



EmailLabs
Delivering Email Marketing Success

Email Marketing
Best Practices
Quick Tips

*A Quick Tips Guide to
Email Marketing*

QUICK TIPS

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Introduction

Email marketing is one of the most powerful and effective forms of marketing used today. It is quick to deploy, offers immediate highly measurable results, enables advanced segmentation and personalization and delivers a high return on investment.

But to achieve the maximum results from your email marketing program requires experience, expertise and advanced technology. To help marketers optimize results from their email marketing efforts, EmailLabs writes and distributes a monthly free email newsletter - The Intevation Report. The newsletter provides tips and best practices in areas including delivery, subject lines, personalization, testing, metrics/reporting, ISP relations, dealing with the effects of spam and more. We've collected Quick Tips from past issues of our newsletter into this handy best practices resource guide.

Additional resource articles and tips can be found online in EmailLabs Email Marketing Resource Center at <http://www.emaillabs.com/resources.html>

We hope you enjoy the Quick Tips and find them of value.

EmailLabs

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Plan & Strategize

Email Marketing Planner & Checklist

Plan and monitor the progress of your email campaigns & newsletters with this email marketing planner and production checklist.

Printable PDF Version: http://www.emaillabs.com/pdf/campaign_checklist.pdf

Campaign/Newsletter Name:

Launch Date(s):

Goals/Metrics:

<input type="checkbox"/> Open Rate	<input type="checkbox"/> Referral Rate
<input type="checkbox"/> Click-Through Rate	<input type="checkbox"/> Transactions
<input type="checkbox"/> Bounce Rate	<input type="checkbox"/> Revenue
<input type="checkbox"/> Unsubscribe Rate	<input type="checkbox"/> Subscriptions

Learnings from previous campaigns/issues:

Testing Strategy:

Segmentation:

Subject Lines: A. _____ B. _____ C. _____ D. _____

Production Checklist

List Preparation:

Upload new lists, new customers/subscribers and additional information
 Conduct list hygiene
 Segment list appropriately
 Create A/B split or other random group lists

Message Creation:

<input type="checkbox"/> Create HTML version	<input type="checkbox"/> Include change email/update profile link
<input type="checkbox"/> Create AOL/Rich Text Format version	<input type="checkbox"/> Include change format preferences link (HTML, Text, AOL)
<input type="checkbox"/> Create plain text version	<input type="checkbox"/> Create PDF version of newsletter and articles
<input type="checkbox"/> Include unsubscribe link and message	<input type="checkbox"/> Obtain necessary approvals
<input type="checkbox"/> Include referral/send to a friend link	

Web Site/Server:

Create profile update page
 Create landing page, survey page, referral form page
 Post images to server
 Modify as necessary/post version of message on Web site
 (newsletters) Create HTML versions of articles and update article index and links
 Post PDFs to Web site

Proofing/Quality Assurance/Schedule:

Spell check copy - including subject lines
 Proof read copy
 Check all links
 (ecommerce) Check to ensure consistent pricing and product information between email and Web site
 Send Proof of HTML, AOL/RTF and Plain text versions
 Send test messages to key email clients/domain accounts (AOL, Yahoo, Hotmail, etc.)
 If forms were used, check to ensure
 Schedule for delivery - recheck time (EST, PST, etc.)

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Plan & Strategize

Post Distribution:

- Monitor distribution
- Monitor bounces, unsubscribes
- Monitor opens, clicks and Web site activity
- Reply to challenge-response messages
- Respond to email comments, feedback

Triggers/Follow-Up Messages/Correction Messages

- Send full campaign (based on test results)
- (If appropriate) monitor trigger-based emails
- (If necessary) Create and send correction email

Reporting/Analysis/Learning Debrief

- Update reporting spreadsheet
- Analyze results/compare to previous messages and target goals
- Determine specific learning from campaign results/testing
- Outline strategies for new campaign/newsletter

3 Ways to Reduce or Eliminate Email Mistakes

1. Third-Party Proof Reader: The major cause of email mistakes is either not proofing and testing links at all, or not proofing/testing thoroughly. One approach to proofing is to have someone outside of the email team read the copy and test the links. A fresh set of eyes is more likely to find errors and less likely to skip links that you as an editor might look over.

2. Pre-Testing: Another common mistake is not sending out test emails, including to different test accounts (i.e., AOL, Yahoo, Hotmail, etc.). An email can work fine on your desktop, but that survey form or referral form that you are excited about is probably not going to work properly for your Hotmail subscribers (for example). Make sure you test your email to see if it works properly for your top recipient domains. The process of pre-tests also helps uncover errors and problems that you may have missed in the proof reading process.

3. Production Checklist: For most people, sending out email newsletters or campaigns is not their only responsibility. As such, it is easy to forget little steps in the email process - particularly if your goal is to just “get it out the door.” Establishing a formal approval/review process and production checklist is a great way to help minimize errors.

When To Send A Correction Email

So you discover - either on your own (hopefully) or by a customer/subscriber that your email had a noticeable goof in it. After you get over the embarrassment or panic (or both), you need to determine if sending a correction email is the most appropriate action. While every situation is unique, we recommend sending a correction email when the mistake:

- Seriously misinforms your recipients (incorrect event date; wrong pricing; erroneous product information, etc.)
- Does not allow recipients to complete a form, transaction, download a white paper, access an article, etc.
- Has the potential to damage your brand image, reputation, customer relationships - or just is not consistent with the expectations of your readers.

Typos, grammatical mistakes, incorrect images or images that don't load, etc., are probably not serious enough to require a correction email. You may want to include a correction in the next campaign or issue if appropriate.

Read the full article at http://www.emaillabs.com/articles/email_articles/article_emailgoofs.html

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Build & Manage Lists

5 Online Ways to Build Your Ecommerce Email List

One of the most effective (and obvious) means to increase revenue from your ecommerce email is to grow your list. Here are 5 quick ways to move your list towards a consistently upward growth trend:

1. **Web Site Form** - Perhaps the single most important method of growing your list is by optimizing your email subscription form on your Web site. Don't rely just on your home page to capture new subscribers. Many of your visitors may enter your site from a search engine on a specific page. If possible, a simplified form - or at least an impossible-to-miss image that links to the form - should be included on every page of your site.
2. **Shopping Cart Form** - Most Web sites capture a customer's email address during the check out process for order and shipping confirmations. But, it is critical that you also strongly promote an opt-in check box for customers to receive your ongoing promotional emails.
3. **Search Engine Pay-Per-Click Programs** - Various research studies indicate that search is one of the most frequently used means for consumers to find products online. Many retailers find that pay-per-click (PPC) programs such as Google AdWords, and Overture can drive significant traffic to their site. If you utilize these programs it is important that you make it easy for visitors to sign up for your promotional emails - whether or not they make a purchase.
4. **Search Engine Optimization (SEO)** - Optimizing your site for search engines can be one of the most cost-effective means to driving traffic and growing your list. Whether you use an external SEO consultant or handle it internally, make sure you optimize every page of your site to achieve top rankings for the products listed on each page.
5. **Refer-A-Friend** - Utilizing your email technology's "Refer-A-Friend" feature can generate a consistent number of new subscribers. If you promote the refer-a-friend program (i.e., \$5 off to the person who forwards the email) - a typical forward rate might be in the 1.5% range, with 10% of the new recipients actually subscribing. On a list of 100,000 that means you would gain 150 new subscribers - not a large amount, but it may be enough to offset your unsubscribes each month.

Minimizing List Churn from Bad Addresses

To ensure delivery of your emails and minimize email churn, actively managing your existing list is vital:

- A high bounce rate (from invalid addresses) may cause an ISP to block your emails (by assuming that you are a bulk spammer).
- Even if you have an average bounce rate of around 2-3% each month, this means that each year you may lose about 25-36% of your subscribers due to address changes and other issues.

Here are two quick list management tips:

1. **List Hygiene:** Customers often incorrectly type in their email addresses. To address this issue:
 - Make sure your email technology will find obvious errors such as a lack of "@".
 - Review your list of bounced emails looking for other typos and errors such as name@alo.com instead of name@aol.com.
 - Require confirmation of the email address on the opt-in form on your website.
2. **Email Address Changes:** According to Return Path, roughly 30% of consumers change their email addresses annually. This means that for a list of 100,000, up to 30,000 subscribers may be lost each year. To minimize this address churn, consider some of the following techniques:
 - Include an "update email address" link in every email.

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Build & Manage Lists

- Include a link to your account page or profile page in all communications and remind subscribers to update their email address and other vital information.
- Add a manage account/preferences page on your Web site, if it doesn't already exist.
- For customers whose email has bounced, send a postcard informing them of their invalid address and incenting them with an offer to update their email address (assuming you have known mailing addresses).
- Consider utilizing an email change of address (ECO) service such as Return Path to obtain new/alternate email addresses for subscribers.
- Another approach is to ask customers/subscribers for a second email address. When the primary address bounces, emails can subsequently be sent to the secondary email address.

10 Offline Ways to Build Your Permission-Based List

Developing a cost-effective email list poses a challenge for all email marketers. Because email addresses change at a rate of 30 percent or more on most lists, marketers must be imaginative in their approach to expand their list. Here are some often overlooked offline ways to build your list:

1. Use Direct Mail and Catalogs – Encourage email subscriptions on all print ads.
2. Direct Employees to Include Messages and Links in Email Signature Lines – Add “Subscribe to the Company X Email Newsletter” to employee email signatures.
3. Direct Call Center and Sales Employees to Obtain Permission and Capture Email Addresses Over the Phone – Instruct call center and sales staff to ask customers and prospects if they'd like to receive newsletters or promotional email.
4. Send Post Cards to Customers Encouraging Them to Subscribe to Email – If you have postal contact information for customers but not email addresses, send a post card with opt-in sign-up offer and URL.
5. Hand Out Sign-Up Forms at Public Speaking Engagements and Seminars – Promote your newsletter in presentations and handouts.
6. Include Opt-in Line on Credit Card Receipts – Not an obvious method, but may be quite effective.
7. Add Opt-in Message to Warranty and Product Registration Cards.
8. Add Sign-Up Message to Invoices.
9. Display Opt-in Forms at the Cash Register – An approach used by restaurants and retailers to advertise weekday discounts, catering services etc.
10. Include Opt-in Forms in Product Shipping Boxes – Advertise email promotions on packing slips and direct mail cards with links to your site. Many retailers and catalogers also include promotional offers from non-competing companies.

Designing Effective Opt-In Forms

The point of the opt-in form is to obtain the right balance of information that you need to send, personalize, segment and optimize your email program for each subscriber.

- Don't Ask for too *Much* Information – Your email opt-in form is not the place to qualify prospects or make them jump through hoops. Don't ask for information that you cannot use for email delivery and personalization/segmentation. If you are concerned that you may have too many fields, consider denoting some of them as optional.
- Don't Ask for too *Little* Information – By the same token, plan for the future. While only asking for someone's email address makes the sign-up process extremely quick, you have not obtained information that will help you deliver more relevant emails to your subscribers. This includes format preference, name and other preferences and demographics key to your program.
- Address Validation - To ensure that subscribers enter their email address correctly, include a script that checks for syntax errors upon submission. Additionally, consider a secondary box that requires them to re-enter their address. This will minimize invalid addresses due to input errors.

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Build & Manage Lists

- Form Fields – The Minimum:
 - First Name
 - Last Name
 - Email address
 - Format Preference (HTML or Text) – In addition to providing options of whether to receive HTML or Text, consider including a note such as the following: (Text is recommended if you use Eudora Light, Eudora Pro 3 and below, Lotus Notes versions below R5 or AOL 5.0 and under.)
- Form Fields – Optional:
 - Secondary Email Address (Since approximately a third of your list will change their email address every year, consider asking for a secondary email address. Then when their primary address bounces you can send a follow-up email to the secondary address.)
 - Frequency (Many sophisticatedetailers and publishers give subscribers the choice of how often they wish to receive emails, i.e., daily, weekly, monthly.)
 - Demographics (gender, age, location, etc.)
 - Interests/Preferences (topic, rock vs. jazz, etc.)

Optimized Opt-in Pages Increase Conversions

The purpose of your email opt-in page has one goal – to convert as many visitors as possible to subscribers. Its design, layout and copy, therefore, should be similar to that of a landing page.

Clean and Simple – The page should be designed in such a way that the images, copy and form instill confidence, trust and value.

Samples – Always include a link to a sample copy or copies of your email and consider including a hyperlinked small screenshot of a sample email message.

Testimonials/Awards – Use testimonials in pull-quote format, either text or as an image, that highlight awards or kudos that readers and third parties have bestowed on your email publication.

Incentives – Offering up an incentive or discount is a great way to increase conversion. Whether it is a “free white paper” or “\$5 off your next purchase”, incentives work.

Value Proposition – Subscribers are happy to provide you their valuable email address, but only in exchange for something of value. It is important that your opt-in page copy and images convey the core value of your emails. For example, if you are a retailer you should highlight things such as “email only specials”, advance notices of sales and other value they will receive as an email subscriber. Newsletter publishers should stress things such as the type of content, timeliness, your expertise and the content relevance to readers.

Privacy/Email Policy – We recommend that you include a brief 1 or 2 sentence email policy located near the form “submit” button and a link to your company’s more detailed privacy/email policy. For example:

EmailLabs will not use your email address or information for any purpose other than distributing the EmailLabs Intevation Report newsletter and related special reports. [View complete Privacy Policy.](#)

Expectations – Lastly, the copy and layout should set expectations for the recipient. This includes accurately conveying the value and frequency of the email and whether they should expect other communications from your organization. Further, clearly explain your confirmation process if you are using a double (confirmed) opt-in approach.

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Build & Manage Lists

Getting Customers to the Opt-in Page

Once someone is on your Web site, how do you get them to the opt-in page?

Don't Hide the Link – If your email newsletter/promotion is key to your business, make sure that it is easy and obvious for Web site visitors to find the sign up page. Consider including links in main and secondary navigation and promotional boxes in side bar areas. Don't make your visitors search to see if you offer an email newsletter. Include some form of link on every page of your site.

Don't Disguise It – When referring to your email in links and navigation areas, don't use some name or term that isn't obvious to all. For a link, "Newsletter," "Enewsletter," or "Email Newsletter" is fine.

Home Page - If appropriate, promote articles and news from the current issue on you home page - and then link to article/issue.

Back Issues/Articles - For newsletter publishers, make sure you have an area of your Web site such as a "Knowledge or Resource Center" where you house archived issues and individual articles pulled from the newsletter. Then promote subscriptions to your newsletter throughout this area.

Web Version Subscribe Link - If you post your back issues on your Web site, make sure they include a "Subscribe" link within the actual email.

Product Pages - For online retailers, consider including copy in a prominent spot such as:

Sign-up for Retailer X's free twice monthly newsletter and get Special Deals and sales only available to Newsletter Subscribers.

Build Your List Through "Piggy-Back Marketing"

A challenge most all email marketers have is to continuously and cost effectively build your list(s). One of the easiest and least costly means is to "piggy back" on your other marketing efforts. An example of this is to promote opting in to your newsletter or email promotions on landing page or other registration forms.

Say you are offering a white paper, sweepstakes or other incentive in response to a banner ad, you are likely capturing a person's name, email address and other information in exchange for the incentive. Above the form submit button add a brief sentence and check box (NOT pre checked) such as: Yes, I'd also like to subscribe to the ABC Company newsletter. Conversion rates can be very high with this approach. As an example, EmailLabs has seen a 60 percent opt-in rate among people who registered to download our Delivery Trends report.

Your Webmaster can add code to the registration form so that the specific information you want is also sent to your newsletter/ mailing list database. Consider including in your subscriber records the date that someone subscribed and the promotion or incentive that they registered for. You can then mail merge in this data in your admin footer area to remind these subscribers when and why they signed up. This can be a great practice and reminder to those people who forget a month later when they receive their first newsletter from you, that they actually did opt in to your email list.

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Creative - Design, Copywriting & Programming

Create a Web Version of Your Email Newsletter

It is always a good idea to provide your recipients with a Web version of your HTML email or the ability to switch to a Text version. Although the vast majority of email clients and email Web interfaces (i.e., Yahoo, Hotmail) render HTML correctly, your recipients could be using an older version of Lotus Notes or AOL, which means your HTML may not render correctly and could result in a garbled message. Providing a Web or text option ensures recipients can view the email as it was intended.

Three tips to keep in mind:

1. Include a “View web version of this message” link at the top of your email. The link can be automatically generated to a Web-hosted version by your email service provider or to a link to your Web site where you’ve posted it (perhaps along with back issues in the case of newsletters). One EmailLabs client is seeing about 0.40% of recipients clicking on the Web version link, not an insignificant number if you have a large list. Also include a link to the Web version in the footer or admin area of your email.
2. Include “Format Preference (HTML or Text)” on your opt-in form. Also include a note such as the following: (Text is recommended if you use Eudora Light, Eudora Pro 3 and below, Lotus Notes versions below R5 or AOL 5.0 and under.)
3. Be sure to include a link to a “Profile Update” page enabling recipients to change the format they are receiving from HTML to Text if they prefer.

Don't Neglect Your Email Design

Improving the design and layout of your email is one of the easiest improvements you can make that can deliver an immediate huge return.

Design and layout are critical to pulling your reader through the email and motivating them to take action. Your email marketing communications are also a key brand touch point of your company and should directly reinforce your company’s brand personality and essence.

We highly recommend that you utilize the services of a designer experienced in the email marketing environment. The payoff can be big, as EmailLabs has seen some ecommerce clients’ revenue from email double after redesigning the layout of their emails.

Writing Effective Subject Lines

Subject lines are one of the most important components of a successful promotional or newsletter email. Working in tandem with the from line, the content of a subject line is the key determinant for whether a recipient will open an email, delete it immediately, ignore it, file it for future access, report it and/or filter it as spam. The subject line content is also a major component in the algorithm of many ISP and recipient-level spam filters. In other words, a poorly written subject line may not only go unopened, it may not even reach the recipient’s inbox in the first place.

Keep these six principles in mind as you approach writing subject lines for your messages:

1. **Inform:** Subject lines should convey something important, timely or valuable, and should say to the recipient: “If you don’t open and read this email, you’ll miss out on something of real value.”
2. **Intrigue:** Your email is competing with 50 to 100 or more other emails for the recipients’ attention. To increase the chance of having YOUR email be opened it must intrigue the recipient, the same way a well written headline does. It must stimulate some part of the recipient’s brain, prompting them to open the email immediately.
3. **Entrust:** Your subject line can support or hurt your brand image. Subject lines that over promise or mislead will ultimately destroy trust with recipients, damaging your brand and driving customers away.

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4. **Action:** Subject lines are a major driver of click-through rates, as they “direct” recipients to pay attention to specific articles, products and information. Every email you send should have an overt or implied strategy behind it. You hope that specific products are purchased over others or that recipients read a specific article and then visit your Web site seeking additional information. Subject lines should reflect your goals and help direct recipients to take the desired action.
5. **Empathy:** While your emails may be distributed to thousands or millions of recipients, they are being received by individuals. Subject lines must recognize this and “speak” to the needs and interests of your recipients as individual customers, readers or prospects.
6. **Togetherness (Subject Lines and From Lines Must Work Together):** Largely because of the dramatic increase in spam email in the last year or two, recipients increasingly look at a combination of the from and subject lines to determine whether it is from a trusted source. As a result, the job of a subject line now must not only entice someone to open an email, it must discourage the recipient from deleting it as an unwanted email.

Dealing With Microsoft Smart Quotes

Problem: Small boxes that appear in your HTML where your quotation marks, double hyphens and arrows once appeared in your MS Office document.

Cause: Microsoft Smart Quotes are a series of special characters that appear only in Microsoft Office Products. Because they are not default plain ASCII characters, they generally do not convert to standard HTML characters. As a result, most non-Microsoft Email clients have a difficult time rendering these characters correctly, often times substituting a question mark or small box in its place.

Solution: Disable the use of Smart Characters in your Microsoft Office Documents. In most versions it can be found under the Tools, Auto Correct, Auto Format as you type. Uncheck, “straight quotes” with “smart quote” and hyphens (--) with dash (—).

Secondly, it is always recommended that you “clean-up” your MS Word copy by pasting it into a non-Microsoft editor like Homesite, Dreamweaver, Notepad or similar program. This can help identify and aid the removal of any unnecessary characters.

Personalize Your Subject Lines

Personalizing subject lines does not mean putting someone’s first name in the subject line, followed by generic information such as, “Loren, Your Personalized May Newsletter.” If you are segmenting your list in any way, then each segment should likely receive appropriate and different subject lines. Even if you aren’t creating separate versions of your email, if you have relevant information on segments of your subscribers, tailoring the subject line to their interests should improve open and click-through rates.

3 Important Reasons To Use Image Alt Tags

HTML “alt” tags are used to display a text description of an image when either the image does not display or when a mouse is scrolled over a displayed image. Using alt tags in your HTML emails is important for three reasons:

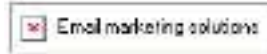
1. Recipients using dial up or other slow connections may not see images for a few or several seconds. Displaying alt tag text can at least convey a sense of what is to come, while the recipient waits for the image to load.
2. Many email clients (Outlook 2003) and email services (AOL and the soon to be released Gmail) have images disabled by default, or display a warning message asking the user if they’d like view the images.

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3. The new Gmail email service (launching later this year) displays what they call a snippet, the first few text words it sees in an email, following the subject line. Gmail will also display the text from alt tags, so it is important to use this to your advantage - as an addendum to your subject line.

A sample alt tag that would display



looks like this: “”

Tips on using alt tags:

- **Newsletters:** For logos, headers, section titles and other uses of images, describe the logo and image, but as appropriate consider adding a brief teaser that explains that section of the newsletter further. For example: “Optimization - Strategies for improving email marketing performance.”
- **Ecommerce Emails:** Include short but complete descriptions of product photos. If the image includes banners such as “50% off”, include that as well.
- **Charts and Graphs:** Include enough text to explain the value and contents of the chart or graph, such as: “Chart: Open Rates from A/B Split Test.”
- **Gmail Snippets/Preview Text:** Use an appropriate image in your header to display key teaser info. For ecommerce emails the information might expand on special offers mentioned in the subject line, reinforce Free Shipping or promote additional products. For newsletters, consider mentioning additional articles beyond what is in the subject line, or expand on the existing topic.

While this may sound like a lot of work, at most it probably adds 5-10 minutes to the production of your email. Most importantly though, by not using alt tags correctly, marketers risk seeing lower open and click-through rates resulting from recipients deciding not to display images or take further action.

How to Address Lotus Notes Compatibility

If you communicate to the B2B market, particularly large professional services firms and many Global 2000 companies, HTML email compatibility has long been a thorn in your side. The issues include:

- Older versions of Lotus Notes (under R5) convert HTML emails to a Lotus Notes Rich Text format. Lotus Notes versions under R5 also do not recognize multipart messages (HTML and text combined in a single email).
- Some companies may be deploying later versions of the Lotus Notes client, i.e., R6, but using an older version of Lotus Notes/Domino server such as 4.6. In this example, the recipient’s email client would also render an HTML message incorrectly.

So for a recipient to view a properly rendered HTML email, a company must deploy both the Lotus Notes client and server of R5 and above. Here are some quick tips you can take if you have a significant Lotus Notes subscriber base:

- Include a link at the top of HTML emails “View Web Version” – the link sends recipients to a Web-hosted HTML version of the email (either on the email technology provider’s server or the sender’s server)
- Also include an “Update Preferences” link – and provide a Web site update form that then enables recipients to choose to receive Text rather than HTML.
- Create complete Text versions for those who prefer not to receive HTML or cannot view HTML.
- On opt-in forms, include an option to receive a Text version and potentially list tips (i.e., “If you are using Lotus Notes versions below R5, select Text”).

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Segment, Target & Personalize

Use an API to Leverage Your Customer Data

So you've captured data on your customers and prospects in your ecommerce, sales force automation, CRM, customer support or other system. Have you integrated this powerful information into your email marketing system?

By using an API (Application Programming Interface), for example, you can automatically have this customer data uploaded to an email marketing application such as EmailLabs.

Integrating this data enables you to implement a highly personalized and targeted email program and also ensures up to date data and eliminates the need to manually upload your data.

Effective Targeting with Dynamic Message Assembly

So now you are really cooking. You've implemented an API to automatically upload your data in real time, your design template is dialed in, you've segmented your database and tested multiple variables.

Dynamic message assembly is an email marketing technology that can bring all of these activities together and automate the personalization and production aspects of your emails.

With dynamic message assembly you create a single template and combine "content blocks" and if/then statements which then dynamically match and assemble the specific email content to the recipient profiles you've identified.

Improved Results Through Behavioral-Based Segmentation

Segmenting email recipients based upon actions they've taken ("behavioral-based segmentation") is probably the dream of many email marketers. Why? Quite simply this approach probably portends the single greatest opportunity for dramatic improvement in results.

Examples of behavioral-based segmentation include sending emails to recipients who have or have not opened an email or series of emails, who have clicked on a specific link, who have visited specific pages on your Web site or who have purchased a specific type of product.

Sound daunting? Actually it is not that difficult to implement, but it does require some strategy and a little extra effort. Consider getting started with a simple program such as sending a follow-up email to recipients that did not open your most recent email or who clicked on a specific link.

Target Your Campaigns Using Demographic Segmentation

If you have more information than name and email address on your customers and email subscribers, why not use it? If you haven't collected information, perhaps this is the key ingredient currently missing from your program.

For example, if you are an online retailer of bicycle apparel, parts and accessories, capturing demographic information such as sex, age and biking preference (road, mountain or both) would enable you to conduct fairly targeted campaigns. Using this data you could develop customer profile segments (i.e., males over 40 who ride mountain bikes) who then receive emails with specific products, offers and messaging that appeals to this demographic profile group

Targeting Emails to AOL Subscribers

If a sizable percentage (say 5%+) of your recipients are AOL users, you should clearly develop separate versions of your email for these increasingly challenging subscribers. At minimum we recommend subject lines that include your company or newsletter name, one that is shorter in length and often more conservative in nature.

Secondly, consider developing and testing both plain text and Rich Text Format (RTF) versions of your newsletter - and

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Segment, Target & Personalize

monitor which versions (HTML, Text, RTF) pull best with your recipients. Better yet, offer these AOL subscribers a choice of which version they would prefer.

12 Tips for Targeting Inactive Subscribers

The point of identifying your inactive recipients is to treat them differently - not to delete them, ignore them or cry over their inactivity. Your goal after identifying and segmenting your “active” and “inactive” subscribers is to spend more productive time on actives and attempt to re-engage inactives. Here are some tips on what you can do to re-engage your inactives:

- 1. Special Offers** - If you are a retailer, for example, consider a special offer such as discounts or free shipping. If you are a B2B marketer you might offer a special white paper that will motivate the recipient to re-engage with your communications.
- 2. Survey Subscribers** - While you are not likely to get a significant response, consider surveying these recipients to help provide insight into their inactivity.
- 3. Update Profile** - Using incentives, drive subscribers to your profile update page where they can change email addresses, update format preferences, demographics and interests. This updated information may now enable you to send them targeted and relevant emails.
- 4. Understand Their Demographics/Profile** - Perhaps a large percentage of your inactives share a common trait. Perhaps they opted in as part of registering for a white paper or seminar or promotional offer. Or perhaps a majority are women, while your content is oriented toward men. (See this month’s Quick Tip for more on dissecting your email performance.)
- 5. Try Different Send Days/Times** - If you always mail on the same day or time of day, try some different distribution times (what do you have to lose?).
- 6. Modify Frequency** - Now that you’ve segmented your list by actives and inactives, consider adjusting the frequency of your sends. If you normally send twice per month, you may want to test sending three times to active subscribers, but only once to inactives.
- 7. Create Different Content** - If your analysis has been able to uncover some common threads among inactives, consider packaging the content differently for this group. For example, a newsletter from a job search-oriented business might logically find many subscribers becoming inactive after completing their job search. For these recipients, the company might want to focus its newsletter content on managing people, careers and the hiring process. Uncovering this type of trend should lead to providing different newsletters or dynamic versions based on a person’s profile or stated preferences.
- 8. Try Different Formats** - Test using a text version, for example, that is very simple but with specific links and messaging intended to drive action.
- 9. Test Different Styles of Subject Lines** - If you’ve used a particular style of subject line, try a different approach with the inactives. Creative subject lines could be one of your most effective strategies in getting recipients to re-engage.
- 10. Monitor Seed/Proof Lists** - Send your messages to proof and seed lists for key domains. Monitor if content or images are causing your messages to be filtered or treated differently with specific ISPs and companies. If problems are detected, consider developing different versions of the messages that may not trip filters.
- 11. Send a Postcard** - If you have your subscribers’ mailing addresses, consider sending them a postcard that offers an incentive if they’ll update their email preferences and profile.

4

Segment, Target & Personalize

12. Move Re-engaged to Active Status - After each email message sent to the inactives, change the demographic status of those recipients that clicked a link to “active.” This helps keep your focus on converting the inactives and tracking your success in those efforts.

Use Your Customer Data to Personalize Emails

Studies have shown that the greater number of personalization elements to an email, the higher the response rates. At minimum of course, personalization can mean addressing a recipient by their first name. Ultimately, however, true personalization means delivering emails that are tailored to the specific profile and preferences of each recipient. The types of personalization may vary in approach based on whether you are sending a newsletter, announcement or ecommerce email, but improved results are generally the outcome.

A simple example can be illustrated by the approach of a regional hotel company that operates five hotels and regularly emails previous guests (who’ve opted in of course). An email template can be created that includes mail merge variables such as logo and name of the hotel last stayed at; name, contact information and scanned signature of the specific hotel general manager; photo of the hotel or amenities; subject line; specific offer; based on satisfaction rating and type of room stayed in; and more. Obviously the amount of energy expended toward personalization has to be weighed against your available resources and the expected return. But consider starting with one or two personalization elements and add additional variables when and if feasible.

5

Privacy & Regulatory Compliance

3 Reasons You Need A Double Opt-In Policy

1. Prevents erroneous subscriptions. Often, simple misspellings of common user names or domain names may cause email messages to begin sending to a completely unintended address. Not only do you lose an interested subscriber, but you gain a user that will most likely cry foul and complain of spam.
2. Prevents malicious subscriptions. A popular nuisance tactic in the internet age is to subscribe someone who really ticked you off to as many mailing lists as possible, sending them a mountain of email. This creates a terrible headache for the victim and turns your newsletters into tools of harassment.
3. Provides an audit trail. Having double opt-in confirmation logs allows you to refute any spam complaints that may come up. Double opt-in is seen by mail administrators as the most privacy conscious way of handling the subscriptions; in case of any corporate filtering, they will be more apt to whitelist your newsletters if confirmation logs are available. And last, but certainly not least, confirmation logs protect against anti-spam legislation by providing evidence of solicitation.

Complying with CAN-SPAM – 7 Key Steps

The CAN-SPAM Act lays the foundation for a clear differentiation of “spammers” from permission-based email marketers. Consider taking the following steps to ensure compliance:

1. Convene all company staff involved in the email marketing process – marketing, Webmaster, IT, call center, legal, sales and others. Ensure that all affected personnel have a good understanding of the act and how it might affect their practices and policies.
2. Review your company’s email marketing programs to ensure that they comply with the content and notification requirements and involve your legal counsel as appropriate.
3. If you haven’t already, add a postal mailing address to all of your commercial emails.
4. Review and test your opt-out/unsubscribe language and process. Make sure it’s clear, simple and actually works. Also, make sure you are using a valid return email address or Internet-based reply mechanism that will function for at least thirty (30) days after messages are sent.
5. Ensure that all opt-out requests are honored within ten (10) business days of receipt. The best approach is to utilize software (installed or hosted) that automates the reply, unsubscribe and global unsubscribe process.
6. If you use pre-checked boxes or other “passive” opt-in mechanisms in your email sign-up process, it’s recommended that you change to unchecked boxes or another affirmative consent approach. Otherwise you’ll need to add conspicuous language that identifies your email as advertisements or solicitations.
7. Add a profile update page on your site and link to it from your messages. This enables customers and subscribers to update their address, opt in or out of individual and multiple newsletters/communications, request global suppression, change email formats and modify preferences and other information.

6

Delivery & ISP Relations

Defining Soft and Hard Bounces

A **soft bounce** is an email message that gets as far as the recipient's mail server (it recognizes the address) but is bounced back undelivered before it gets to the intended recipient. A soft bounce might occur because the recipient's mailbox is full, the server is down or swamped with messages, the message is too large or the user has abandoned the mailbox. Most email service providers will attempt to deliver the email regularly for a few days. If it is still undelivered, it becomes a hard bounce.

A **hard bounce** is an email message that has been returned to the sender and is permanently undeliverable. Causes include invalid addresses (domain name doesn't exist, typos, changed address, etc.) or the email recipient's mail server has blocked your server. Servers will also interpret bounces differently, meaning a soft bounce on one server may be classified as a hard bounce on another.

Getting Added to Recipients' Address Book/Personal Whitelist

Getting the from address added to your recipients' address book or personal whitelist is an important step in getting your emails into the inbox, rather than spam, trash or quarantine folder. More and more people (both business and consumer email users) are adopting the use of spam filters or upgrading their email clients that include some form of spam filtering/whitelist feature.

To remind people to take the step of adding your from address to their address book/whitelist, consider adding a single explanatory sentence at the top of your email. Below are a couple of examples.

To ensure this email is delivered to your inbox, please add the email address respond@yourcompany.com to your address book or junk filter settings.

To ensure receipt of our emails, please add us (something@yourcompany.com) to your Address Book. Thank you!

To insure delivery of this newsletter, please add newsletters@yourcompany.com to your e-mail address book.

Avoid Outlook's Junk Email Filter

Be careful with terms and characters used in your promotional email campaigns. Microsoft's Outlook Junk E-mail Filter will send your emails straight to the Delete Folder if it finds things such as "for free!", "cards accepted", "order today", etc. in your emails.

View the current list of things Outlook filters at
<http://office.microsoft.com/en-us/assistance/HA010450051033.aspx>

7

Open, Click & Convert

More Links Can Increase Your Open and Click-Through Rates

According to recent analysis by EmailLabs, increasing the number of hyperlinks in a message leads to increased open and click-through rates.

Emails with 25 or more links had an open rate of 12 percent higher than those containing fewer than 25 links, and a click-through rate of 29 percent higher than for emails with fewer than 25 links.

These results certainly support some long-held beliefs among email marketers. In general, email marketers should include as many hyperlinks as possible. The more links there are, the greater the chances that one or more will resonate with the recipient and motivate them to click through. And while 25 links may sound like a lot, navigation and administrative-type links in best practices newsletters can easily reach 15-20 links by themselves.

Though these findings are compelling, it is essential that email marketers conduct split tests across key variables to determine what works best for their specific customers and subscribers. The EmailLabs analysis was based on the results of 23,475 email campaigns sent by more than 650 clients between January 1 and March 31, 2004.

Shorter Subject Lines Produce Higher Open and Click-Through Rates

Email marketers seeking to increase their open and click-through rates would be wise to keep subject lines short, according to recent analysis by EmailLabs.

The key finding: subject lines shorter than 50 characters in length led to increased open and click-through rates.

Subject line lengths were divided into zero to 49 characters and 50+ characters. When analyzed, the zero to 49 character subject lines had an open-rate 12.5 percent higher than the 50+ character subject lines. Click-through rates for the zero to 49 character group were 75 percent higher than the 50+ group. The zero to 49 and 50+ character subject line length criteria was used primarily because the AOL email client, used by more than 25 million consumers, displays a maximum of 49 characters for email subject lines.

□

and quickly comprehended by recipients.

Though these findings are compelling, it is essential that email marketers conduct split tests across key variables to determine what works best for their specific customers and subscribers. The EmailLabs analysis was based on the results of 23,475 email campaigns sent by more than 650 clients between January 1 and March 31, 2004.

When is Your Open Concentration Period?

This is the period of time - the first few hours after delivery - with the greatest concentration of opens.

For example, in two recent issues of The Intevation Report, 37 percent and 38.5 percent of opens occurred within the first three hours of distribution (the Open Histogram feature in our solution was used for this analysis.) The newsletters were sent at 10 a.m. and 2 p.m. PST, and not surprisingly the email sent at 2 p.m., saw a much larger drop in opens in hour four - which would be 8 p.m. East Coast time.

So understanding this open concentration period is key to determining that ideal delivery time - and ensuring you maximize this initial "open burst."

ACTION: *If your technology solution does not have an open histogram feature, then simply monitor the number of opens every hour for the first 4-6 hours after opening.*

7

Open, Click & Convert

Demographic/Psychographic Factors Affecting Your Open Rates

If you are reaching teens, then late afternoon when they get home from school is a good time, whereas homemakers might be most likely to open emails in the middle of the day. Many people may work in occupations where Internet/email access is either not available (i.e., construction, factory and restaurant workers) or time makes it difficult (doctors, nurses, teachers).

Differences in sex could be a factor as well. While the gap is apparently closing, a higher percentage of males versus females are more likely to be online during the prime evening television viewing hours.

ACTION: *Understand the composition and habits of your subscribers and identify the time period (or periods) that they are most likely to open and act on your emails.*

Calculating Click-Through Rates (CTR)

Click-through rates are calculated by dividing the number of clicks by the number of emails successfully distributed (e.g., does not include bounces, but does include out-of-office replies). But be careful when benchmarking your rates against those of others.

Some marketers include the number of total, rather than unique clicks, and others calculate CTRs based on the number of emails opened, rather than distributed. Whatever approach you use, just be consistent and careful when comparing your rates.

8

Test, Measure & Benchmark

Improve Performance with Variable Testing

The ability to test variables is one of the greatest benefits of email marketing. It is also an activity that is rarely deployed. If you can muster the energy, we recommend testing at least one variable in each email campaign or newsletter issue (assuming one or two distributions per month).

Test variables can be design/format changes, subject line elements, time of day/day of week, use and style of graphics, copy style, amount of copy, offers and more. Of course, don't just test for testing sake. Testing should form a key foundation of your overall improvement program and help move you forward toward your end goal.

The simplest approach to testing is to split your list into two random but equal groups ("A/B splits") and test one new variable against an existing constant.

Key Metrics for Ecommerce and Publishing

What metrics should you analyze? The basics such as open, click-through, bounce rates cross all types of email programs. But beyond the standard metrics, ecommerce, publishers and corporate newsletter publishers should look at measures more relevant to their goals and objectives.

Depending on your objectives, sample metrics include:

- Open rate
- Click-through rate
- Click to open rate (# of unique clicks/# of unique opens)
- Bounce rate
- Delivery rate (emails sent - bounces)
- Unsubscribe rate
- Referral rate ("send-to-a-friend")
- Number of or percent spam complaints
- Net subscribers (# subscribers + new subscribers) - (bounces + unsubscribes)
- Subscriber retention (# subscribers - bounces - unsubscribes/# subscribers)
- Web site actions (number of visits to a specific Web page or pages)
- Percent unique clicks on a specific recurring link(s)
- Number of orders, transactions, downloads or actions
- Percent orders, transactions, downloads or actions of emails sent or delivered
- Total revenue
- Average order size
- Conversion rate (number of actions/unique click throughs)
- Average dollars per email sent or delivered

Internal and External Benchmarking

If your organization produces more than one email newsletter or campaign, see if your fellow email marketers will share their data so you can benchmark key metrics.

Additionally, comparing your performance to "industry averages" can provide confirmation that your program is on track, or in need of some first aid.

Be careful when comparing against these industry averages. Use them as general guides - not as precise benchmarks that you should compare your efforts to.

That being said, there are a few good sources out there of industry statistics, including:

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Test, Measure & Benchmark

- Emarketer - <http://www.emarketer.com/>
- Email Sherpa - <http://www.sherpastore.com/store/page.cfm/2063>

Dissecting Your Campaign Results - Drilling Down For Answers

Say your last message produced a 40 percent open rate and 12 percent click-through rate. But what happens to these rates if you look under the hood a little more deeply? By running “filter” reports, you can get a more accurate picture of your message performance and potentially identify problems or opportunities. Here are a few examples of ways to slice and dice your message reports:

- **By Top Domain.** Look at results by the most popular domains in your list - such as AOL, Yahoo and Hotmail if you are a B2C marketer. Dramatically different results across domains (generally the rule) might suggest delivery issues, inactive accounts and format problems or simply the result of different demographics of users of those email service providers. For B2B marketers, significantly lower metrics at a major corporation domain might suggest specific spam filtering issues or Lotus Notes challenges.
- **By HTML vs Text.** Because open rates aren't directly trackable for text messages, running separate reports for HTML vs Text messages provides a more accurate measure of your HTML open rates. Comparing click-through rates across the two formats may provide insight into layout issues that are either hurting or hindering reader action.
- **By Demographic.** If you have demographic information, you might uncover significant differences in performance based on gender, age, location, whether they are a customer or not, product interest, etc. Significant differences across certain demographics might suggest the need for different versions of your messages for certain segments.
- **By Source of Subscription.** If you are a retailer, for example, perhaps subscribers signed up in various ways - in a physical store, upon check out in your online store, during interaction with your call center or via a general Web site opt-in form. Understanding which subscription source is driving the highest click-through and purchase rates will help you where to focus your list building efforts.

When dissecting your message results, look beyond just open and click-through rates. If possible, look for trends utilizing your key output metrics such as conversion, demo requests, purchases, seminar sign ups, etc.