's bakery. The team had to quickly shift from a daily email with detailed information to a monthly email with general highlights.

"It was incredibly difficult to get that daily content we wanted to send. We were trying to find out what was going to be in the café and what the bakery was going to be baking on a certain day. But if they didn't have the ingredients, they had to switch gears and it was operationally quite difficult."

This transition was simpler than it would have been if the team had also been establishing several additional segments (which also might have needed adjusting).

#### - Proving results

The marketers were able to prove that segmenting and sending targeted content improved results, giving them the confidence to expand the strategy and gradually add more segments.

"The open rate was high, the unsubscribe rate was low, the clickthrough rates were high, and we sent out the emails and saw people coming into the store. It was as simple as that," Silver says.

### **Tactic #3. Outline other audience segments**

Silver's team outlined six audiences in its email database that would likely want targeted information:

- Subscribers near their retail store (described above)
- Canadian subscribers
- Wholesale subscribers
- Gluten-free subscribers
- Baking Sheet print newsletter subscribers
- Baking Education Center subscribers (King Arthur Flour's baking school)

The team was already aware of these specific groups within its larger audience. The team used purchase history, location and other data to segment the database into these groups. For example, customers who regularly purchased gluten-free products would be added to the gluten-free group, and customers who regularly shipped to Canada would be added to the Canadian group.

“It was fairly easy. Once we had it set up we knew we had these distinct audiences that might not be interested in the majority of our batch-and-blast campaigns, but that certainly would like to hear from us on a regular basis and would like to hear important news from us when it happens,” Silver says.

Here are other tactics they used to associate a subscriber with a particular segment:

- Preference center

The team established an email preference center where subscribers could indicate which types of information they wanted. The team links to this page from every email it sends, and also encourages subscribers to indicate their preferences in a welcome email.

- Sign-up process

Subscribers are asked to indicate their content preferences on the registration page. This page is nearly identical to the page for the team's preference center.

- Providing incentives

Silver's team plans to test incentives, such as coupons, to encourage subscribers to visit the preference center and update their choices.

#### **Tactic #4. Leverage internal resources for content**

Developing and formatting content is the most time-consuming part of King Arthur Flour's email program, Silver says. Every email the brand sends includes a recipe that is related to the audience's interests. For example, gluten-free subscribers will receive gluten-free recipes, and subscribers interested in the education center will receive recipes taught at the school.

Silver strives to repurpose content from throughout the company to use in the email program. She is thankful, she says, that the company's staff are often willing to write blog posts, provide recipes, or help in other ways.

“For each one of our email [segments], there is a business stakeholder from another area of the company, and they are as eager to build their lists and their program as we are. So they are usually very responsive in terms of helping develop content for the emails.”

Another way Silver's team regularly generates content is through repurposing content used in other marketing efforts and recipes that are developed for other areas of the company.

#### **Tactic #5. Carefully manage the schedule**

Silver's team continues to send general emails to its entire database, as well as targeted emails to each of its segments. The biggest challenge in the program, Silver says, is to manage the schedule across its segments.

“We try to send [a maximum of] one email per day, but sometimes there's overlap,” she says.

For example, the team recently planned a free shipping promotion. Since it wanted to reach the gluten-free segment with a targeted version of the offer, the team had to change the gluten-free email's schedule to fit into the promotion's timeline. These types of conflicts happen regularly.

This is another example of why it can be helpful to gradually introduce new segments and targeted messaging. Silver's team was able to understand and create processes for these scheduling challenges — her most significant challenges overall — in the context of a single segment before expanding to others.

## SHIP ON TIME

At the end of the day, you are what you ship. You can write beautifully crafted emails targeted at a specific segment of your list, but if you don't send it at the right time, your message will be irrelevant.

To consistently ship on time and make it a repeatable process, your internal marketing functions need to be in order. It starts with a map of the path to purchase with customer profiles. Followed by an editorial calendar to aid in churning out relevant content and a properly segmented list will put you in position to ship on time. It ends with a predictable approval process that respects the urgency of sending to the recipients at a specific time. It may appear that these processes stifle spontaneous conversations, yet the structure combined with shrewd strategy and compelling creative allows you to reliably manufacture meaningful messages.

## SEND IN REAL-TIME

That being said, within your editorial calendar reserve space for the on-the-spot conversations that are necessary to stay connected in a 24/7 marketplace. Marketers know the most effective communications are those that help a customer move one step closer to the conversion of a sale. Providing accurate information at the exact moment the consumer is discussing a product or making a purchasing decision is a significant competitive advantage and one that is hard to overcome.

Social media has become the catalyst and dominant medium for these types of conversations. Nevertheless, brands can carefully monitor a consumer's on and offline behavior and implement automated email campaigns to accomplish the goal of responding in real-time.

## TREND JACKING

Data mining allows marketers to leverage a reader's *internal* motivations, behaviors and location in the sales cycle. However, those tactics address only one aspect of a subscriber's psyche.

The flipside is trend jacking, a strategy that plays off *external* factors like current events and recent developments that make emails timelier and more relevant. Recipients are already well aware of the latest news by either watching the morning shows or hearing co-workers talk about it at the coffee maker.

Royal weddings, the Super Bowl, weather events, or in the case of Spirit Airlines, the latest political/celebrity scandal are great places to start.

We have seen Barnes and Noble offer a snow day special discount of 19% when NYC received 19 inches of snow. And Qdoba restaurants send a "rainy day" special for \$2 off to locations with stormy weather. The copy in these messages

builds off the child-like excitement of a snow day, or acts as a way to lift your spirits on a dreary day.



**DONT FORGET THE RINGS HARRY!**

**Dear Michael,**  
The Royal Wedding is almost here and to give Prince Harry a helping hand and ensure the Royal nuptials go without a hitch, we've launched a limited edition Gold Ring doughnut.

Based on our signature Original Glazed doughnut, this unique regal treat is finished with a luxurious golden caramel glaze - perfect for a princess.

You can find a glistening Gold Ring in any Krispy Kreme UK store or cabinet until 1st May. However you're planning to celebrate this special occasion, a Dozen Gold Rings shared amongst friends will go down a treat.

So we've got our Gold Rings sorted, it's now down to the best man - don't forget the rings Harry!



From our library of case studies, see how a hotel and casino marketer took news of a major snow storm and turned it into a ski package offer that kept customers booking rooms in [“Integrated SMS, Social and Email Promo Capitalizes on Weather Event: 5 Steps.”](#)

An example for a B2B manufacturer would be to write an educational email on how its materials are used in the batting helmets for players in the Little League World Series, and send the story the week of the annual event. Changes in regulatory laws and industry mergers are also great fodder for B2B creatives. Don't overlook popular culture — Eloqua used YouTube star Rebecca Black in the title of a chart in its weekly email.

Be warned, trend jacking can be tough to implement unless you incorporate resources in your editorial calendar to quickly respond to these opportunities. Weather emergencies, for example, can happen over the weekend or off regular work hours.

In addition, you and your staff need to react quickly to bad turn of events. For instance, AppSumo, a company with a slogan “daily deals for Web geeks,” sent an email on October 6, 2011 at 5:16 AM with the subject line “Steve Jobs was originally obsessed with typography.” This was the morning the world learned of the passing of Steve Jobs, the co-founder of Apple. The subject was especially sensitive to this technology savvy audience, and while other publications ran tributes to the man, it appeared AppSumo was trying to make a buck. In reality, the email was designed weeks before, and the subject line was used previously.

Less than six hours later, AppSumo wrote a sincere apology and explained their mistake. The email was honest and concise, and hopefully for AppSumo, mended the bruised feelings.

## EXPERIMENT WITH SEND TIMES

In the 24/7 connectivity of today's world in which home, work, and entertainment have all become intertwined, there is no universal email best practice for send times. Your organizations ideal send time can only be discovered by putting yourself in the shoes of your unique customer. Start by auditing your campaigns open, clickthrough and unsubscribe rates. With that data, you can assess patterns in subscriber behavior. Be careful to examine how they are reading the emails. Are they opening the email first on mobile and then reading it a week later on desktop?

This data combined with the offer in your email may influence the send time. Case in point — a B2B nurturing campaign offering a new whitepaper. Ideally, this email would be opened on a PC with a larger viewing screen and access to a keyboard to enter any required contact information to read the content. Conversely, it is advantageous for a B2C restaurant to send a “free appetizer” coupon when opens are at their mobile peak, theoretically when people are on the move.

As you begin to test your intuition and analysis, you will uncover what is right for both your customers and brand. Don't be worried if the recommended send time ends up being far from where you began, you will have the results to back up your decision. For instance, Apple has no set frequency for their email campaigns. The surprised timing compliments their brand's unexpected nature and leaves the reader hungry for the next communication. Here are a few ideas to kick off your tweaks and trials.

Try sending promotions to your subscribers on the same day of the week and time of day they had originally enrolled. This is more difficult than simply sending the email once. However, the results may be worth the time and effort. Check with your ESPs or MAs capabilities. Silverpop created a tool that analyzes recipient behavior on a rolling basis to predict the ideal email delivery time for each address on the mailing list. The system then individually delivers messages to subscribers at the precise day and time they're most likely to be in their inboxes

## PRE-WORK

For many, checking email is a chore that is accomplished at the beginning of the day. If an email is sent after 9 a.m., subscribers may have completed that task and moved on to the next priority or meeting. We have seen retailers successfully send their “day deals” during school drop-off periods, so as parents wait in the carpool line, they can check their emails on their smartphones. IPass research backs this theory; it found 35% of global mobile workers check their inbox first thing in the morning before doing anything else.

## TIME ZONE

This strategy takes more time than sending emails all at once. However, if your product or service is time sensitive, like in the case of restaurants, this may positively affect your campaign results.

## OFFICE AND/OR HOME

Making assumptions that a person is using an ISP email address (@hotmail, @gmail or @yahoo) as their home email address will not be 100% accurate. Based on their own personal experience, email marketers may assume others use multiple emails accounts for specific tasks (e.g., work, personal, promotional, etc.) Refuting this theory, HubSpot’s research found that 88% of email users do not have a separate work and home address. Often professionals prefer to use ISP email addresses that permit larger file sharing compared to their corporate email accounts.

## PICK A TIME TO OWN

In contrast to Apple’s random delivery, you could search for a time that your firm could own in the minds of your recipients. The time slot becomes an asset, where recipients are expecting and enthusiastically waiting for the email to arrive.

It is common practice for B2B marketers to send emails Tuesday through Thursday between 10 a.m. and 3 p.m. EST. The challenge with choosing popular dates and times is that your competitors may select the same time, thereby cluttering the recipient’s inbox. In addition, your ESP may stagger your email send to handle the combined email transmission load. To differentiate yourself, you will want to test your send times based on your consumer profiles and their personal email habits.

## STRIKE WHILE THE IRON IS HOT

Sending relevant messages when you know the recipient is on an emotional high can be a successful strategy. The Dancing Deer Baking Co. sent out this email (pictured at right) to fans after the Boston Bruins won the Stanley Cup.

## FREQUENCY

Finding the right frequency to send emails can be a marketer’s biggest challenge. Send too many emails and your customer may grow tired, become inactive, and unsubscribe. Send too few and the subscribers may forget they registered to receive your emails and mark emails as spam. Even worse, you could be leaving money on the table that you would have otherwise collected if you sent emails more frequently.

## AUTOMATE YOUR CAMPAIGNS

After reviewing all the available communications touch points to assist and serve your subscribers throughout a customer’s lifecycle in chapter 2, you may have felt overwhelmed by the opportunities. This combined with importance of timing to deliver relevant content, you may decide to leverage your ESP or MA capabilities to send auto-responders, commonly referred to as drip, lifecycle and triggered email campaigns.

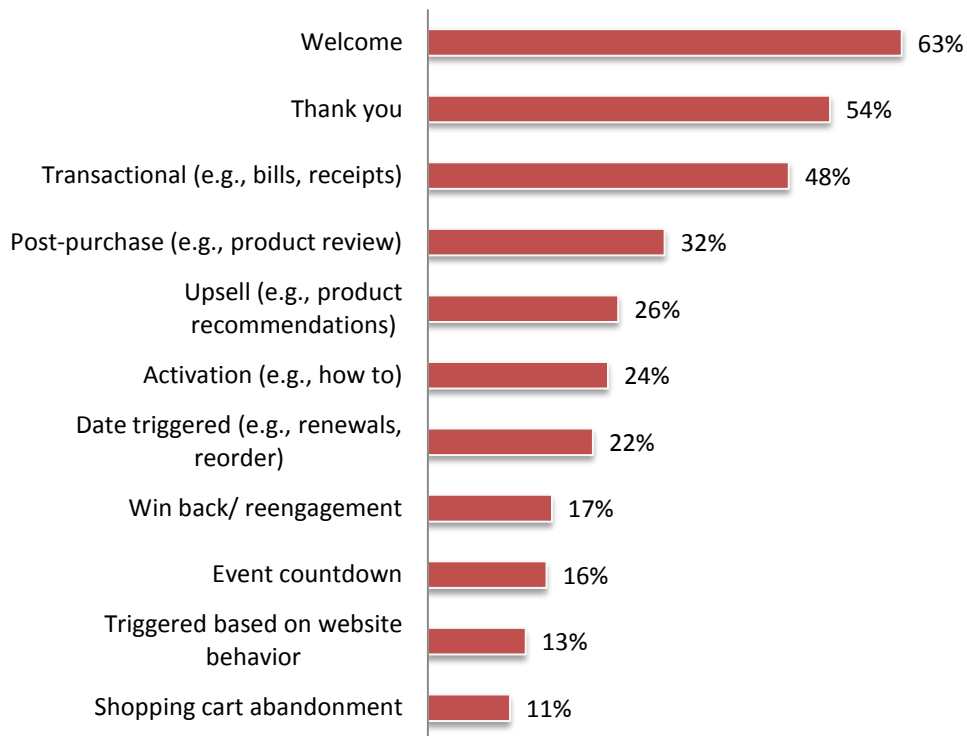



These automation tools can stretch a marketing team’s available resources to send more effective email communications. Find out how one startup cut two-thirds of its marketing department, but nearly doubled the number of campaigns it was able to run in the case study, [“How a start-up doubled campaigns with a smaller department.”](#)

An automated email is a single email or series of emails created by a defined set of rules based on dates, events or behaviors, and sent automatically to a subscriber. These email campaigns categorized as welcome, triggered and transactional, consistently achieve higher open rates due to their timing and relevancy to the reader. Below are the most popular automated email messages.

**CHART: MANNERS MATTER MOST WITH AUTOMATED EMAIL MESSAGES**

*Q. What type of automated, event-triggered, lifecycle email messages does your organization deploy?*



 Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

Although a challenge to set up, our research found that 80% of organizations send automated emails, with automated messages making up an average 22% of the overall email volume. In addition, sending triggered emails was the found to be the most effective tactic to increase engagement and send more relevant messages to email subscribers. It topped all other engagement tactics including segmenting by behavior, producing content for each funnel stage, and using a loyalty/rewards program.

Automated emails are reinforcing the strategy to establish marketing automation processes. Businesses that invest the time to document rules and processes for lead scoring, nurturing and management to move prospects through each stage in the buying process gain resource efficiency and generate more revenue. Because of its effectiveness, marketing automation is becoming a critical component in optimizing the Marketing-Sales pipeline for both B2B and B2C firms.

Investing the time to plan automation campaigns can be a challenge. In reading this handbook, you might have started to recognize areas in the customer’s lifecycle to add email messages. The next step is to identify the sole purpose of each email and how it will produce micro-conversions to move the reader to reaching the intended goal. To accomplish this task, you will need to map out the entire messaging stream, classify subscribers by their placement in the Marketing-Sales funnel, and define business rules for which behaviors trigger entrance or exit from each stage.

Please take a moment to complete the automated email inventory worksheet. Use this as a launching point to identify opportunities that streamline and expand your email marketing efforts. Take note of the sending department and the database that holds the content information. After reviewing, select those emails that are easiest to implement with the greatest likelihood of achieving conversions, and then work systematically toward completing the more complicated emails.

**WORKSHEET: AUTOMATED EMAIL INVENTORY**

Email	Sending Dept.	Database	Event Trigger
<b><i>Prospecting</i></b>			
Webinar confirmation			
Webinar deck delivery			
Whitepaper delivery			
Online tool results delivery			
Other:			
Other:			
<b><i>Nurturing</i></b>			
Email newsletter registration confirmation/ Welcome			
Double opt-in confirmation			
Welcome email series			
Educational email series			
Abandoned online form			
Abandoned landing page			
Abandoned webpage			
Other:			
Other:			
<b><i>Activation</i></b>			
Information request			
Sales appointment confirmation			
Abandoned shopping cart			
Pre-event			
Upgrade notification			
Other:			
Other:			

Email	Sending Dept.	Database	Event Trigger
<b><i>Post purchase</i></b>			
Purchase/ order confirmation			
Reservation/Event Confirmation			
Shipping/ delivery status			
Shipping/ delivery confirmation			
Out of stock notice			
Warranty information			
How to / FAQ			
Invoice			
Account statements			
Cancellation -request received			
Cancellation -request processed			
Post-event			
Refund -request received			
Refund -request processed			
Account balance			
Payment received			
Rebate/ special pricing request			
Rebate/ special pricing processed			
Other:			
Other:			
<b><i>Retention/ Referral</i></b>			
Web chat transcript			
Response to complaints			
Response to compliments			
Renewals			
Reorder			
Win back email			
Reactivation/ re-permission email			
Survey/ polls			
Pricing update			
Other:			
Other:			

## CASE STUDY: HOW JETBLUE'S AUTOMATED TRIGGERS GET 1,640% MORE REVENUE-PER-EMAIL

Case Study ID: #CS31964

Location: MarketingSherpa Member Library

Summary: See how JetBlue created a system of four triggered emails that generated higher open rates, clickthrough rates, and revenue-per-email-sent than its promotional emails. Find out why the airline's marketers were careful not to add too much personalization or promotion in the emails.

### CHALLENGE

Danielle Compitello, Email Marketing Manager at JetBlue Airways, is responsible for all marketing emails sent by the airline. She joined JetBlue more than three years ago and brought a wealth of experience in online retail.

Her experience taught her that triggered emails could be a powerful way to drive visitors back to a retailer's website and boost conversions. However, she noticed that similar remarketing emails were not used in her new industry.

"We did a lot of research and there weren't a lot of airline competitors that were doing the same sort of trigger to our knowledge," she says. "We figured this could be a really good opportunity, not only to fill that gap, but also to deliver a relevant communication to our customers."

Compitello's team wanted to test automated triggers in JetBlue's marketing, but there were serious questions for the brand, she says. Some team members were concerned that the emails could make customers feel uneasy about their actions being monitored. How could the team test triggered emails without giving its audience the creeps?

### CAMPAIGN

JetBlue created a system of triggered emails to be sent to visitors who started but did not finish booking a flight on the airline's website. The emails would avoid featuring too much information from the visitors' behavior and would not make a hard sales pitch. If the emails improved results, Compitello's team could then comfortably invest to improve them.

Here are the steps the team followed:

#### Step #1. Consider the impact on the brand

There are many different types of triggered emails that can encourage a person to return to a company's website. Some feature detailed information from the visitors' behavior, related content, suggestions based on purchase history, and other information.

Compitello's team knew its emails could feature very detailed information but was not sure the approach was right for JetBlue's brand.

"We definitely wanted to be careful with how this came across, because we didn't want to be invasive to the customer," she says.

- Start with a 'medium' approach

The team researched triggered emails it had received from other companies and identified messages that had too much personal information, as well as messages that did not offer enough personalization. The team chose an approach between the two extremes, which is described below. If the emails worked, the team planned a phased approach to increase the relevance of the emails to subscribers' behavior.

## Step #2. Set the emails' goals

Since Compitello had seen success with cart abandonment emails, the team wanted JetBlue's triggered emails to reach people who abandoned the flight-booking process. The team also wanted the emails to communicate some key attributes of JetBlue's brand.

"That's when we asked 'What's the really important thing that a customer should know about JetBlue?' And that is definitely our loyalty program," Compitello says. "I think we by far have one of the best loyalty programs out there."

This gave the emails two goals:

1. Encourage visitors to return to JetBlue's site to finish booking
2. Encourage visitors to join or log in to JetBlue's TrueBlue loyalty program

## Step #3. Identify four different drop-off points

The emails were sent one day after a visitor abandoned a flight-booking session. The team identified four pages from which a person could drop-off and receive a triggered message:

- Flight selection - after selecting departure and destination cities in a search for flights, the visitor was given a list of specific flights to choose from
- Seat selection - after choosing flights, visitors were asked to select their seats on this screen
- Ancillary - this page offered additional services such as car rental and hotel rooms in the destination city
- Payment - this page collected the visitor's credit card information and finalized the sale

- Email sent to subscribers

Because the system needed a visitor's email addresses to send a triggered message, the team focused this effort on subscribers to JetBlue's email programs. Any subscriber who started to book a flight but left the site from one of the above pages would receive a triggered message.

## Step #4. Customize the emails' design

The team created four similar email designs based on two attributes of the audience. Here are the two attributes and how they affected each email's appearance:

Attribute #1. Visitor's final destination

If JetBlue's system detected a visitor's intended destination city, then the triggered email mentioned the city in a customized:

- Subject line
- Headline
- Text

If data on the visitor's destination city was unavailable, then the above elements were generalized. In all cases, the top half of the email listed the benefits of flying on JetBlue, and included a "Book Now" button that directed visitors to the airline's booking tool.

## Attribute #2. Loyalty membership status

The bottom half of every email featured information about JetBlue's TrueBlue loyalty program. If the visitor was a member, this portion featured:

- Headline: "The Benefits of TrueBlue"
- Bullet points listing the benefits
- "Learn More" button linked to the TrueBlue page

If the visitor was not a member, then the bottom half featured:

- Bullet points listing the benefits
- "Join now" button linked to the TrueBlue page

One of two headlines:

- "Join TrueBlue and Earn Points on Your Next Flight to [CITY]."
- "Join TrueBlue and Earn Points on Your Next Flight."

Combining these attributes gave the team four types of triggered emails:

- Email #1 - City known, current loyalty member
- Email #2 - City unknown, current loyalty member
- Email #3 - City known, non-loyalty member
- Email #4 - City unknown, non-loyalty member

- Soft sales pitch

Rather than feature a strong offer or discount, the team designed the emails to highlight JetBlue's strong points and encourage people to return to JetBlue's site.

"If you look at the content of the email, we're not really pushing anything. They're pretty simple. It's a gentle reminder to return to JetBlue," Compitello says.

## RESULTS

Compared to JetBlue's standard promotional emails, the triggered emails generate on average:

- 150% higher open rates
- 170% higher clickthrough rates
- 200% higher conversion rates (conversion defined as a sale made from the email)

The emails also generate a 1,640% increase in revenue per email delivered as compared to JetBlue's standard promotional emails.

"It was really important to prove that we're sending small batches of emails to a customer on a targeted and relevant level and we're making X-Y-Z in revenue," Compitello says. "It's been tremendous. As email marketers, it's a difficult job for us to convince everybody that volume is not always the key, and that targeting, relevancy, and the content you put out in your email is much more important than the size of your distribution list.

- Most-relevant email prevails

Of the four triggered emails, the email with the highest performance was sent to visitors whose destination cities were known and who were TrueBlue members," Compitello says.

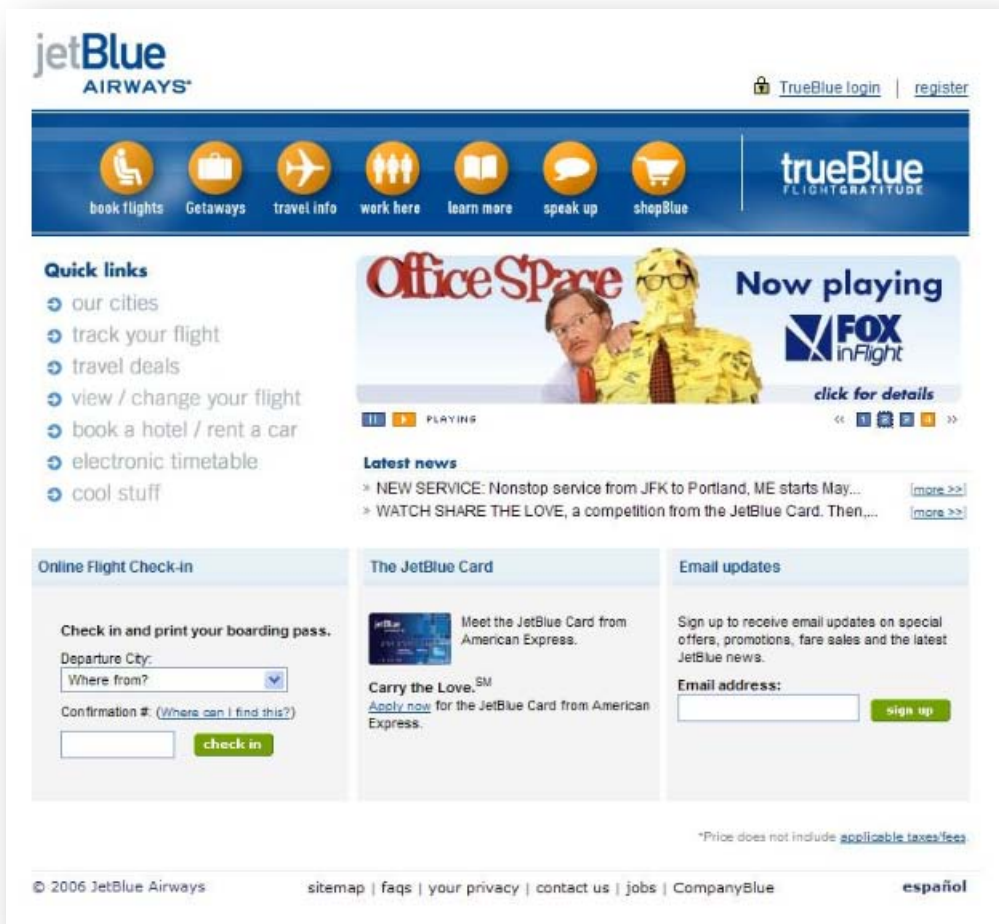


“That makes sense because these are active customers. They're checking their emails. They're part of our loyalty program, and they're interested.”

- Plans to improve the system

“Now that we know how successful a simple email like this is to our customer base, this is where we are going to get more relevant and, I'm assuming, more effective in our communications ... Phase two would be to modify the copy for those drop off points. So, if you drop off the flight page, you're going to have a different email and different copy than if you dropped off on the ancillary page,” Compitello says.

JetBlue's triggered send campaign is just one of many unique case studies we've covered. If you're interested in reading more email marketing case studies and how-to articles, subscribe to the complimentary Email Marketing newsletter.



Visit MarketingSherpa’s library to read more case studies and how-to articles. See how a worldwide events website maintains an alerts program with millions of subscribers, keeps engagement metrics high, and counts on the service to welcome new members to the brand in [“How a triggered alert program maintains 40% open rate, 60% click-to-open rate.”](#)

**SECTION SUMMARY: PRODUCE RELEVANT CONTENT**

Please take a few minutes to complete the assessment for this section.

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1. What are the three factors needed to create relevant content?

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2. Besides creating original content, name two other ways to generate new content.

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3. List at least three types of data.

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4. Give two trend-jacking examples of news topics you could use in your email today.

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*If you were unable to answer any of the above questions, please review the previous sections before moving on.*

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CHAPTER 5 NOTES

CHAPTER 5 NOTES

## CHAPTER 6: DEVELOP (AND KEEP) QUALITY LISTS

CHART: EMAIL LIST GROWTH CONTINUES POSITIVE TREND DURING THE PAST YEAR

Q. Which best describes your organization's email list growth trend for the past 12 months?



Marketers should find the above chart reassuring. The majority of companies surveyed found their email lists slowly growing. Marketers who focus on quick growth may not make it a priority to build long-term relationships with their email subscribers. Yes, having a huge list of customers' email addresses can be beneficial. However, it is only an asset if the subscribers need the solutions your organization provides. The size of the list is secondary to the relevant desires of the shoppers in the database.

The MarketingSherpa *2012 Email Marketing Benchmark Report* found growing and retaining subscribers a top priority for organizations, narrowly beating out delivering highly relevant content. In addition, marketers shared they have the most strategic processes in place for list building and list hygiene maintenance. The intuitive philosophy of "the money is in the list" may have driven more processes to ensure a healthy list of quality and active participation.

This is welcome news, because running a "one-size-fits-all" sweepstakes that drives potential subscribers to single website registration will no longer be successful. Today's subscribers expect brands to be proactive, finding them at locations and times they prefer, all while offering to deliver only content they deem worthy of their time.

Furthermore, the exchange for their valuable email address ought to be easy. There is no short cut to acquiring relevant readers, and this chapter will focus on building and maintaining a *quality* list of email subscribers, never forgetting these subscribers are people and not data points.

## EXCLUSIVITY IS ESSENTIAL

As we all know, marketers today do not have tight control of their brand. It lives and breathes with consumers, in their interactions on channels of their choice. What marketers *can do* is be calculated and discerning in selecting whom they empower to become brand evangelists. Email commonly carries a company's best offer and insider information, so keep it exclusive.

Strive to hold conversations with people willing to collaborate in the brand's success. Seek to build a vibrant tribe who thrive on creating a community of mutually beneficial relationships. Not respecting your core audience in this fashion will have negative consequences on your firm.

## THE GREAT DEBATE

When email communications was in its infancy, many marketers applied the principals of direct mail marketing to their campaigns. The low cost of sending email messages and its trackability drove many organizations to want to quickly grow the channel and add as many members as possible. Nonetheless, as email marketing matured, there was a shift in strategy. We have now transitioned from emphasizing the size of the list to a more targeted list of active subscribers who are enchanted with our brand's content and offer. Rather than seeking rapid growth, marketers are choosing to focus resources on nurturing these relationships with meaningful content to assist the subscriber's progression on the path to purchase.

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*"The game theory pushes us into one of two directions: either be better at pump and dump than anyone else, get your numbers into the millions, outmass those that choose to use mass and always dance at the edge of spam, or..."*

*Relentlessly focus. Prune your message and your list and build a reputation that's worth owning and an audience that cares.*

*Only one of these strategies builds an asset of value."*

– Seth Godin

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## HIGH MAINTANENCE COSTS

Unfortunately, marketers often spend time convincing executives the value of a list is not the size but its quality. Trudging in the trenches, you know that the time spent monitoring unsubscribers and scheming new ways to engage inactive subscribers could be better used to invest in relationships with the business' most valuable customers. And the best way to avert these expenditures is by ensuring only appropriate prospects are on the list before an email marketing campaign is sent.

To make your case, record the accounting cost of the time wasted dealing with dirty lists, from working to remove blacklisting to monitoring delivery statistics. This includes eradicating spam traps, removing unsubscribers and possibly the coordination data across multiple departments. Include the offline time customer service or sales representatives spend following up with subscribers who have recorded soft or hard bounces. Add the opportunity costs of your team and recruited coworkers. With the numbers hopefully on your side, take the data and create an easy-to-understand presentation to draw attention to the considerable costs and how removing these nuisances will benefit the entire organization.

## MANAGE EXISTING RELATIONSHIPS

Let's start by examining current subscribers and ways to retain their loyal membership. As the old adage goes, "a bird in hand is worth two in the bush." It is more important to keep your existing subscribers engaged than to focus on growing new subscribers. It begins with setting clear expectations for the type of information and the delivery frequency to the recipient. As marketers, sometimes our egos lead us to become out of touch with the reality of a situation.

We start thinking we know what the customer "really" wants before they tell us their needs. There isn't anything more important than keeping the promise to deliver exactly what the subscriber requested and *nothing* more. At the core of each communication is a value exchange. The majority of email messages

should contain valuable information in the form of reports, entertaining videos and insightful stories, not endless self-promotion.

## OFFER A PREFERENCE CENTER

To meet the recipient's delivery expectations, the value exchange must be fair. Organizations tend to give more than they receive and invest in the access to future communication with the subscriber. It begins with the opt-in registration page and making the decision on how much information to request.

Based on your company's goals and resources, you may only ask for a name and email address to lessen the angst and increase the number of new subscribers. This puts you in a position to play catch up by either gradually requesting more information or waiting for the opt-in's actions to reveal their intentions. This is where a preference center can hasten the knowledge progression in providing a means for subscribers to tell you a little more about themselves.

We discussed earlier how relevancy was a key factor in effective email campaigns. Marketers can tailor messages to reflect external relevance factors such as the weather, events, and seasonal discounts on their own. What they need help with is identifying an individual's internal relevance motivations. These may include personal interests, demographics, shopping habits and chosen communication channels, specifically mobile device.

Your preference center can mine for specific product categories and message types (e.g., special offers vs. product education). Proceed cautiously. Only ask for information you are going to use. Not acting on cultivated personal information will quickly be viewed as disingenuous behavior and hurt your brand's reputation.

Allowing subscribers to update their own profiles, in addition to empowering them to have some control in the relationship, will relieve the marketing team of this burden to a small portion of the list population. Don't underestimate their desire to be in control. In the early stages of the sales cycle, where you have not completely earned the customer's trust, you want opt-ins to understand they have engaged in a two-way communication channel, not one where your brand is the only one speaking.

The challenge of course lies in encouraging opt-ins to regularly participate. Frequently asking your email members to update their preference will benefit your long-term relationship. A subscriber is not the same person they were when they originally signed up for your newsletter. They may have changed jobs, developed new tastes or even had a baby. Most importantly, you want to keep track of your customer's current email address. Millions of people change their email addresses each month due to various life events. They may have graduated from school, signed up for a new cable service, or changed webmail providers.

Recently added to the list of request is a subscriber's current mobile device. People change their phones and data plans often. This goes beyond asking if they prefer html, SMS or text. Without a standard to render email designs across platforms, it is useful to ask the type of OS they have (Android, iPhone or Windows).

## OPT-DOWN

In your preference center, give customers more options to "opt down" rather than "opting out." The opt-down can include reducing frequency, changing offers types and subject matter topics. Include links to update "follows" and "like" statuses, as your customers may prefer communicating on social media sites like Facebook, LinkedIn or Twitter. The goal is to have conversations on their terms, not yours.

## PAUSE SUBSCRIPTION

The option for a pause in subscription allows the recipient to set the date the email delivery will stop and start up again. This “snooze button” can be set for a week or a month, which is perfect for times when your subscriber goes on vacation or has a big project due over the next few months and wants to keep a clean inbox. Both parties win; the email recipient can better manage their inbox and the sender keeps them on their list. By not sending to an unresponsive subscriber, there is no harm done to the sender’s deliverability reputation and success metrics.

As you can see, your preference center does a lot of the heavy lifting, allowing you to accurately send and segment your contact list. It can also be used to up-sell subscribers and make them aware of additional newsletters, communication options and services you provide. Displaying social media “follow me” buttons and links to your blogs will help expand your digital footprint.

## SEND RE-PERMISSION REQUESTS

Routinely asking a subscriber (especially inactives) to give you re-permission to send email communications is an effective approach to sustaining a list of highly engaged subscribers. Initially, expect your list size to decrease; however, the bounty of higher clickthroughs and deliverability will make it worthwhile.

## INVITE UNSUBSCRIPTIONS

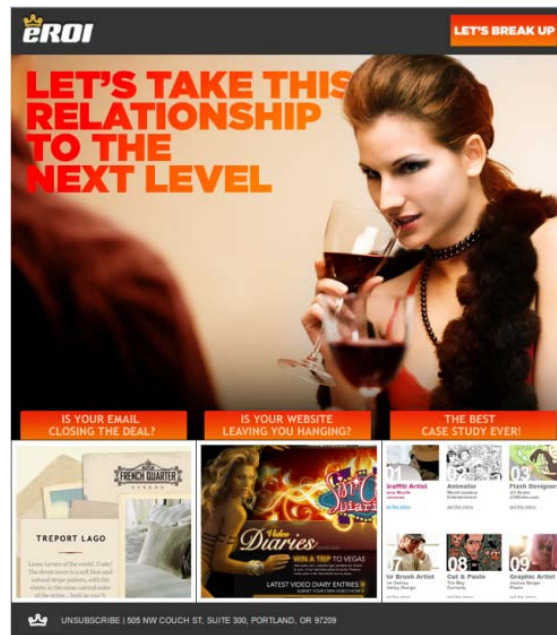
This may sound strange in relation to list building, but we are seeking quality, not quantity. Invite people to unsubscribe often. Remember, an opt-out does not hurt your deliverability reputation, but inactivity or a complaint will.

Don’t hide your unsubscribe link. eROI, an interactive and email marketing agency, takes the idea of relationship building literally in their communications. In this example, they add their edgy personality while quickly seeking a decision.

Notice the unsubscribe button is not only at the bottom of the page, but also prominently displayed in the upper right hand corner giving the recipient the option to “break up.”

Today’s consumers read emails very quickly and will take the path of least resistance when choosing to unsubscribe. Many email recipients (we reported 47% in our *2010 Email Marketing Benchmark Report*) end up clicking the spam button in their email client rather than looking for the unsubscribe link. Unfortunately, clicking the spam button registers as a complaint against your company and hurts your sending reputation with ISPs.

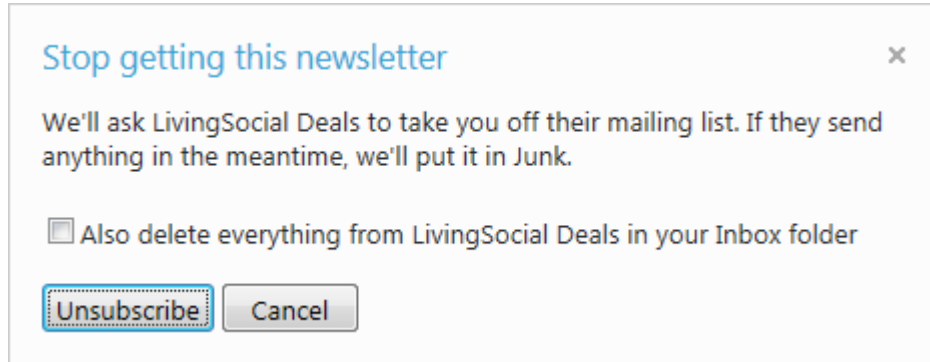
Likewise, Microsoft has declared war on [graymail](#). Microsoft asserts that “75% of email identified as spam by our customers actually turns out to be unwanted graymail that they receive as a result of having signed up on a legitimate website.”





One of the features added to combat graymail means Hotmail will now have a larger role in the unsubscribe process. Hotmail offers their own safe unsubscribe link for users to be removed from a mailing list. Hotmail will then ask the sender to remove the subscriber and send all incoming emails to the junk folder until the task has been completed.

To work smoothly, it is imperative that the sender's unsubscribe link is present and functioning. If not, Hotmail will automatically place future emails in the junk folder. Make sure you test your unsubscribe link regularly to ensure it is in good working order. This development should significantly reduce the amount of false-positive spam reports brands receive from recognized opt-ins who click the spam button.



Similar to Hotmail's objective, make your unsubscribe process just as easy as clicking the spam button. You want the subscriber to leave on amicable terms. A lengthy opt-out process in which an email subscriber must walk through a multi-step process or enter an email address will only frustrate and make it more likely he or she will file a complaint.

In addition, communicate the time when the subscriber's email address will be removed from your database. There is nothing more exasperating than taking the time to unsubscribe and then continuing to receive unwanted emails. On the subject of annoying opt-out operations, the practice of asking readers to re-enter their address to unsubscribe is illogical. The sending organization already has it.

A contrasting strategy to pleading with a reader to stay, or making it painful to unsubscribe, is to entertain the opt-out, leaving them with a positive impression of the brand. A fun example is [Groupon's](#) unsubscribe page, where you are invited to punish the employee Derrick who thought you would enjoy the Groupon emails. If your goal is to keep good relations, be sure to thank the subscriber and let them know you are sorry to see them go.

Like with every break up, you will want to know why the relationship ended. Giving unsubscribers the option to share their reasons will give insight on ways to improve your communications. This should never be a requirement to opt-out and can actually be an exit survey on unsubscribe confirmation page. An accommodating feature is providing a quick drop down menu of popular reasons (e.g., I don't remember signing up) and a comment box to explain additional reasons.

## CASE STUDY: HOW CUTTING A HOUSE LIST 95% HELPED DOUBLE SALES

Case Study ID: # CS31751

Location: MarketingSherpa Member Library

Summary: See how a marketing team took a large list of poor-performing email contacts, re-engaged the list and revamped its email marketing. Find out why cutting the list by more than 95% helped the team eventually double online sales.

### CHALLENGE

When Mark Newman, VP, Marketing and Communications, Indianapolis Symphony Orchestra, joined the team at the performing arts organization in 2008, they had an email database that reached into the tens of thousands of contacts.

However, the list suffered from an unclear strategy, Newman says. The team had relied on a “spray and pray” approach, reaching all contacts with the same emails and managing sends without a schedule. The result was a large list with poor performance.

“Our response rates were very low in relative terms,” Newman says. “We had people who had been receiving email from us for some time, but we weren't very confident in how well they were received.”

This presented a challenge, Newman says. The chronically low metrics undermined tests on subject lines, copy and calls-to-action. The team needed a new baseline to build from.

### CAMPAIGN

Newman and the team decided to launch a re-engagement effort coupled with a new email marketing strategy. They asked every subscriber in the database to declare they wanted to continue receiving emails from the Orchestra and specify the type of content they wanted. Those who did not reply were removed from the database.

Here are the steps the team followed to turn its large, low-performing list into an efficient, high-powered marketing channel:

#### Step #1. Plan new content strategy

The team knew one great way to engage subscribers is to segment them based on their interests and send them relevant content. The team established the following database segments to send separate newsletters:

- Classical
- Pops
- Family
- Happy hour (for young professionals)
- Outdoor summer series
- Yuletide
- Educational and community activities

Newsletters would have similar templates with unique content and subject lines. The team set a schedule to send newsletters every two weeks. Establishing these segments and setting a schedule ensured that subscribers would receive content they wanted on a regular, predictable basis, which the team hoped would keep subscribers more engaged.

## Step #2. Send re-engagement email to most-active subscribers

The team wanted to send an email to all subscribers asking them to opt-in to receive one of the new newsletters. Breaking the process into three phases, Newman felt, would be a good strategy.

First mailed were database's most active subscribers — those who had opted-in, contacted or purchased within the last year. The team sent an email, which included an offer of a free ticket to a performance. It also included:

- Subject Line: "Email never sounded so good with SymphonEmail! Confirm Now!"
- Mention that the newsletter has been redesigned
- List of newsletter benefits
- "Yes" and "no" buttons for recipient to indicate preference

Those who clicked "no" were automatically removed from the team's database. Those who clicked "yes" were brought to an account preferences page, which listed the seven available newsletters they could subscribe to.

After subscribers opted back in, they immediately started to receive the new biweekly newsletter.

### EXAMPLE: INDIANAPOLIS SYMPHONY ORCHESTRA RE-ENGAGEMENT EMAIL



## Step #3. Send re-engagement email to other subscribers

The team planned to send the re-engagement email twice more to reach the remainder of its database.

The second send targeted a portion of subscribers who had not yet received the re-engagement email, as well as those who did not respond to the first. It went out approximately six months after the initial email.

The third and final send targeted the remaining subscribers who had not received the re-engagement email, as well as those subscribers who had not responded to the first or second sends. It went out approximately six months after the second email.

Using this process, the team sent subscribers three emails over the course of 18 months. Those who did not respond were removed from the team's database.

- Warning: Database size drastically cut

This strategy cut approximately 95.9% of the team's database — an enormous cut for any email marketer. Newman was concerned, but he and his team knew they were starting from a solid foundation.

“The reward was we were now getting people who really wanted to get emails from us. These are engaged people,” he says.

#### **Step #4. Respect and grow the list**

The team stuck to the promise it made to subscribers. It delivered targeted content on a consistent, biweekly basis. The additional value the team brought helped the list grow naturally through referrals. They also helped boost subscribers with the following tactics:

- Online sales

Customers buying tickets online are asked for their email addresses and whether they'd like to subscribe to one of the newsletters.

- Ticket giveaways

The team regularly holds contests at festivals and outdoor concerts it participates in. Contestants are asked to fill out an entry slip with their name, contact information and email address.

Winners are often announced via email. After the contest, the team will then send an engagement email to contestants, similar to the one described above, which encourages them to subscribe to one of the newsletters.

- Phone calls

The team uses the phone to build its email list in two ways. First, callers into the box office are often asked if they would like to provide an email address, and subsequently, if they would like to sign up to receive a newsletter.

Second, the team also has outbound callers for fundraising purposes. At the end of calls, these telemarketers also ask for email addresses.

#### **Step #5. Practice good list hygiene**

Consistently delivering targeted content helped keep reengaged subscribers engaged. In addition, the team regularly scrubbed its list to remove duplicate and non-working email addresses.

Non-working email addresses are easily identified by the bounced emails they generate. Duplicate email addresses can easily be found by sorting the database by email address in a spreadsheet. This process can also be automated by some email marketing platforms.

This ensured that the team did not have any dead weight in its database, which would drag down performance metrics and efficiency.

## **RESULTS**

“Our email program paid for itself easily and generated incremental revenue beyond. It's an invaluable asset to us,” Newman says.

Online sales have more than doubled to 35% of all the company's purchases since the re-engagement started. Forty percent of all subscribers have purchased tickets from the Symphony.

While the team initially cut 95.9% of its list size, it has grown the list by more than 500% from that low point. The list is now approximately 24.8% of its size from when the team started — but it is far more responsive, Newman says.

Furthermore, Newman says the program has helped the company's reputation.

“The image of our organization has been enhanced by the fact that we have such a robust campaign in place.”

### - Sample promotion

The team's email list is now a channel through which it can consistently promote shows and sell tickets. A recent discount promotion sent in the team's Pops newsletter for a series of Wayne Brady shows offered two floor tickets for approximately 20% off. The effort captured about a .4% conversion rate.

“On its own, that doesn't sound like a big number. But if you compare it to the costs we incurred from sending the email and the amount of time we invested [there is a huge return],” Newman says.

## DEDICATE EFFORTS TO BRING IN NEW SUBSCRIBERS

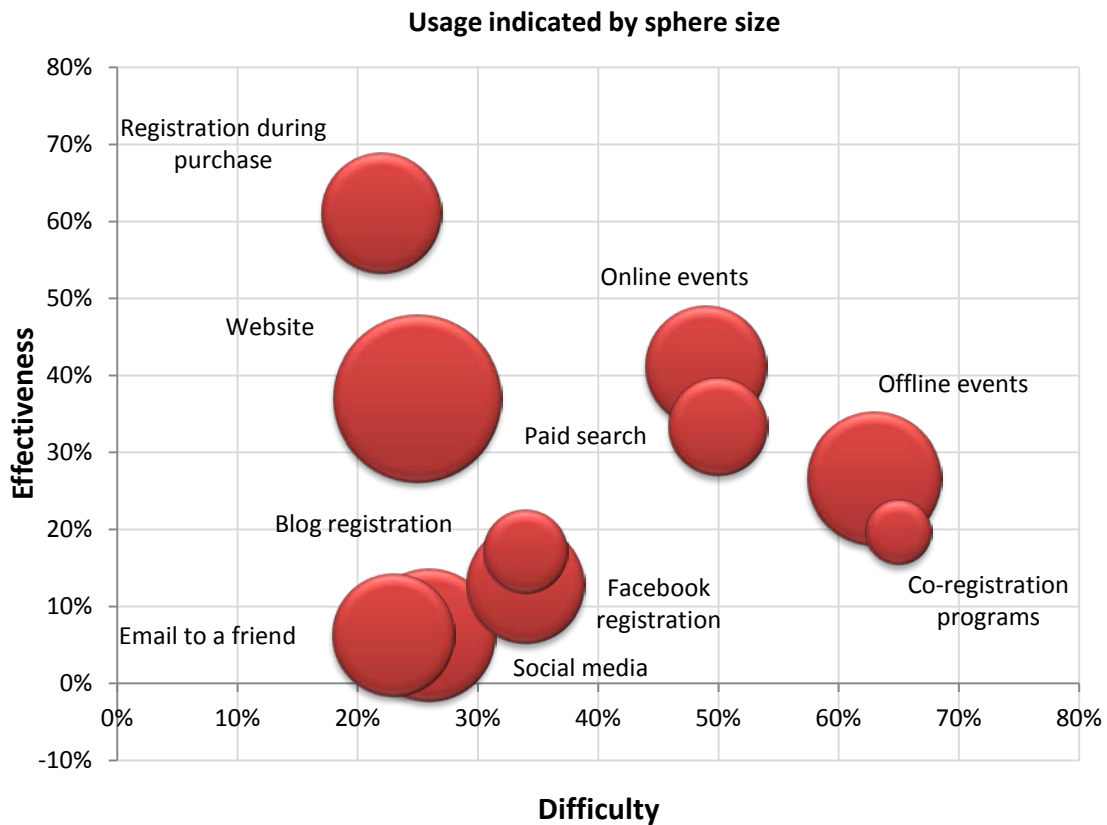
The Email Experience Council reports that each year corporations lose roughly one-third of their email addresses. No matter how healthy your list and how relevant your communications are, there is a constant need to add new subscribers.

A vibrant and targeted email database can be one of your company’s biggest assets. An active network of names enables you to have conversations with your core audience at critical moments for your business, from new product announcements to crisis communications.

### OPT-IN TACTICS

There are numerous tactics available to grow your marketing lists with different levels of effectiveness. The most challenging for email marketers can be making it a habit to ask customers and prospects to opt in. We encourage you to ask all the time. Ask in your email signature, business card, sales collateral, websites, on products or at the register. The chart below reports a wide range of traditional opt-in tactics by their effectiveness, difficulty to implement and adoption. Registration during purchase recognized as most effective email list growth tactic at 61%.

CHART: THREE DIMENSIONS OF LIST GROWTH TACTICS - EFFECTIVENESS, DIFFICULTY AND USE



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

The first step is to audit all of the possible touch points your brand has with prospects and customers. Start with your marketing, customer service and sales departments. Move on to finance, IT and affiliate companies in your supply chain or industry. To kick off the brainstorming, here are a few ideas.

## ONLINE

### Blogs

A well-written, frequently updated blog can attract significant amounts of inbound traffic. Search engine optimization and social sharing cause potential subscribers to first landing on your blog pages instead of your homepage. Make sure you have a way to capture email addresses from blog visitors who might click through to other sections of your website. Placing an opt-in registration link on every page of your blog will ensure the visitor sees the offer no matter which post they choose to read.

Although it's standard practice to use RSS syndication to provide automatic updates of blog content, RSS readers remain a niche technology. However, many feed management systems, such as Feedblitz and Google's Feedburner, allow subscribers to receive updates by email. This option may appeal to visitors who want to follow your blog and are not comfortable with RSS feeds.

### Forward to a friend

The forward-to-a-friend tactic has a lower effectiveness rating than other tactics, but it may be the most sincere manner in which to grow your list. You cannot ask for a better endorsement than when a recipient feels your content is so valuable they feel compelled to share with a friend. Make it easy to find your "forward-to-a-friend" button. Adding a refer-a-friend incentive may nudge them to spread the word if they did not immediately have the urge to share. Please be reminded to follow the CAN-SPAM requirements for refer-a-friend email with an incentive. It requires the forwarding email has an opt-out mechanism.

### Mobile

#### *Short Messaging Service (SMS)*

Statistics show a teenager, on average, texts 3,000 messages per month, and nearly 200,000 text messages are now sent every second. The widespread adoption of texting has enabled marketers to use text applications to recruit opt-ins. You may have seen these requests on billboards, bus wraps or even on [airplane napkins](#). The simplicity of the action required with limitless locations has made this tactic very effective. When designing your strategy, consider optimizing it for mobile devices and ensure subscribers can opt-out just as easily as they did opting in through a simple text.

#### *Quick Response code (QR code)*



The next evolution that makes email enrollment even easier is the Quick Response Code. Commonly referred to as a QR code, this two-dimensional bar code can be read by your smartphone. What this means is the consumer can immediately take a real-world experience and link to a wealth of information via a smartphone. Jumping to the Internet is faster and easier with QR codes versus trying to type in an intricate URL. Ideally, the URL should take you to a mobile-optimized webpage.

You may have noticed them on movie posters, magazine ads, trade show booths or on the hood of NASCAR driver Danica Patrick's racecar. For example, download one of the many QR code apps available for Apple and Android phones, scan the image on the left and it watch as it takes you directly to MarketingSherpa's landing page to register for our newsletter.

The codes are easy to generate. A popular free service is [qrcode.kaywa.com](http://qrcode.kaywa.com). Once created, you can add them to any of your existing marketing vehicles. Application ideas include business cards, products, in-store displays or even promotional temporary tattoos.

In addition, ESPs such as Constant Contact and Mail Chimp have created email coupon applications with QR codes. The apps allow you to create a QR codes and send it to subscribers. The recipient can then print the coupon or display it on their smartphones at the retail outlet. There, the storeowner can redeem and track the coupons.

We have also seen QR codes with text options packaged together, leaving the prospective buyer to choose his or her preference. Either way, do not forget to explicitly set clear expectations for content and delivery.

#### *In-app advertisements*

The growth of mobile applications has stirred interest of in-app advertising and for good reason. Appssavvy's research found that in-app ads performed 11 times better than traditional banner ads and only slightly behind paid search at 12x. One reason may be the current state of the mobile Web. Advertisements within apps can rotate without needing the screen to refresh, a requirement on the mobile Web.

In-app ads success provides a new acquisition opportunity for marketers to trial. Involving outside vendors like Pontiflex, marketers can create positive mobile experience never taking the user away from the app. The process is initiated when a mobile user launches a third-party app. Before the launch is completed, a screen opens offering relevant newsletters registration.

No matter if the mobile user chooses to fill out the form or not, the app launches as usual. Email marketers appreciate the fact that under this arrangement they only pay only for those mobile users who completed the opt-in process.

#### **Social Media**

##### *Share-With-Your-Network (SWYN) buttons*

Earlier in this book, we discussed one of the benefits for integrating social media with email marketing was the growth in email lists. While Facebook and Twitter are the dominant social sharing buttons used in emails, looking at your audience and subject matter will give you many more targeted options. As you might expect, our research has shown that LinkedIn is added in 75% of the B2B companies using SWYN buttons.

Bookmarking tools such as Digg, StumbleUpon and Reddit can make your emails easier to find, share across the Web and entice consumers to join your mailing list. Most ESPs offer a tool as part of their application to add these buttons. On the other hand, you can drop in some code provided by the individual social media sites or aggregator tools like AddThis into your email creative.

Start with no more than three buttons displayed and then perform tests on their effectiveness. Too many buttons can overwhelm the reader and paralyze them in the sharing process. Keep in mind, to maximize the effectiveness of your SWYN buttons, prominently display them in your emails. Encourage subscribers to share and communicate what is in it for them.

Also, optimize for different viewing preferences. For mobile, add space around the SWYN buttons to make them easier to touch, and for the desktop, use HTML code so that if the images are blocked, the subscriber can still share your content.

##### *Facebook pages*

With more than 800 million users, Facebook is a behemoth not only in social media but the Web overall. With the amount of traffic inside Facebook, it is a good idea to register subscribers on your company's fan page. Many ESPs such as Constant Contact make it easy to add. In the past, marketers used Facebook's Static Facebook Markup Language (FBML) code to do it themselves.



Static FBML is a Facebook Platform application developed to allow fan page administrators to add functionality to their fan pages using JavaScript, CSS, HTML and FBML (Facebook Markup Language). In early 2011, Facebook redesigned their brand page, removed tabs from the top, and placed links to the left underneath photos. It represented a technological shift from FBML to iFrames code. This makeover allows marketers to generate more engagement with their fans as the frames will act more like webpages.

In addition, Facebook Places, with its buyout of Gowalla, has its eyes set on competing with Foursquare. These social check-in networks offer a fresh approach to draw potential email subscribers to register.

### Social Games

Another route is to build your own game similar to the successful “Farmville” and “Frontierville.” That is exactly what the NBA’s Boston Celtics did when it created a Facebook game called “3-Point Play.” The game consists of fans predicting the statistics of three players before each regular season Celtics game, and receives points based on the accuracy of their predictions.

The game was conceived in 2009, when the Celtics had 400,000 Facebook fans but no collected data on them. They thought the game would be a fun way to involve fans and get them into their database. The registration requires the fan to share their date of birth and email address. The page includes a check box to receive special offers via email. The first year the Celtics had 50,000 unique fans sign up.



### Transactional email

As we mentioned earlier, transactional emails on average have some of the highest open and clickthrough rates. Adding an opt-in link to your statements, bills and customer service confirmations will enable you to reach customers that may not have signed up to receive your email communications.

For example, the [New York Public Library](http://www.nypl.org) was seeking to grow their subscriber list for their e-newsletter. Current opt-in sources included publications, social media and website. They wanted to expand their opt-in offers and contemplated several options including door clings, SMS and partnerships. The team decided to experiment with transactional courtesy email messages. The sentence “Get the latest NYPL news and events. Sign up for our newsletter at <http://ow.ly/22Ro3>” was added to their courtesy notices. After one month, unique visits to the sign-up landing page increased 165% and subscriber opt-ins increased 120%.

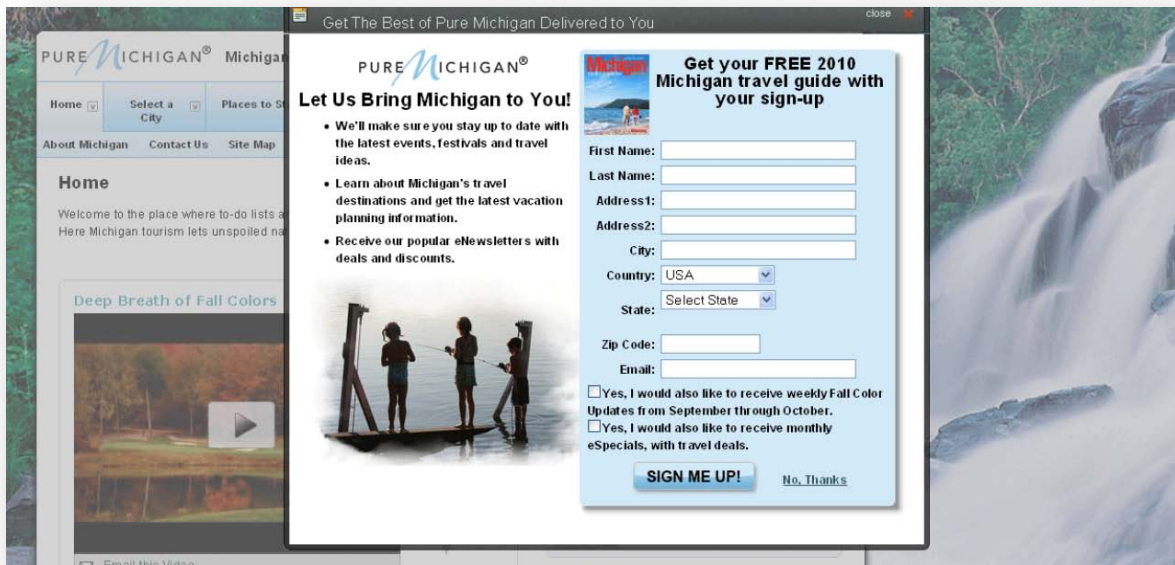
### Webinars

Webinars have become a great source of lead generation, especially for B2B companies. During the registration or at the close of the webinar you may offer the attendee a chance to opt-in to your newsletter. Similar to trade show leads, these attendees can be contacted by your sales force and given the opportunity to enroll for your email communications. If you choose to email the offer, only send it once.

## Website

Your website is your marketing hub and the most obvious choice to place an email registration box. Our research found it to be the most popular email acquisition tactic organizations are exploiting. Frequently, the opt-in request displays prominently in the upper right-hand corner of the homepage or close to the navigation bar. Test your signup placement to reach your registration potential. The remaining pages of your site should also contain an opt-in link. You can't be sure where consumers are entering your site. Keep the placement in a static location. It will make the signup box easy to find and your Web design clean.

Some marketers will resist due to its "in-your-face style," but another strategy to test is the use of pop-up or popover opt-in request. These sign-up forms do not send you to another window; rather a box appears as an overlay moving across the page. Frequently the page background fades, and the box is highlighted. Read how the Michigan Tourism used a interstitial overlay screen to present their newsletter/guidebook offer to first-time site visitors and increased opt-in registrations by 2,000% in our case study titled "[New Opt-in Tactics and Welcome Series Deliver Big Lift in Subscribers, Engagement.](#)"

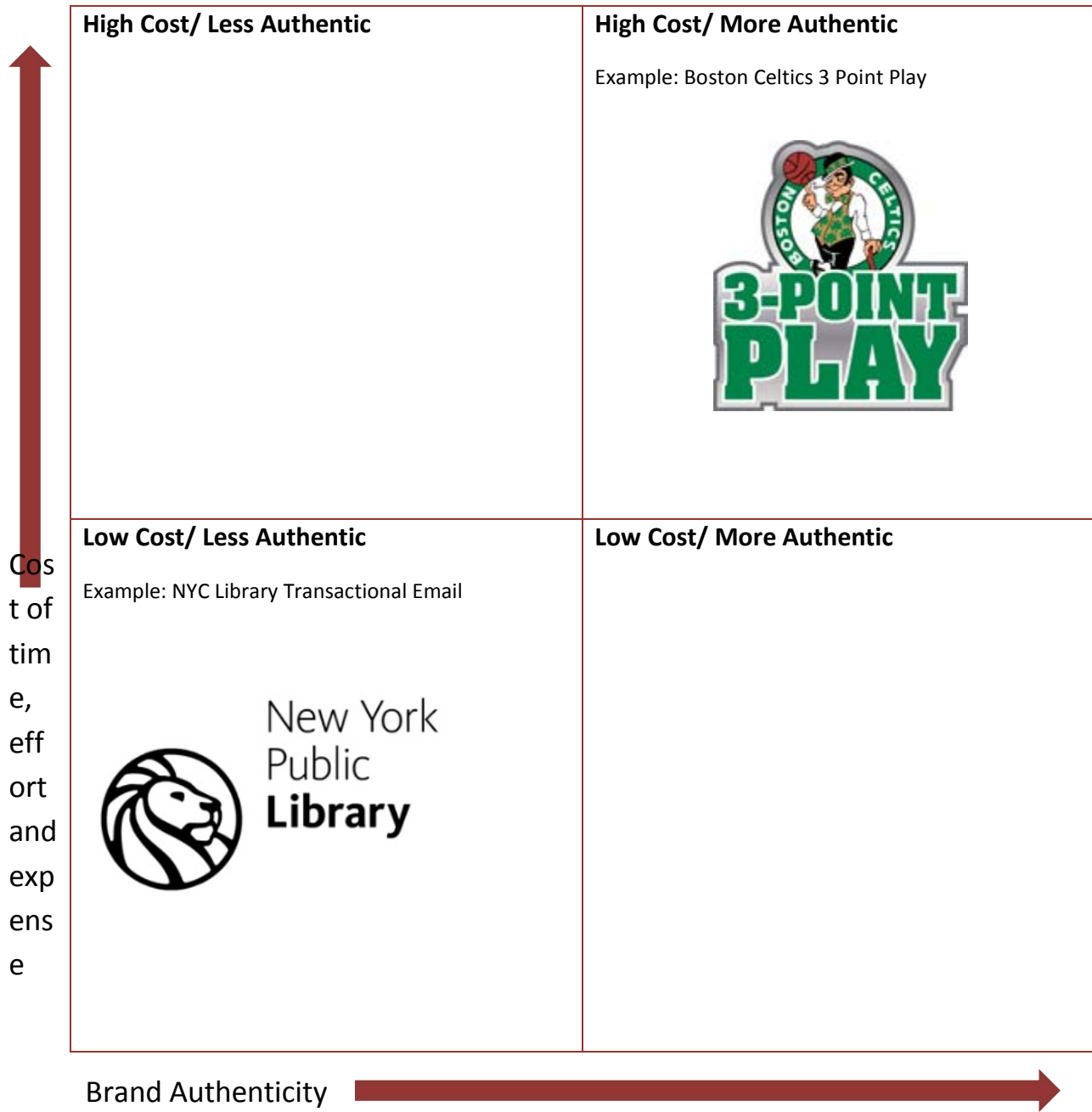


Behavior-based triggered requests can be rewarding. After a customer has taken a particular action, follow it with a landing page, pop-up ads or screen overlay that invites them to register. Effective choices may include adding a registration form to existing service pages like your shopping cart or store locator pages. Also consider the length of time a visitor spends on your site, for example place a sign-up form at the end of a long article.

## Viral games and entertainment

In today's social sharing environment, popular games and videos can quickly go viral and effectively help build your email database. The magnetic content attracts visitors you might not have otherwise drawn. In the case study, "[Personalized Audio/Video Flash App Grows List 10%: How an NHL Team Capitalized on Playoff Excitement](#)," learn how the Washington Capitals successfully used this approach.

WORKSHEET: PLOT NEW OPT-IN TACTICS



## HOW-TO: HOW TO USE SMS AND RELEVANT CONTENT TO ADD OPT-INS

How-To ID: HOW31811

Location: MarketingSherpa Member Library

Summary: See how Scotts Miracle-Gro combined print pamphlets, SMS short codes, sports marketing and email to add more subscribers. Of people who requested content, 40% also subscribed.

Scotts Miracle-Gro announced a multi-year partnership in early 2010 with Major League Baseball, making the consumer lawn and garden brand the official lawn care company of American's pastime.

“There is a huge intersection in people who follow baseball and people who do their own lawn care,” says Keri Butler, Director, Public Relations, Scotts Miracle-Gro.

Scotts' marketing team wanted to maximize the value of its new partnership and test new marketing ideas. The team crafted a campaign that gave fans in stadiums free lawn care guides that include SMS short codes to request another guide or sign up for Scotts' “Lawn Care Update” email newsletter.

“About 40% of those people who text in to get the [lawn care] guide also requested to be part of the email service,” says Mindi Staley, Senior Specialist, Interactive Marketing, Scotts Miracle-Gro. “It was a big learning experience because it was really the first effort. Now we have a baseline to go off of.”

Here are the six steps the team followed to design the campaign:

### **Step #1. Work from an established partnership**

In addition to a partnership with MLB, Scotts established sponsorship agreements with eight teams, including the Boston Red Sox and the Chicago Cubs, which granted in-stadium exposure for its marketing teams.

The amount of coordination required for this campaign would have been cumbersome for a one-off effort. However, by building it on a foundation of established partnerships, the team ensured that the necessary lines of communication were familiar and well-established across organizations.

Other benefits of Scotts' partnerships included:

- Ability to sell grass seed varieties labeled as those used in specific ballparks
- Use of team and MLB logos in marketing and products
- Sponsorship of a premiere attraction at the MLB's All-Star FanFest
- And other benefits

### **Step #2. Tie free content to email program**

Scotts' main email marketing newsletter helps customers use lawn and garden products more effectively. Since not all climates are alike, subscribers receive information targeted by region and interest. Emails feature seasonal reminders for seeding and fertilizing, care schedules, answers to frequently asked questions, and more.

For this campaign, the team created high-quality print pamphlets that offered consumers regional-specific lawn care information, as well as:

- Product images
- Coupon for \$1 off a Scotts purchase
- Baseball team's logo
- An SMS short code to request another copy or sign up for Scotts' email newsletter

The team intended to distribute the pamphlets — called “Groundskeeper Guides” — at baseball games across the country. Each was localized for the region and designed to be small enough to fold and fit into a fan's pocket.

- Incorporate partnership benefits

The pamphlets featured relevant team logos, and most importantly, lawn care tips directly from each ballpark's grounds keeper. These details further increased the pamphlets' relevance to the fans.

### **Step #3. Enable content requests via SMS**

SMS messages are one of the most popular mobile features in the U.S. with 72% of users sending them, according to Pew Research Center. Scotts wanted to integrate this widely-used technology into the campaign.

By texting a keyword such as “baseball” or “guide” to the pamphlet's provided short code, fans could request an additional copy of the pamphlet be mailed to them (not via email). The SMS message they received in response:

“Thx 4 requesting ur free groundskeeper's guide! Reply ball space email address (ex:ball mlb@mlb.com) & b emailed a link.Txt H 4 help. Std rates apply”

After responding, fans received an email with a link to a landing page (see creative samples below). Email subject line: “Your Groundskeeper's Guide Request is Here”

- Getting an SMS Short Code

Short codes, also called Common Short Codes (CSCs), are typically five or six digits long, which makes them easier for consumers to remember and dial than standard telephone numbers.

You can obtain a short code from an SMS service provider or you can lease them directly from the Common Short Code Administration (CSCA). The CSCA leases codes on a three-, six- or 12-month basis. The fee is a non-refundable \$1,000 per month for “select” codes and \$500 per month for random codes (see links below).

### **Step #4. Request opt-ins on landing page**

The landing page included a simple form to accept fans' mailing addresses. The page's design matched that of the email (see creative samples), and also asked fans if they wanted to opt-in to Scotts' email newsletter:

“Would you like to receive promotional offers and tips sent right to your inbox monthly through the Scotts Lawn Care Update?”

“We wanted to make sure we were getting people onto that list who wanted to opt in and not just getting everyone who wanted a groundskeeper guide,” says Staley. “This way the consumers who really want [the newsletter] get it, and our list is more engaged.”

### **Step #5. Also enable newsletter opt-ins via SMS**

The team also allowed fans to text keywords such as “Email” to the short code to sign up for Scotts' email newsletter. After texting the correct keyword, fans received the following SMS message:

“Thx 4 ur interest in Scotts Lawn Care monthly email. Reply LAWN [space] email address (ex:LAWN mlb@mlb.com) 2 complete sign up. H help Std rates apply”

After following the instructions, fans were added to Scotts' email database.

**Step #6. Distribute to trained sports marketing teams**

The team launched this effort at each of the eight stadiums with which it had partnerships. Scotts' sports marketing teams and regional representative were on hand to distribute guides as fans entered the stadiums, and also to put them in the games' programs.

"We were not handing cartons of these to the [baseball] teams and saying 'give these out.' We were giving them out," Butler says.

Overall, the marketing teams did not follow a universal calendar to issue the guides except during major baseball events, such as Opening Day, the All-Star Break, and the World Series. The number of dates the brochures were issued varied across stadiums.



## CASE STUDY: SIGN-UP AD CAMPAIGN INCREASES EMAIL DATABASE 300% AMONG TARGET AUDIENCE

Case Study ID: #CS32039:

Location: MarketingSherpa Member Library

Summary: This case study examines a customized children's book publisher and how it used mobile app advertising to quadruple its email database while reaching its desired market segment with a continually optimized campaign

### CHALLENGE

Young companies have many priorities, and among the top is building a customer base. You may have the greatest product or service out there, but if you can't find that initial group of customers to grow from, it's hard to become successful.

Paper Hat Press was a fledgling company with an interesting product, personalized children's books, and an experienced team of writers, illustrators and producers creating those books. The company also had a clear primary target market — mothers.

Because the product was made on demand and personalized for each child, selling through retail locations was not an easy, or ideal, solution. Early on, the company determined direct-to-consumer was going to be the focus of its marketing efforts.

Find out how Paper Hat Press used mobile advertising to quadruple its email database with opt-in sign-ups and reach its desired market segment.

### CAMPAIGN

Because the buying process for its product was interactive, the company understood it needed to develop a relationship with each customer.

Paper Hat Press customers provide the company with information to personalize each book:

- The name of the child
- Their favorite food
- Their favorite toy
- Other similar personal details

#### Step #1. Go to your target market

Paper Hat Press had engaged in marketing across a variety of channels — trade shows, PR, email and social media — and through these efforts learned that its customers could also be found via mobile marketing.

Manish Naik, co-founder and CEO, Paper Hat Press, said, “We thought it would be a good idea to at least try and tap into that market and reach out to the mothers that have access to these sort of mobile platforms.”

Mobile marketing offered Paper Hat Press two important features: it allowed them to target their ideal customer (mothers), and because the channel is interactive, the company could actually use mobile platforms to complete sales.

#### Step #2. Build a relationship with the customer

Paper Hat Press found its most valued target segment was a repeat customer.

“We had a lot of customers who were making repeat purchases,” Naik stated.

He added the first purchase was typically for the customer's child, but “then they went on and bought it (the personalized book) for maybe their sister or brother's child, and so on.”

With this knowledge, Naik said an important marketing goal was to cultivate a relationship with its target market and have more than a “one-time transaction” with them.

He said Paper Hat Press expects to develop new products and wanted to create and maintain relationships with its customers. To do so meant having access to their email addresses for a database and knowledge about where and how these customers were opting-in to the relationship.

### **Step #3. Use the mobile channel to drive relevant list building**

There are a number of ways to reach potential customers on the mobile channel. You can create an app and drive traffic to that app for customer interaction. There is also third-party in-app advertising, such as banner and interstitial ads.

Paper Hat Press wanted to reach its target market on the mobile channel to accomplish its marketing goals of reaching a specific target audience and developing an ongoing relationship with that audience. However, the company wanted to do more than grab traffic through its own app or traditional third-party in-app mobile ads.

The solution was another in-app advertising platform, mobile sign-up ads. Unlike in-app banner or interstitial ads, sign-up ads wouldn't take the mobile user away from the third-party app:

- A mobile user launches a third-party app
- Before the app fully launches, the user is presented a screen to sign up for relevant lists
- Whether or not any lists are signed-up for, the app launches as normal

These ads allowed Paper Hat Press to engage with its audience on the mobile channel while collecting contact information in a very transparent opt-in manner to continue that relationship.

Mobile users aren't required to completely leave their chosen app to interact with Paper Hat Press, and Paper Hat is able to grow its list with relevant and opted-in members.

### **Step #4. Plan and deploy the mobile ad**

Paper Hat Press decided to offer a discount in the mobile ads ranging from 10 to 20% off a book order as an incentive to help boost user sign-ups.

Because the target audience was potentially found in every third-party mobile app category, the idea was to start the effort with a wide range of ad placement across the entire spectrum of apps, including entertainment, games, health and more.

Once the ad was designed and the initial placement strategy in place, all that was left was to actually deploy the mobile sign-up ad.

The process began when someone loaded a mobile application. They were presented with a screen titled, “Deals and Offers from our Partners,” with three ads listed below the title. In Paper Hat Press's case, the ad opened with, “Create a custom book for your child,” with body text including the discount offer.



If the mobile user chose the Paper Hat Press ad, they were then taken to a sign-up page asking for:

- First name
- Last name
- Email address
- ZIP code

The page included a clearly marked opt-in “complete” call-to-action button and a “No Thanks” option if the mobile user didn't want to sign up for the deal.

Once the submission was finished and the mobile user went on to their app, Paper Hat Press was sent the contact information for the prospective customer who clicked the “complete” button, and the prospect was sent an auto-response with a code to claim the discount.

This process separates mobile sign-up ads from mobile clickthrough ads because the entire process does not take the mobile user away from their chosen app except to complete the sign-up. With clickthrough ads, mobile users are taken to landing pages or other online properties away from the chosen app.

Naik said he liked the entire process because it provides Paper Hat Press access to a potential customer who has clearly opted-in to the offer in the ad.

“When they have this kind of an opt-in, there is a high probability that the person is a parent of a child or know somebody that they would like to buy such a book for, so it's extremely targeted,” he added.

#### **Step #5. Optimize the effort to improve ad targeting**

One very important aspect of the entire campaign for Paper Hat Press was optimizing the effort to seek out its target audience of mothers.

Although the initial ad placement went to a full range of mobile apps, the campaign was continually optimized based on response rates from the targeted segment. Over time the mobile ads began appearing on the best-performing mobile app categories.

#### **RESULTS**

Going into this mobile advertising effort, Paper Hat Press had three main goals: keep costs down, reach its desired market segment, and increase its email database to begin creating relationships with that market segment.

The company was able to control costs by only paying for qualified, new sign-ups. And it was pleased with the very transparent 100% opt-in aspect of the sign-up process. The effort resulted in a quadrupled email database, reaching 13,597 members. Paper Hat Press was also able to learn more about the mobile app usage of its target segment of mothers.

## CASE STUDY: HOW KODAK ADDED 33% MORE EMAIL SUBSCRIBERS AND 53% MORE YOUTUBE FANS

Case Study ID: # CS32056:

Location: MarketingSherpa Member Library

Summary: See how a B2B team at Kodak overhauled its capture page, added more calls-to-action, and updated its welcome series to grab 33% more email subscribers. Find out how the team integrated its social media channels and grew its audiences there, too.

### CHALLENGE

Every email marketer is challenged to grow lists. Alyson Shurtliff, Internet Marketing Manager, Entertainment Imaging at Eastman Kodak, was no different. Her team needed to boost the audiences for its email and social media marketing programs.

“It became important to us to cross-populate and to integrate these channels with one another ... Our objective was to drive high-quality and a high quantity of subscribers to all our channels,” Shurtliff says.

But the team did not want to rent lists or spend a fortune on advertising. The Entertainment Imaging team at Kodak serves the motion picture and television industry, and it needed to grow its lists with the resources it had on hand.

### CAMPAIGN

The team spent two weeks auditing its email capture forms and opt-in requests. It identified how current pages could be improved and where opt-in requests could be added.

Here are the steps the team took after the research:

#### Step #1. Update email capture page

The team first improved its email registration page. This ensured the page would make the most of traffic generated by the team's later efforts and would not deflect potential subscribers.

The older registration page was a blank slate, allowing the team to build up a stronger performer. The team used the following best practices to build the new page:

- Clear value proposition - The page's headline, “Stay connected,” and sub-headline emphasized that subscribers would receive information on the latest industry opinions, news and events by signing up.
- Set clear expectations - The page displayed three examples of emails subscribers would receive and mentioned the emails arrived “every month or two.” This information told subscribers what they would receive rather than making them guess (which can lead to poor engagement rates).
- Beneficial button - Rather than the typical “submit” button, the team used a word that emphasized the benefit of filling out the form: “subscribe.”
- Remove unnecessary fields - The team stopped requesting the cities and addresses of subscribers because it never used the information in the email program and did not plan to. Requesting these items slowed visitors and likely undermined conversion rates, so the team removed them.
- Provide privacy policy - The team linked to its privacy policy on the new page within the following text: “We take your privacy seriously. When you share your information, we do not share it with others.” This statement was designed to ease any concerns subscribers may have about providing their information for yet another email program.

- Identify key segments

Film students are an important segment in Kodak's database. The team helps identify the group on this page by asking "what is your primary job function?" with an option for "Student/Grad Student." When this option is selected, the page reveals another field for the student's estimated graduation date.

"[The date] allows us to keep track of them better and to follow them as they move from the student segment into the emerging filmmaker segment, because their level of needs will change as they move up the chain," Shurtliff says.

**Step #2. Add more opt-in requests**

With the form now improved, the team needed to get it in front of a relevant audience and encourage registrations. Here are several places the team called attention to its email program and asked visitors to sign up:

Follow-us page - The team created this page to list its email programs and social media profiles, including its Twitter feed and YouTube channel. The team links to this page from the site's "about us" page and several other areas described below.

Homepage and navigation - The Kodak Cinema and Television homepage includes small buttons to follow the company in social networks, contact it via telephone, and sign up for its email programs. A link to the "follow-us" page is also included under the "about us" tab in the site's top navigation. A link to "find us on Facebook" is included in the site's footer.

Education section - Students are a key group, so the site provides ample opportunities in its "education" section for visitors to join the database. Links to the "follow us" page are included in the main page of this section, as well as on sub-pages.

Blog - Kodak's "The Storyboard" blog includes an opt-in request on its homepage, as well as widgets displaying the team's latest Facebook fans and Twitter updates.

- Relevant audiences only

The team also has a "text to sign up" program for industry events. Attendees can subscribe to Kodak's emails by sending an SMS text of their email address to a short code provided on posters at the event. Furthermore, the team has an email registration form on its Facebook profile (more on that in a moment).

While it might seem the team asks everyone in the world to join its program, it limited its opt-in requests to a relevant audience. The team did not launch a national ad campaign, for instance, but instead added calls-to-action across its website and blog. This ensured the database added relevant subscribers who were interested in the team's content, and not just anyone.

**Step #3. Add email capture form to Facebook**

Kodak created a customized Facebook tab to offer visitors a chance to join its email program. The tab is comparable to a small landing page. It mentions the email program's value proposition and requests visitors' information.

Visitors do not have to leave Facebook to sign up; they can register directly on this page. (Send your resident developer to the "useful links" section at the end of this article to get started on your custom Facebook tab.)

- Ad campaign

The team ran a small-budget Facebook ads campaign to drive traffic to its profile. By making this capture form the welcome screen for all visitors, the ad drove traffic to the form by default.

- Incorporate other channels

Kodak's Facebook page includes tabs that display its YouTube videos and Twitter messages. This step is another of the many small ways the team integrates these channels.

**Step #4. Overhaul triggered welcome emails**

A welcome email is a great tool for:

- Reminding subscribers that they signed up
- Continuing to set their expectations
- Preventing them from ignoring your emails or clicking “junk”

The team depended on its older triggered welcome email for too long, Alyson felt.

“It did not reflect current branding, and we didn't have our social networks when that version had been created. We really wanted to freshen it up,” she says.

The team scrapped the older email in place of a two-message series:

- Welcome email #1

New subscribers immediately receive this message after signing up. It includes the same header and logo as the team's website, which helps remind subscribers that they signed up. The message also emphasizes that subscribers will “continue to stay on top of the world of film and never miss a beat,” which reiterates the program's value.

The email includes a button to visit a page for Kodak's mobile apps, as well as links to connect with the brand on Facebook, Twitter and YouTube.

- Welcome email #2

This second message is delivered 14 days after the first and emphasizes “why film remains the gold standard for motion capture.” The email links to a film clip on YouTube, additional information, and a form to contact a Kodak sales rep. Links are also included to share the content on Facebook or connect with the brand on the network.



**Step #5. Send “email invitations” to connect**

The welcome emails encouraged new subscribers to connect with the brand on a social network, but they did not reach the team's older subscribers. Not wanting to leave them out, the team launched two email campaigns that encouraged this group to connect.

For example, one email encouraged subscribers to subscribe to Kodak's Shoot Film YouTube channel. The email included:

- Headline: "Keep up with the world of film today"
- Three video screenshots and descriptions
- Calls-to-action to visit the channel and subscribe

These calls-to-action were not stuffed at the end of a newsletter or tacked onto another message. They were the focus of a dedicated email, which gave them much more impact.

## RESULTS

"We are very pleased with our results. Some of [these tactics] we have recently implemented and we are still collecting the data, but we are very happy with the way the results are trending," Shurtliff says.

Since launch earlier this year, the team achieved:

- 33% increase in email subscribers
- 143% increase in Twitter followers
- 53% increase in YouTube subscribers
- 4% increase in Facebook fans

Kodak Motion Picture Film launched its Twitter profile shortly before this campaign, which explains the large jump in followers. Conversely, the team has been active in Facebook for years, making large percentage gains harder to achieve among an audience of more than 22,000 fans.

These results are only the beginning, the team says. Much of this campaign focused on setting up the architecture necessary to drive future growth. The team can now focus on increasing traffic into this architecture to further build its lists.

## OFFLINE

### **Customer service**

Tele-prospecting and customer service teams can routinely ask for opt-ins during their daily conversations. Adding “ask for email opt-in” as part of the qualifying process along with a script of clearly defining the expectations of subject matter and delivery times can make this request easy.

### **In-Store**

A cost-effective way to garner new subscribers is to ask them to opt in while they visit your retail store, restaurant, hotel, stadium, or satellite office. There is a wide variety of promotions to put into service. We have even heard public address announcements and seen in-store television messages.

For those retailers who distribute private label consumer goods, opt-in offers are possible on the products themselves. CPG manufacturers have successfully used under-the-cap sweepstakes to enroll new subscribers. You may find opt-in messages placed on products to have a higher recall. Consumers bring a product home and pick it up several times before tossing it into the recycling bin.

During the holiday season, you may have noticed more retail staff armed with smartphones and tablets to assist in researching product availability and match pricing. The time spent with the customers could also be used to invite them to subscribe to daily deal emails.

### **Out-of-home advertising**

Opt-in text message and QR codes enable you to take your email programs to the street. Add these codes to empower your existing taxicab, bus shelter and building advertisements with a definitive call-to-action.

MarketingSherpa’s Editor, Adam T. Sutton uncovered a unique method for soliciting subscribers on a Delta flight from Memphis to Seattle. While poking through the [touchscreen personal television](#) at his seat, he noticed a request from Delta for his email address.

### **Printed collateral**

Any of the printed pieces you are currently using to connect with customers add a URL address or QR code to your opt-in landing page. This may include brochures, business cards, catalog bind-in cards, coupons, postcards, publications, statements and receipts.

### **Trade shows and conferences**

Trade shows and corporate events can be time consuming and resource draining endeavors. With so much invested, marketers want to get the most out of the leads generated and convert them to revenue. Be careful not to assume just because an attendee gave you a business card or allowed you to scan their badge means you have the right to add them to your email list. It is best practice to follow up with them once, just as they would expect a call from a salesperson. Leverage all your available marketing tactics to turn those conversations on the show floor into conversions.

The adoption of tablet computers has made it easier for tradeshow workers to bring the registration forms to the attendees walking the show floor to encourage opt-ins rather than bringing them over to a laptop. Also, if you are fortunate enough to speak at a conference, mention your opt-in offer. Add the URL address or QR code at the end of your presentation slides.

You may notice that list purchasing and [renting](#) are absent from the list. In today’s business environment where many consumers feel permission cannot be bought and sold, there are very few instances when the

practices of co-registration and partnerships are well-suited to reach your growth goals. However, under the right circumstance, the audience and company partnerships can mesh to make the following tactics possible.

### **Co-registration**

Co-registration is an agreement by two or more companies to place opt-in checkboxes on each other's website or landing pages. The effectiveness on attracting and keeping qualified subscribers is based on how well you select your partners making it the most difficult to execute based on our research. Some guidelines to follow when placing your opt-in checkboxes are to create similar offers and never have the boxes pre-checked.

Your copy should be short and use language that clearly describes the value the subscriber will receive from enrolling. Again, your partners and their offers should be similar to yours, and that might mean a direct competitor. If you are confident in your product, you should not have any worries. To prevent cluttered pages and devalue your name brand, limit the number of other offers on a page to less than ten.

We have seen this done well in the financial industry. Included in their transactional emails is a link promoting approved merchants based on the customer's past purchase decisions. The landing page offers discounts from each recognized retailer.

After reviewing, the customer has the option of selecting which company(s) she would like to receive communications from and gives permission to the financial institution to share her email address to confirm the opt-in. The combination of relevancy and quality contact information makes this a desirable email acquisition program.

### **Partnerships**

The chart in the beginning of the chapter showed co-registration was graded difficult because of the amount of time, effort and expense for the marketing department to execute. The effort to find the right partner to send an opt-in email on your behalf and not just someone to rent a list from can be even more challenging.

Remember, the partner will want you to send an email on their behalf to your list. Most email marketers have high standards for the communication sent to their subscribers. Your partners message will have to be in line with your subscribers needs and wants to make it worthwhile to risk opt-outs and complaints.

For both of these programs, you will need to monitor these new subscribers carefully. Watch the average opens, clicks and quality of conversions to measure your success. Some marketers have found it beneficial to keep them in a separate database, and nurture the new opt-ins with welcome messages until their activity matches their house list's behavior. Once the criteria are met, they feel comfortable moving them over to their core email list.

## **MOTIVATE**

Exact Target reports that 81% of subscribers have been moved to provide a company with their email address due to some form of promotion. Offering exclusive content is a tremendous motivator to enroll and can turn your new subscriber into a brand advocate. The feelings created by being part of a members' only club, draws a subscriber to make the email address exchange if they deem the rewards precious.

Universal expectations for B2C consumers are they will receive first notice on new products, sales and promotions. Unique membership benefits may include the opportunity to purchase premium seats at events and access to the company's celebrities (performers, top designers and spokespersons). B2B

consumers are seeking educational opportunities. It may come in the form of special reports, market research or executive thought leadership to give them a competitive advantage.

## INCENTIVIZE

The exchange of content for an email address must mutually benefit each party. Marketers ought to concentrate on making the offer discriminating, to weed out any unwanted subscribers. There is a high cost in both time and resources in maintaining a list of poor-quality subscribers.

Giving new subscribers premiums or free content can help unlock a consumer's grip on their email address. However, some prospective opt-ins will perceive the special offer as a bribe. It is always a best practice to test your incentives on a small sample of your audience before implementing it across the board.

Sweepstakes have been a traditional practice to entice consumers to sign up for email communications and grow a brand's database. Interestingly, sweepstakes and coupons were not to be found to be the most prevalent incentives in our most recent research findings. Premium content, webinars and exclusive access were the most widely employed.

When choosing an incentive, select your own product or service rather than an exotic getaway or cash prizes. New subscribers who want your products are better-qualified leads than those just looking for a freebie. Furthermore, the incentive should not be the sole reason for guests to subscribe, rather a small advancement on the future value of your communications.

## ESTABLISH EXPLICIT EXPECTATIONS

The time spent researching and developing eye-catching and memorable promotions that attract new subscribers is an enjoyable process for most marketers. However, equivalent effort and energy needs to go into reassuring the potential subscriber that your company is reputable and trustworthy. This is because after you have caught the consumer's interest, and they are listening attentively, the new subscriber needs to feel safe to exchange their email address for a "special" offer.

Setting expectations right from the start of the relationship will reduce anxiety in the registration process and enable you to collect more qualified leads. Taking the time to inform new subscribers of what you will deliver yields more long-term subscribers. Adding a "join my mailing list" box with just a space to type in their email addresses will not effectively communicate expectations.

Every opt-in page should answer the following four questions:

### WHAT

Again, the focus should not be on the incentive, rather the value of the content. Clearly state what type of communications you will be sending. You may even want to include a picture of or copy from sample newsletter. The sample newsletter or email can contain evergreen content so that it is relevant to a potential subscriber.

### WHEN

Identify how often you will be sending email communications. Better yet, let the new subscriber set the frequency at which they would like to receive emails from your company.

### WHY

The "Why should I care?" or "What's in it for me?" questions need to be explicitly answered. Spell out the features and benefits the subscriber will receive in specific detail. The more descriptive and fact-based the copy, the more effective you will be at converting opt-ins. Don't just ask "Sign up for our FREE newsletter!" but rather write from the subscriber's point of view, by explaining how the membership will assist in learning and solving his or her challenges.



## PRIVACY

Adding a link to your privacy policy will reassure the subscriber what your company will and won't do with his or her email address. This tactic aids in overcoming the psychological fear factor of sharing personal information many new opt-ins hold.

## REGISTRATION PAGE DESIGN

With your pay-per-click ad, Tweet or webpage teaser, you have earned a click to your registration page. Maintain momentum by paving a path of logical next steps for new subscribers to follow. The only goal of the registration page is to gain an opt-in. Here are some guideposts to keep in mind when designing your road map.

## CREATIVE CONSISTENCY

The design elements in the registration page should be similar in style to the preceding ad or email that got the visitor to this page. A consistent brand image, language and tone will cause the potential subscriber to find comfort in knowing he or she landed on the correct page. To communicate your value proposition effectively, keep the page clean of clutter and multiple messages. Try changing the URL link to reflect the proper benefit your company is offering to the consumer.

## SINGLE MINDEDNESS

While teaching the MarketingExperiments Email Marketing Certification courses, Flint McGlaughlin emphasizes how there is no place for unsupervised thinking in email communications. The sole goal of the registration page is to capture an email address. Do not distract the potential subscriber with copy for new products, sales, events or links to navigate away from the registration page. These types of offers can always be made available on your "Thank you" page.

## TESTIMONIALS AND MORE

Third-party endorsements can go a long way in reducing a potential opt-ins anxiety and apprehensions in sharing their email address. A well-written endorsement from a satisfied customer can evoke confidence and trust in your brand. A video testimonial can be even more effective as people cannot resist hitting the play button.

A softer and more low-key endorsement tool is a subscriber counter. Seeing how many other people are benefiting from your email communications can establish you as a reputable source of information in the minds of potential email members.

Comprehensive pictures of the actual incentive gifts or newsletters can bolster the credibility of your brand and message. Conversely, consumers may interpret stock photos and generic sketches as insincere and hurt your brand's integrity.

## REGISTRATION FIELDS

Potential subscribers are strapped for time, making it crucial for the opt-in process to be as efficient as possible. A long or multi-step form can be intimidating and cause visitors to abandon the page. A name and email address is usually sufficient for B2C companies, while B2B businesses will add title and company name. Our research found 65% of marketers surveyed reported that new subscribers, in addition to their email address, had to complete a short form of one to five fields.

There are several factors to consider when deciding which questions to require during the registration process and they are all personal to your business. There is a correlation between the number of questions a company asks and the number of registrants gained. The fewer questions there are, the more sign-ups there will be. However, the more information gathered on the potential partner, the more data you will own to customize your communications and qualify the lead for your sales force.

If your company has limited sales resources, it may be in your best interest to add more required fields and ensure the leads can be followed up with at the service level your company demands. On the other hand, if your company sells additional sponsorship inside your newsletter, it may be advantageous to have the largest subscription rate possible and you will ask a minimum amount of questions.

Please consider that with every question added to your form, you are asking the opt-in to give up one more piece of their personal information. The new subscriber will expect the information shared will enhance the communications he or she receives with more personalized content. If the information is not used in this fashion, the subscriber will feel betrayed.

To expedite the process, and make it easier for the new subscriber, some organizations will place pre-checked boxes on items like HTML format over text only. This can be seen as helpful to the person opting in. However, boxes pre-filled during the customer registration or at the online checkout page can be viewed as presumptuous. Communications sent to unsuspecting customers end up being placed in the junk box by either the ISP or recipient.

A sensitive request for some recipients is the question of age. However, most brands have good reason to ask either because it is critical to their segmentation strategy or necessary to comply with the law. The [Children's Online Privacy Protection Act](#) (COPPA) prohibits marketers from collecting personal information from children under the age of 13. If you must ask for a birth date or age, it is paramount you explain your reasons. This is a requirement for brands that cannot sell to adolescents such as alcohol distributors.

Our benchmark data shows that companies are missing an opportunity to personalize their messages with the collected data in their information systems. For instance, 34% of organizations collect and use physical address data, while 44% collect but do not use, and 22% do not collect it all. As we mentioned previously, geo-location data can be the basis for relevant communications with the recipient.

Please note, if you choose to ask a mix of required and optional fields, it is recommended to clearly place an asterisk next to the mandatory fields. This will reduce some of the anxiety for opt-ins when sharing personal information.

#### THANK YOU

After capturing your new subscribers email address and contact information, the process does not end. Use your "Thank you" page to build upon the relationship you started. Make a link to a past newsletter available or relevant page on your website. Understand many times the new subscriber was not finished perusing your website and would like to return promptly. Likewise, a popular tactic is to send them to your preference center where they can tailor their communications and you can capture more demographic data. Do not be afraid to add a little of your brand's personality. It is common to see today embedded video or audio files in the thank you messages describing how recipients should proceed or expect to find in their email inboxes.

SECTION SUMMARY: DEVELOP (AND KEEP) QUALITY LISTS

Please take a few minutes to complete the assessment for this section.

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1. Describe why maintaining a preference center and frequently asking subscribers to update is so important to email marketing success?

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2. Name three online sources for new subscribers.

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3. List four elements to include in your email enrollment page to set clear expectations.

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*If you were unable to answer any of the above questions, please review the previous sections before moving on.*

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CHAPTER 6 NOTES

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## CHAPTER 7: MONITOR DELIVERY AND COMPLIANCE

### BE AWARE (AND AHEAD) OF EMAIL DELIVERY DEVELOPMENTS

Making it to the inbox involves a complex set of issues and is a perennial challenge for email marketers. While many organizations are experiencing measurable improvements in delivery, and recipients have less spam entering their inboxes ([Hotmail boasts only 3%](#)), these successes have become unintentional curses.

Today, the email recipient commands the control in the relationship with the brand. It is the customer or receiver that reaches out to solution providers, determines the communication channel preference, and establishes the frequency and content the brand is responsible for sharing with them.

The definition of spam is no longer shouldered solely by the permissibility of sender; rather the message itself has a responsibility. In this evolving ecosystem where receiver's expectations have risen, an *unwanted* or *untimely* communication can be condemned as spam.

From the organizational or sender standpoint, we have been our own worst enemy in raising expectations. Email marketing's ability to produce measurable financial results and deemed to be "[greener](#)" than traditional mail has driven more sends and caused inboxes to burst. According to Web monitoring service Royal Pingdom, an average of 294 billion emails was sent per day in 2010.

Compounding the challenge is that email is widely accepted as the glue that keeps digital marketing tethered together. Whether it's a "Join my LinkedIn network" request, comment on a Facebook or a notification of a re-Tweet, there is not a social media update that does not end up in the user's inbox.

### UNDERSTAND THE DRIVE FOR DIGITAL DASHBOARD DOMINANCE

In response to recent developments in the email user experience, AOL Mail, Facebook, Gmail, Hotmail and Yahoo! Mail are all trying to create a more robust inbox functionality to appease and retain their users. Each company is vying to become the digital communication hub for people to view their email, IM and social updates. For instance, Hotmail users can sort emails by their contacts, unread messages, social updates, groups, and newsletters with one click of a button. This is a relief to consumers feeling overwhelmed by the amount of messages in their inboxes and looking for help to triage their emails.

In fact, according to Microsoft, 75% of the email messages people reported as spam are really legitimate newsletters, offers or notifications that subscribers no longer wish to receive. This type of *unwanted* email is classified as graymail because it's not black or white. Its designation depends on the receiver of state of mind, as it could be viewed as either spam or a relevant message.

As Microsoft entrenches itself in the war on spam, it has launched new tools to serve their constituents better. These including one-click unsubscribe, scheduled clean up, flags that stay atop the inbox, and newsletter and custom categories. With each new inbox development there is an opportunity or cost for an organization, depending on how well it executes its email strategy.

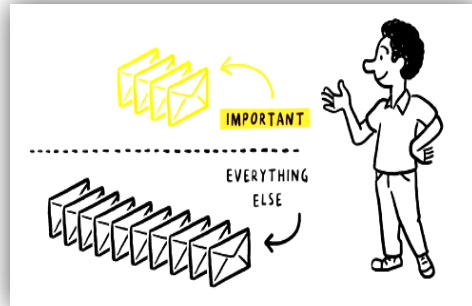
### ANALYZE ENGAGEMENT METRICS TO ASSESS RELEVANCE

As we noted to in chapter 5, ISPs are tracking engagement metrics like if a message is read and then deleted, or just deleted to filter email entering the inbox. Google's Gmail Priority Inbox feature goes a step further. Gmail Priority Inbox analyzes incoming messages to predict its importance to the individual user.

When this optional feature is active, it will automatically classify emails as important, starred, etc.. Its algorithms use engagement metrics, such as which messages have been read and replied to, as well as frequent keywords that appear in messages.

Users can help make the service smarter by marking email important or not important. Return Path found 81% of the Gmail mailboxes analyzed in the month of July 2011 had priority inbox enabled.

Gmail's Smart Labels feature can sort incoming mail into folders named Bulk, Forums and Notifications. Bulk mail is defined as newsletters and promotional email. Notifications are account statements and receipts. Email from group mailing lists is labeled Forums. This optional feature is to aid in email triage.



## IMPROVE DELIVERY RATES THROUGH CAREFUL PRACTICES

Return Path reports the average [global inbox placement rate](#) (i.e., the percentage of emails sent that makes it to the inbox) to be 81%. Seven percent is marked as spam and the remaining 12% just go missing. The United States fared better, but still disappointing considering the technological advances and the years email practices have been in the marketing mix.

The U.S. inbox placement rate (IPR) was 86% with 8% delivered to the junk folder and 6% undelivered in entirety. For those multi-national companies attempting to send emails to China, they have their work cut out. Most email is blocked at the Internet Service Provider (ISP) level, resulting in only 58% of mail reaching the inbox.

The fact that inbox placement rates have remained steady for a decade, and with ISPs developments in engagement metrics, it may look as if dark clouds are overhead. The silver lining for best-in-class email marketers that maintain clean and exclusive lists, publish engaging content, and send messages to relevant readers, will continue to put distance between themselves and their rivals. With strong protocols in place, these marketers execute their email marketing campaigns in a manner that ISPs reward them with high-scoring sender reputations.

The department with the most influence over deliverability rates is not IT or sales, it's the marketing team. Marketing oversees the list hygiene, content and emailing exercises that determine sender reputation. In this chapter, we will carefully review each practice and give you actionable steps to improve your deliverability rates.

## OVERCOME OBSTACLES IN CORPORATE EMAIL

Corporate spam filters provide email marketers unique challenges and are some of the most difficult to tackle because they are decentralized, have custom filtering settings, are trained by system administrators and mail users, and have *many* more points of failure before reaching a user's inbox. For example, the journey of your email begins with common corporate spam filters like Barracuda or McAfee, which greet you at the door.

Next, you will be introduced to OEM filters like Brightmail, Cloudmark or Postini, and later passed to Exchange for closer inspection. The scrutiny does not end there. Your final destination is sheltered by desktop filters like Symantec and McAfee. This voyage to the corporate inbox is no vacation.

If your email does not reach its destination, you will need to invest time contacting each of the individual companies affected. Many will have strict security policies in place to prevent data breaches and harmful viruses from infecting their technology infrastructure.

To avoid this dilemma, B2B email marketers may employ several tactics to overcome these obstacles. One that may surprise you is seeking certification. Having a third-party service verify a business's compliance to

best practices can improve deliverability with ISPs such as Comcast, Hotmail and Yahoo! In our *2012 Email Marketing Benchmark Report*, we found B2B organizations to find this strategy effective.

This is unexpected, as we don't think of these enterprises having many webmail client email addresses within their subscriber lists. However, those companies that target smaller companies who may use Yahoo! infrastructure for the basis of their business email system may find it worthwhile. In addition, employee preferences are evolving. HubSpot found that 88% of email users do not have a separate work and home address.

The approach most B2B firms deploy to hurdle corporate spam filters is similar to B2C: content and sender reputation. The reason being is these filters also evaluate reputation. For instance, Postini looks at content and unknown users to determine threats. Hotmail's reputation filter, Smart Screen, is also used by Microsoft in Exchange and Outlook.

## RELY ON YOUR SENDER REPUTATION

The battle against traditional spam rages on. In December of 2010, StrongMail reported that of the eight billion emails Hotmail receives each month, 5.5 billion are blocked at the gateway, and another one billion are marked as junk. Internet Service Providers (ISPs) work diligently to fight against spam, phishing scams and other email abuses. The email systems ISPs employ continue to get more sophisticated, evolving from spam words and volume, to now monitoring your reputation and your level of engagement with email recipients.

Your sender reputation with ISP is the most influential factor in your email reaching the subscriber's inbox. Each ISP does not measure your reputation the same. Nevertheless, common determinants are your IP's architecture, whitelisting, blacklisting, content, complaints generated, hard bounces or unknown users, the rate of and volume of your delivery, and spam trap hits.

Email reputation scores can be accessed from third-party reputation monitoring providers such as Cisco IronPort SenderBase Security Network, Return Path and SendMail IP Reputation. Remember each company has their own scoring system, and even if it rates your company well, you may still have trouble with individual ISPs. Use reputation scores as guides to benchmark your own routine deliverability audits.

In addition, email deliverability solution providers like Unica Pivotal Veracity provide their customers with details on the entire mailing process. The company checks and validates your sending infrastructure, content and reputation. It also gives critical email delivery information on whether your message landed in the inbox or spam folder, or was blocked.

This inbox placement rate can be helpful, especially when you consider the statistics revealed earlier in this chapter. Consider going beyond standard deliverability metrics and look at other engagement factors like session length and overall activity with subscribers to stay ahead of your rivals. Let's take a look at the four foremost influences on reputation.

## KEEP HEALTHY LIST HYGIENE

A list compiled of opt-ins, and maintained with list cleaning and pruning practices, will have few deliverability issues. Establishing routine procedures can be challenging to set up. Yet once implemented, they can be simple and cost-effective to continue. This is reflected in our research findings that firms in the Strategic phase of list hygiene are three times as likely to routinely do this job as those in the Trial phase.

## SEND WELCOME MESSAGES

Immediately sending a welcome message can prevent future spam complaints. In addition to being good etiquette, it acknowledges the request and visually demonstrates to the new subscriber your brand's communication style. This brand recognition makes the email easier to distinguish in a crowded inbox when it arrives in the following days or weeks, making it less likely the recipient will mark it as spam.

### **Set expectations**

Reinforce the promises and expectations set during the opt-in process in the welcome message or series. The four cornerstones of these communications are to confirm subscription, restate the value and frequency of the messages, gather more preference data and whitelist your sender address. Most important to your sender reputation is offering a one-step unsubscribe process. Should the recipient have buyer's remorse, an easy opt-out is better than the spam button alternative.

### **Separate new subscribers**

Quarantining new subscribers and sending them a double opt-in welcome message from a separate server until you determine the addresses are accurate is another viable option. The email addresses that register a hard bounce, or give complaints, in your feedback loop are not moved to your main server. You can try to clean, remove or update these names. Learn how Infusionsoft uses three tiers of IPs to earn an outstanding delivery metrics in the MarketingSherpa blog post "[Email Deliverability: How a marketing vendor with 99 percent delivery rates treats single opt-in lists vs. double opt-in lists.](#)"

## CLEAN NAMES

Entering a correct email address can sometimes be a difficult task for busy subscribers. As mentioned earlier, in the process of monitoring his opt-in list, Jack Hogan, CTO at LifeScript, has found more than 500 ways to misspell yahoo.com, from yahoodotcom to yaho.ocom. These misspellings will earn an automatic hard bounce.

### **Prevent typos**

#### *Ask for confirmation*

The most popular manner in which marketers try to resolve typos is asking the subscriber to confirm his or her address. The hope is that by entering the address twice, with pop-up message alerting them if the addresses do not match, accuracy will increase.

Every marketer needs to assess the risk and rewards of implementing such a strategy. The upside is more accurate email addresses resulting in a reduced bounce rate – *assuming* they don't copy and paste their first entry. The downside of this practice is that new subscribers may find it cumbersome and abandon the page, potentially reducing your list growth.

#### *Use CAPTCHA fields*

To ensure the addresses acquired are not computer generated, 14% of firms evoke technology called Completely Automated Public Turing Test to tell Computers and Humans Apart ([CAPTCHA](#)), which display scrambled letters and numbers opt-ins must re-type to complete registration. Similar to entering an address twice, some prospective readers may find this a nuisance and bail. The benefit is the CAPTCHA device protects organizations from the threat of spam bots that can fill databases with fake subscribers.

### **Hire a list-cleaning service**

Some of the errors can be manually corrected, like common domain misspellings and absent "@" characters that can be quickly recognized. If the volume of your opt-ins is large, you may choose to use a



third-party list cleaning service. In addition to correcting invalid or missing domain names, characters or usernames, these vendors can remove bogus and malicious email addresses.

### **Rescue bounces**

When a customer gives you permission to send him or her email, a promise is made. Keeping this pledge is the first act of building a solid relationship and every effort should be made to deliver on that commitment. Likewise, your company has invested resources to gather the opt-in email address so it is important to review your sending reports to justify the expense. Most ESP sending reports include clear categories for each failure type including soft and hard bounces. Do not be afraid to ask your ESP for explanation of each code and advice on addressing each failure.

#### *Soft bounces*

A soft bounce is an email that was sent to an active email address but could not be delivered. In most cases, it is a temporary problem such as the mailbox is full or the recipient's email server was down. The majority of the time the message will be held in the email recipient's server and be delivered later. Some ESPs are open to working with clients to set up redelivery rules based on the soft bounce code, including the number of resends.

#### *Hard bounces*

Hard bounces or unknown users are classifications for emails that were sent but could not be delivered because the recipient is invalid and should be immediately removed from your list. If the email address was not obviously a typo error, attempting to contact the subscriber may be worth the effort, especially if they are a loyal customer. You may try to reach them through the mail with a postcard, call them, or have a salesperson update their email during a scheduled meeting.

### **Eradicate spam traps**

ISPs plant fake email addresses across the Web to lure spammers who collate fake email addresses into their email lists. Due to the obvious disregarding of opt-in practices, third-party services will give you a poor rating for sending to spam trap email addresses.

Your ESP may be able to help you identify possible spam traps if they have a list sanitation feature. If you manually review your email list, look for addresses like [noreply@ABC.com](mailto:noreply@ABC.com) or [info@XYZ.com](mailto:info@XYZ.com). Many ESPs will either not allow, or highly recommend that you do not import, email addresses based on job roles such as [sales@ABC.com](mailto:sales@ABC.com) or [support@XYZ.com](mailto:support@XYZ.com). In some conservative industries, this situation may require asking the opt-in for a personal email address to ensure delivery.

In addition to removing likely spam trap emails, you have a few other options. The first is to stop mailing to all inactive email addresses. You may determine that if a subscriber has not opened or clicked though on an offer that they are no longer interested in your products or services.

You will likely clear out spam traps and honey pots. Honey pots are once active email addresses that have not been used in 6-12 months. This is a quick solution, but may have some drawbacks if the person has taken other actions off-line, such as made a purchase, attended a webinar or called customer service.

### **REACTIVATE AND RE-PERMISSION E-SUBSCRIBERS**

Monitoring the activity of each subscriber in your email database will pay dividends in your delivery rate. Depending on your sending schedule, dedicate time every 6-12 months to scrub your list. List scrubbing is the removal of subscribers that have not opened or clicked for a set period, depending on your business cycle. These names can be separated, and sent win-back or re-permission campaigns.

There may be several reasons why your subscribers go silent. They ended the relationship without telling you. Their interests changed, or prefer to communicate through a different channel, such as social media. You are sending messages to the recipients "other" email address that they rarely check. Traditionalists prefer to read text versions that do not signal opens.

Or, latent readers changed jobs and left their email address behind. A boastful email marketer knows however it is his or her subject lines. They are written so well that the recipient doesn't even have time to open it before picking up the phone to place an order.

All kidding aside, it remains there are countless causes for a subscriber going into hibernation. Meanwhile, their inactivity is hurting both your deliverability reputation with ISPs and your own metrics. When you remove sleeping addresses, the number of people that open and click will not change, but your open and click rates will rise due to the decrease in total quantity. This makes it imperative that you take action to reactivate and reenergize this group.

### **Crusade for a comeback**

As outlined in chapter 2, sending an inactive subscriber a special incentive or a simple "we missed you" note can reengage the audience and keep the relationship moving forward. Keep in mind the special offer should not be over the top. You do not want an idle subscriber to reengage solely for the prize, otherwise you will be in the same situation again, and will have started a bad communication cycle.

Capitalize on your customer insights and response data to group non-responders based on the reasons why readers emotionally unsubscribed. This will enable you to better speak to the underlining disconnect between your brand and the email recipient.

### **A difficult deliberation**

If the inactive subscriber does not react to your win-back email, what should you do? This ignites a long debated dilemma that questions the true intention of an email marketing strategy. Proponents of keeping the inactives and continue to send communications argue that these subscribers want to receive the messages and are filing them until they are ready to make a purchase. Or, that the mere sight of the company's name in the recipients inbox, results in beneficial brand awareness.

While opponents for holding on to non-responders stress that the sacrifice to the sender reputation is too high a price to pay for the ability to reach loyal and engaged subscribers. In addition, the stalker-like behavior may leave a lasting bad impression.

Recently, Responsys conducted an interesting experiment. To examine how retailers manage inactivity, they signed-up to over 100 major retailer email programs using fictional names. The team vigorously opened and clicked on the incoming emails and stopped allowing 40 months pass by with no activity. According to the company's *"Email Engagement and Deliverability Study,"* 31% of companies continued emailing inactive subscribers with no frequency reduction, while 23% continued with reduced frequency.

The decision to compromise and send less frequently reduces the negative impact compared to no frequency reduction, but only if the marketer is respecting subscriber choices.

As part of the MECLABS family, MarketingSherpa recommends investigating the reasons through testing and surveys. In a past research project, we conducted our own non-responder survey by picking up the phone and inquiring about their viewing habits. With unique business models, the best decision for companies is to trial different types of messages based on length of dormancy and the reduction of frequency. With each new nugget of knowledge uncovered, iterate your process to handle inactives.

## Re-permission campaign

The inactive accounts who do not respond to your win back email communications can be sent a re-permission or re-opt-in campaign. This message speaks frankly to the subscriber and asks them they would like to keep receiving emails from your company.

In most cases, 80-95% of these subscribers will not opt-in again. The good news is that you will have removed spam traps and honey pots from your list.

This is an excellent practice to use when you change the content or frequency of your email messages drastically. It can also be used when you need to demonstrate your brand's list is 100% opt-in for a certification or moving from an opt-out only email practice.



## REMOVE DEAD WOOD

Processing unsubscribers quickly is an important function to install in your program. CAN-SPAM regulations give brands ten business days from the date of the opt-out request to add a name to your “Do Not Email” list. It is best to remove opt-outs before the next email, since a rapid response will reduce complaints.

Our research found 81% of marketers removed readers from their email marketing lists within 24 hours of receiving an unsubscribe request. Shockingly, 4% of marketers admitted to not complying with the CAN-SPAM act, which requires organizations to remove unsubscribers within 10 days.

## QUICKLY HANDLE COMPLAINTS

Complaints received directly or through your feedback loop should be treated in the same fashion as unsubscribers. Remove complainers promptly before the next commercial email goes out.

As mentioned earlier in the handbook, many email recipients (we reported 47% in our *2010 Email Marketing Benchmark Report*) end up clicking the spam button in their email client, rather than looking for the unsubscribe link in your email. Be proactive to counter this trend and make it easy for your subscriber to opt-out. Design the unsubscribe button to be easy to locate and a one-click function. Also, have a system in place to remove the subscriber from your list via offline channels including telephone and in-store.

## BLACKLISTS

A blacklist is a list of IP addresses, domain names or emailers suspected of sending spam. If your company is blacklisted, your email messages may not be delivered due to the ISPs' efforts to reduce spam. Blacklists are collected in a number of different ways; some are generated by third-party groups like SpamAssassin, SpamCop or SpamHaus. Email recipients may employ security software such as Norton and MacAfee. ISPs may either subscribe to a third-party list or maintain their own.

Each blacklist has its own criteria for what will cause a company to be included. In general, brands are added to blacklists for poor list hygiene and a high number of complaints. Other reasons for blacklisting can be complaints charged to mailers who share an IP address with you, or configuration slips with your server.

Unfortunately, no one will notify you if you are on a blacklist. You need to be aware of reports of emails gone missing, monitor deliverability statistics by domain, or use online research tools like MXToolbox, SpamCop or SpamAssassin.

If you find your company is on a blacklist, tackle the situation methodically. First, contact your ESP for their guidance. It may have been security issue, and the ESP may have more influence with the major blacklist than your company does alone. Next, identify and solve the problem that triggered the blacklist and learn the procedures for proper removal. Once you have completed these steps, contact the blacklist operator with documentation of your email best practices.

#### FEEDBACK LOOPS

Feedback loops or complaint feedback loops are service-provided by major ISPs like AOL, Hotmail and Yahoo! These systems allow ISPs to notify senders that their emails have been reported as spam. ISPs receive user complaints from the report spam buttons placed in their webmail clients or from grievances sent to their help desks.

You need to contact ISPs on an individual basis to register for the service. Each form is slightly different, but in general asks for similar information. The ISPs will request your IP addresses, proof of domain ownership and if you have authentication set up in your DNS record. In addition, they will ask for a dedicated email address to send complaints, privacy policy URL and opt-in page URL. Common address names are [complaints@abc.com](mailto:complaints@abc.com) or [abuse@xyz.com](mailto:abuse@xyz.com). Many times, your ESP will handle this process on your behalf, and incorporate into your ESP's reporting service or reputation monitoring service.

Before you begin, it is wise to prioritize which ISP receives the majority of your emails and start with those. Also, read the terms and conditions of each ISP. Most require you treat a spam report like an unsubscribe and immediately remove them from your entire list.

#### DELIVER RELEVANT CONTENT TO THE READER

The bar continues to be raised for what is considered relevant content. Google's bulk sender guidelines states "The way Gmail classifies spam depends heavily on reports from our users. Gmail users can mark and unmark any message as spam, at any time. To increase the inbox delivery rate of your messages, make sure that all recipients on your distribution lists actually want to receive the mail." Notice Google's definition of spam did not focus on subscriber opt-in request, rather if they even *wanted* to receive the email. This makes even more risky to be maintaining lists that are not opt-in only. With opt-in only lists you at least know at one time they wanted the email sent to their inbox.

#### THE ENGAGEMENT EFFECT

We talked earlier in chapter 5 about how relevant content is essential for effective email communication. It is becoming just as important to your deliverability success. ISPs filter emails based on engagement. Individual user actions that are measured include the quantity and speed in which recipients open, click and interact with your messages.

Let's watch how this news plays out. Relevant content increases your open and click rates. In turn, your deliverability reputation improves with ISPs, earning you lower spam detection and increasing your deliverability success.

Unfortunately, for many marketers this changes the rules of the game. No longer can they broadcast the same email to every customer on their list and hope enough respond to meet their sales goals. For those marketers that have harvested in-depth preference data on their subscribers and have high-value content to match their needs, this evolution is an opportunity to separate from the pack.

Be cognate that brand's definition of compelling content may differ from its email recipients, and this disparity in expectations contributes to a bad reputation. To avoid this predicament, review your email from the subscribers' point of view. Are you really delivering what you promised? As people speedily scan their email messages, recent changes in branding, frequency or product extension may be confusing them into reporting.

Watch frequency carefully. If you do not communicate on a regular basis and then stuff their inbox during the holiday season, be prepared for a spike in complaints. The combination of an already overcrowded inbox during the holidays from other like-minded retailers, combined with an unfamiliar email, is difficult to overcome.

## MAINTAIN SENDER PERMANENCE

Spammers are known for switching IP addresses frequently. If your address has a poor reputation, switching will not fix the underlying problems. Without making changes to your email marketing process, you most likely will be in the same situation four months later.

In cases where you need to add a brand new IP address, be aware that IP addresses with no volume history are subject to higher levels of scrutiny by ISPs and may control the volume or limit email transmissions.

## ADDITIONAL BEST PRACTICES

Maintaining good list hygiene, handling complaints quickly, sending relevant content and keeping the same IP address are presently the principal influencers on your sender reputation. However, do not overlook traditional best practices.

## WHITELIST

So far we have looked at what marketers, ESPs, ISPs and reputation monitoring services can do to help ensure a relevant email lands safely in the inbox and spam does not. Whitelisting is one activity that the recipient can take responsibility for receiving sought after messages.

## PERSONAL

Whitelisting is an email industry word used in reference for a subscriber placing your brand's email address in their email client's address book or safe sender list. Once your name is whitelisted by the email recipient many ISPs will respect this user-initiated rule to allow your messages to be sent directly through to the inbox without spam filtering or blocks. An added benefit is that HTML images and links will be on by default.

Please note this practice does not guarantee delivery. ISPs may still prevent the email from reaching the inbox if your IP address has been blacklisted. Whitelisting is only available with some webmail clients. Google's Gmail does not participate; neither do popular business inboxes like Outlook and Lotus Notes. Corporate IT departments are responsible for blocking your business email address.

A whitelist request should communicate the value of adding your name to their contact list and reduce any anxiety that may accompany the request. Make it easy for them by including step-by-step instructions either in the copy or via links to a help page.

Here are a few recommended tactics for prompting your subscribers to whitelist your address:

### **At the point of registration**

During the registration process, you may ask the new subscriber to add your name to their online address book before completing the form. Email confirmation and thank you pages can be used to request new members to whitelist your address.

### **Welcome email or series**

Include the suggestion for new subscriber to whitelist your address in your welcome email. If you send a series of welcome emails, you may want to dedicate one entire message to the request. In either case,

segmenting the list based on webmail client can help personalize the message. Including “only for Hotmail subscribers” in the subject line and then giving safe sender how-to instructions can increase your success.

### **Routine requests**

A common practice is to add a whitelist address at the bottom of each email request. It may read, “To ensure delivery of future emails receive, please add our information to your online address book. Please visit our email [preference center](#) for complete instructions.”

### **ISP**

Whitelisting at the ISP level means your IP address and/or domain has been verified by the ISP that you are following best practices. So once the email passes through the ISP scrutiny user rules will be implemented. Similar to feedback loop requests, you should prioritize the ISP whitelisting requests by their popularity with your subscriber base.

### **BECOME CERTIFIED**

A third-party service can verify your compliance with email best practices and give you their seal of approval. Certification does not guarantee your emails will be delivered, however many ISPs (Hotmail and Yahoo!) respect certified email and will be less likely to scrutinize your communications.

In addition to improved deliverability, other benefits may include unblocked images, enabled links, and the ability to bypass spam filters, Web security filters and volume filters. In the case of certification provider Return Path, certified members benefit from the trusted “unsubscribe” button on the Windows Live Mail interface allowing subscribers to opt-out rather than filing a complaint.

To contain costs, companies may choose to certify only a segment of their list based on their webmail client address (Hotmail or Yahoo!) Testing a portion of this list is also a good way to understand the impact certification will have on your overall campaign.

### **CERTIFICATION CRITERIA**

Each certification vendor has different requirements. However, be prepared to meet these prerequisites.

#### **Infrastructure standards**

Your email must be sent over dedicated IP address(es), verification you are the only sender that uses it and the IP address has been in use for at least 90 days. In addition, the certification vendor will ask you to be Sender ID compliant with SPF records published for all domains from which email messages are sent. Domain Keys Identified Mail (DKIM) authentication will be necessary for all email messages sent over certified IPs. Refer to the email authentication section later in the chapter for more information.

#### **Security**

Maintain industry standard practices to prevent open proxies, open relays and computer viruses, worms, spyware, etc.

#### **Opt-in addresses only**

The tactics may include double opt-in, single opt-in and pre-selected opt-in. The vendor will most likely request to see all of your opt-in landing pages where a person could subscribe including offline sources.

### **Privacy policy**

Your privacy policy will need to include your company's contact information and clear instructions for how an email recipient can unsubscribe. The policies referenced should reflect actual practiced programs. Your privacy policy should be easy to find on your website and all opt-in sources.

### **Unsubscribe process**

Demonstrating an easy one-click unsubscribe button will be required, alongside documentation of the timely removal of an address within ten days, to be honored indefinitely.

### **Messages**

All emails must be CAN-SPAM compliant. Email message headers, subject line and body content cannot be false, deceptive, or misleading in any way. The content should be yours alone and not third-party messages.

Once you meet these criteria, the vendors will research your performance data for percentage of complaints, spam traps, and user unknowns per the volume of email sent. These metrics will have to meet each individual ISP's requirements. The number of blacklisting reports will also be evaluated.

## **AUTHENTICATE**

Authentication is the process by which ISPs verify you are who you say you are. ISPs implement these steps to prevent spammers from masquerading as a legitimate brand. To enable ISPs to verify your identity you will need:

### **STATIC IP ADDRESS**

The IP address is a unique number assigned to each device connected to the Internet. Having a static IP address is similar to having a consistent phone number or physical address. Dynamic IP address numbers change with each email message or campaign sent and triggers spam filters.

### **DNS AND RDNS**

DNS or Domain Name Systems is how computer networks find Internet domain names and translate them into IP addresses. You will want to make it easy for the ISP to look up backwards and forwards.

Traditionally, a DNS search starts with the domain name, and looks for which IP addresses are associated with it. A reverse DNS (rDNS) lookup begins with the IP address and checks for the registered domain name assigned to it.

### **AUTHENTICATION PROTOCOLS**

#### **Sender Policy Framework**

Sender Policy Framework (SPF) is an IP-based authentication protocol used by domain owners to code which emails have, or have not, been generated from their domain. The SPF record or code is placed in the sender's DNS information. When an email is sent, the incoming server will verify the sender's identify against the SPF record before allowing the email to be delivered.

#### **Sender ID**

This anti-spoofing proposal joins the ideas of SPF and Caller ID. Sender ID is a Microsoft protocol and works similar to SPF in the way it validates email sender addresses. Both protocols add syntax to the policy records in DNS, the difference is the location. Sender ID verifies the header address while SPF does not.

## **DomainKeys**

DomainKeys is an anti-spam software application developed by Yahoo! It uses a combination of public and private “keys” to authenticate the sender’s domain and reduce the chance that a spammer or hacker will fake the domain sending address.

### **DomainKeys Identified Mail (DKIM)**

DKIM uses a form of encryption, which allows the sender to electronically “sign” legitimate emails in a way that can be verified by recipients.

## **MONITOR REPUTATION METRICS**

To effectively respond to changes in your email deliverability statistics, you need to implement an ongoing monitoring system. Regularly checking with third-party reputation monitoring providers is valuable, but so is reviewing your own information. Key metrics to follow are:

### **COMPLAINT RATES**

Following your feedback loop reporting, document the average rate of email identified as spam per emails sent. The threshold for complaint rates varies for each ISP before it begins to diminish your reputation. A rule of thumb is to remain below one complaint per thousand emails sent.

However, the goal is not zero. If you do not receive spam complaints for an extended amount of time a specific ISP may have cancelled its feedback loop in which you are now not being properly notified, or your emails are being delivered straight the junk folder.

Be sure to track complaints both overall and by individual domains to recognize any unusual spikes or drops. For further analysis, look for trends based on the source of your email addresses. Finding that most of your subscribers hitting the spam button are coming from your website landing page will allow you to make changes to the page and close gaps in expectations.

### **BOUNCES RATES**

Study both hard and soft bounces. Most ESPs provide this data in their campaign reports. Hard bounces consist of the percentage of your list containing invalid email addresses. A soft bounce rate is the percentage of your list that includes live email addresses but was rejected before delivery because of server error or full inbox. Soft bounces are normally found to be a temporary situation.

In addition, monitor closely your unsubscribe rate and the growth of your do not mail list.



## HOW TO: HOW PCH USES “BLACKLISTED” WORDS YET ACHIEVES A 99.2% DELIVERY RATE

How To ID: #HOW31926:

Location: MarketingSherpa Member Library

Summary: See how Publishers Clearing House is able to maintain a large and active email database, even while building its lists through sweepstakes. Check out the five tactics that drive their success and the higher clickthrough rate they achieve from very long emails

Publishers Clearing House is a known authority in sweepstakes and direct mail marketing. But, times have changed. The company still focuses on sweepstakes, but digital marketing channels have risen to prominence.

“We're very dependent on email to be successful,” says Sal Tripi, Senior Director, Operations and Compliance, Publishers Clearing House. “Protecting that channel, to us, is something we invest very heavily in.”

Publishers Clearing House (PCH) has millions of subscribers to its six email programs. Each program has a different theme related to winning sweepstakes and prizes. A typical email the company sends achieves:

- 99.2% inbox delivery, as audited by a third-party
- 30% to 40% of recipients clicking through

“We use our iconic sweepstakes to get consumers into our email program,” says Josh Glantz, VP and General Manager, PCH Online. “There are a lot of marketers who would probably ask how we retain those customers if all they are interested in are sweepstakes.”

Indeed, misusing sweepstakes to build an email database can result in a high number of irrelevant subscribers and poor performance. PCH's high-volume and high-performance email strategy, however, is based entirely on sweepstakes – proving that giveaways can have a part in an effective program.

We sat down with Tripi and Glantz to better understand how an email program focused entirely on sweepstakes could be so effective. Here are the five tactics that drives their success.

### **Tactic #1. Take control of acquisition**

PCH works with partners to help build its email database, but the company does not buy lists. Instead, partners are required to drive visitors to a PCH registration page.

“We do not acquire names other than by having them register on our acquisition pages,” Tripi says. “We get a full name and address from all.”

Visitors typically arrive on a PCH registration page to sign up for a sweepstakes. The page offers visitors the option to opt-in to receive information about additional sweepstakes from PCH and its partners.

- Choose partners wisely

PCH thoroughly vets potential partners. Companies are required to fill out a brief survey to list their business practices, IP addresses, domain names, and other information. PCH uses this information to research the company's email reputation among webmail providers and ISPs.

“We probably turn away more publishers than we accept when it comes down to it, because to us, the protection of our brand is more important than any quantity of new members,” Tripi says.

## **Tactic #2. Focus on relevant content and value**

People who sign up to receive emails from a company have various motivations. Some want to receive more information from a company they support. Others want to enter a sweepstakes the company is running.

The problem with sweepstakes is that they are not always relevant to a company's brand or email program. People who are trying to win a prize are not necessarily interested in an email newsletter. Such subscribers can drag down overall performance in a database.

“If you're running a sweepstakes or other promotion and you want to really drive success, the success does not just come from getting people to register and sign up,” Glantz says. “The success is getting a relevant audience to sign up and opt into your email program and then be responsive.”

PCH bypasses this issue by basing its emails entirely on sweepstakes. People who sign up for PCH's emails are doing so to enter a sweepstakes, and they can opt-in to receive information about more sweepstakes. PCH does not offer a typical “newsletter,” Tripi says, just information about new opportunities to win.

- Highlight relevant value

A person filling out one of PCH's sweepstakes forms is obviously interested in winning prizes -- that's why they're on the page. PCH tailors its messages to this motivation when encouraging visitors to opt-in. Here's sample copy from one of its opt-in checkboxes:

“YES! I'd like to be informed about chances to win prizes instantly from PCH Search&Win. I know I can unsubscribe at any time by clicking the unsub link or the 'EZ Unsubscribe' seal in any email. Privacy Policy”

## **Tactic #3. Invest in testing and optimization**

PCH has a long history of marketing optimization carried over from its decades as a high-volume direct mailer. The company has incorporated this testing culture into its email marketing. PCH has at least six people throughout the organization who are “totally isolated from any other regular duties just to execute tests and report,” Tripi says.

“We spend an enormous amount of time, money and effort in testing and retesting. We execute about 30 to 50 test emails or test segments every month just so we can really get our arms around what our consumers are saying.”

When it comes to email, “nothing is assumed,” Tripi says. The company tests emails' subject lines, timing, content, audience, and many other factors. They sometime uncover surprises.

“Most marketers say to keep emails nice and short with a big call-to-action. You know what? We found that absolutely is not the case with us. Our best performing emails probably contain 3,000 to 4,000 words and require the user to scroll down three fold,” Tripi says.

## **Tactic #4. Ensure email delivery**

Email marketers have been warned for years against sending emails about “prizes,” “sweepstakes” and many of PCH's other key phrases. However, PCH maintains an average 99.2% inbox delivery rate despite using these terms.

Tripi highlighted several ways his team maintains this average:

- Multiple seed lists

Before sending a campaign, PCH's marketers send it to two seed lists to ensure the email renders correctly and is not blocked by popular spam filters. The marketers maintain a list of 40 accounts to receive test emails. They also use a third-party provider to maintain a list of about 400 seed accounts and monitor delivery.

- Clean the list

List hygiene is "critical" to PCH's deliverability, Tripi says. The company has screening systems for all incoming addresses to check them for typos and syntax errors. Also, inactive subscribers are routinely removed from the database. The period of inactivity varies across PCH's six email programs.

- Short- and medium-term analysis

PCH has signed up for complaint feedback loops from major ISPs and webmail providers, which report to PCH when a subscriber marks an email as spam.

PCH monitors these metrics and others for every campaign. It also aggregates subscriber engagement and complaint data over a four- to six-month period to look for any aberrations or slow-growing trends.

- Tactics mentioned above

The previous tactics mentioned in this article also contribute to PCH's high delivery rate. First, the marketers ensure only valid and relevant subscribers opt-in to the program. Second, they only deliver subscribers the information they were promised. Third, they constantly test emails and monitor metrics to ensure a high level of engagement.

**Tactic #5. Display relevant advertising**

PCH does not buy third-party information about its subscribers, but the company is constantly learning about its audience. The information is gathered on a "first-party" basis, Tripi says, through registration forms, subscriber activity and surveys.

The marketers primarily use this information to segment their audience and offer relevant third-party advertising in emails. PCH is able to identify subscribers' interests (such as cooking, saving money, etc.), match them with relevant advertising partners, and deliver the most relevant ads.

The content in each of PCH's six email programs is not typically customized for subscribers' preference. However, the advertising in each email is always customized. This has the double benefit of sending subscribers more relevant offers, as well as connecting PCH's advertisers to more relevant subscribers.

## COMPLY WITH THE LAW

*Note: When dealing with CAN-SPAM and privacy policies, it's best to talk to an attorney. It's always better to err on the side of caution.*

The speed at which information-sharing practices are evolving continues to be a hot button driving how privacy policies and even laws are being determined. The topic of privacy is sensitive for both consumers and marketers. On one hand, consumers demand personalized content based on their preferences and delivered efficiently so not to take up their valuable time. Marketers strive to accomplish this order by obtaining more and more behavioral data to rise above the overwhelming flood of communications targeted at consumers each day.

Shoppers become concerned when the tracking practices or the intended uses of the information are not disclosed. The lack of transparency leaves consumers anxious and distrusting the brand. Feeling this lack of trust, their attention turns to, "How can I take control over my information?" and laws are the byproducts of people desire for control.

Government and industry regulations are evolving every day and obviously it is in your best interest comply. However, in some cases the laws will be less rigorous than an ISP's requirements. As you make decisions and implement your data collection and privacy policies, focus on earning and keeping your customer's confidence. The pillars of trust and transparency can serve as your guideposts. Today's consumers are willing to pay a premium for trust and security.

## CAN-SPAM ACT

The U.S. legislation, "Controlling the Assault of Non-Solicited Pornography and Marketing" Act was passed in 2003 and updated in 2008. The act outlines and standardizes the requirements for commercial emails and details penalties for sending spam. The CAN-SPAM Act defines commercial email messages as those for which the primary purpose is to advertise or promote a commercial product or service.

### LISTS

The CAN-SPAM act does not require your list to be comprised of only opt-in subscribers. However, it forbids the list generation practices of harvesting (the act of stealing names from the Web) or auto generating emails. This makes it constructive to record the timestamp/date that the contact subscribed and his or her IP address. Businesses cannot send email to anyone that has unsubscribed from their list and do not share those email addresses without first notifying the unsubscribers at the time of registration.

In addition, brands must maintain a Do Not Email (DNE) list. This is a list of addresses that need to be removed from a general mailing list and reviewed before any email communications that go out on behalf of your organization - personal and transactional emails are exempt.

### COPY

The "from" and "subject" lines in your emails cannot be false, fraudulent, or misleading in any way. The email must disclose your company name and physical address. The email should contain a functional unsubscribe mechanism. The IP address and domain names cannot be falsified. A campaign sent with an incentivized forward to a friend link must provide an opt-out mechanism as the brand is considered the sender, not the original recipient who forwarded the email.

### UNSUBSCRIBE PROCESS

The opt-out mechanism and process must be simple, either replying to a mailbox or visiting a single website page. The most a person who wants to unsubscribe from your mailings should be required to do is enter their email address or check a box. The opt-out mechanisms mentioned in your email are obligated to be available 30 days following the messages delivery. All requests for removal must be completed in ten business days. All communications are to end unless the recipient opts back into the program.

## COMMERCIAL VS. TRANSACTIONAL MESSAGES

CAN-SPAM only pertains to commercial messages not transactional or relationship email communications. Transactional emails are messages that provide service updates such as order confirmation, billing statements, receipts, and online chat transcripts.

## INTERNATIONAL LAWS

Review the international email laws by country, as you might expect each has their own unique approach to dealing with spam. Here is an overview:

### CANADA'S ANTI-SPAM LEGISLATION (CASL)

In Fall 2011, Canada's "Fighting Internet and Wireless Spam" Act (FISA) was planned to go into effect. Akin to the CAN-SPAM Act, FISA, Bill C-28 or now being called CASL seeks to protect Canadians from unsolicited marketing tactics such as malware, phishing and pharming. The act goes beyond just email and applies to any form of commercial electronic message sent via email, SMS (text message), instant message, social network - plus anything new that comes along by Canadians, to Canadians, or hosted on Canadian servers. This will include emails sent outside the country and opened inside Canada's border.

At the time of this writing, the specific details of the regulations have not been released and further consultations are now planned. The Canadian Marketing association believes the law will not take effect until the summer of 2012 at the earliest. When the act is published, we recommend you review closely with legal counsel.

The risk of not complying with the law is high. Organizations can be sued for up to \$10 million per offense. Yet, it appears that marketers are not concerned about the new Canadian Anti-Spam Law. In our research we found CMOs rank CASL as the least likely new developments to affect their organizations email marketing program. We had to diverse responses on this answer ranging from being unaware of the new law, to no concern because they currently maintain a 100% opt-in list.

### Lists

The second notable difference from the CAN-SPAM Act is that it requires consent. Email recipients must *explicitly* ask to receive your email. There are some situations where implied consent is permitted. These include when the recipient gives their email address directly to the sender or the sender has an existing business or non-business with the recipient within the last two years. As these are very narrow exceptions, the safest route is to require opt-in before sending commercial electronic messages. In addition, marketers cannot use common spam tactics to build lists, including address harvesting or dictionary attacks.

This may demand changes in your email acquisition practices including website, customer service, and Facebook registration pages. The law will necessitate a subscriber is clearly informed about the information they are consenting to receive from you. You will also be obligated to retain documentation of the opt-in source, date and the agreed upon consent statement. The burden is on the sender to prove consent.

### Database management

With the ratification of the law delayed, it is a good time to plan for how your organization will meet these new standards. This may mean changes to your current database fields to identify subscribers consent status as either express or implied. It will be essential that your database is capable of managing time limits.

A subscriber's contact record must track implied consent to ensure they give explicit permission within the two-year window. If they do not sign up for your email program a "stop send" date should be recorded to ensure compliance.

As you can see this potentially be a resource draining practice and will need to be maintained in this manner moving forward. For brands that have kept opt-out only lists or ones with few current customers, the prospect of their list size drastically being cut will drive many too reach out to ask subscribers to opt-in.

### **Copy**

It is a requirement to identify the person sending the message and an easy way to for the recipient to connect with them. The contact information and company's postal address shared must be valid for at least 60 days after the send date. If you are sending on behalf of a third party, they need to be identified as well. All communications sent will include an accurate subject line, and a working unsubscribe mechanism. The opt-out link needs to be functional for at least 60 days after the campaign is sent.

### **Unsubscribe process**

The unsubscribe process must be straightforward and visible. If a recipient has unsubscribed, businesses must honor the request quickly and remove them within ten days. Future communication may only take place after the customer opt-in again. Also the process must be able to be completed by email.

### **Commercial vs. Transactional**

CASL only applies to commercial communications and not transactional messages. Email messages that provide estimates, complete or confirm a transaction, or give product warranty or recall information are exempt.

An excellent free resource is the [Bill C-28 Anti-Spam Readiness Checklist](#) from InboxMarketer.

### **EUROPEAN UNION DIRECTIVE**

The European Union's "Privacy and Electronic Communications Directive" requires Member States to prohibit the sending of unsolicited commercial communications by fax, email or other electronic messaging systems unless the recipient gives consent through an opt-in system.

Similar to CASL, the exception is email sent to an existing customer. The products and services must be similar to the original purchase, and communication at the point of sale must indicate that the information collected could be used for future direct marketing purposes. At the point of collection and with subsequent messages the customer should easily be able to stop further messages with an opt-out system.

Like other spam regulations, the directive prohibits the concealment or disguise of the sender's identity, and to mandates a valid address be provided for recipients to request the stop of future communications.

The directive only establishes the legal objectives; it is up to the Member States to decide how to meet the outlined goals. Each country interprets and implements laws to carry out the directive differently. This can be seen in the United Kingdom's broad definition of consent, similar to that of the United States, as compared to Italy's which states that explicit opt-in is required for any kind of "profit-seeking" email.

### **PRIVACY POLICY**

A privacy policy is a legal document that discloses ways a brand gathers, uses, shares, manages and protects a customer's data. A copy of the document, including the policy's effective date should be stored with both your marketing team and legal counsel. Review once a year during your annual email audit.

The policy includes how a company manages a subscriber's email address. Companies may choose to enact strict privacy in which they do not share, rent or reveal email addresses to any firms outside their business including scrubbing services, deliverability vendors or ESPs. The benefit for having such a policy is that it reassures the customer his or her information is safe. The drawback is that the policy may limit how you can conduct your list hygiene and delivery of your messages. Businesses that do not ratify strict policies will use

strong sentence structure to emphasize exactly what the company will and will not do with a recipient's email address. This is essential to comply with the CAN-SPAM act requirement to notify the subscriber of the intent to share information with a third party at the time of consent.

One final comment, privacy policies do not have to be written entirely in legal jargon. They can be written to convey your brand's voice and identity.

SECTION SUMMARY: DELIVERABILITY AND LEGAL COMPLIANCE

Please take a few minutes to complete the assessment for this section.

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1. Name four deliverability reputation factors marketer's control.

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2. What actions are webmail providers implementing that drive the need for relevant content?

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3. Which piece of legislation does not require email recipients to opt-in? CAN-SPAM or CASL

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*If you were unable to answer any of the above questions, please review the previous sections again before moving on.*

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CHAPTER 7 NOTES

CHAPTER 7 NOTES

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## CHAPTER 8: EXECUTE ENGAGING EMAIL CAMPAIGNS

By the time you have the chance to sit down and write an email to your subscriber base you have accomplished several feats. Most likely, you have written a marketing communication plan, laying out your strategic goals and objectives. Your team selected and placed well-suited tactics into your customer's path to purchase and obtained permission from future brand evangelists to send email communications.

Finally, you targeted a segment of your audience and created relevant content that these members are eager to acquire. At this point, you can see the finish line, but here is the decisive moment where campaigns are either won or lost. A well-composed email delivers and communicates your brand's *value* to its subscribers.

At each point in the process, unconsciously or consciously, you and your team reflected on your company's value position. It was the value position that narrowed where in the sales funnel your communications could assist the buyer. It was the value proposition that revealed how email could work in conjunction with other mediums to create an enjoyable experience.

It was the value proposition that drove the debate on how frequently email communications should be sent. It was the value proposition that determined the criteria for targeting and scrubbing email recipients. And now it will be the value proposition that will guide how the message is designed and written.

### CONFIRM THE VALUE PROPOSITION

Unless your organization is led by a steadfast strategic executive who effectively communicates the brands values at every turn, your value proposition probably is interpreted differently within the company. It may change slightly to take advantage of a business opportunity or defend a market position. One pillar is the focus when speaking with a customer and another highlighted with a vendor. As a contributor to the marketing communications of your department it is essential you have a clear understanding of your brand's value proposition.

Your company's value proposition is not something created in a brainstorming session like a corporate slogan or vision statement. The value proposition is not an edict. Rather it is driven by customer need and discovered by asking unbiased questions regarding your organization, employees, rivals and the marketplace.

Whether you are reviewing an existing value proposition or creating a new one, you want to keep it simple. You may uncover that your company requires unique value propositions for each of your business units due drastically different products, services or markets.

In the interest of clarity, there is only one question you need to consider when developing your value proposition and it will require you to step into your customers shoes.

#### **Q: If I am your ideal prospect, why should I buy from you rather than your competitors?**

To answer this question review your customer profile, competitive analysis, past campaigns and their performance metrics. Next identify the potential categories of the value proposition, based on your customer profile. Push yourself to find at least five key points that distinguishes your solution unique and better than the competition with credible facts to back up your claims. Once, collected write drafts for each category.

Next you will want to measure the impact or force of the statement. Examine and rate your value proposition drafts by four criteria:

### **Appeal**

For appeal, essentially you are assessing the degree to which the value proposition is desired by the ideal prospect.

### **Exclusivity**

For exclusivity, you are assessing the degree to which the ideal prospect can get this value elsewhere. Are you the only place where this offer is available? How unique is it? What sets it apart?

### **Credibility**

For credibility, you are assessing the believability of your claim. If you had the exclusive rights to a legitimate cure for male-pattern baldness, your challenge wouldn't be appeal or exclusivity, it would be credibility. Your value proposition must be stated in such a way that it is instantly credible.

### **Clarity**

For clarity, you are assessing the succinctness and speed at which your statement is understood using both cognitive and emotional intelligence. What facts cut through the clutter and effectively communicate your brand's unique offer?

Now move onto testing your value proposition to ensure its accuracy and effectiveness. Hone it until a single, instantly credible sentence emerges. Experiments can be performed with a variety of communications channels. Media requiring short-blast communications work best. Consider pay-per-click ads, email subject lines or Tweets.

Finally, analyze the results, make a decision and in due time you will be back either to work on the brand's value proposition again or a specific product asking yourself *"If I am your ideal prospect, why should I buy from you rather than your competitors?"*

We have provided the following sample to familiarize you with a clear, concise value proposition. These are supported by proof points identifying the most effective specific and quantifiable facts that bring credibility to statement. These proof points will be used in expressing the value proposition in email copy and landing pages.

### **Sample value proposition**

*"The [name] Business Essential Account simplifies small business banking by providing all the tools and resources you need for success"*

Essential proof points:

- *24/7 phone access to our dedicated small business advisors*
- *Designed exclusively to meet the needs of small business*
- *Starting at \$6, it's an exceptional value compared to similar accounts*

Learn more about how to test, measure, and integrate your value proposition online by watching the *free* webinar titled "[Do You Have the Right Value Proposition?](#)" from the MarketingExperiments library.

**EXERCISE: WRITE A CONCISE VALUE PROPOSITION**

Using the above mentioned process write your organization's value proposition. To keep you fixated on creating an effective value proposition, we challenge you to write your value proposition in no more than one sentence. For most marketers it is tempting to elaborate on all of the things your company does well. We're glad that you have such great enthusiasm for your brand, but recall the focus is on brevity and clarity.

*Note: We have included multiple entry spaces to allow you to create concise value propositions for a variety of products or services you may offer.*

## CAPITALIZE ON ENGAGEMENT OPPORTUNITIES

This new marketing ecosystem makes manic marketers feel like they are always chasing the latest marketing trend whether it was search and social media or now mobile. We have to remind ourselves that our customers' priorities are not with the communication channels, but rather the relationship it has with our brand. The channel merely delivers the solutions they desire on media tool they prefer, making the channel subservient to our relationship.

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*"Connecting is the ability to identify with and relate to people in such a way that it increases our ability to influence them."*

- John C. Maxwell

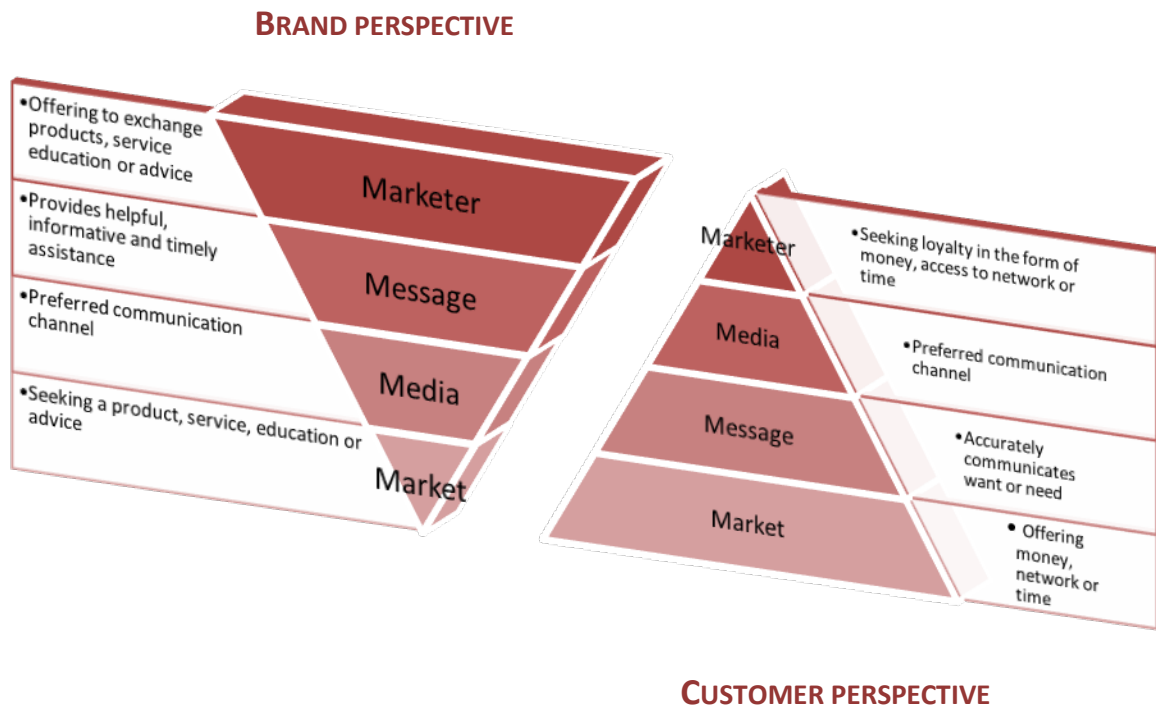
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When you boil marketing down to its essence, it is designing, preparing for, and capitalizing on opportunities to engage with people that produce unforgettable branded experiences. If successful, the recipient is captivated by the experiential exchange and takes action to influence others within a personal or professional network.

Making new connections and maintaining them requires extreme effort in the form of active listening and interacting in a meaningful ways to their innate communication style. The communication can be categorized into four elements; media, message, marketer (i.e. brand) and market. The two-way conversation must freely flow back and forth between parties.

Both know they each have their own objectives with the shared understanding if their criterion is not met, one will walk and look elsewhere. Still, both engage in good faith seeking a relationship worth the investment of their time, effort and expense. Mutual trust builds with multiple micro-decisions, shared information, and fair value exchanges.

GRAPHIC: POST-MODERN CONSUMER COMMUNICATION EXCHANGE



## ENSURE YOUR EMAIL MEETS THE NEEDS OF THE USER

As the previous graphic demonstrates communications between customers and brands are delicate. There are numerous ways in which expectations could become misaligned. The problems of the customer might not be a match for the brand's solutions. The brand's message could overpromise its product's capability or the customer may not fully disclose the extent of their difficulties.

The customer's communications could be carried on a media platform foreign to the brand, or vice-versa. Marketers must ensure the message fits the brand's offering, the channel's specifications and the customer's desires. Let's start with the email message's creative options.

## CHOOSE AN EMAIL DESIGN

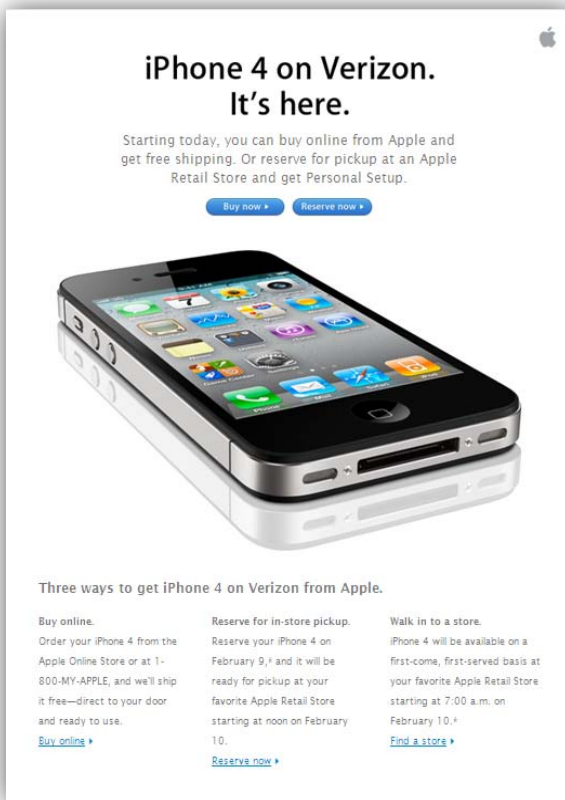
Selecting the right design template is an important decision that should be thought through carefully. It starts having a clear definition of your email's objective. What is the *one* action you want the recipient to

take? Is the desired action to clickthrough to your site, print a coupon to redeem at a retail outlet, or share the information with friends and colleagues?

Apple's email (on the left) uses ample white space not to distract the reader and quickly gets to a clear call-to-action; either buy now or reserve now. Having a plainly stated and agreed upon goal will help you better judge the results of the email campaign.

Additional considerations include your audience's preferences on how the consume communications. Are they in the office or on the road? Viewing the email on a laptop or mobile phone? Do they have the time to read an in-depth article or are they looking for a quick sound bite?

Only you will know the answers to these questions. Testing each will validate your hypotheses. Let's take a look at four email designs and see how they might fit into your brand's personality.



## E-POSTCARDS

A popular email format is the e-postcard. As the name implies, the email renders looking like a postcard on the recipient's desktop screen. Most people design the card so it encompasses the entire screen and the subscriber does not need to scroll down to view. This style can be effective when you want to send a quick message like business announcement, change of address, holiday greeting, reminder or thank you note. The email alert's concise layout makes it easy to forward to a friend.

We encourage you to experiment with this format. The design's laser-like focus makes it a quick read and can be a welcome change of pace if your emails are consistently letter or newsletter formats. Try using the format to carry nurturing messages with links to e-books, webinars, whitepapers, or video demonstrations. Test drive traditionally second tier calls-to-action in email communications like inviting subscribers to follow you on social media sites.

As space is a premium, think as if you were designing an outdoor billboard. The copy needs to be attention grabbing and extremely short. Links to a single offer is recommended. Remember the majority of email objectives will be to earn a click. Links may be found in your copy and in supporting pictures.

Imagery can be a great ally in communicating your message in such a confined area. Stock photography of people is not as effective as using professional photos of your co-workers. In this age of transparent marketing, consumers expect to see “real” employees in action. Images displayed on your communications easily found on other organizations marketing collateral will quickly trivialize your brand identity. Likewise, stock photography of generic products and services are not as helpful as photos of your actual products or services in their working environment.

#### E-COUPONS

Similar to e-postcards, e-coupons are effective at driving subscribers to take action. Email versions of a brand’s coupons have distinct benefits. Marketing departments can more affordably segment and target consumers with their own house databases. Friends and family discount coupons can quickly go viral and enable you to gain new customers without any additional expense. Some marketers believe e-coupons to have a dual benefit of both spurring transactional sales and building brand awareness even with those who choose not to redeem the offer. They also appreciate the ease in which e-coupons can be trialed to find new sub segments of opportunities to drive sales.

#### LETTER

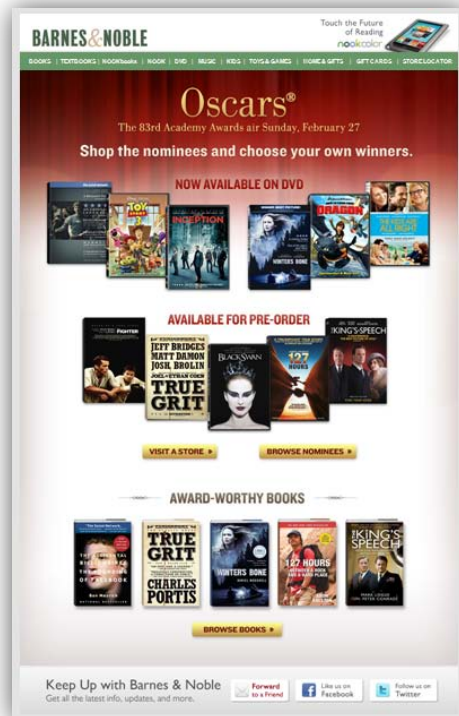
When the message requires a more formal delivery, the letter format can be the correct choice. Following the style of a traditional letter, templates include graphic header, date, greeting, headline, copy, salutation and signature. Keep the copy brief as possible, but as this is in a letter format, the reader can expect the copy to be longer with more details than an e-card or e-postcard. This may be the most honest form of email. The message predominately communicates with words and not images or graphics. A letter format grants a great opportunity for you to talk with your brand partner without any additional noise.

#### NEWSLETTER

The newsletter format gives you the opportunity to provide robust content around specific themes relevant to your subscriber. B2B marketing topics may evolve around a particular industry or market your company services. For B2C businesses, the content may encompass a particular hobby, holiday or health habit. The Barnes & Noble email shown on the next page promotes their Oscar-nominated movies available on DVD and books the weeks leading up to the Academy Awards.

The design and copy must be clutter free, easy for the reader to scan and find the most relevant articles. According to the Nielsen Norman Group, the average reader will spend 51 seconds reviewing each newsletter in their crowded inbox. Multiple headlines, bullets and links to the complete article on your website are common newsletter features to facilitate scanning. Design elements of evocative images, simple graphs and meaningful numbers can grab a reader’s attention.

A newsletter is your chance to aggregate recent news and deliver it to your brand partners on their terms in a simple, useful and easy to read format. You are providing a service that allows them to keep up-to-date on their industry or favorite activity. Newsletters lean towards





goals of brand awareness and website traffic rather than actual transactions. These objectives allow you to provide a wider variety of stories and offers within the specific topic to peak the reader's interest.

In most cases, copy written in conversational language is welcome. Repurposing blog posts, status updates and customer feedback can make the newsletter feel more interactive.

New technologies provided companies like GroupVine are emerging to allow newsletter to be more interactive. Surveys, polls and social media discussions can now be instantly shared with readers in the form of graphically displayed results and real-time feedback.

Finally, if your marketing plan is dependent upon a robust email subscriber base, make sure you include some exclusive content they cannot find anywhere else on the Web.

## NOVELTY

Sporadically surprising your readers with a fresh look can keep the relationship from becoming stale. Gaining a smile or a laugh from your email recipient with the use of an occasional animation or video can make your brand seem more interesting and enrich the interaction. If you find your metrics increase, do not get caught up in the success. A gimmicky email is just a change of pace communication. Do not use it consistently. The novelty quickly wears thin.

## FORMAT EMAIL FOR TODAY ... AND TOMORROW

The decision to create your email in HTML or text will be determined by your email's objective. Both formats have their strengths and weaknesses. HTML's ability to track behavior makes it a favorite of marketers, even when a simplified message is required. Asking your subscribers to identify their preferences will also weigh in on your decision and how much time you invest in each format design.

## HTML

Your email will not render the exact same way for each of your users based on their device, email client and screen size. If you have the ability and resources to research your subscriber unique traits, you can find some commonality and design for the viewing tastes of the majority. Do not forget to leverage your ESP's or MA's expertise. Many can provide reporting on the percentage of your subscribers opening your messages by email client and mobile device. Some marketers go as far as designing a template specifically for an email client like Gmail or iPhone mobile device. Most memberships are too diverse to justify the time to segment, here are some general guidelines.

### **Plan for image blocking**

A key benefit to HTML is the ability to add images, colors and buttons to your email communications that aid the subscriber in visualizing the value of the offer. However, our *2010 Email Marketing Benchmark Report* found that only one-third of consumers report having images on by default. This means 67% of email users have images blocked when they first view an email. For this reason, it has become standard practice to add "view online" at the top of the email to encourage recipients to see the email as it was originally intended.

When planning for this challenge, the first step is to determine if the added design elements are necessary. Will the additional images and color communicate your message more effectively? For certain messages like special requests or survey invitations, plain text are more successful as they appear less like a promotion and more like a personal appeal for help.

If you decide on HTML, maximize your ability to customize the ALT-text tags that display in space where the image would otherwise appear. Rather than using generic descriptions like, "company X logo" or "click here," give concrete details of where the link leads to and what is the actual offer. In some cases, your logo will lend itself to a common font like the following Nike email promoting Lance Armstrong's charity.



Designers using table cells or tables build more legible emails and reduce reader’s distractions. Tables enable your message to retain the basic structure of your HTML messages, including columns and image sizes. In addition, they also allow you to display some color and images within the table – even if the recipient has turned off images.

### **Keep it narrow**

A narrow design forces you to be brief and focus on the most critical message points. It works well across the majority of devices and clients. Use a simple, solid color background to make up the space surrounding your emails will make the design more appealing.

### **Go small**

Your recipient’s inbox is most likely overcrowded. Large email files can result in increased bounce rates and distress corporate IT departments.

### **Differentiate yourself**

Best practices start with a simple and clean design. A grid layout allows you to group your messages to create clearly defined sections. Following these guidelines is a great place to start, but to get the full benefit out of HTML, make your design unique to your brand. Some email designers have reverted to sprinkling CSS style sheets into their layouts to make call-to-action buttons glow. Unfortunately CSS has rendering issues with Outlook 2010, Lotus Notes and Gmail, the good news it works well iPhones iOS.

### **TEXT**

Text emails can be very effective when the message is urgent and needs a prompt response. When composing a text-formatted email, there are several elements to keep in mind. The length of your sentences should be short, 45-50 characters maximum and each paragraph no more than four lines. The email should be quickly scannable with hotlinks placed in the first two paragraphs. Design the hotlinks to be short and if possible branded. Long links can wrap around when viewed on traditional blackberry devices and deter readers from clicking on it. A solution is to use redirected links in which you can customize and shorten the text. Even though an image of your logo will not appear, you will still want to communicate whom the email is from, to identify yourself as credible.

### **JAVASCRIPT AND BEYOND**

Email continues to evolve from plain text to HTML to now JavaScript and HTML5. Email clients like Hotmail, Yahoo! and Gmail are improving their services to reduce the need users have to navigate away from their inboxes. Gmail has enabled email recipients to preview content from YouTube, Flickr, Picasa and Yelp since 2009. To stay competitive Hotmail and Yahoo! now will allow developers to embed and run JavaScript from within emails so they will look and function like a webpage.

This gives marketers the opportunity to provide a variety of benefits to subscribers, including easier access to videos, and real-time tracking information. The Direct Marketing Association has reported that marketers can double and even triple open rates by using video within their emails.

HTML5 is supported on all major mobile devices, including Google, Apple, Microsoft and RIM. This makes HTML5 the best solution for creating and deploying content in the browser across mobile platforms.

## PC PREVIEW PANES

Our *2010 Email Marketing Benchmark Report* found that more than 80% of business people and more than 50% of consumers utilize the preview pane view on their email clients. Through this window, they make the decision to open, delete or archive the email. That does not give you a lot of room to make a positive first impression. While it is not possible to create the perfect email for all email clients and orientations, there are a few “R” principals to keep in mind when you choose to focus your optimization on PC preview panes. Of course, all treatments should be tested for your particular audience.

### **Remove clutter**

Information surrounding whitelisting and links to “view on online” at the top of your email can prevent the subscriber from reading your value proposition in the preview pane. Placing this information below the fold can free up critical space, especially if not a large number of your opt-ins use these features.

### **Reduce image sizes**

Large images, headers and logos will not help the reader decide if they should open your email, especially if the graphics are blocked. Reduce the size of the images so that your headline and call-to-action link is present in the preview pane.

### **Redesign**

If you find the majority of your subscribers read their email on personal computers, you may want to consider a complete redesign. The new design would display a table of contents and text about your offer in the upper left hand corner. Logo images would be turned in for rich text, to allow your company’s name to be seen even if images were blocked. The copy will use simple elements such as bullets and lists for readers to quickly scan and find relevant content.

## MOBILE

Yahoo! predicted that by the end of 2011, 50% of Yahoo! users will access their email through a mobile device. With smartphones heading toward a tipping point, mobile usage and consumer viewing habits will be more of a deciding factor in design. The use of CSS style allows for “Responsive Web Design” – the creation of a HTML and smartphone version in one template.

The small screen, typically a few inches, demands format changes to improve the email recipient’s experience. In addition to discussing the importance of researching your audience’s mobile habits in Chapter 4, we talked about several style changes to optimize emails for mobile subscribers. To summarize:

### **Mobile Intelligence**

Think beyond layout and put yourself in the shoes of the subscriber. Viewing an email while standing in line at the grocery store may require different content and pace. Clicking on a link in a beautifully optimized email, only to end up on an illegible landing page is irritating. Expect landing pages and websites designed with mobile users in mind, to produce higher conversion rates.

## Single Column Format

The limited environment requires a single column format and stacking information into easily scannable blocks. The standard width for emails has been in the range of 600 pixels. The first-mover status of the iPhone is pushing many marketers to design their emails at 640 pixels, which scale down automatically for iPhone users to render at 320 pixels. The screen width of the iPhone 3 is 320px; the iPhone 4 is 640px. Unlike the iPhone, Android and most other devices do not scale down images. For versatility, many marketers are opting to design at 320 pixels for all mobile screens.

## Simplify

Your writing style should get straight to the point. Few words, short sentences with a minimum font size of 14. The font should be dark in color to make it easier for the reader to see on the small screens. Add space around the links and increase the size of the buttons to allow fingers to touch accurately. The spacing can be tight in the copy, use the media queries CSS to spread out the text.

Remove any distractions from the top of the email. Slim down subject lines and pre-header text, display a brief call-to-action in the top left area and anything else can be moved below the fold. Prioritize the use of tracking URLs. Tracking URLs can take up several lines per screen, especially if they are reformatted from HTML into text.

The use of preview text has taken off with its adoption by Outlook, Gmail and the iPhone. The first few lines of your email text will be displayed right after the subject line giving subscribers a preview to what's in the email. It will also come up on iOS devices and Windows Mobile 7.

## Images

The widespread adoption of HTML in mobile is mixed news, on one hand it is universally accepted across mobile devices. The bad news is that the only mobile operating system that does not block images by default is the iPhone/iPad. Compounding the problem only Android displays alt-text behind a blocked image.

If you have images in your email marketing campaign, make sure you scale them down correctly. Mobile users find waiting for images to render, then taking up the entire screen.

## PRE-SEND TESTS

For PC, tablet and mobile it is a best practice to test the designs to see how they will render across, email clients and devices. Even though your team attempts to design a fluid and simple layout to render well across a wide variety of devices, there will be some glitches. This is just part of the email marketer experience when an email is sent flawlessly to 99% of the subscribers, but did not render correctly on the CEO's mobile device. Based on your resources and subscriber viewing preference you will have to decide how closely you will pursue perfection.

Many marketing departments create a seed list. This is a list of email accounts from several email service providers and devices that represent the majority of its organization's opt-ins. Nevertheless, testing manually can be cumbersome, work with your ESP or reach out to vendors that can preview email campaigns across multiple email client and mobile devices.

## EXAMINE THE ELEMENTS OF AN EMAIL MESSAGE

Several components of your email need to work in conjunction to result in the correct thought sequence to earn a click. Each element has a specific task to accomplish to move the reader along the desired path. In addition, each part plays a role in ensuring your commercial emails comply with CAN-SPAM laws and are safely delivered to your subscriber's inbox.

## FROM LINE

The name displayed in the “From” line of your email becomes the designated sender, according to CAN-SPAM regulations. Including your brand or product name in this space will differentiate you from other email senders. Keeping the “From” name consistent will build trust and brand recognition with your email recipients. Over time, they look forward to seeing your brand's name in their inbox. Adding an individual's name and job title can also reap benefits in certain situations. If the recipient works with a particular sales person or customer service representative, their name will be recognizable and increase open rates. Be cautious of this strategy if your company has a high turnover rate with employees.

## SUBJECT LINE

Email marketers are in a perpetual search for the perfect subject line and for good reason. Subject lines are one of the few elements in their complete control. Choosing just the right words can double or triple open rates. Remember the sole purpose of the subject line is to get the recipient to open your email.

### Accuracy

Obviously, you will want to write a subject line that stands out in a crowded inbox and grabs the recipient's attention. However, be sure not to go overboard on this quest. The fastest way to receive spam feedback is to mislead your audience in any way, shape or form. Communicating your credibility, exclusivity and relationship are key ingredients in accurate and truthful subject lines.

#### *Relationship*

The subject line supports the “from” line and sets realistic expectations for the content inside the email. Use your brand's voice to remain consistent with previous messages and the one he or she will soon read. Write the subject matter to jog their memory of why they originally signed up. If it was to receive exclusive offers, relay that message concisely without exaggeration. Remind them of the challenges they face and opening the email may provide a resolution.

#### *Credibility*

Consumers are comforted by data. Sharing numbers, percentages or short testimonials can reduce the anxiety of opening an email.

#### *Exclusivity*

Knowing your company's competitive advantages allows you to communicate your value proposition in terms of exclusivity. People are more attracted to help they can get nowhere else. Exclusivity combined with urgency drives even more opens. The addition of an actual due date or expiration date in subject lines has proven to increase open rates.

This is a good tactic only if it is truthful and communicated in factual tone and not as promotional hype. Implementing dates too often can reduce your campaign's impact, as your readers will become accustomed to these calls-to-action.

### Brevity

For a number of reasons, keep the subject line length short. First, people's attention span becomes smaller every passing day. Secondly, shorter subject lines are more likely to be seen on the varying email clients, screens and devices. For these reasons, the first two words are critical. Readers with “inbox ADD” will decide whether to continue reading based on those first two words.

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*“Credibility translates into trust; trust translates into relationship, and relationship can translate into sustained sales”*

- Flint McGlaughlin. MECLABS

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However, do not be so brief that you lose the value you are providing to the reader. Remember this is your opening line to start a conversation. In addition, for social media sites like Twitter, the subject line is the default Tweet when a recipient chooses to share your email. Twitter only allows for 140 characters, so if you plan to have his shared socially you will want to make sure it is less than 140 characters to allow space for re-Tweets.

### **Avoidance**

Much has been discussed subject line words that trigger spam filters to block emails. The use of characters, words and phrases such as “!,” “FREE” and “buy now” have been discouraged. Using these words in conjunction with all caps can make the recipient feel as if you are shouting and pitching them instead of introducing a topic to discuss.

Today, these words do not have as much influence in the delivery of your emails compared to your reputation with ISPs. With the vast variety of words to choose from, it is easy to avoid these words. However, if you find yourself in a situation where a spam friendly word fits your message perfect, go ahead and test your subject line. You may find no delivery hiccups and high clickthrough rates.

### **Branding**

Adding your company or brand name to the subject line has several benefits. Locating the brand name in both the “from” line and “subject” line makes a logical thought progression in the mind of the reader and signals the message is coming from a trusted source. Constructing the content as part of a branded series can comfort the subscriber in setting clear expectations. As mentioned previously, many times subject lines end up as social media updates where you will want your brand's name to be prominently displayed.

### **A/B testing**

Testing subject lines on a regular basis takes commitment. Your effort will be rewarded with higher open and clickthrough rates as marketer’s intuition does not always select the correct winner. Pull a random section of your targeted list and conduct an A/B split. You will find new insights on what triggers your audience to take action. You may choose to test requesting the recipient to take action or place the offer in the subject line. Experiment with using trendy words, like “green” if your products are environmentally friendly and your audience cares. Trial real-time news headlines regarding changes in government laws and technology.

When strictly focus on “wordsmithing” subject lines, look for inspiration in blog titles, Tweets and newspaper headlines. Google’s AdWords Keyword tool can get your creative juices flowing. Like a subject line, each copy style peaks interest and, in very few words, encourages further investigation.

### **BODY**

The body design of your email continues the reader on a straight path to take an actionable event. The most common goal is to earn a click. Well-integrated marketing plans will prompt offline actions such as phone communications, redemption of coupons at retail stores or reserve a meeting time with a sales person. The channels may be different but the goal is singular in scope. To achieve the stated objective a number of pieces need to be aligned.

### **Copy**

The length of your copy should be only as long enough to communicate the value of the one desired action you want the subscriber to take. Respect your reader’s valuable time. Adding unnecessary information will potentially frustrate or distract their thought process. Similar to your layout design, write the copy in short, easy-to-scan paragraphs, using your brand's voice to invite the reader to take a specific action.

### *What's in it for me?*

Experienced copywriters understand the importance of communicating the brand's value in a way most relevant to the reader. Every subscriber is thinking WIIFM or "What's in it for me?" Putting yourself in the shoes of the reader and thinking about how they would like to be addressed, will aid you in creating better one-to-one communication. Your customer profiles will give you insights to their needs and interests. Messages focused on the subscriber's desires are more likely to engage the reader than the features and benefits of your products.

Numbers and specific attributes not only grab a reader's attention, but also add credibility to your message. Use percentages and dollar values to demonstrate concrete offers.

### *User-generated content*

Testimonials and shopper-generated reviews can be used to support your value proposition, as user-generated content has proven to increase conversions. The display of actual consumer feedback, positive and negative, increases trust between your brand and the email recipient.

In telling your brand's story and defining your market space, letting consumers know what you are not, can be just as important as explaining what you are. Making concessions with strategic negative testimonials gives you the opportunity to demonstrate your honesty. This candor will earn you recognition as an unbiased source and place focus on your brand's product or service.

This is not a recent tactic. Long before social media Jack Trout and Al Ries wrote about Smuckers' self-deprecating tagline "With a name like Smuckers it has to be good" in the book *22 Immutable Laws of Marketing*. A brand comfortable enough to make fun of their own name is more genuine in the mind of the consumer. The openness translates into buyer confidence.

### *Tracking links*

Hot links are the trigger mechanisms that capture and track your reader's behavior, as well as measure your email message's success. Marketers place links in various positions in the email. For example, you may find the same link in an image, first paragraph and message footer. It is a good practice to code each hot link differently so you can detect trends to improve your email design in the future.

Prominent placement of the link above the fold will make it easier for your reader to take action. People have made a shift in how they archive their emails because of webmail clients increasing their email storage capacity. It is now common for recipients to save and file your email communications. Subscribers retrieve them later as a reference document. The links embedded in emails are launching pads to engage with your brand.

Link shorteners have become popular in trimming down long URLs for digital messages. However, be cautious when using them in email. Spammers like to use them to hide their actual website domains and there is the potential that URL shortening companies will be blacklisted by the ISPs and third-party services like Spamhaus.

### *Closing*

Email signature options will vary depending on your design template. In a personalized letter format, the simplest form is to add a digital signature with the sender's contact information. Designs that are more complex use secondary links to drive traffic to webpages or social media sites. They also add images of corporate logos or a professional photo of the sender. Some businesses are experimenting with video

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### ***On user generated content...***

*"Pet owners, like a lot of consumers, tend to trust each other a lot more than anything your company can say about the products."*

John Lazarechic,  
Vice President of E-commerce,  
Petco

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signatures. With these options, it is easy to lose track of keeping the design simple and focused on the conversion.

## MESSAGE AMPLIFIERS

Copywriting provides you with the greatest potential to communicate your value proposition in precise detail. Words have the ability to deliver specific and quantifiable details in a tone that matches the reader's motivations. However, each subscriber has unique learning preferences and digests information differently. Adding graphic, video, audio and interactive elements can add power and force to your messages, and move the email recipient to take the next step in their path to purchase.

### Images

Flint McGlaughlin, Managing Director of MECLABS discusses in his optimization Web clinics how to choose images that communicate value with the most force. He sees three key strengths in using images:

#### *Relevance*

The force of an image increases as the connection between the image and the perceived value becomes clearer. Therefore, marketers must choose images that have a direct implication of value for the actual product or service. For instance, to increase image relevance, marketers should stop using random stock images that communicate little to no value about the offer.

#### *Reality*

The force of an image increases with its authenticity. Images can bring a realism that reduces the "virtual distance" between an offer's value and the recipient's perception of that value. Therefore, choose images that help the visitor to visualize the core value of the product. For instance, showing a family enjoying a roller coaster ride can provide tangible reality to the purchase of amusement park tickets.

#### *Relative weight*

The force of an image increases as its relative graphical proportion increases. Used properly, images should draw the natural eye-path of the visitor and thus bring more force to the value communicated by the image. Image weight must be used sparingly, as too many competing graphical elements will only confuse the visitor.

The key is to find the right balance between copy that carries specific details and images that generate genuine emotion to make a real connection with your audience. Keep this concept in mind when evaluating additional media selection.

### Graphs and charts

In the art of storytelling, authors will create tension by expanding upon contrast. Marketers do the same as they try to differentiate their products. Faster or slower, simple or complex, and expensive or cheap are common narratives. When discussing a comparison, charts and graphs can swiftly communicate the degrees of difference to your audience. These elements reinforce credibility and allow the reader to take the next step in their thought sequence.

### Video

ComScore reported that 183 million U.S. Internet users watched online video content in November of 2011 for an average of 20.5 hours per viewer. Amazingly, 85.9% of the U.S. Internet audience viewed online video. With this trend, marketers are seeing boosts in their response rates by adding video links in their emails. They are seeing rises in both open and clickthrough rates.



Traditionally, it has been best practice to show a screen shot or thumbnail of your video with a link. The link takes the subscriber to your website or YouTube rather than embedding a video in the email. The video should be no longer than 60 seconds, and we recommend displaying the video on the frame that visually communicates your value proposition the best.

Today, most webmail providers now play videos directly in the email-viewing screen. It may be advantageous to experiment with this new capability. Consider using HTML5 so the videos can be viewed on tablet computers and smartphones.

If you do not have video files available, try using animated GIFs. This image file type can simulate animation with images appearing in succession. Animated GIFs can help demonstrate a product, show variations of a product or grab attention for your call-to-action.

### **Personalization**

Personalization tactics are only effective if they are truly personal. Today, it's relatively easy with the help of most ESPs to include a first name your messages. For example, Eloqua ran an experiment with over 200 million emails in January 2011. They discovered personalizing subject lines with someone's name increased the open rates about 4.7% over the average. Inserting the recipient's company name in the subject line reduced the open rates by 2.6% below the average.

To connect with your email recipient, demonstrate you know his or her needs, desires, and history of your relationship. Relationships evolve overtime and this can be recognized in your email design and content. Most templates are designed with a new subscriber in mind. The designs include a strong logo presence and branded taglines. Yes, brand consistency is important for brand recognition, nevertheless as a relationship matures the brand messaging does not have to be so dominant. Sometimes sending a simple text heavy message for an important request or offer will be more effective. Moving the administrative text (whitelisting, permission reminders, etc.) usually found at the top of emails to the bottom enables more relevant content to appear higher on the page. This paves the way for a clearer thought progression for your loyal readership.

Including a client's account representative's name and photograph in the email or e-newsletter can further personalize the email. By doing so it expresses your brands desire to provide one-to-one customer service.

### **Dynamic personalization**

Fully leveraging your database to segment your subscribers, based on user preferences, location and needs will ensure your emails are well-received. Traditionally segmenting lists, creating custom content, and designing unique templates has taken extreme effort and for many worth the resource expense. Watch for advances in technology in which an empty wireframe is sent to a recipient's inbox.

When a subscriber opens the email, the content fills in milliseconds based on a number of variables, time of day, user's preferences or behaviors and the learned history of other subscriber's actions with this email campaign. Microsoft is doing this today.

We have wrote a blog post titled "[Dynamic images get 5 opens per reader on a single email](#)" on the success Style Campaign when they sent a holiday email to its subscribers gradually revealed a fun holiday image over the course of the day.

### **LEGAL REQUIREMENTS**

Each commercial email is required to include an option to unsubscribe, a CAN-SPAM "Do not mail" opt-out statement and your company headquarters address. This includes commercial emails from your marketing, sales, customer service departments and any triggered messages. Discuss with your legal department how to word each. Most companies include a privacy statement; have legal review this as well.

SECTION SUMMARY: EXECUTING EFFECTIVE AND ENGAGING EMAIL CAMPAIGNS

Please take a few minutes to complete the assessment for this section.

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1. Name a few design elements to consider when planning for messages viewed in the preview pane.

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2. List four ingredients to reflect on when crafting a subject line.

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3. Name three factors to think about when choosing an image to include in an email.

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*If you were unable to answer any of the above questions, please review the previous sections before moving on.*

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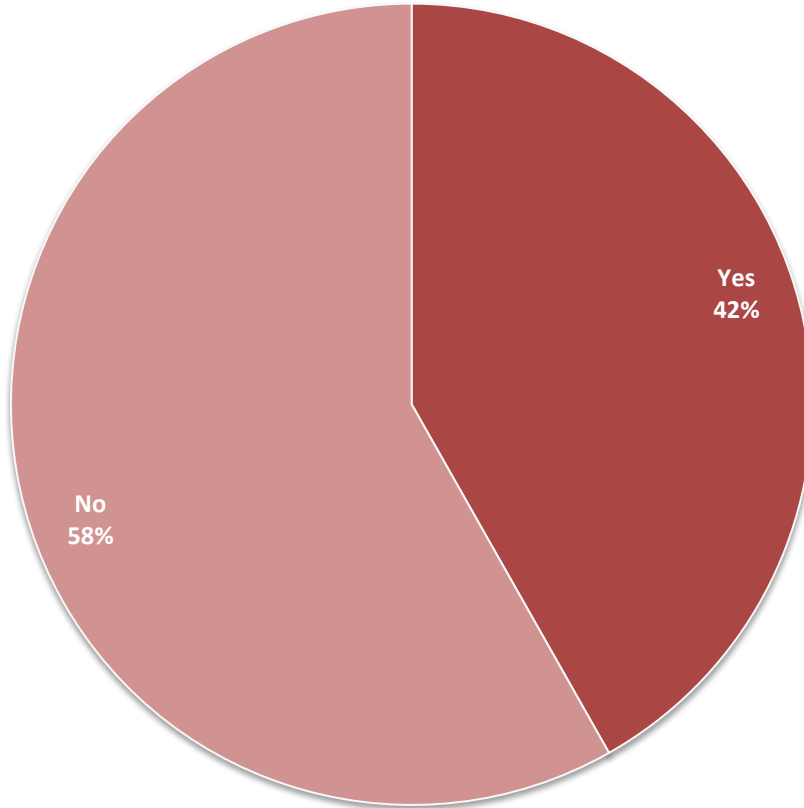
CHAPTER 8 NOTES

CHAPTER 8 NOTES

## CHAPTER 9: TEST AND OPTIMIZE

### CHART: MINORITY OF ORGANIZATIONS ROUTINELY TEST EMAIL CAMPAIGNS TO OPTIMIZE PERFORMANCE

Q. Does your organization routinely test (A/B split, multivariate or other method) email campaigns to optimize performance?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

Marketers know to meet their organizations unique objectives their teams must continuously test and iterate their processes. As the chart above shows, testing is easier said than done. Marketers have more responsibilities and less time to accomplish them making it easy to overlook the benefits of testing.

### TAKE THE TIME TO TEST

Organizations research email best practices and update their knowledge base through industry blogs, webinars and conferences. Learning the latest trends to maximize email's effectiveness is a great place to start, however only through testing and optimization will you find out what works best for your company and more importantly your customers.

Continuous experimentation and testing is the quickest path to peak performance. Dedicating 5-10% of a marketing team's budget and time will repeatedly pay back the investment. Employees will have to push themselves to think differently in order to create meaningful experiments. New approaches and initiatives will arise. The recorded results will reveal insights on your organization's marketing strategy as it attempts to have relevant conversations with its core audience. With each new nugget of knowledge, proceeding communications will become more efficient and effective.

## CREATE YOUR OWN “LAB”

Our *2012 Email Marketing Benchmark Report* found 31% of marketers who have written guidelines and a formal process that they routinely execute for testing email campaigns reported spending more than 10% of their budget on email experiments. Strategic organizations can build strong cases for running effective email trials that justify the additional funding needed to expand their research capacity

To attain this research funding, start by creating a culture of continuous improvement. Build your own testing lab with a group of researchers from your existing team. Look for colleagues with innate curiosity balanced by traits of objectivity and fairness. Establish a process for experimentation, measurement and implementation that aligns with your business objectives. Have your “lab coats” maintain an ongoing list of ideas ranging from simple to the impossible to inspire and implement new trials. Encourage input from teams outside your department.

Great test ideas can come from sales and customer service representatives. They can share their customers' insights and feedback on products and services, allowing you to gain new ideas on subject lines, email copy and promotions.

Start with tiny experiments to earn quick wins to help gain momentum. Preserve the small-scale tests to have the greatest flexibility for envelope pushing experiments with minimum risk. Keeping to incremental innovations will allow you to accelerate the introduction of new practices without rising reasons for resistance. Over time, each development will build your case for additional funding and resources to expand your research capabilities.

### STANDARD TESTING PROTOCOLS

Steve Wozniak, Co-founder of Apple, once said “You need the kind of objectivity that makes you forget everything you heard, clear the table and do a factual study like a scientist would.” To maintain your “testing lab” you will need to implement formal processes to keep your data impartial and accurate.

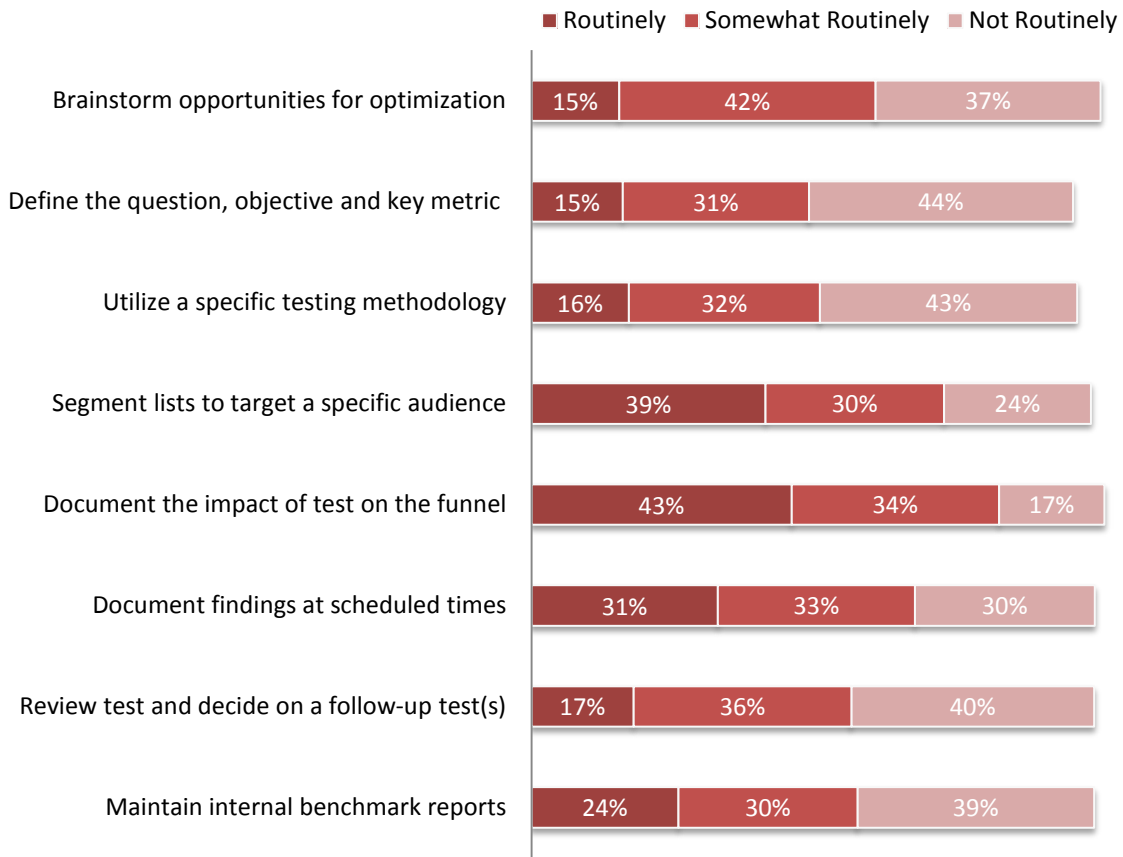
The survey for our *2012 Email Marketing Benchmark Report* set out to discover which common testing practices organizations routinely executed. The survey uncovered organizations are spending the most time segmenting their lists, understanding the impact of the test on the entire funnel, and documenting their findings.

Where firms can dedicate more time is defining the question, identifying key metrics, and actually reviewing the tests to decide on follow-up actions. Defining the question and reviewing the test is where the essential learning happens. Remember the goal of the test is not to get a lift, rather a discovery.

The chart on the next page displays common testing practices in chronological order from top to bottom.

**CHART: TESTING PRACTICES MOST ROUTINELY IMPLEMENTED**

*How routinely does your organization implement the following testing practices?*



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

**DEVELOP A METHODOLOGY FOR EMAIL TESTING AND OPTIMIZATION**

We found it startling was that only 16% of organizations utilized a specific testing methodology. To help leaders optimize the financial performance of their sales and marketing programs, MECLABS developed, and utilizes, a unique methodology to help analyze real-world data and create new single- and multi-factor tests that produce significant results.

MECLABS methodology is centered on an empirically derived model of human behavior, motivation, and decision-making consisting of a small set of core principles, or “heuristics.” This model provides proven principles for the planning, design, conduct and interpretation of conversion optimization tests, thereby greatly reducing the time-to-discovery, and to increased demand.

For example, the heuristic for MECLABS' **Email Messaging Optimization Index** is:

$$\text{eme} = \text{rv} (\text{of} + \text{i}) - (\text{f} + \text{a})^{\text{©}}$$

Wherein: **eme** = email messaging effectiveness index

**rv** = relevance to the consumer

**f** = friction elements of process

**of** = offer value (why)

**a** = anxiety about entering information

**i** = incentive to take action

For the purposes of the MECLABS testing methodology, Friction is defined as a psychological resistance to a given element in the sales or sign-up process. Anxiety is a psychological concern stimulated by a given element in the sales or sign-up process.

The application of the heuristics, as well as the others quantified in the MECLABS research process, allows MECLABS' analysts to empirically extend these findings to any number of marketing situations.

## OPTIMIZATION MINDFULNESS

To implement this methodology of email testing and optimization requires marketers to accept a few of MarketingExperiments' principal truths. This mindset and focus on behavioral psychology will help you communicate effectively with today's postmodern consumer.

### CLARITY TRUMPS PERSUASION

If you ever attend a lecture from Dr. Flint McGlaughlin, Managing Director and CEO, MECLABS, you will hear this phrase a number of times and for good reason. In today's overloaded inbox, you have less than a seven second scan to a grab the reader's attention and convince them to take action, even if that task is to save and not delete. Email messages must have one goal in mind for both the recipient and the sender.

Make sure your team is clear on the one desired outcome. Most of the time the lone objective will be to earn a click to a landing page. Remember, the landing page does the work of selling your product or service, not the email message.

Be straightforward when communicating with the reader. Do not clutter the message with multiple offers, links or flowery language. If you have to have more than one objective, make sure one is dominant and the other is clearly secondary. Its singular purpose must be extremely relevant to the subscriber to be successful. As discussed earlier, relevancy can be either external, relating to weather, news and events or internal in nature, tailored to the opt-ins' personal habits, interests or tastes.

### STRUCTURE A THOUGHT SEQUENCE

Like a conversation, there are some consistent and familiar patterns in email communications. The aim is to ensure there isn't any unsupervised thinking, but rather a gradual progression to the call-to-action. This can be broken down in three steps: capture, convince and close.

#### Capture

First, there is an introduction and greeting. In everyday life you would never introduce yourself by your job title, so don't do so in an email from line, either. Use the sender's name, title and company name so the recipient can quickly recognize this message is not spam. Tell the reader why you are writing them today.



## Convince

The first paragraph and proceeding paragraphs builds off the trust established in the opening. The copy carries a natural conversation tone with relevant reasons why the recipient should continue reading. Mixing personal traits with tangible benefits will accomplish the goal of getting to the close.

## Close

The close contains the call- to-action and contact information. If the preceding message is consistent and relevant from subject line through the copy, it will be easy for the reader to want to continue the conversation by taking the action to click, call or visit the retail outlet.

Before you begin to craft your message, review this creed and put yourself in the shoes of your customer.

### THE PROSPECTS PROTEST (A PROBLEM)

- I am not a target; I am a person: Don't market to me, communicate with me.
- Don't wear out my name, and don't call me "friend," until we know each other.
- When you say "sell," I hear "hype." Clarity trumps persuasion. Don't sell; say.
- I don't buy from companies; I buy from people. And here's a clue: I dislike companies for the same reason I dislike people. Stop bragging. It's disgusting.
- And why is your marketing "voice" different from your real "voice"? The people I trust don't patronize me.
- In all cases, where the quality of the information is debatable, I will always resort to the quality of the source. My trust is not for sale. You need to earn it.
- Dazzle me gradually: Tell me what you can't do, and I might believe you when you tell me what you can do.
- In case you still don't "get it," I don't trust you. Your copy is arrogant, your motives seem selfish, and your claims sound inflated. If you want to change how I buy, first change how you market.

### THE MARKETINGEXPERIMENTS CREED (A RESPONSE)

ARTICLE ONE: We believe that people buy from people, that people don't buy from companies, from stores, or from websites; people buy from people. Marketing is not about programs; it is about relationships.

ARTICLE TWO: We believe that brand is just reputation; marketing is just conversation, and buying is an act of trust. You earn trust with two elements: Integrity and effectiveness. Both demand that you put the interest of the customer first.

ARTICLE THREE: We believe that testing trumps speculation and that clarity trumps persuasion. Marketers need to base their decisions on honest data, and customers need to base their decisions on honest claims.

## PREPARE WELL-THOUGHT-OUT TESTS

Poorly planned and run tests can cost organizations time and money. You want to ensure you are helping and not hurting your email program. To avoid bad assumptions and mistakes you will want to conduct a preflight check in three key areas: analytics, segmentation and frequency.

## TRIPLE CHECK

### RIGHT ANALYTICS

Before you begin, make sure you have a process or analytical system in place to capture the metrics tied to your goal. The lack of complete information can turn a success into a failure, and jeopardize the company's profitability.

For example, if you are just measuring email metrics, you might try a new subject line that increases open rates. However if you don't watch clickthroughs from the message to online sales, you may not see that, in reality, you are decreasing total revenue. The subject line could be setting the wrong expectations about the message and subscribers are deleting the email.

### RIGHT SEGMENT

Understanding who makes up your database is critical to productive testing. Universally testing across the board will leave you with muddy results. The respondents will inevitably give you data that pulls you in all different directions.

Spend the time to segment your lists based on your testing objective. Investigate the characteristics of your subscribers based on demographics and behaviors that are most relevant to your testing goals. This customer-profile knowledge will help you interpret the results and provide hypothesis for their actions. It is best to focus first on the most significant segments, and adding layers of complexity over time as you learn more about what motivates and drives your email subscribers.

### RIGHT FREQUENCY

With each new discovery your team will build confidence and excitement for experimentation. Be cautious not to allow the team to become overzealous and test too often. Testing too much can be a practice in diminishing returns. Think critically about each test, the potential impact and the proceeding actions required. You don't want to have so much data and testing that you cannot implement improvements.

Conversely, you don't want to gain a new approach and stop testing. Your subscribers are continuously evolving based on both internal and external factors. The economy, competitor's alternatives and personal growth, change your customer's likes and dislikes. An incentive that worked in January may not do well in July. Testing must become a routine to capitalize on the full benefits to testing.

## CONDUCT A/B TESTING

One of the most common testing methods is A/B testing. Your ESP may even provide it as a timesaving service, which is automated into your sending procedures. This testing practice entails creating two distinct versions of the same email communication and sending it to two separate audiences from your subscriber list. Through the subscribers' actions, you crown a winner. One school of thought is to test 10-20% of your audience and then send the more successful version to the remaining 80-90% of the list.

A/B Testing is used on a variety of variables including message copy, layout designs and special offers. Choose to test the variable you feel has the most influence on your success first. Don't limit yourself to just subject and from line testing. You are seeking to make incremental, yet precise changes to improve performance, so testing multiple variables at once will be fruitless. By strategically isolating the variable, it will be easier to identify and record your results.

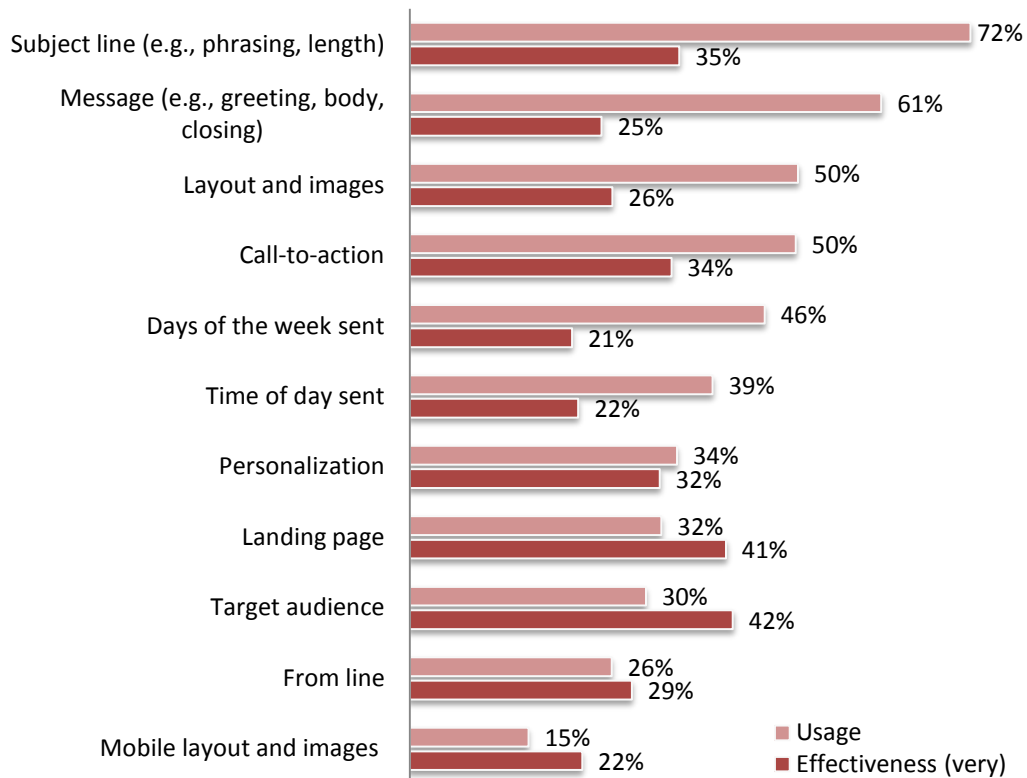
The key is patience. Testing and optimization is rarely an immediate success, rather the payoff happens gradually over time as you make several small iterations. These slight modifications require attention to details, consumer insight and diligent analysis. The tedious work will be rewarded when these small methodical changes add up to notable improvements in the effectiveness of your email communications.

Please note, as you routinely conduct A/B tests, be sure to benchmark your results for future comparisons. The documentation of benchmarks and specific changes to your email content or design will make the testing process more efficient and quicker to adjust to subscriber’s evolving reading habits.

## DETERMINE NEW APPROACHES TO FOSTER CHANGE

Testing and optimization practices have proven to be extremely efficient means to increase email performance. Routinely running tests enables marketers to discover new approaches, initiatives and insights, leading to more effective communications.

CHART: LANDING PAGES FOUND TO BE MORE EFFECTIVE ELEMENTS TO TEST THAN SUBJECT LINES  
 Q. Which of the following email campaign elements do you routinely test to optimize performance?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
 Methodology: Fielded July 2011, N=2,735

One of the more interesting discoveries in our *2012 Email Marketing Benchmark Report* was that the most popular testing elements were not always the most effective. In the chart above, two of the least tested elements, landing page and target audience, were found as the most effective elements to test

As you begin to test individual elements of your email campaign keep in mind the behavior and motivations of your subscribers. Carefully optimize each component to communicate your value to the reader and reduce any apprehensive feelings.

## TARGET AUDIENCE

As we discussed in the testing pre-flight checklist unilaterally testing will leave you with cloudy results. The varying respondents pull the data in different directions.

One idea for testing is to segment your list based on brand loyalty. Identify your most highly motivated evangelists – this core customer base may be ripe for receiving more frequent message. A great example is a test MarketingExperiments conducted on behalf of one of their research partners. The goal was to find the optimal send frequency to generate the most revenue from a loyal segment of their list. The research partner sent over one million emails per year and the current send rates varied from once a week to multiple times a day.

MarketingExperiments chose to test seven different frequency rates from every three weeks all the way down to two days. Again, they targeted a highly motivated and loyal segment of their large subscriber base.

The results were insightful. Unsubscribe rates increased as frequency rose. You might expect this with giving recipients more opportunities to remove their address. After looking at the data closer, MarketingExperiments found there was minimal increase in unsubscribe rates per email sent. In addition, there were no significant correlations with open rates.

What the data did reveal was that when sending email at the rate of once per week this company was missing three times the amount of revenue it could have been making! Overall, the more MarketingExperiments increased frequency, the more revenue increased. They never reached the point of diminishing returns (Please note: the Research Partner did limit the maximum frequency to 15 email messages per month).

A key take away is that optimal email frequency is related to the quality of your relationship with your subscribers. As each email recipient has individual motivations, you will need to segment your list carefully and not implement one frequency across the board. Once you have grouped different user types, test a broad range of frequencies. If your findings will drastically alter your sending frequency, make sure you first notify your subscribers of the changes

## LANDING PAGES

The goal of an email is to earn a click to the landing page. It is the landing page that does the heavy lifting to create a conversion. Before you begin to optimize the landing page first empathize with your subscriber. Consider all of the micro-conversions she has completed.

Initially, the email was accepted into the subscriber's inbox, and out of all the awaiting messages yours caught her eye. After reading the subject line, she decided open the email, read the header, and follow the thought sequence from opening through the closing. After agreeing that pressing the call-to-action button was worth her while she arrived at your landing page.

Now that she has arrived you quickly need to help her answer three questions.

### **Q: *Where am I?***

A: To help her understand where she is you will want to carry your theme from the email over to the landing page. A consistent brand image, language, tone and offer will provide her comfort in knowing she landed on the correct page. Without adding too much clutter, consider adding a Certified Privacy Seal and a link to your privacy policy to calm any apprehension.

**Q: *What can I do here?***

A: This is a great example of where to enact the optimization principal of “Clarity trumps persuasion.” As quickly and efficiently you want to communicate that the offer she saw in her email is right here waiting for her to act.

**Q: *Why should I take action?***

A: Everything else on the landing page provides the reasons why she should take action with outlandish claims that distract her from engaging. You know she has many choices, but you succinctly provide the value proposition answering the question “If I am your ideal prospect, why should I buy from you rather than your competitors?” This is supported by sequential proof points of the value proposition.

## SUBJECT LINES

The previous chart shows that subject line experimentation is the most popular element to test. Its number one ranking is due to its impact on open rates and the ease at which marketers can substitute subject lines. As you experiment, treat the subject line as if it was a mini-billboard. Subscribers are scanning through their inboxes as fast as they speed by billboards on the highways. Help them sort their inboxes by clearly describing your email’s purpose and explain why it is worth their time to read.

Keep in mind the best practices discussed in Chapter 8, including accuracy, brevity and branding. The goals remain earning an open and setting up the headline found inside the message.

A number of slight modifications can be made to your subject lines. Try inviting the subscriber to take action, or front load the sentences with your brand name or buzzwords. Experiment with the subject line length, personalization, or current event.

## CALLS-TO-ACTION

Your call-to-action is where the proverbial rubber meets the road. This final element will determine if your communication initiates a positive action by the recipient. There are two general ways to test your call-to-action.

The first is the offer itself. Test which offers are most successful with different segments of your readership, you might be surprised. Check out this test Cisco Systems ran to turn email addresses it knew little about into active subscribers. You’ll see that offering nothing is sometimes more effective than offering a whitepaper in this article “[Email List Reactivation Incentives: Gift cards vs. whitepaper vs. nothing](#).”

The second is the wording of the offer. Will a \$50 off a purchase offer do better than a 15% off your total purchase? You may hypothesize that the \$50 off coupon is more tangible and as a result have a higher redemption rate. The only way to find the truth is to test your specific audience.

Finally, the offer placement is a prime area to look for improvements. Try moving the call-to-action button up further in the email message. Discover if it increases clickthroughs due to its location or if it will disrupt the readers thought sequence and discourage action. You may also like to try testing the design of your buttons, their size, color, and graphic style.

## LAYOUTS AND IMAGES

Today’s ESPs provide a wide variety of email templates making it easy to change layouts, images, fonts and colors. These are all ripe for testing. For example, experiment with the design of your clickable buttons. Increasing the buttons size, shape or color may improve your results.

Often you will find yourself testing a feature added to the email message whether it is more images, buttons or links. Do not be afraid to test removals as well. Sometimes eliminating an element from an email can create a moment of clarity for the reader. As messages become less cluttered, there are fewer distractions to confuse the subscriber and they will have an easier time taking action.

One of the more interesting and psychological trials is to experiment with color. Depending on your cultural ethnicity, colors can have distinct meanings. Blue can signify “blue chip” success or “blue sky” tranquility and red can represent love or danger depending on the viewer’s vantage point.

Also, consider ways to reduce the subscriber’s anxiety. Conduct a trial using a security icon or anti-hacker logo. The icon may increase conversions as it communicates to your readers that the message is safe.

## MESSAGES

The first words a subscriber reads after opening an email message should reaffirm the subject line value proposition. The connection from subject line to email should be immediately recognizable, especially for those subscribers viewing in the preview pane. Readers will skim headlines and sub-headlines to confirm the content matches their expectations.

Reliable testing practices center on a brand’s voice, personalization and long copy vs. short. We encourage you to alter the message format to make it easy for the reader to follow a thought sequence. Use blogging strategies like “top ten tactics” or “five easy steps to success” to focus the reader in on educational messages. Write in the active voice to push the reader along with lively language. For most attention-deprived readers, the copy only transports them from point A to point B. As long as you do not interrupt their thought sequence with roadblocks or detours between the headline and the call-to action, their trip will be successful.

## SEND DATES AND TIMES

Close to 40% of marketers routinely, test the day of week and time of day. This a positive sign, as there is no universal “best” sending time. Each organization has a unique set of customers with distinct personal communication and product preferences. Acknowledging this fact and accepting that subscribers’ preferences evolve over time will motivate you to continue testing sending times.

When deliberating which days or times to run an experiment, consider the context of the purchase in relationship to the buyer. For example if you own a gardening center, most of your customers make their purchases on the weekends when they have time for yard work. The best time to send an email would be mid-week as they start to finalize their plans for the weekend. This way you can direct them to your store Friday evening or Saturday morning to pick up flowers, mulch and fertilizer. As with all experiments, your intimate understanding of your customers, and what drives their decisions, will guide your testing designs.

A few more testing ideas are to experiment with stagger sends according to time zones, or for B2B email marketers sending during non-business hours and weekends. For more ideas including sending at the time the subscriber registered, please refer to Chapter 5.

## AUTORESPONDERS

When testing an automated series of emails such as welcome messages and drip campaigns it is best to test the whole series and not just a single email. Some testing ideas include measuring the impact of the total number of messages and the effect of each additional communication. Learning more about the time between messages sent can be essential. To what do your customers respond best? After an enrollment confirmation, do they prefer to receive an email the next day or three days later?

SECTION SUMMARY: TEST AND OPTIMIZE

Please take a few minutes to complete the assessment for this section.

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1. What is the recommended percentage of a marketer's budget and time to dedicate to testing?

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2. What are the three steps in designing a thought sequence for an email message?

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3. Name three areas to check before conducting an experiment.

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*If you were unable to answer any of the above questions, please review the previous sections again before moving on.*

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CHAPTER 9 NOTES



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# MARKETING AND OPTIMIZATION GLOSSARY OF TERMS

## *POWERED BY MECLABS*

**1st-party Cookie:** A piece of code placed on the user's browser by the website they are currently visiting that tracks visitor behavior. Also **First-Party Cookie**.

**2nd-tier Search Engine:** Vague grouping of search engines/properties that can be simply any search property but Google, Yahoo!, MSN and AOL.

**3rd-party Cookie:** A piece of code used to track user behavior, placed on the user's browser by someone other than the website the user is currently visiting. Third-party cookies are used in Web analytics<sup>12</sup> and ad serving, among other areas. Also **Third-Party Cookie**.

**4PC:** In print advertising, the abbreviation for "four-page, full-color" — a standard unit on most print media price lists.

**A/B Split:** Refers to a test situation where two randomized groups of users are sent different content to test performance of specific campaign elements. The A/B split method can only test one variable at a time.

**Abandonment:** As in call or site abandonment, measured when people leave a site, telephone call, etc.

**Abandonment Rate:** It is the number of users who abandon divided by the total number of unique visitors for a given period, measuring the efficiency of the marketing tool.

**Above the Fold:** The part of a webpage that is visible without scrolling. Material in this area is considered more valuable because the reader sees it first. It refers to a newspaper term for the top half that's above the fold but, unlike a newspaper, email and webpage fold locations aren't predictable. Your fold may be affected by the users' preview pane, monitor size, monitor resolution and any headers placed by email programs.

**Access:** The ability to see what you are trying to view, e.g., accessing a friend's photo but not their profile.

**Acquisition Cost:** The cost to generate one lead, newsletter subscriber or customer in an individual email campaign; typically, the total campaign expense divided by the number of leads, subscribers or customers it produced.

**Acquisition List:** A rented list of prospects to which email can be sent. Prospects on a legitimate acquisition list are supposed to have opted in to the list and possess a certain set of characteristics. Example: dog owners who shop online.

**Ad Swap:** An exchange between two publishers who agree to run each other's comparably valued ad at no charge. Value is determined by rate card, placement, size of list, quality of list, name brand fame, etc.

**Address Book Whitelisting:** When a consumer adds a company's email address or domain name to their email address book. This prevents inadvertent "false positive" filtering out of content that the consumer wants to receive.

**AdSense:** Google's pay-per-click, context-relevant program available to blog and Web publishers as a way to create revenue.

**Advertising Network:** Sells ads across multiple publishers to optimize ad delivery based on the user rather than context, e.g., Adknowledge, RockYou, Social Cash, DoubleClick.

**Adwords:** The advertiser program that populates the AdSense program. The advertiser pays Google on a per-click basis.

**Affiliate Marketing:** A partnership between a website owner (affiliate) and a retailer (affiliate merchant) where the website owner advertises the retailer on their site and receives a fee for every lead or sale generated.

**Affiliate Network:** Cost-per-action (CPA) ads for multiple retailers across multiple publishers, e.g., Affiliate Window, TradeDoubler.

**Aggregator:** A Web-based tool or desktop application that collects syndicated content.

**Affiliate:** A marketing partner that promotes your products or services under a payment-for-results agreement. The affiliate relationship ranges from simply carrying a button on a webpage to full-blown email campaigns by the affiliate.

**Affirmative Consent:** An active request made by a reader or subscriber to receive advertising or promotional information, newsletters, etc. Generally, affirmative consent does not include the following: failing to uncheck a pre-checked box on a Web form, entering a business relationship with an organization without being asked for separate permission to be sent specific types of email or opt-out.

**Agent Name Delivery:** The attempt to feed search engine spiders different content from what is delivered to “human” website visitors in an attempt to optimize for page ranking. This tactic has fallen out of use as search engine spiders generally appear to be standard browsers. Also **Bait-and-Switch** and **IP Delivery**.

**AJAX:** An acronym for Asynchronous Java Script and XML that represents a way to create real-time Web applications.

**Akismet:** Comment spam filter that is popular with WordPress blogs.

**Alerts:** Tool to get a search engine to tell you whenever a new page is published on the Web, which includes your specific keyword. This can include email messages that notify subscribers of an event or special price.

**Algorithm:** A set of mathematical rules that describe or determine a circumstance or action. In the case of search engines, unique algorithms determine the ranking of websites returned within search queries. Although some of the qualities used to determine ranking (number of referring sites, metatags, etc.) are known, the precise functioning of search engine algorithms is a closely kept secret to prevent the manipulation of the system

**A-List Bloggers:** The blogging elite with heaps of daily blog posts and many links to their blogs.

**Anonoblog:** A blog site authored by a person or persons who do not publish their name(s).

**App:** A program that performs a specific function on your computer or handheld device.

**Applet:** Small programs (usually written in Java) or another Web-friendly language that run within a Web browser. Some applets may be negatively viewed by search engine spiders, affecting indexing and page rank

**Application Program Interface (API):** How a program (application) accesses another to exchange data. A client may have an API connection to automatically load database information to an email vendor and receive data back from the email.

**Application Service Provider (ASP):** A company that provides a Web-based service. Clients don't have to install software on their own computers; all tasks are performed, or hosted, on the ASP's servers.

**Archives:** Most often an index page, often organizing posts or entries by either category or date.

**AstroTurfing:** A fake grassroots push to generate buzz or interest in a product, service or idea. This movement is often motivated by a fee or gift to the writer of a post or comment, or may be written under a pseudonym. Atom: A popular feed format used for syndicating content.

**Attachment:** A text, video, graphic, PDF or audio file that accompanies an email message but is not included in the message itself. Attachments are not a good way to send email newsletters because many ISPs, email clients and individual email recipients do not allow attachments since hackers use them to deliver viruses and other malicious code.

**Authentication:** A digital automated process that verifies an email sender's identity.

**Authentication:** Digital method of proof to authorize online activities.

**Authorization:** Permission to perform a desired action.

**Auto Responder:** Automated email message-sending capability, such as a welcome message sent to all-new subscribers the minute they join a list. Triggers can include users joining, unsubscribing or email arriving at a particular mailbox. Auto responders may be used for more than a single message and can be a series of date or event-triggered emails.

**Avatar:** A graphical image or likeness that replaces an author's photo on a blog.

**Average Adopter:** Those who want to take advantage of new technologies but have lengthy processes in place to protect them from adverse reactions. They'll often wait for a big-name company to offer a solution in an area spearheaded by smaller, faster-moving companies.

**Average deal size:** The average amount of all purchases made during a specified time period.

**Awareness:** The first phase of the product marketing cycle, during which prospects gain awareness of the product/service.

**B2B:** Business-to-business. Also B-2-B, BtoB and B-to-B.

**B2C:** Business-to-consumer. Also B-2-C, BtoC and B-to-C.

**Back Channel:** Communications such as private emails or other messages sent by the facilitator or between individuals during public conferencing.

**Backlink:** (or inbound links) A link pointing to a particular webpage.

**Badge:** An image usually squared and displayed on a blog, which signifies the blogger's participation in an event, contest or social movement.

**Bait-and-Switch:** The attempt to feed search engine spiders different content from what is delivered to "human" website visitors in an attempt to optimize for page ranking. This tactic has fallen out of use as search engine spiders generally appear to be standard browsers. Also **Agent Name Delivery** and **IP Delivery**.

**BANT:** An acronym for the basic pieces of lead development information: budget, authority, need and timeframe.

**Bayesian Filter:** An anti-spam program that evaluates header and content of incoming email messages to determine the probability that it is spam. Bayesian filters assign point values to items that appear frequently in spam, such as the words "money-back guarantee" or "free." A message that accumulated too

many points is either rejected as probable spam or delivered to a junk mail folder. Also **Content-Based Filter**.

**Biz Blogs:** Blogs that companies and organizations write to communicate with customers, partners and employees.

**Black Hat:** Involves techniques that aim to deceptively or unethically show relevance or importance of a website per a specific key term. Search engines frown upon black hat techniques. If found out, websites utilizing black hat techniques are generally blacklisted by the search engines. **Also known as search engine spamming in PCC.**

**Blacklist:** A list developed by anyone receiving email — or processing email on its way to the recipient, or interested third parties — that includes domains or IP addresses of any emailers suspected of sending spam. Many companies use blacklists to filter inbound email, either at the server level or before it reaches the recipient's inbox. Also Blocklist and Blackhole List.

**Blast:** In postal mail or email, and also referred to as solo blasts, a reference to promotional campaigns done on a one-time basis. Blasts are distinct from ongoing communications, such as email newsletters.

**Bliki:** A blog that readers or an agreed group of collaborators can edit; like a combination of a blog and a wiki.

**Block:** A refusal made by an ISP or mail server to forward your email message to the recipient. Many ISPs block email from IP addresses or domains that have been reported to send spam or viruses, or have content that violates email policy or spam filters.

**Blog (weblog):** A style of Internet publishing using content management software that allows for quick posting of journals, news and articles, e.g., WordPress, Blogger, MovableType.

**Blog Digest:** A regularly-updated summary of related blogs.

**Blog Post/Entry:** Content published on a blog. Entries may include pictures, embedded videos and URLs for online sources.

**Blog Storm:** In hopes of garnering mainstream media attention, bloggers write thousands of posts about a subject. Sometimes known as a "blog swarm."

**Blogging:** The act of writing and/or posting content to a blog.

**Blogsphere:** The term used to describe the totality of blogs on the Internet, and the conversations taking place within that sphere.

**Blogroll:** A list of recommended blogs.

**Boardreader:** An aggregator of message boards and forum discussions.

**Bonded Sender:** A private email-registration service, owned by email vendor IronPort, which allows bulk emailers who agree to follow stringent email practices and to post a monetary bond to bypass email filters of Bonded Sender clients. The program debits the bond for spam or other complaints from recipients.

**Bookmarking:** An online tool that saves the address of a website or item of content, either in your browser, or on a social bookmarking site such as del.icio.us.

**Bookmarklet:** A "faux" bookmark containing scripting code, usually written in JavaScript, which allows the user to perform a function.

**Bounce:** [Website-related] When website visitors leave after a single page visit, or leave after a short time period. [Email Marketing] A bounce is when a message is undeliverable. Emails can bounce for dozens of reasons: incorrect email address, closed email address, full mailbox, downed mail server, or spam or offensive content detected by the system. See **Hard Bounce** and **Soft Bounce**.

**Bounce Handling:** The process of dealing with the email that has bounced. Bounce handling is important for list maintenance, list integrity and delivery. Given the lack of consistency in bounce messaging formats, it is an inexact science at best.

**Bounce Message:** Message sent back to an email sender that reports the message could not be delivered and why. Note that not all bounced emails result in returned message to the sender, and not all bounce messages clearly or accurately relay the reason the email bounced.

**Bounce Rate:** Regarding a website, it refers to the percentage of website visitors that bounce. For Email Marketing, it is the number of hard/soft bounces divided by the number of emails sent. This is an inexact number because some systems do not clearly or accurately report back to the sender. Also **Return Rate**.

**Broadcast:** The process of sending the same email message to multiple recipients.

**Bulk Folder:** Where many email clients send messages that appear to be from spammers, contain spam, or are from any sender who is not in the recipient's address book or contact list. Some clients allow the recipient to override the system's settings and direct that mail from a suspect sender to be sent directly to the inbox, e.g., Yahoo! Mail gives recipients a button marked "Not spam" on every message in the bulk folder. Also **Junk Folder**.

**Bulletin Boards:** A place where users connect with a central computer to post and read email-like messages. These early vehicles for online collaboration are the equivalent of public notice boards.

**Buyer persona:** A detailed profile that represents an actual, real-life group of a target audience. It includes common interests, motivations and expectations, as well as demographic and other behavioral characteristics. By establishing buyer personas, organizations are enabled to deliver unique content that will attract and nurture new and existing leads. Although buyer personas are profiles developed for marketing purposes, they should be based on sound qualitative and quantitative research.

**Buzz:** The cumulative coverage of an issue, event, company, etc. in all media outlets and the population at large. Companies that measure buzz examine the volume and tone of coverage in both individual-generated media — blogs, message board postings, discussion lists — and mass media outlets.

**Call-to-action:** The link or body copy that tells the recipient what action to take in marketing messages, Web ads, emails, etc.

**Campaign:** A set of coordinated marketing messages delivered at intervals with a specific goal, such as raising funds for a cause or candidate or increasing sales of a product.

**CAN-SPAM:** Popular name for the U.S. law regulating commercial email. Full name: Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003.

**Canvas:** The screen area an application can use to serve content and features within a social network.

**Categories:** Pre-specified ways to organize content, such as a set of keywords that you can use, but not add to, when posting on a site.

**Catch-all:** An email server function that forwards all questionable email to a single mailbox. The catch-all should be monitored regularly to find misdirected questions, unsubscribes or other genuine live email.

**Cause Marketing:** A business relationship in which a for-profit and a nonprofit form a partnership that results in increased business for the for-profit and a financial return for the nonprofit.

**Cell:** A list segment in which a different treatment is sent specifically to see how it responds versus the control (normal treatment). Also Test Cell or Version.

**Challenge-Response System:** An anti-spam program that requires a human being on the sender's end to respond to an emailed challenge message before their messages can be delivered to recipients. Senders who successfully answer the challenge are added to an authorization list. Bulk emailers can work with challenge-response if they designate an employee to watch the sending address's mailbox and to reply to each challenge by hand.

**Champions:** A group of enthusiasts willing and confident to get things moving by posting messages, responding and helping others.

**Chat:** Interaction on a website with a number of people adding text items one after the other into the same space, most often in real-time.

**Churn:** The percentage of customers who decide not to continue doing business with an organization over a certain length of time. In email marketing, churn is the percentage of subscribers leave a mailing list (or how many email addresses go bad) over a certain length of time, usually expressed as a percentage of the whole list.

**Circulation:** Total distribution of individual copies of a publication. Distinct from the total readership, which refers to the total copies printed, multiplied by the average number of pass-along readers, which is different for each publication.

**Civic Media:** Any form of communication that strengthens the social bonds within a community or creates a strong sense of civic engagement among its residents.

**C-Level Executive:** Any chief officer of a company, including CIO, CEO, CFO, COO, CMO and more. CXO can refer to any C-level executive.

**Clickthrough:** When a hotlink is included in an email, search ad or online ad, a clickthrough occurs when a recipient clicks on the link.

**Clickthrough Rate:** Total number of clicks on email link(s), search ads, etc. divided by the number of emails sent, impressions, page views, etc. Also **CTR**.

**Clickthrough Tracking:** Refers to the data collected about each clickthrough link, such as how many people clicked it or how many clicks resulted in desired actions such as sales, forwards or subscriptions.

**Click-to-Open Ratio:** An email metric that looks at the quality of content by comparing the number of people who opened the email with those who clicked. Several factors can have a dramatic impact on CTO ratio, including filtering of images that suppresses open rate and newsletters that include only snippets of content in an email, elevating click numbers. Also **CTO**.

**Client:** The user's computer, browser or application that requests information from another online application. Most client applications request information from a server-side application.

**Closing rate:** The percentage of leads closed out of the total lead volume. ((Number of closed deals / total lead volume) \* 100).

**Cloud Computing ("the cloud"):** A growing phenomenon of users who can access their data from anywhere rather than being tied to a particular machine.

**Cluster:** Content grouped with similar tags, e.g., Flickr Clusters

**Cold calling:** Involves contacting prospects with a phone call to generate leads See also **Telemarketing**.

**Collaboration:** Ability to discuss and work with people across boundaries of organization, time and space. Activities like commenting, social bookmarking, chatting and blogging help develop the trust necessary for collaboration.

**Collaborative Filtering:** Using the experience of previous searchers to return results that are more relevant. Also **Social Filtering**.

**Commercial Email:** Email whose purpose, as a whole or in part, is to sell or advertise a product or service, or to persuade users to perform an act, such as to purchase a product or click to a website with content designed to sell, advertise or promote.

**Common Gateway Interface (CGI):** The specification for transferring information between the Web and a Web server, such as processing email subscription or contact forms.

**Communities:** Groups of people who mainly communicate through the Internet. They may simply have a shared interest to talk about or more formally learn from each other and find solutions. Online communities may use email lists or forums, where content is centralized. Communities may also emerge from conversations around or between bloggers.

**Community Building:** The process of recruiting potential community or network participants, helping them to find shared interests and goals, use the technology, and develop useful conversations.

**Comparison Shopping Site:** Similar to search engines, comparison shopping sites or engines allow users to compare products from a variety of sources (websites). Merchants feed product data to the comparison sites and pay for leads or sales generated.

**Compete:** Provides Web analytics (i.e., unique monthly visitors to the site) and enables people to compare and contrast up to five different sites at a time.

**Complex sale:** Refers to B2B sales cycles with a number of lead stages, generally with sales cycles of several months or more.

**Conditional Content:** Use of a database to allow or block content based on user behavior. This is done with “if” and “then” statements.

**Confirmation:** An acknowledgment of a subscription or information request. It can be either a company statement that the email address was successfully placed on a list or a subscriber’s agreement that the subscribe request was genuine and not faked or automatically generated by a third party.

**Confirmed Opt-in:** May refer to double opt-in subscription processes or may refer to email addresses that do not hard bounce back a welcome message. Ask anyone using this term to define it more clearly.

**Connect (Facebook Connect / Friend Connect):** The ability to bring friends to existing sites. Also, the ability for existing websites to allow users to log in with their Facebook or Google accounts.

**Consideration:** The second phase of the buying cycle, when consumers familiarize themselves with products, features, prices and benefits. Consideration is the phase during which relationship marketing using email, telemarketing, etc., is commonly used to warm the lead, or move the lead from consideration to the sales funnel. Also **Consideration Phase**.

**Consumer Generated Media:** Any of the many kinds of online content that are generated at the user level. Personal webpages, such as MySpace profiles, are rudimentary examples. Blogs and podcasts are more evolved forms.

**Content Management Systems (CMS):** Software suites offering the ability to create static webpages, document stores, blog, wikis and other tools.

**Content Rich:** Refers to a webpage that contains relevant content to the topic at hand, usually used to refer to the need to repeat keyword phrases within the body copy of a website. Search engine algorithms give higher ranking to a site that contains the keyword phrases that a user is searching for.

**Content:** All of the material on a webpage, including all words, images and links.

**Content-Based Filters:** A type of filtration that sorts messages based on strings or keywords located within the message. Filtering can take place based on a score assigned to some words or phrases, or based on binary if/then statements. Example: Block if “free” in subject field.

**Context Ads:** Advertisements placed directly inside or next to relevant content or features.

**Conversion nurturing:** Lead nurturing campaigns that target prospects that are further along in the sales cycle. The goal of these campaigns is to drive prospects to make a purchase. Examples of conversion nurturing content include buyer’s guides, case studies, etc.

**Conversion Rate:** The percentage of visitors/users who “convert” on the action of a webpage or campaign. For example, actions may be purchasing, submitting a form, downloading content, calling a telephone number, or making an extended site visit.

**Conversion:** The point at which a recipient of a marketing message performs a desired action. A conversion could be a monetary transaction, such as a purchase made after clicking a link. It could also include a voluntary act such as registering at a website, downloading a whitepaper, signing up for a webinar, or opting in to an email newsletter.

**Co-registration:** Arrangement in which companies collecting registration information from users (email sign-up forms, shopping checkout process, etc.) include a separate box for users to check if they would also like to be added to a specific third-party list.

**Cost-Per-Lead (CPL):** The price of each lead generated from a marketing channel or campaign. (Total investment / total lead volume).

**Cost-Per-Thousand:** The advertiser pays for a set number of page impressions, paying for each 1000 impressions the ad receives. See also **Cost-Per-Mile**.

**Cost-Per-Acquisition (CPA):** A method of paying for advertising where payment is based on the number of times users complete a given action, such as visiting a website, purchasing a product, or signing up for a newsletter that takes place as a result of the marketing effort. Essentially, it’s the price of each new customer. (Total investment / number of closed deals). See also **Cost-Per-Action**.

**Cost-Per-Action (CPA):** A method of paying for advertising where payment is based on the number of times users complete a given action, such as visiting a website, purchasing a product, or signing up for a newsletter that takes place as a result of the marketing effort. See also **Cost-Per-Acquisition**.

**Cost-Per-Click (CPC):** A method of paying for advertising where payment is based on the number of clicks on a link, such as in Google Adwords. Different from CPA because all you pay for is the click, regardless of what that click does when it gets to your site or landing page.



**Cost-Per-Install (CPI):** A specific type of cost-per-action where the required action is the installation of a social application. See **Cost-Per-Action**.

**Cost-Per-Mille (CPM):** “Mille” means thousand in Latin. The advertiser pays for a set number of page impressions, paying for each 1000 impressions the ad receives. See also **Cost-Per-Thousand**.

**Crawler:** A small program that surfs the Web to index information for a search engine. See also **Spider**.

**Creative Commons:** A nonprofit organization and licensing system that offers creators the ability to fine-tune their copyright, spelling out the ways others may use their works.

**Creative:** An email message’s copy and any graphics.

**Cross-Campaign Profiling:** A method used to understand how email respondents behave over multiple campaigns.

**Cross-Post:** To send the same email message to at least two different mailing lists or discussion groups.

**Crowdsourcing:** The act of sourcing tasks traditionally performed by specific individuals to a group of people or community (crowd) through an open call.

**C-suite:** The group of officers within an organization with the word “Chief” in their title and represents the highest level of management.

**Clickthrough Rate (CTR):** Slightly inexact because some clicks get lost between the click and your server. Be sure to ask if the CTR is unique, meaning that each individual user is only counted once, no matter how many times they click on a link.

**Customer Lifetime Value (CLV):** A measure of the total amount the customer is going to spend with a merchant during their tenure. Usually calculated by their spending per year multiplied by the average number of years they are likely to be a customer.

**Customer Relationship Management (CRM):** The software and processes of tracking the information that defines a prospect or customer relationship. CRM systems typically store contact and interaction data, such as number and dates of touches, products considered.

**Cyberspace:** A once widely used, general term for the Internet or World Wide Web.

**Dashboard:** The administration area on blog software that allows users to post, check traffic, upload files, manage comments, etc.

**Date-based Archives:** The archives of a blog, organized by timestamp. Nearly all blogs have some form of timestamp. Some list in weekly, but most on a month-by-month basis

**Daypart/Weekpart:** Division of the month and day into sections for the purposes of targeting marketing. For example, a radio buyer might target “drive time” while a restaurant might target weekends versus weekdays.

**Dedicated Server:** An email server used by only one sender. A dedicated server often costs more to use because the expense is not spread among multiple users, but it performs better than a shared server. Email usually goes out faster, the server is more secure, and it eliminates the possibility that another sender could get the server blacklisted for spamming.

**Dedupe:** Identifying and consolidating duplicate names, usually done in a merge/purge operation.

**Deduplication (also Deduping):** The process of removing identical entries from two or more data sets such as mailing lists. Also Merge/Purge.

**Deep Linking:** Links that direct the person clicking on the link to a page beneath the homepage of a website. Sometimes used to mean linking to a deep page on someone else's website, which has different legal issues than simply directing someone to a homepage.

**Deferred Conversion:** Sales that take place after visiting a website. With many online marketing tactics, it is not always possible to discern whether a sale took place as the result of some past interaction. See also **Latent Conversion**.

**Delicious:** A social bookmarking site that allows users to quickly store, organize (by tags) and share favorite webpages. Users may also subscribe to RSS feeds of other users and specifically share a page with another user.

**Deliverability:** The degree to which emails are successfully delivered, or not. Also refers to the general issues surrounding this question.

**Delivered Email:** Number of emails sent minus the number of bounces and filtered messages. A highly inexact number because not all receiving ISPs accurately report which emails don't go through and why.

**Delivery Tracking:** The process of measuring delivery rates by format, ISP or other factors and delivery failures (bounces, invalid address, server and other errors).

**Deploy:** To send a marketing campaign into the field.

**DHTML:** The technology on which floating online ads are built. DHTML can be made to sit on top of the page, incorporating movement and sound. DHTML is not typically blocked by pop-up/pop-under blocking software.

**Digest:** A shortened version of an email newsletter that replaces full-length articles with clickable links to the full article at a website, often with a brief summary of the contents.

**Digg:** A popular social news site that lets people discover and share content from anywhere on the Web. Users submit links and stories, and the community votes them up or down and comments on them.

**Digital Inclusion:** An effort to help people who are not online gain access with affordable hardware, software, tech support/information and broadband Internet service.

**Digital Story:** A short personal nonfiction narrative that is composed on a computer, often for publishing online or publishing to a DVD.

**Discussion Group:** An email service in which individual members post messages for all group members to read ("many to many"). In contrast, a newsletter is a "one-to-many" broadcast, where comments by members or subscribers go to only the message sender. Also known by the trademarked name Listserv.

**Do-good Networks:** Online communities aimed at societal improvement.

**Domain Name System (DNS):** How computer networks locate Internet domain names and translate them into IP addresses. See also **Reverse DNS**.

**Domain Name:** The actual name for an IP address or range of IP addresses, e.g., MarketingSherpa.com. The identifying name of a website.

**DomainKeys:** An anti-spam software application, developed by Yahoo!, using a combination of public and private “keys” to authenticate the sender’s domain and reduce the chance that a spammer or hacker will fake the domain sending address.

**Double Opt-in:** A process that requires new list joiners to take an action (such as clicking on an emailed link to a personal confirmation page) to confirm they do want to be on the list. Some email broadcast vendors incorrectly interpret it as a new subscriber who does not opt-out of or bounce a welcome message. See also **Verified Opt-in**.

**Drupal:** A free, open source platform and content management system written in PHP. It is often used as a “back-end” system that powers community features on many different types of sites, ranging from personal blogs to large corporate and political sites.

**Dynamic Content:** Email newsletter content that changes from one recipient to the next according to a set of predetermined rules or variables, usually according to preferences the user sets when opting in to messages from a sender. Dynamic content can reflect past purchases, current interests or where the recipient lives. [*Email Marketing Usage*]

**Dynamic Content:** Webpage information that changes according to rules set by the client or server and can adapt to instructions. For example, a dynamic content system makes it possible for unique homepages to be delivered to millions of Yahoo! users whose personal preferences have been set. [*Website Usage*]

**Early Adopters:** The first to experiment and benefit from new technologies. They are often beta testers and tech companies themselves.

**E-Book:** An electronic version of a traditional printed book that can be downloaded from the Internet and read on your computer or handheld device.

**Email Change of Address (ECO A):** A service that tracks email address changes and updates.

**Ecosystem:** A community and an environment functioning as a whole. The blogosphere can be viewed as an ecosystem.

**Ecto:** A standalone publishing application, allowing users to compose posts offline.

**Edublog:** A blog site focused on education, be it teacher, administrator, consultant or student.

**Effective Rate:** Metric that measures how many of those who opened an email message clicked on a link, usually measured as unique responders divided by unique opens.

**Electronic Frontier Foundation (EFF):** The leading civil liberties group defending users’ rights in the digital world.

**Email Address:** The combination of a unique username and a sender domain (JohnDoe@anywhere.com). The email address requires both the username and the domain name.

**Email Append:** Service that matches email addresses to a database of personal names and postal addresses. Appending may require an “OK to add my name” reply from the subscriber before you can add the name to the list.

**Email Client:** The software recipients use to read email, such as Outlook Express or Lotus Notes.

**Email Domain:** The portion of the email address to the right of the @ sign. Useful as an email address hygiene tool, e.g., identify all records where the consumer entered “name@aol” as their email address and correct it to “name@aol.com.”

**Email Filter:** A software tool that categorizes, sorts or blocks incoming email, based on the sender, email header or message content. Filters may be applied at the recipient level, the email client, the ISP or in combination.

**Email Friendly Name:** The portion of the email address that is displayed in most, though not all, email readers in place of, or in addition to, the email address. Also **Display Name** or **From Name**.

**Email Harvesting:** An automated process in which a robot program searches webpages or other Internet destinations for email addresses. The program collects the address into a database, which is frequently resold to spammers or unethical bulk mailers. Many U.S. state laws forbid harvesting. CAN-SPAM does not outlaw it by name but allows triple damages against violators who compiled their mailing lists with harvested names.

**Email Newsletter:** Content distributed to subscribers by email on a regular schedule. Content viewed as valued editorial in and of itself, rather than primarily a commercial message with a sales offer. See also **E-zine**.

**Email Prefix:** The portion of the email address to the left of the @ symbol.

**Email Vendor:** Another name for an email broadcast service provider, a company that sends bulk (volume) email on behalf of its clients. See also **Email Service Provider (ESP)**.

**Embedding:** The act of adding code to a website so a video or photo can be displayed while it's being hosted at another site. Many users now watch embedded YouTube videos or see Flickr photos on blogs rather than on the original site.

**Engagement Ad:** A display ad that includes interactivity specific to the particular social network.

**Engagement Nurturing:** Lead nurturing campaigns that target prospects that are early in the sales cycle. The goal is to build stronger relationships with new prospects to increase interest. Engagement nurturing can also be used to re-engage dormant sales opportunities. Examples of engagement nurturing include content specific to prospect needs, such as webinars, articles, whitepapers, etc.

**Enhanced Whitelist:** A super whitelist maintained by AOL for bulk emailers who meet strict delivery standards, including less than one spam complaint for every 1,000 email messages. Emailers on the enhanced whitelist can bypass AOL 9.0's automatic suppression of images and links.

**Entry:** An individual post or article published on a blog. These entries, while appearing in an index, are also webpages unto themselves.

**Event Blog:** A blog specifically launched as a companion to an event.

**Event-Triggered Email:** Preprogrammed messages sent automatically based on an event such as a date or anniversary.

**Expression Engine:** A robust content management system (CMS).

**Eye Tracking:** A type of webpage testing that follows the eye movements of participants to gauge how they interact with the page.

**E-zine:** Another name for email newsletter, adapted from "electronic 'zine" or "electronic magazine."

**Facebook:** The most popular social networking site in the western world, with more than 800 million active users worldwide. Users' homepage streams can now be seen in a wide range of applications and devices.

**Fair Use:** A doctrine in U.S. law that permits limited use of copyrighted material without obtaining the permission of the copyright holder.

**False Positive:** A legitimate message mistakenly rejected or filtered as spam, either by an ISP or a recipient's anti-spam program. The more stringent an anti-spam program, the higher the false-positive rate.

**Frequently Asked Question (FAQ):** Listed questions and answers, all supposed to be commonly asked in some context, and pertaining to a particular topic.

**Fast Follower:** Someone who stays informed about new technologies as they appear and move to integrate them as soon as they are proven effective. The sales process can be a long one with fast followers because they want information long before they are ready to buy.

**Feed:** Online content served at regular intervals.

**Feed Reader:** An aggregator of content, subscribed to by the user so specific content or search results arrives in their "reader."

**FeedBlitz:** An RSS service that makes it easy for avid email users.

**FeedBurner:** A Google tool allowing websites, blogs and podcasts to gather content into a simple way for readers to subscribe.

**Filter:** See **Email Filter**.

**Findability:** Refers to being locatable. Has become a popular term in creating a findable, locatable and navigable presence on and across the Web and social networks.

**Firewall:** A program or set of programs designed to keep unauthorized users or messages from accessing a private network. The firewall usually has rules or protocols that authorize or prohibit outside users or messages.

**Flash Mob:** A group of individuals who gather and disperse with little notice for a specific purpose through text messages, social media or viral emails.

**Flickr:** A leading photo sharing and hosting site. Its members have uploaded more than 5 billion photos.

**Folksonomy:** Categorization taxonomy determined by democracy rather than by authority.

**Footer:** An area at the end of an email message or newsletter that contains information that doesn't change from one edition to the next, such as contact information, the company's postal address or the email address the recipient used to subscribe to mailings. Some software programs can be set to automatically place this information.

**Forums:** Discussion areas on websites, where people can post messages or comment on existing messages independently of time or place.

**Forward:** The process in which email recipients send an email to people they know, either because they think their friends will be interested in the message or because of incentives to forward messages. See also **Forward to a Friend** and **Viral Marketing**.

**Frequency:** The number of times someone is exposed to an advertisement or marketing message.

**Friend (noun):** A person with whom you have a mutually agreed connection.

**Friend (verb):** The act of adding a person to your social graph on a particular social network.

**Friend List:** A user's personal sub-categorization of friends on a social network.

**From:** Whatever appears in the email recipient's inbox as the visible "From" name. The sender chooses it, and may be a personal name, a brand name, an email address, a blank space or alphanumeric gobbledygook. **Note:** This is not the actual "From" contained in the header and may be different from the email reply address. Also **Email Friendly Name**.

**Full-Service Provider:** An email vendor that also provides strategic consulting and creative support, in addition to sending messages.

**Gateway Page:** A page submitted to a search engine that is designed to give the spider what it's looking for (fitting the algorithm for that particular search engine) and increasing the relevance of the site. Most, if not all, search engines seek to discover and eliminate the use of these pages, because it is another form of "gaming," or trying to fool, the algorithms.

**Geolocation:** Serving targeted/different content to users based on their location. See also **IP Delivery**.

**Geotagging:** The process of adding location-based metadata to media such as photos, video or online maps. Geotagging can help users find a wide variety of businesses and services based on location.

**Gmail:** A free email service from Google that gives users more than 7GB of storage space, email search, instant messaging and conversation threading. Gmail also uses technology that adds advertisements next to messages containing keywords that match those advertisers in its AdWords program.

**Goodbye Message:** An email message sent automatically to a list member who unsubscribes, acknowledging the request.

**Groundswell:** A social trend in which people use technologies to get the things they need from each other, rather than from traditional institutions like corporations.

**Groups:** Collections of individuals with some sense of unity through their activities, interests or values.

**Haloscan:** A free commenting, ratings and trackback service for blogs and websites, allowing visitors to leave instant feedback.

**Hard Bounce:** An undeliverable message returned to the sender due to an invalid, closed or nonexistent email account.

**Hashtag:** A community-driven convention for adding additional context and metadata to your Tweets. Similar to tags on Flickr, Twitter users often use a hashtag like #followfriday to aggregate, organize and discover relevant posts.

**Hat Tip:** A public acknowledgment to someone (or a website) for bringing something to the blogger's attention.

**Header:** Routing and program data at the start of an email message, including the sender's name and email address, originating email server IP address, recipient IP address and any transfers in the process.

**Heatmap:** A map of a webpage that displays where consumers are most likely to direct their eyesight on a webpage.

**Hero Shot:** A shot of a product or brand from its best position to make it look as good as possible.

**Heuristic Filters:** Heuristic filters attempt to identify UCE using reiterative guesswork and past experience, to establish filtering rules. The longer a heuristic filter system is in place and its experience grows, the more accurate it becomes.

**Hidden Text:** A black hat technique in which text is invisible to readers (same color as background, an HTML comment, etc.) but is visible to spiders. Most search engines can detect this practice, and pages suffer the consequences in rank.

**Hits:** A measurement used in Web analytics, often defined as any request for a file from a Web server.

**Honeypotting:** Occurs when planted email addresses find their way into permission email marketers' lists. ISPs and spam-fighters place these addresses on the Web, waiting for a spammer or un reputable list creator to harvest them. If an emailer sends to a list containing a honeypot, all mail going to the ISP using the honeypot is blocked, even if some or most list recipients did opt-in.

**House List:** List of email addresses an organization develops on its own.

**HyperText Markup Language (HTML):** The most common of the programming languages used to create webpages.

**HTML Message:** Email message that contains any type of formatting other than text. This may be as simple as programming that sets the text in a specific font and font treatment (bold, italics, Courier 10 point, etc.). It also includes any graphic images, logos and colors.

**HTML Sniffer:** Technology embedded in email software that determines if users' email clients can receive HTML content.

**HyperText Transfer Protocol (HTTP):** The (main) protocol used to communicate between Web servers and Web browsers (clients).

**Hub:** Refers to an organization's corporate website.

**Humanizing the Brand:** Portraying human traits of a corporate entity. By humanizing brands, organizations are able to build trust, manage their reputations, and generate leads that meet ideal customer profiles for their organization. Social marketing can be an effective tactic in humanizing brands.

**Hygiene:** The process of cleaning a database to correct incorrect or outdated values. See also **List Hygiene**.

**Hyperlink:** A navigational reference to another document or page on the Web.

**Hyper-local Community:** A group of people from a specific location who interact in online communities and use social media tools.

**Ideal Customer Profile:** A buyer persona that identifies common interests, motivations and expectations, as well as demographic and other behavioral characteristics of an organization's ideal customer. The ideal customer may be the most profitable customers, or the customers that are the most ideal fit for a solution, for example.

**Identity:** The general term for ensuring the correct representation of a particular individual on a Web application.

**Impression:** A single view of one page by a single user, used to calculate advertising rates.

**Inactivity:** When a list member or registered user has been inactive for some period of time. There are no industry standards, as inactivity depends on the nature of the relationship and frequency of communication. For example, a list member who is mailed quarterly wouldn't be considered inactive as quickly as one who is mailed weekly.

**Inbound Marketing:** Marketing strategies and tactics that increase the visibility of a company's website to prospects that are researching and shopping for a solution. Inbound marketing tactics include search engine optimization, pay-per-click and social media.

**Inbox Placement Rate (IPR):** The percentage of email messages that are delivered straight to the inbox. This excludes email messages that arrive in the "junk" or "spam" email folders.

**Index:** Provides a comparison against the average. Typically, 100 is the average in an index.

**Influencer:** A person specialized in a specific subject matter and highly recognized in an online community that has the ability to sway others' thoughts

**Instant Messaging (IM):** A chat in real-time between two people using a tool such as AOL Instant Messenger, Microsoft Live Messenger or Yahoo! Messenger.

**Internet Message Access Protocol (IMAP):** A standard protocol for accessing email from a server.

**Internet Newsroom:** An area of a corporate website that communicates corporate messages and makes content available to the news media and public.

**Internet Protocol Address (IP Address):** A unique number assigned to each device connected to the Internet. An IP address can be dynamic, meaning it changes each time an email message or campaign goes out, or it can be static, meaning it does not change. Static IP addresses are best because dynamic IP addresses often trigger spam filters.

**Internet Protocol Delivery (IP Delivery):** Serving targeted/different content to users based on their IP address, often because the IP address provides geographic information. See also **Geolocation**.

**Internet Service Provider (ISP):** A company that provides access to the Internet Examples: AOL, EarthLink, MSN, RoadRunner, etc.

**Joe Job:** A spam-industry term for a forged email, in which a spammer or hacker fakes a genuine email address to hide his identity.

**Keyword Density:** The percentage of a page's text a single keyword makes up. For example, if a 500-word press release has the keyword "security" in it ten times, it has a two percent keyword density.

**Keyword Phrase:** A phrase that forms all or part of a search engine query.

**Keyword:** A word that forms all or part of a search engine query.

**Laggards:** A group defined by their attitudes toward change and innovation. Laggards depend on tried-and-true technology and are more concerned with stability and security than cutting-edge ideas.

**Local Area Networks (LAN):** Technologies and industries that create and maintain data communications networks that are geographically small and allow interconnection of terminals, microprocessors and computers within nearby buildings.

**Landing Page:** The destination webpage for people responding to an advertisement, designed specifically for that campaign and audience. The campaign might be in any medium, but is typically search or online-ad driven and email. The key difference between a homepage and landing page is that the former must be all things to all visitors, while the latter should be very narrowly designed for the campaign and, perhaps, for a segment of the audience responding to it.

**Latency:** Regarding search marketing and conversion, the likelihood of a conversion to take place after an initial visit. Estimates say, in some categories, 85% of conversions are latent.



**Lead Development:** The process of moving a qualified lead toward becoming a prospect (someone in the sales funnel).

**Lead Nurturing:** A process of building and nurturing relationships with ongoing, valuable communications, whether or not the prospect buys from you.

**Lead Scoring:** The process of adding or subtracting points because of various lead attributes and behaviors that identify sales-ready leads.

**Lifecasting:** An around-the-clock broadcast of events in a person's life through digital media.

**Lifestage:** In marketing, the division of life into stages based on age and family status, from "young singles" to "empty nesters."

**Lifestreaming:** The practice of collecting an online user's disjointed online presence in one central location or site. Lifestreaming services bring photos, videos, bookmarks, microblog posts and blog posts from a single user into one place.

**Limbo Leads:** Leads for which Marketing and Sales are mutually responsible. This usually includes sales-ready leads that have been passed to Sales, and enrolled in a conversion nurturing campaign.

**Link Bait:** Useful, interesting or entertaining website content that encourages other websites to link to it.

**Linkrot:** Term describing the process of links going bad over time, because either a website has shut down, or a site has stopped supporting a unique landing page provided in an email promotion.

**Links:** The highlighted text or images that, when clicked, bring users from one webpage or item of content to another.

**List:** The list of email addresses to which you send your message. Can be either your house list or a third-party list that sends your message on your behalf.

**List Fatigue:** A condition producing diminishing returns from a mailing list whose members are sent too many offers, or too many of the same offers, in too short a period of time.

**List Host:** See **Email Vendor**.

**List Hygiene:** The act of maintaining a list so hard bounces and unsubscribed names are removed from mailings. Some list owners also use an email change-of-address service to update old or abandoned email addresses (hopefully with a permission step baked in) as part of this process. See also **Hygiene**.

**List Management:** How a mailing list is set up, administered and maintained. The list manager has daily responsibility over list operation, including processing subscribes and unsubscribes, bounce management, list hygiene, etc. While the list manager can be the same as the database manager, the manager is not always the same person as the list owner. See **List Owner**.

**List Owner:** The organization or individual who has gathered a list of email addresses. Ownership does not necessarily imply "with permission."

**List Rental:** The process in which a publisher or advertiser pays a list owner to send its messages to that list. Usually involves the list owner sending the messages on the advertiser's behalf. (If someone hands over their list to you, beware).

**List Sale:** The actual purchase of a mailing list along with the rights to directly mail it. Permission can only be "sold" if the subsequent mailings continue to match the frequency, brand name, content and "from" of the

past owner's mailings — and even then this is a somewhat shaky procedure on the spam front. You are, in effect, buying a publication and not just a list.

**Listening:** In the blogosphere, the act of skimming feeds to see what topics are discussed, and when an organization is mentioned.

**Live Chat:** A website alternative to customer service using real-time chat. Typically more inexpensive than toll-free numbers, but not as widely used or accepted.

**Log File Analysis:** Combing through website log files to study Web visitor behavior.

**Long-Tail:** Refers to keywords usually with three or more words and lower search volumes. These terms target a niche audience and tend to convert at a high rate.

**Loyalty Program:** A program initiated by a company to create or maintain customer loyalty by offering benefits for continued use of the brand.

**Lurker:** Someone who reads social media content but rarely contributes. The usual ratio is 1% creator, 10% commenter and 89% lurker.

**Mail Bomb:** An orchestrated attempt to shut down a mail server by sending more messages than it can handle in a short period of time.

**Mail Loop:** A communication error between two email servers, which usually happens when a badly configured email triggers an automated response from the recipient server.

**Mailing List:** A list of email addresses that receive mailings or discussion group messages.

**Mailto:** A code to make an email address in either a text or HTML email immediately clickable (mailto:JohnDoe@anywhere.com). When the link is clicked, it usually opens the user's email client and inserts the email address in the "To:" link of a blank message.

**Mail Transfer Agent (MTA):** A computer that forwards email from senders to recipients (or to relay sites) and stores incoming email.

**Mail User Agent (MUA):** See also **Email Client**.

**Marketing Automation:** Software solutions that support marketing processes like lead scoring, nurturing and management in execution and measurement.

**Mashup:** Combining two or more Web services to create something new, such as combining Twitter posts with Google maps to create TwitterVision.

**Mentions:** Number of times your brand is mentioned in any publicly communicated capacity. Mentions consist of press release pickups, news article coverage and financial message board postings. This is used as a barometer of PR share of voice.

**Message Boards:** An online discussion site where people look to discuss particular issues or needing support post threads (a message) on the forum or message board in hopes to gain more information or start a conversation.

**Meta Search:** A search that aggregates the results from a variety of search engines by submitting the query to them and consolidating the results.

**Meta Tags:** HTML components that can include page titles, descriptions and keywords. These components are visible to search engine spiders but do not affect the appearance of the webpage.

**Metadata:** Information — including titles, descriptions, tags and captions — that describes a media item such as a video, photo or blog post.

**Microblogging:** Is the act of broadcasting short messages to other subscribers of a Web service. On Twitter, entries are limited to 140 characters, and applications like Plurk and Jaiku take a similar approach with sharing bite-size media.

**Micro-philanthropy:** Donations made in small amounts (\$1, \$5, \$10, \$20).

**Microsite:** A cross between a landing page and a regular website. These sites often have their own domain names and even separate brands from the organization's core brand. Marketers use them to offer a user an extended experience for branding or educational purposes. In fact, the visitor might even return to a microsite as a destination.

**Mobile Search:** Conducting a search query from a handheld device with wireless Internet connection, such as a smartphone or blackberry.

**Moblogging:** Posting to a blog via mobile phone.

**Modality:** Generally used as a synonym for "category." For example, "Direct mail is among the oldest modalities of offline marketing."

**Monetization:** The approach to making money from an online property, usually by display advertising, subscription, affiliate links or context advertising.

**Movable Type:** A publishing platform created by SixApart.

**MSP:** Marketing Service Provider or Mail Service Provider, such as Hotmail.

**Multichannel Marketing:** Marketing efforts that use multiple mediums to target unique prospects. For example, sending direct postal mail and email with complementary messaging and offers to the same people with coordinated timing.

**Multichannel:** A differentiator of merchants that employ multiple sales channels, as opposed to being strictly one (brick-and-mortar) or the other (Web-only or "pureplay").

**Multimedia:** Media and content in different forms such as videos, pictures, etc. Examples include YouTube and Flickr.

**Multi-Part MIME:** Message format that includes both an HTML and a text-only version in the same message. Most, but not all, email clients receiving messages in this format will automatically display the version the user's system is set to show. Systems that can't show HTML should show the text version, but this doesn't always work — in particular for many Lotus Notes users. See also **Email Sniffer**.

**Multivariate Testing:** Using a statistical model to allow the simultaneous testing of multiple variables. Contrast with A/B testing, which examines only one variable at a time. Also known as the Taguchi Method.

**MyBlogLog:** A Yahoo!-owned community and social networking site that tracks traffic and visits to member sites.

**MySpace:** An online social network. MySpace caters to artists and bands that enjoy the flexibility of creating an individual "look" for their page. MySpace allows users to "friend" each other and create groups.

**Natural Results:** See **Organic Listing**.

**Navigation (Nav):** A menu of links or buttons allowing users to move from one webpage to another within a site.

**NetNewsWire:** A free RSS news aggregator for the Mac platform.

**Network:** A Facebook term for a broader social grouping, such as a city, large company or university.

**New Customer Nurturing:** Nurturing programs that provide educational “how-to” information to new customers to propel customer satisfaction.

**News Aggregator:** A Web-based tool or desktop application that collects syndicated content.

**News Feed:** Throttled, filtered amalgamation of friend-generated stories.

**News Reader:** Gathers the news from multiple blogs or news sites via RSS feeds, allowing users to access all their news from a single site or program. See also **Feed Reader**, **RSS** or **News Aggregator**.

**NewsGator:** An RSS company that offers its own Web-based feed reader and powers the feeds in Microsoft Outlook.

**Newsvine:** An open source, community news service that lets members customize news viewed by “seeding” articles or posting for others to view and rate.

**NoFollow:** An HTML attribute instructing search engine spiders that a URL should not be considered in ranking algorithms. Nofollow tags exist to maintain credibility of a “vote” that is represented when one site naturally links to another.

**Notification:** A low-importance message generated either automatically or because of a friend’s action.

**Nth Name:** The act of segmenting a list for a test in which names are pulled from the main list for the test cell by number, such as every fifth name on the list. See also **A/B Split**.

**Offline Conversion:** Sales or other conversion events that take place in the real world, typically in a brick-and-mortar store.

**Ongoing Nurturing:** Consistent communications intended to keep brands on prospects’ minds. Examples include regular company newsletters.

**Online Advertising:** One or a combination of CPA, CPC, CPM or Tenancy. Search is a form of CPC but is so large (Google Adwords) that it usually referred to separately.

**Online Community:** A group of people using social media tools and sites on the Internet.

**Open Media:** Video, audio, text and other media that can be freely shared.

**Open Rate:** The number of HTML message recipients who opened your email, usually as a percentage of the total number of emails sent. The open rate is considered a key metric for judging an email campaign’s success, but it has several problems. The rate indicates only the number of emails opened from the total number sent, not just those that were actually delivered. Opens can’t be calculated on text emails. Also, some email clients allow users to scan message content without actually opening the message, which is falsely calculated as an open.

**Open Relay:** An SMTP email server that allows outsiders to relay email messages that are neither for nor from local users. Often exploited by spammers and hackers.

**Open Video:** A movement to promote free expression and innovation in online video. With the release of HTML5, publishers will be able to publish video that can be viewed directly in Web browsers rather than through a proprietary player.

**OpenID:** A single sign-on system that allows Internet users to log on to many different sites using a single digital identity, eliminating the need for a different username and password for each site.

**Openness:** A measure of a user's tendency to share and collaborate – something aided by social media.

**OpenSocial:** A technology for deploying the same application across multiple platforms (MySpace, Friendster, Hi5 but not Facebook or LinkedIn).

**Opt-in:** A specific, proactive request by an individual email recipient to have an email address placed on a specific mailing list. Many list renters and buyers now require list owners to provide proof of opt-in, including the email or IP address date and time the request was received.

**Opt-out:** A specific request to remove an email address from a specific list or from all lists operated by a single owner. Also, the process of adding an email addresses to lists without the name's pre-approval, forcing names who don't want to be on your list to actively unsubscribe.

**Organic Listing:** Search page result that is provided free and based on the search algorithms of the search engine. A site might have a high "organic" ranking without paying the search engine anything at all. Conversely, a high spending advertiser in a keyword category might not appear anywhere near the top organic results. See also **Natural Listings**.

**Outbound Marketing:** Demand and lead generation marketing activities that involve the delivery of a message from the company to a targeted audience. Outbound marketing tactics have existed a lot longer than inbound marketing tactics, and are viewed as more traditional marketing practices. Outbound marketing tactics include direct mail, email marketing, outbound calls, print advertising, etc.

**Outreach Nurturing:** Lead nurturing campaigns that aim to capture new leads, or permission from new leads to have a salesperson reach out to them. Outreach campaigns can also collect additional data from a lead. When marketers ask for more from their prospects in an outreach nurturing campaign, they should expect to provide something of value.

**Paid Placement:** Ad model in which search engines return paid advertising when appropriate queries are used. For example, if someone searches for "new cars," a paid ad from a major auto manufacturer may appear. Advertisers bid on specific keywords that are contained in search queries and attach specific text ads to them. Google, Yahoo! and Bing are the largest paid placement search engines. See also **Pay-Per-Click**.

**Paid Search Marketing:** The placement of paid ads for a business or service on a search engine results page. An advertiser pays the search engine if the visitor clicks on the ad. See also **Pay-Per-Click**.

**Pass-Along:** An email recipient who received a marketing message that was forwarded from a subscriber. Some emails offer "forward to a friend" in the creative, but the vast majority of pass-alongs happen using email clients. Pass-alongs can affect the formatting of the email, often stripping off HTML.

**Passed Parameters:** The act of including known subscriber information in a redirect URL. This allows you to provide Web applications that can pre-populate form values requiring the subscriber to do less typing.

**Pay-Per-Click (PPC):** Regarding search engine marketing, refers to search engine advertisements based cost-per-click payment model. Advertisers place a bid on various keywords, and pay when their ads receive a click. The ranking position and number of impressions an advertiser receives is calculated by their bid, any other bids on that keyword, their daily budget and their quality score. See also **Sponsored Search**.

**Penetration:** In search, the percentage of the total potential search engine users who conduct a search on a given engine or site.

**Percentage of Qualified Leads:** The number of sales-ready leads in relationship to total leads generated. ((Qualified lead volume / total lead volume) \*100).

**Permalinks:** The permanent URLs to individual blog posts, as well as categories and other lists of blog postings.

**Permission:** The explicit approval given when a person actively requests to have their email address added to a list.

**Persona-based Design:** Personas are virtual customers — useful templates based on common customer types that can guide site design, offer testing, etc.

**Personal Media:** User-created material; typically grassroots works such as video, audio and text.

**Personalization:** A targeting method in which a webpage or email message appears to have been created only for a single recipient. Personalization techniques include adding the recipient's name in the subject line or message body, or an offer reflecting purchasing, link clicking or transaction history.

**Personalized Search:** Search engine feature that determines a search engine user's results based on that user's search history.

**Pretty Good Privacy (PGP):** Software used to encrypt and protect email as it moves from one computer to another. Can be used to verify a sender's identity.

**Phase I: Trial:** For the purpose of this report, Search Marketing Benchmark survey respondents who indicated that they had no repeatable process for performing PPC.

**Phase II: Transition:** For the purpose of this report, Search Marketing Benchmark survey respondents who indicated that they had an informal process that was randomly performed for PPC.

**Phase III: Strategic:** For the purpose of this report, Search Marketing Benchmark survey respondents who indicated that they had a formal process for PPC that was routinely performed.

**Phishing:** A form of identity theft in which a scammer uses an authentic looking email to trick recipients into giving out sensitive personal information, such as credit card or bank account numbers, Social Security numbers and other data.

**Phone-Ready Leads:** Rules-validated leads that meet certain criteria agreed upon by Sales and Marketing teams as a lead that is ready for Sales follow-up.

**Phone-Validated Leads:** Phone-ready leads that have been validated by Sales and confirmed to meet agreed-upon criteria.

**Plain Text:** Text in an email message that includes no formatting code. See **HTML**.

**Platform:** The ability for third parties to serve additional applications to users, such as Facebook.

**Podcast:** A downloadable radio show designed to be listened to on a portable media device.

**Podcast:** A way to publish audio content to the Internet for multimedia players to download.

**Podsafe:** A term created in the podcasting community to refer to any work that allows the legal use of the work in podcasting, regardless of restrictions the same work might have in other realms, such as radio or television use.

**Poke:** Smallest unit of communication on a social network.

**Post Office Protocol (POP):** Used by email clients to send to or receive messages from an email server. Not to be confused with Point of Presence, an access point for the Internet.

**Postmaster:** The person to contact at a website, ISP or other site to request information, get help with delivery, or register complaints.

**Preference Center:** In email or website registration, the practice of asking the registrant questions that tell the marketer more about them. Typical preference centers will ask about interests and preferences for HTML vs. text emails. They can, however, be more sophisticated and guide frequency and segmentation.

**Preferences:** Options a user can set to determine how they want to receive your messages, how they want to be addressed, to which email address messages should go, and which messages they want to receive from you.

**Preview Pane:** The window in an email client that allows the user to scan message content without actually clicking on the message. See also **Open Rate**.

**Privacy Policy:** A clear description of how your company uses the email addresses and other information it gathers via opt-in requests for newsletters, company information or third-party offers or other functions. If you rent, sell or exchange your list to anyone outside your company, or if you add email addresses to opt-out messages, you should state so in the privacy policy. State laws may also compel you to explain your privacy policy, where to put the policy statement so people will see it, and even in the form the policy should be displayed.

**Privacy Policy:** A clear description of how your company uses the information it gathers about visitors, users and/or customers. Links to privacy policies are generally included on landing pages, email registrations, lead forms, etc. as a best practice.

**Privacy Settings:** The ability to limit social content by network or friend lists.

**Profile:** The online representation of an individual's identity.

**Property:** A generic term for a page, application, widget or website.

**Prospect:** A lead that has progressed from the qualified lead stage into the sales funnel. However, the term is often heard used as a synonym for qualified lead.

**Public Domain:** A work that becomes available for public use when donated by its creator or when a previous copyright expires. A work in the public domain can be freely used in any way, including for commercial purposes.

**Public Media:** Any form of media that increases civic engagement and enhances the public good.

**Purchase Phase:** The final stage of the buying process, when consumers commit to purchasing a product.

**Qualified Closing Rate:** The percentage of qualified leads that closed out of the total qualified lead volume. ((Number of qualified leads that closed / qualified lead volume) \*100).

**Qualified Lead Volume:** The total number of sales-ready leads collected from lead generation campaigns that meet the universal lead definition.

**Qualified Lead:** While the definition varies from marketer to marketer, a qualified lead is generally the next step up from inquiry — the lead fits some criteria to warrant lead development. It may be as simple as “anyone who searched for this term is qualified” to “they only corresponded to three of five criteria from our registration form, they’re not qualified.”

**Quality Score:** A measurement of the relevance of a pay-per-click advertiser or ad to a search query that considers a number of factors including an advertiser’s historic performance in clickthrough rate. In general, high-quality scores lead to higher ranking positions in sponsored search at a lower cost-per-click.

**Quantcast:** Tool used to measure the amount of traffic a URL receives, as well as data about the readership (demographics, psychographics, etc.).

**Query:** A word, phrase or string of words used to define the response from a search engine or database.

**Queue:** Where an email message goes after you send it but before the list owner approves it or before the list server gets around to sending it. Some list software allows you to queue a message and then set a time to automatically send it, either during a quiet period on the server or at a time when human approval isn’t available.

**Ranking:** A webpage’s position in search engine results for a particular keyword/search phrase. Higher rankings typically indicate better PPC and SEO, as well as high volume and quality traffic.

**Read Email:** There is no real measure of “read” email, although the term is sometimes used as a synonym for opened email. Only opens and clicks are measurable. You can never know if a recipient read your message.

**Readability:** The degree to which an email client correctly renders an HTML email.

**Readership:** Circulation multiplied by average readers per copy. Equals the total reach of a publication.

**Readiness:** A check on whether a user (or organization) is prepared to engage with social media.

**Real Time Search:** A search engine’s ability to index Web content and index it in real time without delay. Content commonly displayed in real time includes social media content.

**Recency:** A measure of how recent information was produced. Usually refers to the age of contacts on a rented or third-party list.

**Record:** A file in a marketer’s database. It may contain anything from an anonymous code with preferred site characteristics to an extensive profile of a customer or prospect.

**Recreational Shopper:** Someone who is part of the approximate 40% of the population who say they like to shop and consider shopping a hobby or fun activity.

**Referrer:** The address of the webpage from which a visitor arrived.

**Registered Leads:** Includes all inquiries that respond to a marketing campaign by calling in, sending a direct response card, submitting a form on an organization’s website, or responding in some other form.

**Registration:** The process of providing a username, password and other details when seeking to access a website that has otherwise restricted content.

**Registration:** The process where someone not only opts in to your email program, website membership program, etc., but provides some additional information, such as name, address, demographic data or other relevant information, usually by using a Web form.



**Relationship Email:** An email message that refers to a commercial action — a purchase, complaint or customer-support request — based on a business relationship between the sender and recipient. Generally, are not covered by CAN-SPAM requirements.

**Remix:** Any work that takes elements from two or more media files and combines them to create a new piece of media.

**Reply-To:** The email address that receives messages sent from users who click “reply” in their email clients. Can differ from the “From” address, which can be an automated or unmonitored email address used only to send messages to a distribution list. “Reply-to” should always be a monitored address.

**Research Phase:** The initial stage of the buying process, when consumers begin to understand a product and its role in the market.

**Retention Loop:** The application dynamic that encourages users to return regularly to an application.

**Return Rate:** The percentage of total sales (by item, category or all sales) that is ultimately returned by customers.

**Reverse Domain Name System Lookup (Reverse DNS):** When an IP address is matched correctly to a domain name, instead of a domain name being matched to an IP address. Reverse DNS is a popular method for catching spammers who use invalid IP addresses. If a spam filter or program can’t match the IP address to the domain name, it can reject the email.

**Rich Media Ad:** A display ad that includes video or interactive elements.

**Robots.txt:** A website command in HTML that tells search engine spiders to stop indexing a site or page.

**ROI (Return on Investment):** Either mathematical or anecdotal analysis of payback for a project. Mathematical calculation for ROI equals  $((\text{Return} - \text{investment}) / (\text{investment}) \times 100)$ .

**Really Simple Syndication (RSS):** XML-based content distribution method that powers many blogs and other types of content websites. RSS gathers “feeds” of content from user-designated sources — blog entries, news stories, headlines, images, video. The “feeds” include clickable headlines and blurbs about full pieces of content. RSS is seen as an alternative to some types of email communication, but has yet to become an established marketing medium.

**Rules-validated Leads:** Registered leads that pass the criteria as valid leads and appear to be in the organization’s target market.

**Sales Cycle:** All lead stages between first direct contact (may simply be a registration on a website) and ultimate sale. Sales cycle is a measure of efficiency of the sales organization. Also known as Sales Funnel.

**Sales Outcome:** Determined when the sale is won, lost or indefinitely postponed.

**Sales-forecasted Opportunities:** Meet the criteria defined by sales management for forecasting future deals.

**Sales-ready Opportunities:** Phone-validated leads who are willing to begin the sales process with a salesperson and often meet another set of criteria agreed upon by Marketing and Sales.

**Sales-validated Opportunities:** Sales-ready opportunities that have been validated by Sales to meet agreed upon criteria.

**Scheduled Nurturing Message:** A nurturing message developed and deployed at a pre-determined time.

**Scraping:** The process of obtaining keywords from competitors' websites.

**Search Engine Marketing (SEM):** All of the tactics and versions of search engine advertising, including search engine optimization (SEO) and pay-per-click marketing (PPC).

**Search Engine Optimization (SEO):** Includes a set of processes to increase the visibility of an organization's website, webpage or multimedia content so search engines will index them in the natural, organic results. While there is no cost-per-click for organic listings, the cost of these programs typically includes the use of in-house resources or agency time.

**Searchjacking:** Optimizing a page for highly sought after search terms, even though the page has nothing to do with the subject matter. Used to generate large volumes of (highly irrelevant) traffic.

**Seed Emails:** Email addresses placed on a list (sometimes secretly) to determine what messages are sent to the list and/or to track delivery rate and/or visible appearance of delivered messages. Seeds may also be placed on websites and elsewhere on the Internet to track spammers' harvesting activities. Also known as Seed Addresses.

**Segment:** The ability to slice a list into specific pieces determined by various attributes, such as open history or name source.

**Segmenting Log File:** A process that goes beyond simply correlating keywords by frequency with later conversion. Often keywords that occur infrequently can be top converters. The inverse is also true.

**Select:** A segment of a list determined by any number of attributes, such as source of name, job title, purchasing history, etc. CPM list renters pay an additional fee per thousand names for each select on top of the base list price.

**Selections:** Information about people, households, companies, etc. that is used to target direct marketing. Demographic selectors may include age, income, gender, hobbies, holding a credit card, etc. B2B selectors include role, title, purchasing history, etc.

**Selective Unsubscribe:** An unsubscribe mechanism that allows a consumer to determine which email newsletters they wish to continue receiving while stopping the sending of others.

**Sender ID:** The informal name for a new anti-spam program combining two existing protocols: Sender Policy Framework and Caller ID. Sender ID authenticates email senders and blocks email forgeries and faked addresses.

**Sent Emails:** Number of email names transmitted in a single broadcast. Does not reflect how many were delivered or viewed by recipients.

**Search Engine Results Page(s) (SERP(s)):** the listing of webpages returned by a search engine keyword query.

**Server:** A host computer that fulfills requests from other computers such as information, data, webpages, emails, images, etc. Can store and distribute email from one mailbox to another, or relays email from one server to another in a network.

**Share of Wallet:** A measure of how much business in a given category is owned by a merchant. For example, of everything that someone might be expected to spend on product X this year, how much are they spending with merchant Y?

**Shopping Search Engine:** See Comparison Shopping Site.

**Stock Keeping Unit (SKU):** Any product, part or accessory that is numbered. Often used to refer to the number of products sold by a merchant.

**Short Message Service (SMS):** A feature of mobile phones that allows the transmission of short text messages from one device to another.

**Simple Mail Transfer Protocol (SMTP):** The most common protocol for sending email messages between email servers.

**Social Marketing:** The planning, execution and measurement of marketing tactics deployed through social media sites and involving the voluntary actions of prospects and consumers.

**Social Media Integration:** The use of social media to support search marketing plans. For organic search, content development and link building tasks are facilitated. For pay-per-click, clickthrough and conversion rates are improved.

**Social Media:** Applications and websites that allow for the publishing and sharing of user generated content and discussions. Examples of social media include social networks, blogs, microblogs, multimedia sharing sites and games.

**Social Sharing:** Tools and tactics that enable email recipients to share email content on popular social networks and other social media sites.

**Soft Bounce:** Email sent to an active (live) email address but is turned away before being delivered. Often, the problem is temporary — the server is down or the recipient's mailbox is over quota. The email might be held at the recipient's server and delivered later, or the sender's email program may attempt to deliver it again. Soft-bounce reports are not always accurate because they don't report all soft bounces or the actual reason for the bounce.

**Solo Mailing:** A one-time broadcast to an email list, separate from regular newsletters or promotions, and often includes a message from an outside advertiser or a special promotion from the list owner.

**Spam:** The popular name for unsolicited commercial email. However, some email recipients define spam as any email they no longer want to receive, even if it comes from a mailing list they voluntarily joined.

**Spamcop:** A blacklist and IP-address database, formerly privately owned but now part of the email vendor, IronPort. Many ISPs check the IP addresses of incoming email against spamcop's records to determine whether the address has been blacklisted because of spam complaints.

**Spamdexing:** Any technique designed to fool search engine spiders, and increase or artificially change a search ranking or result.

**Specifier:** Someone whose role in the technical purchase process is to identify specific needs, features, etc., needed from a product.

**Sender Policy Framework (SPF):** A protocol used to eliminate email forgeries. A line of code called an SPF record is placed in a sender's Domain Name Server information. The incoming server can verify a sender by SPF record before allowing a message through.

**Spider:** A small program that surfs the Web to index information for a search engine. See also **Crawler**.

**Spidering:** The process of surfing the Web, storing URLs and indexing keywords, links and text. Because there is far too much information available to index it all, every search engine has unique (and highly proprietary) ways in which it saves time and space.

**Sponsored Search:** A method of search engine marketing based on a cost-per-click model. See also **Pay-Per-Click**.

**Spoofing:** The practice of changing the sender's name in an email message so it looks as if it came from another address.

**Status:** Short character description of what a user is doing at a specific moment, e.g., "Sergio is writing a glossary of social media terms."

**Stemming:** An advanced search quality of some search engines that allows the engine to return results containing the same word stem as the keyword. Example: A "stemming" return for "marketing" might return results for "marketer."

**Stop Word:** Words that are so common they don't affect search results, such as "a," "an," "the," etc.

**Streaming Media:** Video or audio that can be watched or listened to online but not permanently stored.

**Style or Style Sheet:** CSS that determines the look/feel of a site.

**Subject Line:** Copy that identifies the topic of an email message, often designed to entice the recipient into opening the message. The subject line appears first in the recipient's inbox, often next to the sender's name or email address. It is repeated in the email message's header information inside the message.

**Subscribe:** The process of joining a mailing list, either through an email command, by filling out a Web form, or offline by filling out a form or requesting to be added verbally. (If you accept verbal subscriptions, you should safeguard yourself by recording it and storing recordings along with time and date, in a retrievable format).

**Subscriber:** The person who has specifically requested to join a mailing list.

**Subscribing:** The process of adding an RSS feed to an aggregator or newsreader.

**Suppression File:** A list of email addresses you have removed from your regular mailing lists, either because they have opted out of your lists or because they have notified other mailers that they do not want to receive mailings from your company. Required by CAN-SPAM.

**Syndication:** Allows blog content to be distributed online.

**Tag Cloud:** A visual representation of the popularity of the tags or descriptions that people use on a blog or website. Popular tags are often shown in a large type and less popular tags in smaller type.

**Tagging:** The act of allocating particular keywords to content, such as in Flickr photos.

**Tags:** Keywords added to a blog post, photo or video to help users find related topics or media, through either browsing on the site or as a term to make your entry more relevant to search engines.

**Target Market:** A profile that an organization selects to target with marketing materials. Target markets are typically based on demographics, such as location, company size, annual revenue, etc. They differ from buyer personas, which are more in-depth profiles that include behavioral characteristics.

**Technorati Authority:** Used to determine the number of times a keyword or URL are mentioned and linked in blogs.

**Teleconferencing:** A meeting held without being in the same place, using a network connection and tools like Voice over IP, instant messaging, video and whiteboards.

**Telemarketing:** Involves contacting prospects with a phone call to generate leads See also **Cold Calling**.

**Tenancy:** An ad displayed for a set period of time. See also **Sponsored Search**.

**Terms of Service (TOS):** The legal basis upon which you agree to use a website, video hosting site or other place for creating or sharing content.

**Test:** A necessary step before sending an email campaign or newsletter. Many email clients permit you to send a test email before sending a regular email newsletter or solo mailing, in which you would send one copy of the message to an in-house email address and then review it for formatting, copy errors or improperly formatted links. Email marketers should also send a test campaign to a list of email addresses not in the deployment database to determine likely response rates and how well different elements in the message perform.

**Text Newsletter:** Plain newsletter with words only — no colors, graphics, fonts or pictures. Anyone with email can receive it.

**Thank-You Page:** Webpage that appears after a user has submitted an order or a form online. Is often a receipt.

**Threads:** Strands of conversation. On an email list or Web forum, they will be defined by messages that use the use the same subject. On blogs, they are less clearly defined, but emerge through comments and trackbacks.

**Throttling:** The practice of regulating how many email messages a broadcaster sends to one ISP or mail server at a time. Some ISPs bounce email if it receives too many messages from one sending address at a time.

**Time to Close:** The average number of days it took for deals to close during a specified time period.

**Tool:** Software applications on your computer, and also for applications that are Web-based.

**Top 2 (or Top 3):** Scoring method in which only the top two responses are used in calculation. Top two responses are usually expressing favorability toward the selection and usually include “very” and “somewhat” as the two responses.

**Total Investment:** Includes the total financial investment made for a marketing channel or campaign. Can also include employee salaries or sales commission.

**Total Lead Volume:** The total number of leads collected from lead generation campaigns. Includes sales-ready leads and non-sales-ready leads.

**Total Revenue:** The total revenue gained for a marketing channel or campaign.

**Trackback:** A facility for bloggers to leave a calling card, instead of commenting.

**Transactional Email:** An email that is part of a transaction, usually a receipt. Has been used to refer to rich-media emails with transactional capability embedded in the email itself. However, this term has largely fallen out of use as filtering of email has limited the utilization of rich media elements. Also known as Transactive Email.

**Transparency:** Enhancing searching, sharing, self-publish and commenting across networks makes it easier to find out what’s going on in any situation where there is online activity.

**Triggered Nurturing Message:** A lead nurturing message sent in response to an action that a lead has taken.

**Troll:** Someone who posts controversial, inflammatory, irrelevant or off-topic messages in an online community, such as an online discussion forum or chat room, with the primary intent of provoking other users into an emotional response or to generally disrupt normal on-topic discussion.

**Tweet:** A post on Twitter, a real-time social messaging system.

**Tweetup:** An organized or impromptu gathering of people who use Twitter. Users often include a hashtag, such as #Tweetup or #sfTweetup, when publicizing a local Tweetup.

**Twitter:** A popular social network, unveiled to the public in July 2006, that lets members post updates of no more than 140 characters. People often use Twitter to point to news stories, to raise funds for charity or other unexpected uses. See also **Microblogging**.

**Twitterverse:** Akin to blogs and the blogosphere, the Twitterverse is the community of people who use Twitter and the conversations taking place within that sphere.

**Unsolicited Commercial Email (UCE):** See also **Spam**.

**Unconference:** A collaborative learning event organized and created for its participants, by its participants.

**Unique Reference Number:** A unique number assigned to a list member, usually by the email broadcast software, and used to track member behavior (clicks, subscribes, unsubscribes) or to identify the member to track email delivery.

**Unique Visitor:** A single visitor to a website determined by the number of unique IP addresses that hit the site.

**Universal Lead Definition:** A lead that has been determined to fit the profile of the ideal customer, has been qualified as sales-ready, and spells out the responsibilities and accountabilities of the participants in the program, Sales and Marketing (Brian Carroll, Executive Director of Applied Research of MECLABS, CEO of InTouch).

**Universal Search:** A search engine's ability to deliver multimedia content in search results pages, including images, videos, news, local information, social media sites and books.

**Universe:** The total membership of a defined group. The universe of influencers on technology purchases, for example, includes technical staff, IT management, Line of Business managers and executives at the VP and C-level.

**Unsubscribe:** To remove oneself from an email list, either via an emailed command to the list server or by filling in a Web form.

**Update:** A newsletter sent to fans of a specific social media page.

**Upload:** Transfer a file or other content from your computer to an Internet site.

**Uniform Resource Locator (URL):** The Web address for a page, always beginning with http:// (or https:// for a secure page) and followed by "www." (or variations, although some URLs are set up to not include this information) and the domain name, e.g., http://www.marketingsherpa.com.

**Usability:** The study of how people interact with their environment. In online marketing, a specialized form that focuses on webpage design.

**User-Generated Content (UGC):** An industry term that refers to all forms of user-created materials such as blog posts, reviews, podcasts, videos, comments and more.

**Value Proposition:** A clear and concise statement that defines the key reason why an organization becomes the best choice for their ideal customer. It should clearly communicate both what the company does and its unique benefits over the competition.

**Vendor:** Any company that provides a service. See **Email Vendor**.

**Verification:** A program that determines an email came from the sender listed in the return path or Internet headers; designed to stop email from forged senders.

**Video Email:** An email message that includes a video file, either inserted into the message body, accessible through a hotlink to a website or accompanying it in an attachment (least desirable because many ISPs block executable attachments to avoid viruses).

**Video Search:** A search engine's ability to "crawl" the Web for video content and index it on a search results page.

**Videoblog (or vlog):** A blog that contains video entries. Often called video podcasting, vodcasting or vlogging.

**Viral Loop:** The dynamic that encourages one to share a property with friends.

**Viralocity:** The number of new users gained for each user. A viralocity of one means for each user, one new user is gained.

**Virtual Event:** Much like a webinar but intended to include a large number of participants, and is often marketed as an online conference or summit. See also **Webinar**.

**Virtual World:** An online computer-simulated space such as Second Life that mixes aspects of real life with fantasy elements.

**Voice over Internet Protocol (VOIP) Service:** Enables you to use a computer or other Internet device for phone calls without additional charge, including conference calls, e.g., Skype.

**Wall:** Shared discussion board specifically about an individual and displayed on the individual's profile.

**Warm Traffic:** Sending users to your website who have already been engaged via a social page or app – e.g., "warmed-up" users who are more likely to convert to customers.

**Web 2.0:** Refers to the second generation of the Web, which enables people with no specialized technical knowledge to create their own websites to self-publish, create and upload audio and video files, share photos and information, and complete a variety of other tasks.

**Web Analytics:** The measurement, collection, analysis and reporting of Internet data for the purpose of understanding who your visitors are and optimizing your website.

**Web Bug:** A one-pixel x one-pixel image tag added to an HTML message and used to track open rates by email addresses. Opening the message, either in the preview pane or by clicking on it, activates the bug and sends a signal to the website, where special software tracks and records the signal as an open.

**Web Conferencing:** Used to conduct live meetings or presentations over the Internet.

**Web Feed:** Allows you to read, listen or watch new content on a blog or a website without having to revisit that site. See also **RSS**.

**Web-based Tools:** Google, Yahoo! and a host of other commercial organizations provide an increasing range of free or low-cost tools including email, calendars, word processing and spreadsheets that can be used on the Web rather than a desktop.

**Webcasting:** Refers to the ability to use the Web to deliver live or delayed versions of audio or video broadcasts.

**Webinar:** Short for Web-based seminar, a webinar is a presentation, lecture, workshop, meeting or seminar that is transmitted over the Internet through a Web conferencing tool.

**Webmail:** Any of several Web-based email clients where clients have to go to a website to access or download email instead of using a desktop application. Some examples are Gmail, Yahoo! Mail and Hotmail.

**Welcome Message:** Message automatically sent to new list members as soon as their email addresses join a list.

**White Hat:** In PPC, this refers to ethical and acceptable methods of optimizing a website to achieve higher search engine rankings and increased traffic.

**Whitelist:** Advance-authorized list of email addresses, held by an ISP, subscriber or other email service provider, which allows email messages to be delivered regardless of spam filters. See also **Enhanced Whitelist**.

**Widget:** A small block of content, typically displayed in a small box, with a specific purpose, such as providing weather forecasts or news that is constantly updating itself (typically via RSS). Widgets make it easy to add dynamic content to your site or blog. Sometimes called a **gadget, badge** or **applet**.

**Wiki:** A technology designed to allow many different people to edit a webpage by providing an easily reversible audit trail of edits and changes. The best example of this in practice is the Wikipedia project.

**Wish Lists:** A merchandising technique that allows registered website users to store a list of products they would like. Like a digital version of a wedding registry.

**Word-of-mouth (WOM) Marketing:** An emerging area in marketing that attempts to measure and/or harness the power of personal recommendations. With the explosion of blog readership, WOM has become a hot topic in virtually every industry.

**WordPress:** A popular open source blog publishing application.

**XML (Extensible Markup Language):** A new language that promises more efficient data delivery over the Web. XML does nothing itself. It must be implemented using "parser" software or XSL.

**Extensible Markup Language (XML):** An advanced language developed by the World Wide Web consortium (W3C) to complement HTML. HTML is about displaying information, while XML is about describing information. XML does nothing itself. It must be implemented using "parser" software or XSL.

**XML Feeds:** A method of feeding page information to search engines using XML. Some feeds are paid by the user on a CPC or subscription basis.

**YouTube:** A video sharing website where users can upload, view, share and comment on clips from TV, film and amateur videos.



# About MarketingSherpa LLC

MarketingSherpa is a primary research facility, wholly-owned by MECLABS, dedicated to determining **what works in marketing** via exclusive case studies, surveys, and results data analysis. Then we publish what we learn so our community of marketers and weekly readers can improve their results and train their teams.

Praised by *The Economist*, Harvard Business School's Working Knowledge Site and Entrepreneur.com, MarketingSherpa is distinguished by offering **practical, results-based marketing** information researched and written by a staff of in-house reporters.

MarketingSherpa features:

- **Best Practices:** 1,000+ brand-side marketer case studies and 3,500+ Creative Samples
- **Research:** 2,000+ marketing and research abstracts
- **Instruction:** 800+ how-to articles
- **Newsletters:** 230,000+ marketers read weekly case studies on topics such as email, search, social, lead generation, lead nurturing, optimization and content marketing
- **Training:** 100+ live, hands-on training sessions providing practical and proven solutions
- **Summits:** 3 annual vendor-neutral, research-based marketing events

## About MECLABS

MECLABS is a science lab that uses real-world research and training to **help business leaders get better use out of sales and marketing technology and resources**, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

MECLABS deploys a rigorous methodology to conduct research. This research is compiled from:

- More than **10 years** of research partnership with our clients
- **1,300** experiments
- Over **1 billion** emails
- **10,000** landing pages tested
- **5 million** telephone call
- **500,000** decision maker conversations

MECLABS has consulted with companies like Cisco, Johnson & Johnson, *The New York Times*, 1-800-Flowers, and NetSuite to optimize sales and marketing processes and achieve triple-digit ROI gains.

Register for Summits and Workshops at [MECLABS.com/training](http://MECLABS.com/training) or contact:  
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