SILVERPOP

ALMOST EVERYTHING YOU WANTED TO KNOW ABOUT EMAIL MARKETING

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About the Author:

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Loren McDonald's role at Silverpop is to educate clients and prospects on best practices and emerging trends in email marketing and marketing automation. He has more than 28 years of experience in marketing, consulting and strategic planning. McDonald has held executive marketing positions at companies including Lyris Inc., EmailLabs, USWeb/CKS and Arthur Andersen.

He has written more than 400 articles and blogs and is a frequent speaker at events around the world. He has won several awards, including the eec 2011 Marketer of the Year and the 2005 American Business Award's (The Stevie's) Marketing Executive of the Year.

Introduction

The email marketing landscape is evolving constantly. Trying to keep up with this change is a challenge even for veteran email marketers. Whenever I meet with clients for Silverpop, marketers pepper me with questions on every aspect of email marketing, from strategy to content, opt-in to opt-out and beyond.

With this ebook, I've attempted to answer the questions I hear most often, whether from clients, audience members at workshop and conference presentations, or other marketers in the field — and even in informal conversations.

Often, these answers might just be the starting point. You'll find more detailed information in Silverpop's library of case studies, white papers, Webinars and other resources.

In the end, of course, there's no one right answer that will meet the needs of every person asking the question. You must try, test, tweak, analyze and repeat to find the approach that works best for your company.

I hope this ebook gives you a good starting point to help you take your email program to a higher level.

Enjoy!

Loren McDonald

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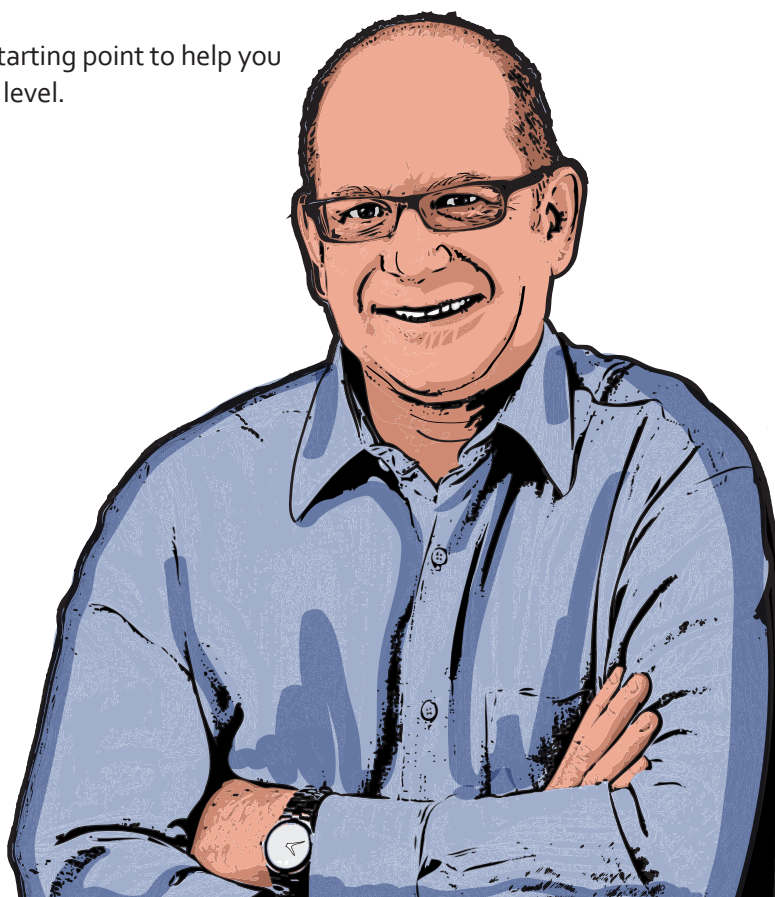
What Role Should Email Play?

Email marketing: It's the workhorse of your digital marketing program, the Swiss Army knife of marketing and one of the most widely used digital channels in your marketing arsenal. For most marketers, email costs the least but makes the most money.

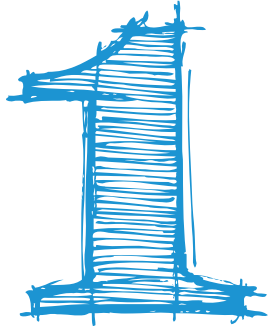*You'd think that would be enough to make email king among all digital channels, but it speaks to a very limited perception of what email can really do for your company.*

One of the greatest things about email is its versatility, the ability to serve the needs of other channels such as the Web and the social network. It's the glue that binds and integrates your channels together.

But if you're using email just to sell to your customers, you're missing out on its ability to connect with your customers between campaigns and to solve problems within your own organization. And the digital world is changing, a little bit each day. That means the role your email program plays must shift to help you meet those changes.

Email can adapt to those changes and shifts. Can you?

Why Email Continues to Rule the Digital World

Q: **What can I tell my marketing manager who is thinking it's time to move budget money from email to social media advertising?**

A: At least once a year, I have the same old conversation with people who want to zero email out when dividing up the marketing dollars.

They claim it's a stale technology that can't keep up with innovative digital channels like Facebook, mobile apps, Pinterest and Twitter, for instance.

Let's not forget that email itself was once the shiny new toy that attracted those who got bored fast with Web marketing. These marketers nearly broke email because they didn't understand the medium and then wandered off to the next cool new thing.

What happened after that? The best minds in the industry came together and worked out solutions. They did research and tested to see what worked and what didn't. They created software that brings email to the very doorstep of the totally personalized and unique one-to-one communication that we've always dreamed of.
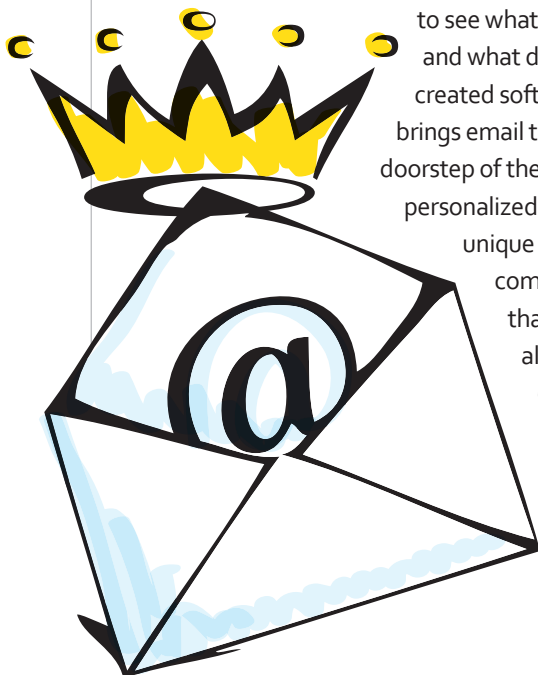
Email Keeps on Rockin' Your Marketing Strategy

- It works even when you don't do it well, and it delivers the highest ROI when done well. If your email results aren't what you want them to be, it's probably because you're not using the medium correctly, more so than an inherent email fault. Email generates almost immediate results, which allows for rapid testing and optimizing in marketing campaigns.

- Consumers still request and respond to email and have become skilled managers of their own inboxes, confident in their ability to deal with spam.

- You can easily demonstrate email's bottom-line value to your management through tracking and analytics. After all, your CEO is (hopefully) more interested in what adds value to the organization than in trendy but untested new apps.

- Email is the first channel to recognize that consumers truly are in control of the medium. It paved the customization trail by giving recipients many options for tailoring content to their own interests.

- The email industry actively develops new ways to build trust and confidence in the medium. Authentication, spam complaint process, reliable unsubscribing and transparent opt-in policies are a few examples.

- Email is still the primary medium that provides a solid two-way connection with your customers, bolstered by the trust-building initiatives listed above.

Email Keeps Reinventing Itself ...

You can't beat email for its ability to reinvent itself, overcome performance challenges, integrate with other technologies and channels and provide multiple distinct value propositions to both senders and recipients.

If email is so last-generation and stodgy, why is it a core application in many of the new, supposedly more innovative, technologies? Two examples: aggregated RSS feeds and blog posts, as well as messages, posts and friend requests for networking sites like LinkedIn and Facebook.

Keeping up with the expanding platforms is another way email stays fresh and relevant to your subscribers, whether you read it on your clunky desktop computer, your ultra-thin notebook with a 17.5-inch screen, or your iPhone, iPad or Kindle Fire.

... But Will It Eventually Age Out?

I'm not too worried about that prospect. Email's brain trust has risen to identify and craft solutions to the challenges that could have brought email to its knees in recent years, such as spam, image blocking, rendering challenges and phishing.

While not all of these have been solved yet, steps have been taken to keep the channel alive and kicking (or sending and receiving).

I'm confident that this natural bent for true innovation will help email meet any challenge shiny new technologies can throw it.

I would love to debate this point further, but I have to check my email. The latest posts from my favorite blogs just arrived in my inbox, handily aggregated in a single email, and I just got another LinkedIn friend request.
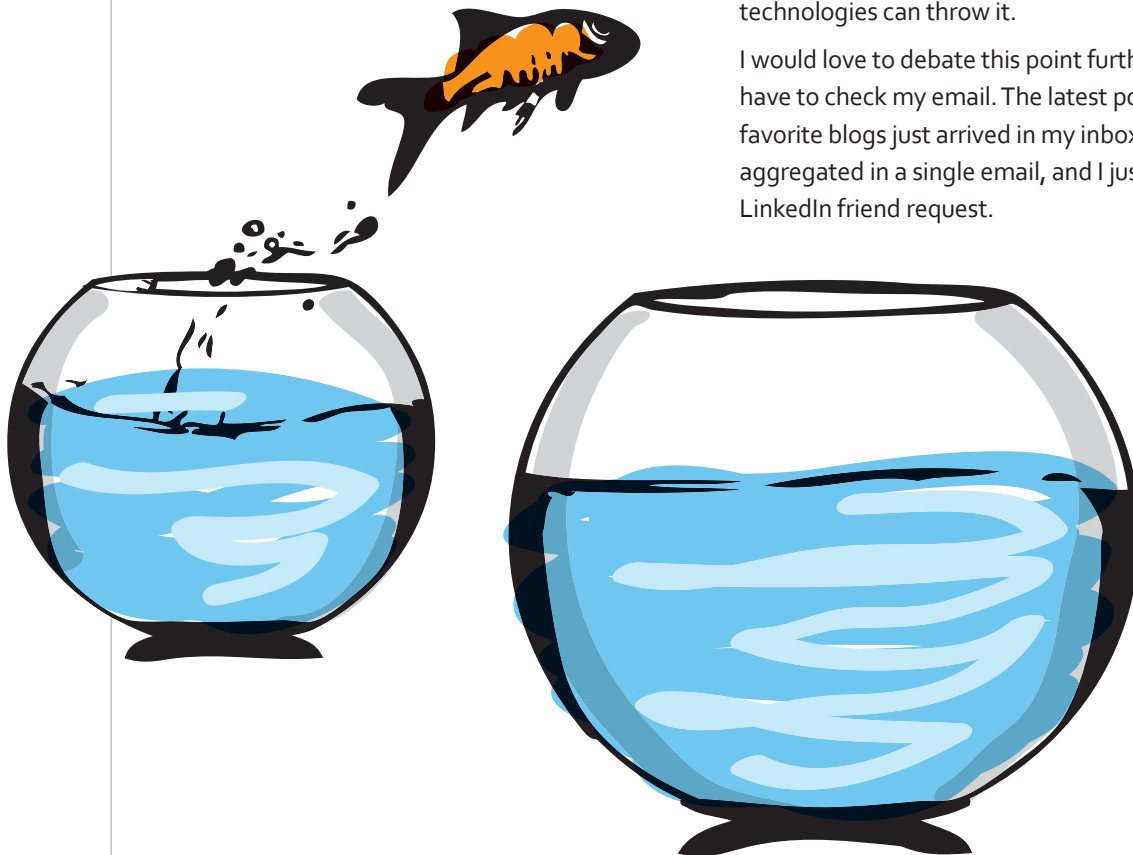
Maximize Email's Value Beyond the Sale

Q: **I would like to see our company use email in more ways that just selling our products and following up with customers. What do you suggest?**

A: Most email marketers tend to focus on email marketing's role to generate revenue or some conversion activity. Justifiably so, because email typically generates the highest ROI across your marketing channels and activities.

However, at its core, email is a communications vehicle, with sales being just one of its many uses. Equally important, and even more so at times like this, it's the quickest way a company can reach out to its customers.

Consider the global financial crisis of a few years ago, when in the United States banks were failing at a rate of more than one per week, and the U.S. government was bailing out major corporations and financial institutions.

The current global financial meltdown serves as a great reminder of the broader role email can play in maintaining or enhancing your customer and subscriber relationships.

I have direct customer relationships with three major financial institutions. In those rocky weeks, only one of the three communicated with me to reassure me, explain company actions or advise me on how best to weather the financial storm.

Coincidently and not surprisingly, a survey from Opinion Research Corp. found at the time that 46 percent of respondents said the bank in which they have the most assets was not communicating with them enough.

One of the incommunicado institutions, in fact, was a well-known bank whose recent troubles kept it in the headlines. It missed a prime opportunity to reassure concerned depositors, explain its bailout, or explain how to get questions answered.

What Else Can Email Do?

Every message you send should provide value to your customers or subscribers and help achieve your business and lifetime customer value goals. As the global financial quagmire continues and further contributes to an economic slowdown, smart marketers will use email to help retain customers and maintain or strengthen their brands.

Take a step back and look at your email program more broadly. What would you as your own company's customer want to receive? The following are just a few different examples, as the opportunities to use email to enhance customer relationships are numerous:

Update – Customers don't like surprises. Use email to regularly keep your subscribers and customers up to date on issues that affect their ability to use your product or service.

Remind – Reminder emails take all forms: appointments, payments due, out-of-stock or low-supply notices, travel reservations, subscription expirations, registration deadlines.

Nurture – As sales cycles lengthen due to the economic slowdown, use email drip and life-cycle email programs to stay top of mind, build your case and move customers over to sales or to a conversion activity.

Retain – In a down economy, customers in both the B2B and B2C worlds become more price-sensitive and likely to shop around. Use email proactively to educate your customers on how to get more out of their relationship with your company and general tips related to your company's business.

Simplify – Encourage offline customers to move their lives online, handling business such as account statements, automated payments, checking on appointments or reservations, etc., in order to reduce paper, postage, waiting in line or on the phone, or other inconveniences.

Share – Use email to foster and share ideas among customers.

Listen – Survey customers on how you can better meet their needs; follow up via email on what you heard and how you'll respond.

Build in Flexibility; Watch Your Frequency

This new breed of email messaging requires flexibility in your frequency schedule. Make sure your messages are on target, highly valued, and aren't viewed negatively as too many emails. Watch your cadence carefully, considering all the other email your subscribers might be receiving from your company.

Also, segmenting subscribers and customers by customer value or activity and then targeting messages appropriately will get better results. A highly focused email, such as a referral request, a detailed product tip or an upsell message, will likely be annoying to a customer who has never purchased from you.

Email's Other Role: Adding Value to the Customer Relationship

Q: **What else should our email messages do besides sell?**

A: Email is the most valuable, flexible and successful of all marketing channels. But its success goes well beyond its ability to drive conversions and revenue for companies. Finding that sweet spot remains a challenge for many email marketers, but some have discovered email's power as a retention and loyalty channel.

Instead of just filling their subscribers' inboxes with one "free shipping/10 percent off" offer after another, they're adding a slew of emails that surprise, add value or simply engage the recipient.

Following are a few examples from some marketers that exemplify this approach:

Air New Zealand: The UK-region marketing team for the airline has a unique challenge. With only a few flights a day from the United Kingdom to Los Angeles and New Zealand, the airline's marketing approach must focus more on brand building and creating word of mouth than attracting frequent fliers.

Besides the usual added content you find in pre-trip emails after a customer books a flight – local weather and attractions, travel and security tips, etc. – the email is personalized with a message and photo of the actual fight service manager who will be on your flight.

These emails have been a smashing success with both passengers and the flight crew. Many customers print the email and show it to the crew member. This is my all-time favorite marketing email.

Peter Glenn: Customers who purchase products made with Gore-tex from this sporting goods retailer receive an email with detailed care instructions.

I never read the instructions that come with things I've purchased. However, an email like this will always be in my inbox when I need it.

Fabric.com: This online fabrics retailer notifies customers who have previously requested fabric swatches that those fabrics could go out of stock soon. While this drives increased purchases, the notification can be a very helpful prompt to someone who forgot or procrastinated about buying the fabric.

Mud Pie: As a male who tends to forget birthdays, anniversaries and other occasions my wife deems important, I appreciate Mud Pie's easy-to-set-up reminder emails.

For example, simply enter your spouse's birthday and name for the reminder. Then, 21 days before the event, you receive an email reminder with a $10 discount coupon.

Not only do the reminder emails provide significant value to recipients, they also are Mud Pie's highest revenue-producing email.

Email Must Embrace Its Inner Rock Star

Q: **What do you think email needs to do to keep getting respect from people? Isn't it getting a little dusty these days?**

A: I have a riddle for you. How is email marketing like Madonna?

Both are headliners, with staying power and strong track records. Both make millions and reinvent themselves constantly to adapt to changing tastes.

But they also have to compete for the spotlight with brash newcomers. Lady Gaga borrows from Madonna's repertoire.

Similarly, social media, "apps" and mobile marketing are the shiny new toys that make email marketing look stodgy and "so Web 1.0."

Email marketing needs to remake itself from top to bottom – not just how we do email marketing, but how we talk about it with others and the values we use to promote it.

It's time to reposition email marketing with key people like colleagues outside the marketing department and the C-suite executives who control the budget.

We have to find and communicate email's inner Lady Gaga — the eye-popping, sexy qualities that keep email marketing a robust headliner year after year.

Let me be clear. This isn't the 947th piece proclaiming email marketing isn't dead. In fact, this ebook could also be about search marketing, which has also fallen victim to shiny-toy syndrome and needs its own Lady Gaga reinvention.

No, this is about changing email marketing's image from the "boring old workhorse," as so many of us refer to it, into the hip, leading-edge revenue-generating machine that it has become for so many companies.

Not Your Father's Email Marketing

For years, email's backers in the industry have trotted out the annual DMA report showing email marketing has the highest ROI of any marketing channel.

However, naysayers and executives discount it because email is so "cheap" to produce and send. That's like dissing wines from Chile because they cost less to make than French wines.

Email marketers encourage this shortsighted thinking when they give their own programs the "same-old, same-old" treatment, not trying to stretch the boundaries.

We need to show that there's a new email in town.

Email is a Content Technology Platform

Here's what's cool about email marketing: It might not be as sexy as an iPad app, but it has become a content aggregator, pulling multiple technologies and types of content into a single platform.
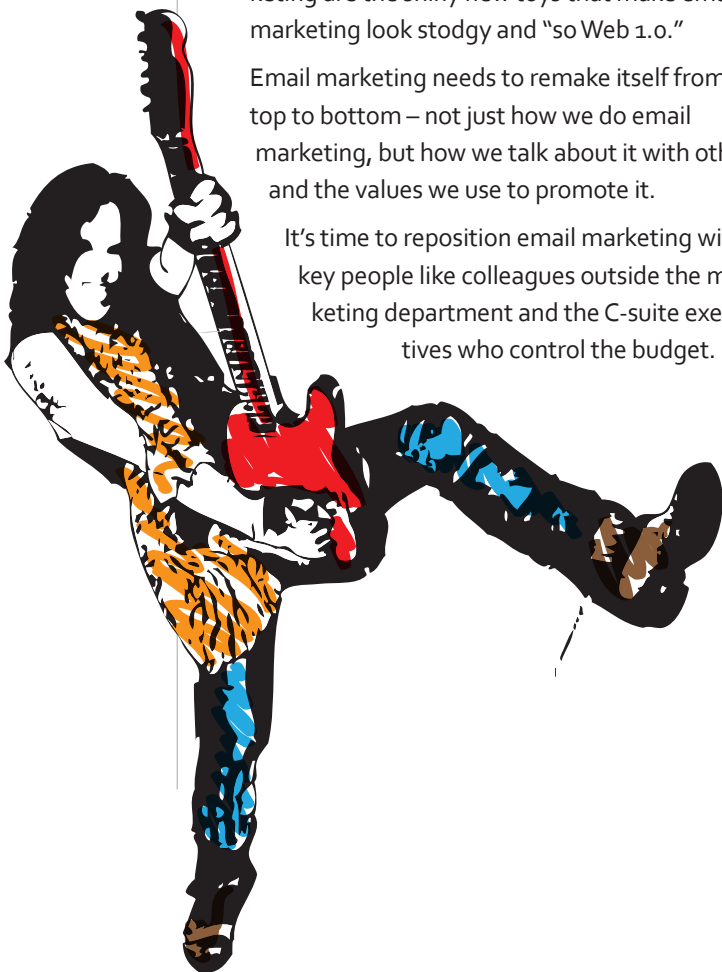
As marketers struggle to adopt emerging tools, email easily incorporates many of these new channels or Web technologies:

- Social sharing (Share-to-social/SWYN)
- Social followers (Facebook Like/Fans, Twitter)
- Product recommendations
- Customer product reviews/Community comments
- Web behavior (browse and cart abandonment)

Search and social excel at the top of the marketing funnel, bringing in prospects from multiple channels. But email is the glue that binds these channel relationships together, converting prospects into customers and first-time buyers into repeat customers.

Eight New Rules for Email in a Lady Gaga World

This repositioned email marketing needs new rules, including metrics and language. Consider these:

1. Never talk opens and clicks with other departments or the management suite. They don't or shouldn't care.
2. Talk loudly about revenues and cost savings.
3. Talk up the percentage of total company revenue that comes from email (assuming it's good). If you don't know, figure it out.
4. Don't talk about deliverability and rendering problems.
5. Remind executives that an email address is the core of most social and mobile relationships.
6. Show how a tiny percentage of email volume generates a massive amount of your email revenue via automated emails. (Hint to the C-Suite: Adding automation is like printing money.)
7. Cite strategic metrics that will wow executives, such as revenue per email, email revenue per worker hour, call center deferral rate, etc.
8. Document and communicate email revenue opportunities. As I write this, a client just emailed me to point out several missed opportunities she noticed when purchasing from another retailer, which could add up to millions of lost dollars.

At the same time that CMOs and executives invest in the shiny new toys of marketing without knowing what the payback will be, they probably are leaving tens of millions of dollars on the table simply by not implementing basic programs like recovering abandoned carts.

Repositioning email this way helps email strap on the blingy stilettos of a marketing rock star and claim its rightful position in the company spotlight.

What are you doing in your company to make email sexy again?

How My GPS Pointed Me Toward Email's Future

Q: **What's email's future beyond mobile and social integration?**

A: Let me start by telling you about how my GPS crystallized my views about what's happening in email marketing and where it has to evolve.

I was heading out to a conference about an hour from my house. I had entered the address into the GPS, but it wanted to use a different route.

Within a block of my house, it started telling me I needed to go a different way than I preferred. I ignored the GPS' repeated attempts to sell me on "Take the next exit."

Finally, but also with no other alternatives left, the GPS recognized I was ignoring its instructions and began to give me directions for the route that I preferred.

Does this sound familiar? Most broadcast email operates like this, too.

Preferences vs. Intent vs. Context

The marketing perspective is shifting, too, away from the marketer dictating the terms and toward a system that pulls in streams of data to create messages based on what the customer does rather than what the marketer wants to sell.

Smart email marketers have been changing much of their programs the last few years, from ones that rely on broadcast email to more of a one-to-one communications channel.

The first transition was from the pray and spray of broadcast email to educated guesses via targeted messages based on profiles and preferences. Now, though, focus is shifting to triggered messages based on intent and context.

Intent is mainly what customers are telling you through their behavior, such as browsing, purchasing or clicking/not clicking on email messages.

Context marries location, device, buying stage and social activity to intent and preference behavior. It's the next frontier because it also pulls in real-time recommendations based not just on what the customer himself bought but also what similar, or "like-minded," individuals bought.

The goal, of course, is delivering the right message at the right time to consumers. Rather than crossing your fingers and hoping a message is relevant, a marketer's behavioral GPS system listens to individual actions and responds in real time with content and offers that solve a consumer's problem.
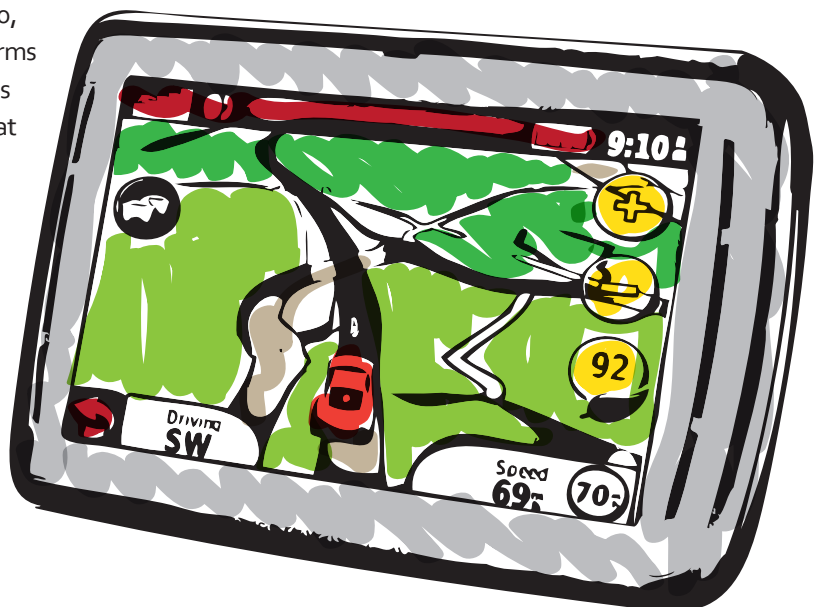
Sources of Intent and Context Data

Data and behavior are of course the keys to this approach to marketing: data that's all around you now and new kinds of data from multiple sources.

Below are a few examples of what might lie ahead:

- **Web tracking:** This practice allows you to match anonymous Web behavior to an email address when the customer opts in and place her in a track right away that matches her intent from browse activity.

- **Purchase, browse and cart abandonment:** These activities can launch individual streams of messages, such as post-purchase follow-ups; suggestions based on Web pages or products browsed or recommendations based on what others browsed or bought; and reminders to redeem items left in a shopping cart.

- **"Mocial" initiatives:** That's shorthand for "mobile/social/local" marketing, which fits right in with this shift to a consumer-centric approach. A few examples:

  - **Social login:** More customers or prospects will log in to sites using their social networking accounts, giving marketers access to their social profiles.

  - **The Facebook "Like/Recommend" buttons:** When consumers like a brand, product or piece of content, they are clearly demonstrating valuable affinity and potential purchase intent.

  - **Local check-ins:** Checking in to Foursquare and Facebook provides marketers not only location data and history, but also customer loyalty, value and influence.

  - **Mobile apps:** Use of mobile apps provides engagement and usage data that can further round out the picture.

- **Channel optimization:** Your marketing database will know when, where and in which channel a customer has engaged more often and serve up a message optimized for the individual in the channel they are most likely to engage in at the specific time and context.

Some of these data and behavioral sources are commonplace today, and others may be a bit down the road. Nevertheless, they don't render broadcast email obsolete, but rather help email deliver on the dual promises of one-to-one messaging and the right message at the right time. Both will help marketers realize the greatest engagement and ROI from their efforts.

The challenges of course for marketers and their vendors will be how to sort through all of this emerging data and behavior, make it actionable in real, or near, real time and use it responsibly in a way that provides clear value to consumers.

2

What's Your Email Strategy?

Email marketing used to be so easy. You created a message, sent it to your mailing list and counted up all the responses. And then you did it again, and again, and again.

Today, an email marketer has so many decisions to make:

Should I send one message to my entire mailing list, or should I divide my database into segments and send a different message to each segment? Or, should I send mostly triggered messages?

Should I send messages on a specific day of the week or whenever I have something to send?

How many messages should I send in a set amount of time?

What other kinds of messages can I send to drive greater sales for me and more value for my recipients?

Before you start sending messages, or when you think it's time to revamp your email program, you need to decide on your messaging approach.

It's not an arbitrary decision, like broadcast versus targeted/triggered messaging. Your decision rests on things like what you want email to do for your company, how much time, money and human capital you can invest, and what your email software is capable of doing for you.

Do Your Emails Need Ketchup?

Q: **I need some fresh ideas for what I can use email for at my company. What do you suggest?**

A: Think of your email messages as if they were burgers. You could send out the same old familiar burgers that everybody else makes, with maybe one version that includes a skinny slice of processed cheese for variety.

Or, you could create burgers like the one I had on vacation once. The Kobe beef patty was topped with Havarti cheese, garden-ripe red tomatoes, caramelized onions and wild arugula:

This gorgeous burger's appearance made me rethink a near lifelong habit of automatically adding a dose of Heinz ketchup to my all-beef patty.

How does email figure here? Because many marketers also automatically add "ketchup" in the form of discounts, free shipping and other common incentives to their emails.

What they really need is a better-tasting burger.

Now, marketers deploy these tactics for a reason. Incentives and sweeteners produce results and, in most cases, still deliver a great return on investment. But what if you didn't need ketchup — er, incentives?

Here's my challenge to email marketers: Rethink your $4 email burger and serve up a $15 version instead.

Remember, the success of my $15 burger (with garlic fries) rested on the quality of the ingredients: home-made buns, fresh produce, gourmet cheese and high-quality beef.

Below is a menu of key ingredients that will turn your fast-food email burger into a mouth-watering gourmet treat that will generate a higher ROI and improved margins because you need fewer incentives:

- Messages tailored to individual recipients based on their demographics or behavior
- A welcome program that sets expectations and creates value for new subscribers out of the gate and confirms that their decision to opt in to your email program was a good one
- Creative subject lines that motivate people to take the action they (and you) want, not just open the email
- Emails designed to render well on multiple environments and platforms — PC, Web and mobile
- Creative and compelling copy that motivates people to want to know more and act
- A competitively positioned email program, which serves a clear need to recipients relative to your competitors' offerings
- Emails with genuine personality that provide a reason for subscribers to anticipate your next message
- Emails designed from a user perspective, making it easy for subscribers to find the information and links they need to take the action they want, anything from changing their preferences to buying your latest widget.

Incentives and sweeteners will always play a role in email programs, but as you retool your email program — designing it from the ground up, with better ingredients — they may become less important to your success.

Think Big to Get Big Results

Q: **We really have to move the needle on our email program revenue, but we just don't know how to start. What do you suggest?**

A: The easiest place to start is to focus on improving the single most critical aspect of your email program in order to drive significantly more revenue or conversions and to exceed, not just meet, your key program goals.

I'm not talking about tweaking the pre-header text or testing subject lines. Certainly, continuous optimization is very important, but you can end up spending resources on incremental improvements at the expense of tackling your largest opportunities for improved ROI.

Think big instead. Look for the fulcrum – the email or point in your customer's lifecycle or relationship that tends to drive future revenue, repeat purchases, engagement and loyalty. How can you use and optimize email to drive the biggest increase in your company's revenue or conversions in 2013?

Case in point: In a recent meeting with a client, we discussed several ideas for improving their email program, including fixing some preference center issues, adding dynamic content, doing real-time image testing for CTA buttons, adding more personality – and on and on.

But this company's business model hinges on one thing: getting new registrants to make their first purchase. Their conversion rate off their fulcrum email was 4 percent.

Presto. To me, all of the other things we discussed mattered little. This client's major focus should be on rethinking the existing offer and designing a multi-email series based on sub-scriber behavior designed to get double or triple that conversion rate.

Control the Conversation

In many meetings with marketers over this last year, I've found that most knew what they needed to do to improve their email programs. But when the time came to act, they let internal roadblocks, such as IT resistance or lack of resources, or the day-to-day push to get out another email campaign, derail them.

Sure, these obstacles are usually real, but you don't have to let them defeat you. Look for ways to take control of the conversation, to say to your boss, "I can deliver more revenue if you give me the resources to make this one change."

A few years ago, a client made the case to management for the need to move to a more sophisticated approach to email using automation and lifecycle messaging. The marketer won over management and got the necessary resources simply by using conservative revenue projections for just one of these programs, a cart-abandonment series.

Big Things First

It's really all about setting priorities and focusing on the most important things. Remember Stephen Covey's time-management anecdote about how best to fill a jar with rocks, pebbles and sand?

If you start with the little, less important tasks (sand and pebbles), then there is no room for the larger, most important activities (the rocks). By tackling the biggest things first, you can fit the smaller, more tactical tasks into your email-marketing schedule.

Unfortunately, many marketers get bogged down in the grind of creating and sending one email campaign after another instead of stopping and

focusing on improving key aspects of their program that will deliver a significant rather than incremental increase in results.

One Example: Add Value to a Standing Email Message

Your first step is to identify the fulcrum point in your customer relationships and email program. This could be the onboarding period, post-purchase or other behavioral trigger.

One e-commerce client's fulcrum email is a triggered email that reminds customers that their recurring monthly orders will be shipped in seven days unless they cancel or revise their orders.

The company conducted significant order-size analysis and added a free-shipping offer to encourage purchases beyond the standing monthly product order. They also added additional product recommendations, top sellers and other information.

The changes worked well: This email is now the single largest revenue-generating email in their program, not including revenue from the recurring order.

"Thinking Big" Starts Now

Have you identified that fulcrum email or period in the customer lifecycle where you can double or triple revenue or conversion rates?

While tactics such as optimizing your emails for mobile and touch screen devices will be important in 2013, don't take your eye off the ball and ignore the biggest ROI opportunity that is sitting at the center of your email program.

Receipt in the Bag or in Your Email?

Q: **I recently experimented with getting my store receipt via email instead of having it printed out at the cash register. Does this have a future in email marketing?**

A: It might never replace the register slip, but receipt-via-email has promise both as a customer service and as an acquisition tool for your email program.

The travel industry has emailed receipts to time-pressed travelers for years, while Apple Stores pioneered the practice at the retail level using iPhones. Now more mainstream brick-and-mortar stores have added it or are testing it.

The pros and cons of emailing receipts boil down to convenience (no more paper receipts to lose) versus privacy (some customer say they think it's a sneaky way to add addresses to a database).

My own experience with emailed receipts has been a mixed bag. When they show up on time, are accurate and stand out in my inbox, they're great.

But sometimes they don't show up. And if they do arrive, they often do nothing to enhance the brand relationship.

So, if you're willing to spend some time and money to build in extra value, the email receipt could be a great way to integrate your offline transactions with your e-commerce program and bring in new subscribers.

Email Receipts = Transactional Emails = Marketing Emails

Email receipts are essentially a different kind of transactional email, but they face the same issues. Many of these emails, whether from in-store or online transactions, are text-based, ugly and lacking in branding/marketing value.

Of course, these emails are supposed to provide an electronic record of a transaction, notify customers their orders have shipped or are out of stock, or fulfill other transaction-related purposes. But they don't have to look as outmoded as an eight-track tape.

Transactional emails are among the most relevant emails you can send because they relate to a purchase or related process. They are among the emails your recipients read and value the most.

Transactional emails can also upsell, inform, brand and market to customers just like regular promotional emails, but to more engaged recipients.

Where Receipt/Transactional Emails Fall Short

Consider my two recent experiences with emailed receipts:

- **The Missing Receipt:** I bought a pair of shoes at a store in a California outlet mall and agreed to the email receipt (and promotional emails). Weeks after the sale, neither has shown up. Did the employee type my email address in wrong (I spelled it twice) or did the POS-to-email system fail somehow?

- **The Horrible Email Experience:** I couldn't track down a crucial hotel receipt in my inbox. Once I finally unearthed it and got the information I needed, the message gave me little reason to engage further with the company.

Whether you're looking to add receipts via email to your POS process or spruce up your order confirmation emails, make sure you optimize the message for everything from delivery to inbox presence to content.

Look for these opportunities to provide the best email experience for your recipients and the best benefit for your marketing program:

1. On-time inbox placement

Reliable delivery is the single most important aspect of a transactional email. Many companies rely on homegrown transactional systems or e-commerce platforms that lack the authentication, delivery and bounce processing infrastructure common to email marketing or dedicated transactional email systems.

Make sure your email system has no major challenges or blocks at key ISPs. Or, consider upgrading to a dedicated transactional email system. When possible, the transaction should trigger these emails immediately.

In this instant-message age, waiting two days to get a hotel statement is unacceptable.

2. Easily recognizable "From" name

Searching for my missing hotel receipt dredged up only irrelevant emails. After scrolling one by one through hundreds of unread emails, a message from "DoNotReply@BigHotelChain. com" surfaced (name changed to protect the clueless/guilty). Bingo!

An email address in the "From" field instead of a name makes the message look spammy. Instead of a "gobbledygook" email address or something obscure, like "Accounting," use a logical, trusted and easily recognizable "From" name that includes your company or brand.

In this example, the "From" name could have been "Big Hotel Chain" (or "BigHotelChain" if the email software doesn't permit spaces) or "BigHotelChain Service."

(See Chapter 5, "Deliverability: How to Get Your Messages to the Inbox Where They Belong," for specific advice on choosing and using a "From" name.)

3. Informative subject line

Subject lines that just say "Order Confirmation" aren't horrible, but they provide neither context nor clarity.

When possible, go beyond the basics, like this subject line from Costco: "Your Costco Photo Center Print Order Is Currently Being Processed."

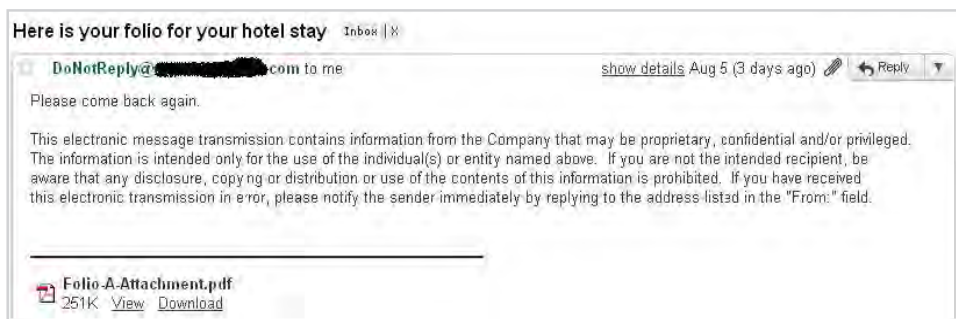### 4. Attractive design and clear branding

No law says transactional emails can't use HTML or images or look as sharp as your best promotional emails. Yet so many look like circa-1992 email messages sent to my AOL account.

Incorporate relevant branding in your messages. Make appropriate use of HTML and images to deliver a message that represents your brand well and packs an informational punch.

5. Value-added content

Go beyond the basic transaction or receipt information and provide additional content that provides value to the consumer. This might include delivery tracking information, loyalty program status updates or product usage tips.

My hotel receipt (screenshot below) has one line of marketing-related copy ("Please come back again") followed by an 80-word legal disclaimer. The receipt itself was a PDF attachment that looked exactly like a printed hotel bill.

Besides my bill, it listed my loyalty-point reward, pitched the hotel's branded credit card and gave me a chance to win time with a personal trainer. All or most of that copy should have been in the email's message body, leaving the "folio" for the PDF.

6. Cross-promote your email program

Many transactional email recipients might not have opted into your email program when they bought from your company. Use your receipts to invite these new and valuable paying customers to sign up for your email program with a link and brief benefit statement.

Good idea: Transactional emails sent by a Silverpop client include a dynamic content block inserted for nonsubscribers inviting them to opt in to its promotional email program.

7. Cross-selling

These emails are a great opportunity to promote related products and services. An email receipt for a camera purchase can include a promotion for a camera bag and zoom lens based on like-minded purchases.

Find Your Fulcrum to Lift Your Email Program

Q: **What can I do to drive more email sales without adding yet another email stream to our messaging stream?**

A: Can you identify your "Black Friday" email? Not the emails you send in late November, but an email that serves as the fulcrum: the trigger event that generates a majority of revenue or conversion activity and helps your program meet or exceed its goals.

Identifying and optimizing your "fulcrum event" is one of the most important steps you can take to improve email marketing results.

Think Big, Act Big

For many email marketers, their "Black Friday" is the fulcrum event in the customer relationship that drives revenue, repeat purchases, engagement, and loyalty. It could be an on-boarding or welcome program, post-purchase follow-up or other behavioral triggers.

For one Silverpop client, the fulcrum email became a triggered email reminder of a standing product order. After conducting significant order-size analysis, the company added a free-shipping offer to encourage additional purchases, as well as product recommendations, top sellers and other information.

That reminder email is now its single largest revenue-generating email, without even including revenue from the recurring order.

How Fulcrum Thinking Fosters the Improvement Process

Focusing your attention on your fulcrum event helps you answer one of the great questions in email marketing: Where do I start to make things better?

It also clarifies your thinking, avoids distractions and frames the case you might need to make to your management for interdepartmental cooperation (such as IT or customer service) and additional budget resources.

Once you have optimized this key point in your email marketing program, many other incremental improvements will fall into place or become obvious that they are next up on your list of things to tackle.

Focus on Your Fulcrum Opportunity

1. Identify your fulcrum event (or events). It could be your busiest sales period of the year or critical conversion triggers such as these:

- Membership or standing-order renewals
- The first 30 days after an email opt-in
- First purchases that drive follow-on revenue
- Converting free users to premium accounts
- Product demos
- Reducing churn driven by inactivity
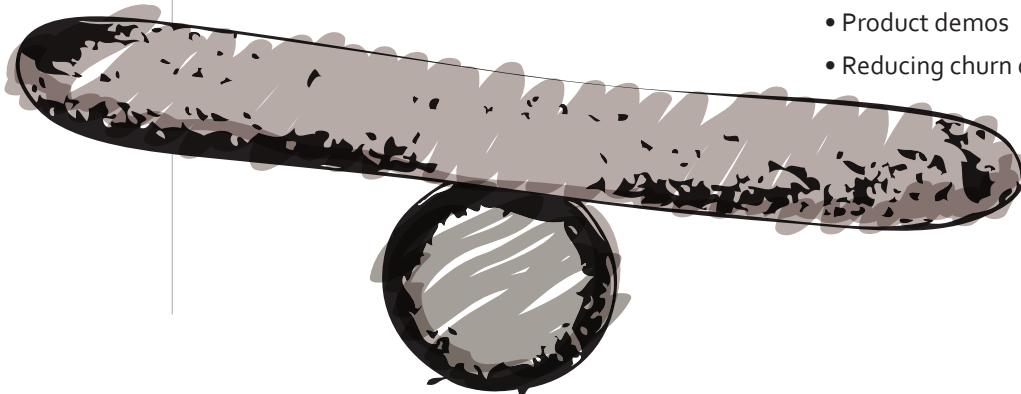
2. Analyze your current performance, and identify opportunities where you could improve. Use output metrics such as percentage of conversions from basic to premium service, free trial to paid or first purchase.

Once you have found your stumbling blocks to conversions or opportunities to improve, you're ready to go to your boss and ask for help.

3. Advocate for more budget and resources to help you achieve your goals. Speak your boss's language here.

Lay out the problem in clear terms. Show the strategies you plan to deploy to solve it, the resources you need to make that happen, and the top- or bottom-line results the investment should generate.

4. Focus your energy and attention on the aspects that improve and support your fulcrum area: Many marketers get frustrated when they try to focus on the most important things because they have so many demands on their time and so many problems to fix.

It's essential to not get distracted from your big goal. Once you have improved your fulcrum event, it will make prioritizing and implementing other marketing projects easier.

A Progressive Approach Builds Frequency with Value

Q: **How can I meet my marketing manager's demands to "send more email" and yet not annoy my subscribers by sending too much?**

A: Although many email marketers are concerned about sending too much email, the simple truth is that one email message often isn't enough to persuade people to take the actions you want.

Sometimes, consumers just need to be reminded about the subscription that's expiring or the software they downloaded but haven't tested yet.

Besides reminders, a series of related emails can help you build engagement with a new customer, move a prospect onto the right track or nudge a good lead closer to a buying decision.

Below are four approaches that use automated messages to prompt your customers into acting:

1. Resend the original message.
Emails get lost or overlooked all the time. Or, customers just aren't ready to act when your message arrives.

Try resending the original offer one to two days or a week later to recipients that didn't record an open. However, you must handle this practice carefully to minimize unsubscribes and abuse complaints:

• Test this approach with a portion of your list first, if possible, to see what impact it has on increased response and ROI as well as list churn.

• Try sending at a different time of day.

• Use a different subject line that might catch the attention of previous non-openers.

This approach requires minimal effort and might annoy a segment of your subscribers. It likely will produce the lowest return of any reminder efforts. But at least it's a start.

2. Resend your original message, but modify the creative.
Send a series of emails, often two or three, with modified copy and creative, but the same goal as the first email.

This might include a reminder-focused subject line and message copy that advises the recipient to act on your offer before it's too late.

This kind of reminder would work with just about any kind of deadline-based email such as a survey request, subscription renewal, event invitation and sale.

Birthday reminders are a great but underutilized opportunity for this approach. I recently received about 15 birthday email messages, many with excellent offers that expired within 30 days or so. But not a single company sent me a reminder email before the offer deadline.

The cart-abandonment series is another familiar example. Here, you could deploy a three-part series over a week, with the first message taking a service focus, the second a free-shipping offer and final message with a "last chance and 20 percent off" offer.

In all cases, recipients are suppressed from successive messages when they take the desired action.

3. Create a scheduled email series.
This is a group of email messages designed to drive one or more actions or improve engagement. Each succeeding email builds on the previous one with a different but related message.

Consider the "welcome"

message. One "welcome" message is better than none, but a series of messages will give you more opportunities to introduce your company, brands, value proposition, acquire more customer information, and drive immediate sales through an offer.

A key goal in this scenario is to create a predetermined and controlled onboarding experience for the new subscriber.

4. Behavior-based tracks.

Here, you create a sophisticated set of business rules that apportion customers into different tracks based on their actions or lack of action.

This approach requires a marketing automation platform that enables the marketer to map out a series of "if-then" statements and deploy messages or other actions, such as sending a direct mail piece or call from a sales or call center rep.

The program automatically moves individual subscribers into different tracks based on their ongoing behavior, such as:

- Opening or clicking on an email, or not
- Making a purchase or not
- Visiting a Web page
- Downloading a white paper
- Logging into your account
- Speaking with a call center rep

More (and Better) is Better

The simple fact is that sending more emails to subscribers works, but not an unending series of messages with the same call to action time after time.

Instead, leverage individual recipient behavior and automation to nurture them down the conversion path.

But basic math also works here. One client sends a fairly simple three-part cart abandonment reminder series with only minor creative changes and a modest gift offer in the final email.

Conversion rates for the emails are 22 percent, 15 percent and 24 percent. If the client only sent a single cart reminder, they would be leaving millions of dollars in revenue on the table each year.

Ready to ramp up frequency with value-driven emails?

Upgrade Your Welcome Email

Q: **What suggestions do you have for creating a "welcome" email for new subscribers?**

A: Didn't you hear? The "welcome" email is dead!

I can hear you now: "What? You always say I'm supposed to send a welcome message to new subscribers, and now you tell me it's dead? What gives?"

No, I haven't flip-flopped. A single welcome message is still better than no message at all if you want to build up subscriber engagement early and head off inactivity.

But the stakes are higher now for marketers who are under pressure to generate maximum value from their subscribers, and who would rather focus limited budgets and resources on retaining existing subscribers over acquiring new ones.

Think Onboarding Program Rather Than Welcome Message

An onboarding program evolves the initial greeting into a strategically designed, calibrated series of automated messages designed to convert your new subscriber into a regular customer in a highly personalized and systematic way.

These multiple-message email series can warm up new subscribers and provide a positive experience for the all-important initial phase of the relationship by doing the following:

- Answer questions and provide how-to info and FAQs on using your website, buying from you or setting up an account.
- Educate users on specific features of your service or website that they need to know in advance.
- Set email expectations.

- Present options for creating a highly personalized experience for each subscriber.
- Move subscribers closer to purchasing or becoming engaged users.

Onboarding can help you address specific challenges or objectives, especially when you incorporate data on subscriber behavior and demographics:

- Sort email subscribers into tracks and targets with specialized information based on the areas your subscribers visited on the site, or the demographics and interests they provided.
- Track potential user abandonment by triggering follow-up emails for subscribers who haven't completed account registration or taken other actions they need to do to become engaged customers.
- Educate users who sign up via one mode, such as a mobile app, in order to promote additional features available on your Web interface as well.
- As a secondary benefit, these emails can become a handbook that users can save to a folder or print out and consult before going to customer support or an FAQ page.

Use Onboarding to Manage the New-Subscriber Experience

The 30- to 60-day period after opt-in is typically the most crucial in the email relationship, whether you're an online retailer or service provider, or a non-retailer that has moved offline operations such as account creation and customer service online.

Onboarding messages allow you to control which emails your new subscribers see first. If you drop newbies into your regular broadcast stream, the first few emails they see might get them off on the wrong note.

A few years ago an email marketer from an energy utility told me that volatile natural gas prices sometimes caused the utility to send rate hike messages more than once a year to customers.

"So, as a new customer, my first email might inform me that my energy bill is going up?" I asked. She immediately understood the value of a good welcome experience in that initial email contact.

Onboarding in Action

A publishing client collects opt-ins from multiple sources for email newsletters, each of which promotes one of its nearly 20 paid-circulation hobbyist and special-interest magazines.

Its three-message onboarding program aims to promote each magazine's reader benefits and its hobbyist community, and to sell subscriptions to the corresponding magazine.

Results: 35 percent of email subscribers register at their magazine's individual website, while 18 percent subscribe to the magazine itself, and 6 percent buy other program add-ons. These figures represent a 175 percent improvement over its previous welcome program.

Use a Phased Approach to Get to the Next Level

A single welcome message is better than none, but you can do much better.

Here's the simplest approach. Expand your single welcome message – which treats every subscriber alike whether she opts in at your website or from a transactional email, mobile app or bag stuffer in one of your stores – into a multi-message format.

Each message in this format warms her up with a different value proposition or call to action keyed to her point of entry, her interests or what she needs to do to become an experienced user of your product or service.

Then take your lessons from this approach and build a truly sophisticated onboarding program that responds to each individual's behavior and interests.

Using Email to Remarket to Your Customers

Q: I see a lot about remarketing to customers on your websites, but can I also apply that to email?

A: Remarketing to customers is one of the benefits that email delivers once you begin to use the channel for more than sending yet another untargeted discount or free-shipping offer.

The emails you send in a remarketing program are highly personalized messages, which generate significantly higher response and conversion rates than broadcast emails.

With a branded sender line and a subject line that reflects the actions your recipient took on your site, a retargeting email stands out in an increasingly crowded inbox.

Remarketing requires an upgraded email program that integrates clickstream data generated by your email subscribers' activity on your website: which pages or products they view, and whether they buy the items they put in their carts or leave without completing a purchase.

It's worth the effort, though. An effective remarketing program helps you retain customers and boost your bottom line.

Recovering Abandoned Shopping Carts through Remarketing

Abandoned shopping carts represent a huge remarketing opportunity. A survey by U.K. marketing technology agency Amaze and the University of Glasgow found that 87 percent of British online shoppers actually abandon their carts before paying.

Cart reminders can also give you a competitive edge, because seven in 10 marketers never follow up with lost shoppers, according to a survey by Web analytics provider SeeWhy.

Shoppers abandon their carts for many reasons. Some get interrupted, find a better deal elsewhere, or just aren't ready to buy yet. Others get to the end of the process only to find they don't qualify for the discounts or shipping incentives that brought them to the site.

Still, about 75 percent said they would go back to complete the purchase and in essence use the shopping cart as a wish list, according to the Amaze/University of Glasgow study. So, it pays to try to redeem as many of those product-laden carts as possible.

Creating an Effective Cart-Abandonment Email

Test every aspect of your email message to find the content and design approach that will work best with your customers. Consider these factors:

- **Timing.** The longer you wait to send your email, the less effective your remarketing email becomes.

A Forrester study of a financial services provider measuring loan-application abandonment found the response rate hit a high of 89 percent on messages sent immediately after abandonment but fell to below 20 percent three days later.

- **Product Inclusion.** Test whether to include the actual products your customer left in the cart or just use a generic reminder to come back and purchase them. Always link directly to the cart, however.

- **Incentives.** Incentives to return aren't always necessary if shoppers abandoned for technical reasons or they got interrupted.

  Incentives and discounts clearly will increase conversion rates, but test different types and levels of offers against no incentives to find the optimum balance of revenue and margins.

  Also, many consumers are waking up to cart abandonment offers and are seeking these additional discounts. Consider holding back discounts to those customers who show signs of abandonment discount abuse.

- **Message Design.** Cart-abandonment emails might seem creepy or an invasion of privacy to some shoppers, even though they're already your email customers. Reassure recipients you are contacting them as a service, not just hounding them to buy. Include applicable terms such as duration (how long they have to complete the purchase).

  Drive customer service, too. Include customer-support contact information (email links, live support or phone numbers) to allow shoppers to report technical problems with the sites or issues they had with the product or your checkout process.

  As with any transactional email, make sure your marketing team owns them and designs them to reflect email best practices (branding, rendering, usability, great content and deliverability).

An effective remarketing program, implemented using email and Web best practices, could help you recover up to 25 percent to 50 percent of your abandoned shopping carts.

Lifecycle Marketing Makes Frequency Issues Moot

Q: I know you hear this all the time, but how often can I email my subscribers before I start burning them out?

A: If you're a publisher, this is still a reasonable question. But for most other businesses, it's so last-century, so old-school, so Web-1.0, so … you get the picture.

The better, though more complicated, question might be: "What demographics, preferences and behaviors can I use to drive a continuous program that maximizes the lifetime value of my customers?"

In the old, direct mail world, you sent to a list until it didn't make money anymore. With email, consumers tell you when you've gone postal on them by opting out or hitting the "This is Spam" button. But this paradigm is driven by sending regular, non-personalized "broadcast" emails.

If you can move to a system of emails fine-tuned to your customer relationships, you can likely email less often without sacrificing ROI, or even send more frequently and you won't be penalized by ISPs. Most importantly, you'll become even more valuable and relevant to your customers.

Email is the Swiss Army knife of marketing, giving you multiple tools to communicate with prospects and customers. While sitting in on a conference seminar one day, I came up with 30 different kinds of email messages beyond the standard "Buy This" broadcast email: everything from welcomes to trigger-based messages to one-offs to confirmations to cross-sell/up-sell messages.

This vast array comprises "lifecycle marketing," where the impetus for sending a message isn't just the product or service you want to sell but a trigger, event, need or other factor of your customer, combined with your organization's offerings and goals.

Further, many of these messages can be automated, meaning you create the email, set the parameters, and let the technology take over. When you shift to this kind of customer-focused marketing, you turn the concept of frequency on its head.

(See Chapter 10, "Better Email Through Automation," for more information, strategies and advice on lifecycle marketing.)

How One Multichannel Marketer Missed the Boat

I bought a refrigerated wine cellar from an online retailer whose catalogs I have been receiving for 15 years and emails for a few years.

This cataloguer sells only wine-related items, from books to glassware to custom wine cellars. A wine unit like mine is one of the most expensive items it offers. Previously, I had made only a minor purchase. Now, this latest purchase should have vaulted me into a high-value customer segment.

You wouldn't know it from my inbox, though. After I purchased the cellar, I received a basic order confirmation along with an average nine emails a month, none of which acknowledged this significant purchase. At least one promoted the exact cellar unit I bought!

So, I came up with a list of at least two dozen kinds of email messages this retailer could send to drive more sales from customers like me. They fall into seven categories:

1. Order Follow-Up/Customer Support: Besides the confirmation, send "Your order has shipped" and "Did you receive it/have any problems?" emails. Each could also include some upsell message for extended warranty, etc.

2. Cross-selling/upselling: Next, a series of emails promoting related products such as Riedel glasses, decanters, wine inventory software, premium openers, books or tasting kits.

3. Product replenishment: The filter on my wine fridge should be replaced every 12 months. Remind me early and around my purchase anniversary to change it with a link to the filter page on the website.

4. Special programs/offers: Send me a birthday reminder and gift-certificate program for my wine-loving friends. How about a special VIP invitation or discount to your regional wine tastings and magazine?

5. Refer a friend, receive a gift: Most wine drinkers don't do it in private. Some of my friends spend more than I do, too.

6. Check up: "How are we doing?" surveys, reminders to update preferences, post comments on the product.

7. Behavior-based: Where I click on the website or in the regular emails should trigger messages, especially if I abandon a cart.

Yours truly is a motivated buyer. But the nine-a-month, one-size-fits-all approach is not prompting me to pull out my credit card again. In fact, on average, I open only one or two out of the nine. Send me an email promoting the inventory software, and I'd likely pull the trigger.

So, the next time you're waiting for a plane or riding the train home from work, list all the email messages your company could be sending to add value to your customer relationships. I guarantee you can come up with 15 different ones, or I'll eat this ebook!

3
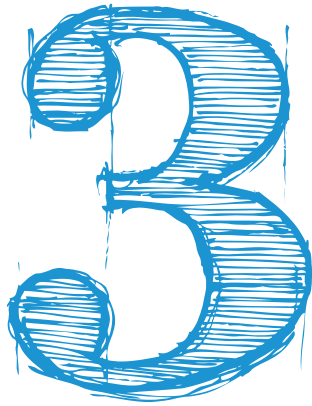
Steady, Reliable Growth Is Your Key to Email Success

Acquiring a sizable and healthy database of email addresses is one of the foundations of a successful email marketing program, but it's also one of the easiest aspects to mess up if you aren't persnickety about where and how you acquire names.

Some email marketers want to blast out their messages to millions of people right away. So, they collect email addresses any way they can: scraping them off the Web, appending addresses from postal lists, and buying or renting email lists from dubious sources that can't verify the permission status of every email address they provide.

Other marketers build their databases from multiple sources, too, but they all contain people who have opted in to their messages at their websites, from their transactional messages, in their social channels and through verifiable offline sources.

Assembling a million-address database takes longer this way, but they end up winning the email race in the end.

Can You Handle a Super-sized Email List?

Q: **I need to build up a big list fast. How can I do that?**

A: This question usually comes from an email newcomer, often an entrepreneur or small-business executive just getting his business going or a marketer who comes from the direct-mail world or another discipline.

They're all looking for the "easy" button, the one best way to make a mailing list grow overnight. But the short answer is that there's no "easy" button for email marketing.

First, the rules are different for email, beginning with permission and continuing on with cadence, content and deliverability via the spam-complaint button.

Having a large list sounds ideal, but it guarantees nothing – except, perhaps, potential deliverability challenges. It certainly doesn't ensure the high ROI for which email is famous.

A Big List Isn't the Only Answer

It's easy to argue in the abstract that an active and engaged smaller list can drive better results than a larger one comprised of mostly inactive subscribers.

However, the average marketing boss is probably going to be more impressed by big numbers (probably also the same person whose solution to increasing email revenue is "Send more email!").

And yet, having a big list shouldn't imply that it's lower-quality than a smaller one. A list with millions of names can provide a wider reach and has the flexibility to support meaningful segmentation and targeting.

It also might correspond with your addressable market opportunity. And, no matter how engaged your customers are, 100 percent of them are not likely to buy at the same time.

Variables Affecting Potential List Size

Use the list of variables below to determine if you're ready to take on the challenges a large list poses:

1. Market size/share: Are you entering a new or growing market, a shrinking or stagnant one, or a highly select niche market?

2. Prospect acquisition cost: Do you have an adequate budget and resources to aggressively grow your list? Are your acquisition costs low enough to expect a return on your investment in a reasonable time frame?

3. Relationship with your brand/company: Are you acquiring email addresses from people who have a relationship with you – or prospects who might take years before they provide any meaningful return?

4. Customer lifetime value: Are you building your list full of customers who will buy only from your deepest discounts and thus represent a very low lifetime value to your company?

5. Demographic and psychographic profiles: Are you acquiring names of people who fit your ideal customer profile – or just warm bodies filling up your database?

Newsletter Signup

Subscribe

6. Stage in the purchase or product lifecycle: Are you acquiring prospects all along the purchase cycle – or just those at the top of the funnel, who might take years for you to nurture and cajole into making a purchase?

7. Buying frequency: Replenishment emails for products such as printer paper or coffee beans encourage more frequent and regular buying, which a smaller list of active buyers could support.

Seasonal or big-ticket items might be purchased only once a year or every several years; so, you might need a very large marketing base.

8. Cross-sell/upsell potential: If you market items people buy only every few years, such as cruises or high-end sporting goods, you have longer repeat-purchase and consideration cycles.

Can you create value from this base by marketing accessories and maintenance packages, and enabling loyal customers to do your marketing for you?

9. Message value: A large list generally has a more diverse audience than a small one. Can you provide enough content in your messages to leverage this diversity, or segment your list to create individual message streams that reflect multiple interests?

10. List churn: If you already have a sizable list, one-third to one-half of it is likely inactive. It can be even more if you aren't providing significant value for subscribers but continue to just pound away at their inbox.

10. Organizational support: Aside from the budget to pay for list acquisition and deployment costs, you need marketing and possibly IT personnel to handle the demands of a large database.

Size is Just the Start

In the end, a list – large or small – is only as good as what you do with it. Engaging those new subscribers to keep them active on your list is your next challenge.

See Chapter 6, "Engagement: Why It's Vital to Your Email Health" for advice on this crucial aspect of email marketing.

7 Channels (Besides Your Website) Where You Should Collect Opt-Ins

Q: How can I use other marketing channels to acquire new email addresses?
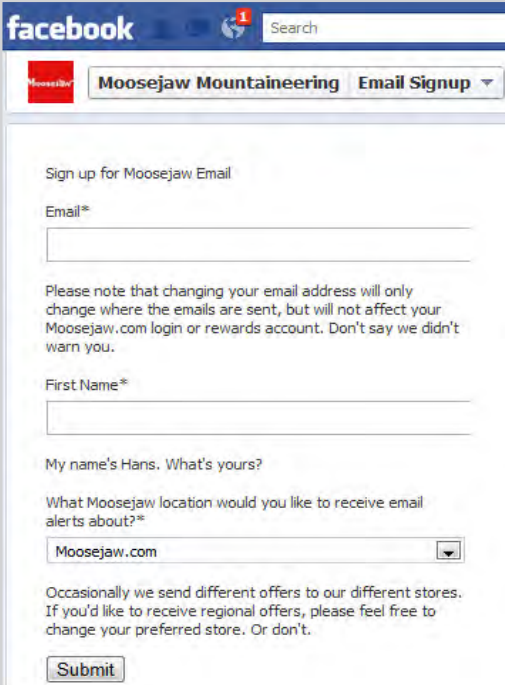
A: Your website and email programs are great sources of opt-ins, but you should also have acquisition strategies for all the mobile, local and social channels where potential customers or subscribers could run into you.

Below are seven opportunities where you can tell your email story to a wider audience:

1. Facebook brand pages

Use your Facebook page to drive email sign-ups:

- Promote your email sign-ups in wall posts visible to anyone who comes to your page, as in this post from King Arthur Flour:

"Pssst! Watch your email box Wednesday for a 1-day-only, super-duper shipping offer, available only to our free subscribers. Not a subscriber? There's still time — click "Stay in touch" at left, under the King Arthur logo, and sign up by midnight Tuesday to become a subscriber and receive the offer. PJH"

- Create an "email" tab subscription button and opt-in form, where fans can sign up for emails without leaving Facebook. See this in action on the Silverpop Facebook page.

Don't just stop at Facebook. Promote your email program on your home or "About" pages on other social networks, such as LinkedIn and Google+.

Also, use your news feeds and streams to promote great email newsletter content and your email value proposition.

Even Pinterest provides a URL option that you can use to link to your home page (with highly visible email opt-in) or to a specific landing page with opt-in form.

2. Blogs

Blogs almost seem old school these days, but 500 million people follow their favorites regularly.

Your blog page should always include a link and benefit-based promotion to subscribe to your email program. Whenever you publish a newsletter, promote the content in a blog post. Also, cross-promote your blog by sharing relevant posts in your email messages.

3. QR codes

Hundreds of millions of smartphone users have scanned these coded squares of squiggly lines to

link up with more information, such as product data, videos or white papers.

Use QR codes in a print ad or trade-show flyer, on a product package, in a catalog or on a printed receipt and link to a special mobile-optimized landing page. Because users will be on the smartphone, make sure any form is short, sweet and touch (finger) friendly.

4. SMS/Texting

Your customers don't go anywhere without their phones these days, so as with QR codes, make it easy for customers in your physical locations or viewing billboard ads or event signage to text to opt in to your email program.

Context and value is key to getting people to opt in via SMS. Texting at a rock concert to opt in to receive email updates on the band is a great example. Adding copy to the address label on a magazine read mostly by those older than 50 may not make sense.

5. Check-ins

It started as a game ("I checked in to more places than you did!"), but Foursquare, with more than 25 million users, Facebook (more than 350 million mobile users) and other location-based apps are becoming the new model for loyalty programs, contests and coupon delivery.

Once you claim your business location on Foursquare, for example, you can create rewards, sweepstakes and other programs and ask visitors to register via their Facebook or Foursquare account.

You'll then have access to their email address and can message registrants via email about the program and special offers.

6. Mobile apps

The sheer numbers of mobile apps — more than 1 million for Apple and Android users alone — and their increasing sophistication presents both opportunities and challenges.

The growing adoption of mobile apps means you may be reaching new customers not currently in your database. So make sure you ask new downloaders for their email address or offer social registration such as Facebook where you can obtain their email address and permission.

A key challenge with apps is that according to Localytics, 25 percent of downloaded apps are only used once. Capturing their email address enables you to educate and nurture these downloaders and increase engagement.

7. Kiosks/Tablets

Tablets offer an attractive and simple option for consumers to opt in to your email program in retail and other physical locations. Securely mounted on walls with high traffic and near POS systems, tablets offer consumers the convenience of signing up for your program and greater data integrity for the marketer.

Essential: Take Out the Friction

As handy as many mobile opt-in channels can be, they can be a stopper if the forms they link users to are long or hard to fill out on a small screen.

You can take out the friction in this process by using social sign-in, which allows users to connect with you through social networks such as Facebook, LinkedIn and Twitter. With one tap on a button, you can capture all the details they choose to make public, which often includes their email address.

The other essential element is a simplified registration form, optimized for mobile screens and "fat finger syndrome." Once in your database, use progressive forms and a nurture email approach to capture more data over time.

Your list-growth strategy should include a plan to offer opt-in opportunities to shoppers in every channel where they come into contact with you. These should be optimized for the advantages as well as the limitations of each channel.

Got the Basics Covered, Too?

Don't overlook your website and email messages as opt-in sources as well. Be sure to optimize these two sources:

1. Website: Adding an email sign-up on every page on your site will offer something to shoppers who are interested in your offerings but aren't ready to commit.

Do you promote email opt-ins in these key locations?

- Home page in a prominent location (not sandwiched between other content modules, unless your click metrics show that location drives the most traffic to your registration page)
- Account registration page
- Blog pages
- Interior product pages
- Checkout and transaction confirmation pages
- Landing pages created for search campaigns

2. Transactional email messages: These highly valued messages are fertile ground for expanding the customer relationship to include email. Be careful to keep the transaction prominent in the message.

Messages like these are ideal for extending the email relationship:

- Order or payment confirmations
- Order status
- Shipping notices
- In-stock or out-of-stock updates
- Customer-service follow-ups
- As a best practice, use dynamic content blocks that substitute alternate promotions for existing subscribers

Remember: Sell the Benefits

No matter where you approach your potential subscribers, the language you use to promote your email program should always answer the customer's unspoken objection: "What's in it for me?"

Don't just ask people to sign up for your emails. Instead, highlight the benefits (early notice of sales, special discounts, etc.).

Social Sign-In: Take the Friction Out of Opting In

Q: **I keep seeing websites that let me register with my Facebook or Twitter account. Does that have any potential for capturing more email addresses?**

A: There's been a lot of buzz lately about social login now that research has shown the benefits of offering this option as an alternative to having people fill out forms or register on your site.

A Blue Research study, for example, revealed that three out of every four Internet users leave a website rather than take the trouble to register a new account.

For marketers interested in more effectively collecting data and building lists, here's an overview of social sign-in, why it's poised to change digital marketing, and what new questions it presents to marketers.

What's Social Sign-in, and Why Is It Hot?

Social login offers you these benefits:

- Increases opt-in rates by making the visitor's sign-in process easier
- Strengthens the social perception of your brand
- Improves data collection by capturing a visitor's profile and storing it in your database

Better still, research shows that customers and prospects actually prefer social login. The Blue Research study indicated that 77 percent would choose social login over filling out traditional forms.

Join Our Email List

To join our mailing list or update your preferences, please complete the information below and click **Submit**.

Or, sign up by logging into your Facebook account >>

f facebook

First Name*

Last Name*

Email*

Enter your birth date to receive a special birthday message

mm/dd/yyyy

Please select the areas of interest which you would like to hear about...

☐ Scout Promos   ☐ Specials   ☐ Website Updates
☐ New Products   ☐ Sales   ☐ Send Me Everything!

How did you hear about us?

○ Through a friend
○ I was browsing online
○ I saw Bungalow and/or Scout products in a store
○ Facebook
○ Blog

Are we part of your social circle?

☐ Yes, I am connected with Scout on Facebook
☐ Yes, I follow Scout on Twitter
☐ Yes, I read YO, DEB!
☐ Yes, I am registered on the Scout Kennel Club Site
☐ No, not yet

Submit

As people get used to the concept of signing in via apps and social sign-in, the trend should continue to snowball.

What Makes Social Sign-in a Game Changer?

In addition to improving the user experience and removing a barrier to list growth, offering social sign-in options has the potential to impact both the amount and the accuracy of data that companies collect:

• **Reduces form abandonment:** Offering social login helps reduce the number of required fields, leading to increased opt-in rates. Companies who have implemented this option have seen conversions increase between 10 percent and 50 percent.

• **Increases amount of data:** With social sign-in, some social sites provide a lot of information, and some provide companies just a little (see chart below). But the net result is that you'll capture interesting data right out of the gate that might have taken you several form fields and a year's worth of time to capture in the past.

Consider: Despite their high ROI, many companies don't deliver triggered birthday emails because they haven't had a good mechanism for collecting customer birthdates.

But because Facebook requires a birth date to become a member, this will be a piece of info that marketers will now have access to if someone signs up using their Facebook log-in, making it easier to implement birthday programs.

Email	✓	✓		✓			✓	✓	✓	✓
Name	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Location	✓	✓		✓	✓	✓		✓		✓
Birth Date	✓			✓	✓	✓	✓	✓		
Gender	✓			✓		✓	✓			
Friends/Contacts	✓	✓	✓	✓	✓	✓	✓			
Profile Photo	✓		✓	✓	✓	✓	✓			✓
Interests	✓			✓	✓	✓				
									Source Janrain	

Increases data accuracy: In the past, some people —particularly on the B2B side — would use made-up company names and info to get materials such as white papers and Webinars because they weren't ready to talk to salespeople.

With social log-in, that prospect's social identity data is more likely going to be accurate. By offering social sign-in, you remove a barrier for people who want your offer but don't want to fill out a long form, while simultaneously reducing the inflow of inaccurate data.

Burning Questions

As marketers start to dig into the nuts and bolts of social login, there are a few questions to consider:

Which social networks should I offer?

How do you decide whether to offer two, five or 10 social networks as login options — and which ones?

As a starting point, you can use what you've learned from studying the social-sharing habits of your customers and work with your social media personnel to gain a better understanding of which social networks your company is most engaged in and which are the top strategic priorities.

Then, go with your gut, starting with a larger group, then testing and whittling down from there. The good news is that once you start collecting data on which social networks people are signing in with, you can use that data to inform your future social media strategy.

How do I collect key data that I don't get from a social network?

Marketers who decide to offer social sign-in options will need to think about how to adjust to the different kinds of data they'll receive depending on what social network visitors use to sign in from. With Twitter, for example, you won't get a customer's email address.

One option: Don't offer a particular social network if it doesn't capture critical data that you need for your program.

Also: Use progressive forms to collect the data later.

Set up your form so that visitors who log in with Twitter, for instance, would be automatically routed to a second form asking for an email address, an approach that might work well depending on what you're offering.

What can I do with this new data — and what shouldn't I do?

With social login, marketers will have access to lots of information they may have wanted in the past, but lacked an obvious way to collect.

For example, a jewelry retailer may have wished it could capture gender and zip code but been hesitant to ask for this information at opt-in because of fear of form abandonment. But through social login, the jeweler can gather this data and be able to deliver more relevant content based on gender and location.

A chain of coffee shops might suddenly know if new subscribers are located near specific retail outlets. It could then use this data to promote its location-based marketing program, delivering an automated email encouraging recipients to check in via Foursquare or Facebook to certain local coffee shops and be entered into a sweepstakes.

Don't Be Creepy

As marketers gain access to new data through social login, how they use this data could be the difference between providing a welcome dose of increased personalization and relevancy and creeping people out.

If you're delivering content based on data the recipient might not associate with having given you, such as his home address, take a more subtle approach to avoid confusion. For example, highlight three stores in his area rather than just the one that's 2.1 miles from his house.

No matter how you use social sign-in, offering this option gives you a valuable opportunity for marketers to interact with customers and prospects on their terms. Don't miss this chance to integrate social into your communication mix — and gather valuable data in the process.

4
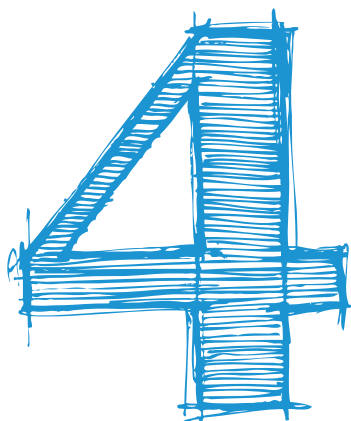
Content Creativity:
Design, Personality and Copy

Your email content is the public face of your email marketing program and the most important element in building engagement with your readers.

Everything else I write about in this ebook is behind the scenes, which your readers never see. Your ultimate success can rise or fall on what your recipients view on their computer, tablet or smartphone screens.

Do your customers care that you have an admirable acquisition and onboarding process, a precise database-marketing program and the best email service provider in the business?

Nope. A world-class infrastructure isn't enough. You must also send out engaging messages that mix sharp writing with attractive images in an easy-to-read layout. Good content also expresses your brand or company personality in ways other than simply "Buy, buy, buy!"

Creative content is everything your reader sees in your message:

- *Text (headlines, call to action, product descriptions, article introductions, footer, etc.)*
- *Images (product hero shots, logos, icons, etc.)*
- *How you organize each element into a message layout*
- *Background colors and other graphical elements*

Today, online selling is evolving into the higher concept of "content marketing" among savvy digital marketers. They recognize that content which seeks to explain, educate, reassure or converse with customers drives more action than one-note, hard-sell messages.

Give Your Email Messages Their Own Personality

Q: **How can I make my emails stand out more to my readers?**

A: Think about the emails that you choose to receive. Which newsletters and promotional emails do you anticipate, open as soon as they arrive and value the most? I'll bet that most of them have distinctive personalities.

This is often a tough challenge for promotional emails or corporate newsletters, where many people (the CEO, your boss, the legal department, the sales manager, etc.) might have their hands in the mix.

Still, even the most conservative institutional publications can cultivate a personality.

Personality is a mix of many things: your positioning, value proposition, company's culture, newsletter or email goals and a reflection of who you understand your readers and customers to be.

You express it through the offers you send or the news you report, your design and choice of images but especially through your writing style, tone and voice.

Personality, however, is first and foremost embodied and conveyed through people. Think of the financial newsletters from The Motley Fool, with its tagline "To Educate, Amuse & Enrich."

The irreverent personalities of the two co-founders are expressed via the company logo, tagline and humorous-yet-educational approach to stock investing tips.

Also consider The Magill Report by direct-marketing publishing veteran Ken Magill. Although guest writers appear now and then, the articles that Magill writes reverberate with his outsize personality.

How to Add a Little Personality

You can give your emails a personal voice, using an editor or executive from your company or even a fictitious character or amalgamation. Remember that email is a conversation between you and your subscribers. Conversations are more interesting than lectures.

So, cultivate a personal, reader-oriented approach (use "you" far more often than "I" or "we") and a tone that reflects natural speech. Read your copy out loud as you proof it. The ear often picks up awkward constructions better than the eye.

Many times the newsletter personality comes from the person most closely associated with creating the copy or the email's look and feel. It can be a great asset for your program, but what happens when the "human personality" leaves the company?

It's easier to decide on your email personality and envision it as a persona with defined characteristics that your marketing team can use as a yardstick when creating copy.

Whether your email personality comes from a live human being or a digital persona, the personality should be consistent with the company's personality as you understand it or as the company wants it to be.

When your human personality moves on, the successor probably will inject a different individual personality into the emails, but the core tone and style can still move seamlessly from one human to the next.

Add Your Customers' Voices to Your Emails

Q: **We have some great customer stories to tell. Can we incorporate these stories into our newsletters?**

A: Adding your customers' voices to your email messages can be the best way to "humanize" your content. Emails that let your customers tell your story actually help you create a community of buyers or users, not just sell products.

Today's consumers are increasingly basing their purchase decisions more on the opinions of their fellow consumers than on the adjectives in your marketing messages.

Social networks are a natural gathering place for user content such as comments and testimonials. Use this "voice of the consumer" in your email messages, both to add the kind of humanization and personality that makes your messages more appealing and to help consumers talk to each other on your terms.

Your email platform then becomes a hotbed of "sideways marketing" in which your subscribers and customers help sell, educate and promote your products and services to each other in your messages.

How to Track Down User-Generated Content for Your Emails

Content that your customers, shoppers and fans produce about your company, brands or products comes in four basic categories:

- **Testimonials:** Unsolicited and solicited qualitative statements about your products/services and customer experience. Example: Incorporating a customer testimonial in an email promoting benefits of upgrading to a higher service or membership level.
- **Reviews:** These are qualitative reviews from buyers/users that can serve either as brief excerpts or full testimonials with names. Example: Including a customer review of a featured product in a remarketing email.
- **Comments:** Postings in social networks, on blogs (both posts and comments on posts), via email contacts, comments to call-center personnel or other sources. Example: "Quote of the Week" highlighting one comment a week from a subscriber.
- **Media/Original Content:** This includes photos your customers took on recent trips, fun or instructive videos about a product or experience with your company, and other "original" content. Examples: Recipes or cooking tips that incorporate your ingredients or products; a subscriber's travel photo and story.

Other Sources You Probably Overlook

Everywhere you look you'll find content your users have produced about your company, products, services and customer experience, including some places you might not have considered:

- **Your call center:** It's not just for solving problems. Your support people can solicit and pass along comments and testimonials from satisfied customers.
- **Inbound email messages:** This is another reason why it's so important to monitor your email reply-to and related customer-contact addresses.

• **Product review pages:** Solicit these through post-purchase emails and your website review functionality or third-party software.

• **Social networks/communities:** These include posts on your Facebook wall, in your Twitter stream, in location-based communities (Foursquare/Yelp), in private discussion groups or communities and similar sources.

• **Blogs:** Your own posts on your corporate blog can generate comments you can repurpose for email, as well as customer or third-party blog posts or comments.

• **Media sites:** YouTube (videos), Flickr (photos) and SlideShare (presentations) are just a few examples.

• **Solicited comments:** These include post-purchase customer surveys, in-store or website comment forms and other feedback sources.

Testimonials Drive Success for King Arthur Flour

These techniques are producing measurable results for Silverpop client King Arthur Flour, which manufactures premium baking products.

The company uses the Web, email and social networks to connect with and capitalize on its community of bakers, bloggers and other enthusiasts and to promote its products and resources.

King Arthur used A/B testing to discover that emails containing testimonials generated a significant increase in engagement and revenue over messages without testimonials.

The company ran an email A/B test in which one version of the email featured star ratings and testimonials for the main products, while the other did not.

Results: Approximately a 30 percent lift in all key metrics — orders, sales and orders per unique opens. Also, fewer unsubscribes and spam complaints and a slight increase in average order value. Testimonials are now a key part of their email program.

A final note: Ask your customers or users for permission to use comments or original content. Don't rely on vague privacy-policy or user-agreement language to cover you on this. Also, check with your legal counsel and review usage policies of third-party sites.

Preview Panes: Treat Them Like Subject Lines

Q: Do I still need to worry about preview panes now that email clients are more sophisticated or people are reading them on mobiles?

A: Yes, because you can't guarantee that every phone, even smartphones, will render your email the way you intended, especially because you don't know whether a user is seeing your email in all its HTML glory or even how much of it is visible.

Preview panes typically give you only a few inches of space to state your case. Add to that the double whammy of images that are disabled by default, and you end up with a big blank space if you rely heavily on large images to relay your message.

The preview pane is prime real estate – the Boardwalk of email messages for those of us who grew up playing Monopoly. Optimize that "hot zone," the top few inches and left corner of your message, and you greatly increase your chances of conversion with recipients.

But, when I look at the emails in my inbox every day, the vast majority of marketers don't treat the top any differently from the bottom of their messages.

On second thought, they do. In many cases the bottoms are better optimized. Putting aside those few messages with well-optimized preview panes, most fall into two other camps:

1. Image Intensive: The top of the email is taken up by one or more images – often logos or mastheads. Which means when I scan my over-full inbox, I see either nothing or red Xs.

2. Instruction Overkill: You know what I'm talking about. What probably started out as a good idea a few years ago has gotten out of control.

Look at the top of many emails today and you'll see variations of the "View Web version" and "Add to address book" instructions. Some now also include unsubscribe directions, how you got added to the list and other administrative information.

Countering the Arguments

I expect my argument will raise at least three major disagreements or counterpoints:

- Not enough email users read email in the preview pane to significantly affect engagement.
- Adoption rates for both preview panes and disabled images are much lower in the consumer market, where Outlook, which pioneered the default preview pane, is not
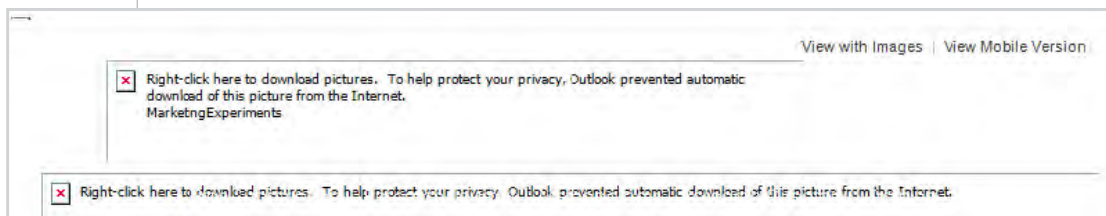
the standard email client that it is in the business market.

- Most mobile devices don't even have preview panes, so users have to open the messages anyway.

Today, nearly all Web-based or desktop email clients offer a preview pane. Research studies disagree over how many use it – the numbers range from half to 75 percent.

Some smartphones, like the iPhone, open your email in a full-screen format, although it's considerably reduced from the view you see on a desktop/laptop. The Android email experience varies, depending on the user's settings and the phone's capabilities.

Depending on how the email is coded, only a portion might be visible, which creates a virtual preview pane.

The era of "pretty" email is over. Function is the key, and the preview pane is now where the battle for your recipients' attention is taking place.

Your Email Can Say More than "Buy This!"

Q: I hear a lot about humanizing my email content. What is it, and why should I bother?

A: Remember that old advertising maxim, "Sell the sizzle, not the steak"? Good. Now, forget it. Today's digital marketing world calls for a new set of content rules.

When you want to sell someone that steak today, you have to stand out from all the other sizzle-sellers in your customer's inbox by surrounding your message with content like this:

- An anecdote from the rancher explaining why that steak is the best he can get for the price.
- A sommelier's list of wines to drink with it.
- A video of your head chef showing how to grill it properly.
- Positive ratings or comments from other diners who chose that steak.

This strategy asks you to add a face and a voice to your messages with a message that says more than "buy, buy, buy."

What's So Different?

Content humanization isn't just a new buzzword. It's a new way of doing content marketing. It brings in your corporate personality and style and makes both your employees and customers visible in your messages as it's appropriate for your content and business goals.

Humanizing your content means that you lose your "corporate speak" and talk as an individual from the company back out to people. It's being accepted and driven by social media, and even becoming a customer expectation, where your company is being represented by someone on Twitter or Facebook with a picture, name or specific voice.

A Moosejaw Mountaineering marketing rep characterized her company's approach this way: "We try to make our marketing reflect our core values, to be notable, to be engaged with our customers, to make them love us and to only do cool stuff … We try to include some kind of human element and some kind of 'madness' element in everything we do, because our slogan is 'Love the Madness.' … [Talking to customers] and having a real conversation with them is a first step in the humanization of our messages."

4 Strategies to Add the Human Touch to Your Emails

Q: **If putting a human voice on our email is so great, why don't I see everybody doing it?**

A: Adding a human element to your marketing content sounds so easy, but it can disrupt the status quo of a typical marketing program.

These are some of the challenges you might have to overcome to be successful:

1. You need organizational change. Marketing might still own the process, but the faces and voices that can populate your messages might come from all over your organization.

Consider the emails that Air New Zealand sends to passengers who have booked flights. Each email features a picture and welcoming message from the flight crew scheduled for the passenger's flight.

Airline reps say passengers actually carry a print copy of that message to show the crew.

2. You need more content. Well, actually, you don't. You just need a different kind of content, and you probably have much more content than you realize. You just don't know where to find it. Your other marketing content, like blog or Twitter/Facebook posts, can be a rich vein, along with your customer support staff, line employees, etc.

3. You need new ways to measure the impact. This is what makes the standard, undifferentiated "20 percent off and free shipping" offer so appealing. Emails like this have concrete ways to measure success such as clicks, conversions and unsubscribes.

Because this new marketing-message style can have a different goal, you need to use different metrics and a longer timetable.

Here, you're looking for ways to measure an overall lift for your brand, through metrics such as an increase in sharing via forwards or postings on Twitter and Facebook; an increase in email subscriptions; a boost in Twitter followers and Facebook fans; or a decrease in list churn.

4. You just aren't that funny. Humor is an attention-getting way to add a humanizing voice to your messages, but that's only one tactic. Humanizing content is all about being memorable and engaging.

Your choice of voice will be the logical extension of your company or brand image or presence in the marketplace. What works for one company likely won't fit well with yours.

Besides your messages, your customers are also receiving email from four or five other companies that sell widgets just like yours for about the same price. Which messages will they remember and anticipate?

Content humanization just reflects another age-old marketing maxim: "People buy from other people." That's what you accomplish when you add faces and voices to your messages, whether they're your employees or your customers.

The Subject Line: Yes, Size Matters (Sort Of)

Q: **How long should my subject line be?**

A: The conventional wisdom is that the shorter the subject line the better, because you have less risk of getting cut off in the subject-line field.

That's changing somewhat, as some research has shown longer subject lines can convert better and as more people read email on smartphones, whose email programs often display the entire subject line.

Because every subscriber group is different, you should test long vs. short subject line to see which works best for you. No matter how you go, however, be sure to front the key content in your subject line instead of delivering the message in the last couple of words.

Less effective: "Happy Birthday"

More effective: "Happy Birthday, Loren! Enjoy 15 percent off all month – offer code inside"

Should you repeat your company, brand or newsletter name in the subject line if you already have it in your from line? At one time, the conventional wisdom encouraged this. Today, it's more important that the subject and "From" lines complement and amplify each other.

Test several combinations to see which performs best for your email messages.

Bob Evans Farms	Inbox	Happy Birthday from Bob Evans!
FJL and Giorgio's Italian	Inbox	Happy Birthday From FJL and Giorgio's Italian!
Bahamas Ministry of Tour.	Inbox	Happy Birthday Loren
Betty Crocker	Inbox	A Birthday Wish from Betty Crocker
Olympus	Inbox	Happy Birthday, Loren, from Olympus

Is Your Email Message Template Ready for a Web 3.0 World?

Q: **I know email has changed a lot in recent years, but I haven't paid much attention to my templates. How should I update them to keep up with the changes?**

A: As email marketers, we focus a lot of our efforts on content and images that are designed to do one main thing: get recipients to convert.

That built business in a one-way, Web 1.0 world where digital communications were all about the message you wanted to deliver and the actions you wanted recipients to take: mainly, "buy this," "download that" or "sign up."

But the Web has evolved to Version 2.0 via social media like blogs and social networks, where interactivity rules. People want and deserve not just to consume content but also to create it or serve their own purposes with it.

Do your email messages give subscribers the option to do something else besides what you want? Equally important, do they make it possible for subscribers to act, whether it's to convert or do something else, like seek information or solve a problem?

If you haven't updated your message template to build in social connections and usability, you're becoming as obsolete as Internet Explorer 3.0.

The New Value Proposition Includes Social and Mobile

Email is now part of a new communications ecosystem, sharing time and attention with social media and mobile communications. In this new reality, your email must provide new value.

In email's early days, the value was getting messages directly from favorite or familiar brands in the inbox. The value served the company's needs, mainly the value proposition and call to action.

Today, that definition is too narrow. An important aspect of an email's role and value to recipients is how well the message helps subscribers do what they want to do.

This utility factors in message content, such as those that allow users to change email preferences, contact customer support, or check out a product or service other than the one(s) being promoted in the message.

Add High Value with Mobile-Friendly Design, Social Links and Usability

Adding links to your email messages makes them more useful to your recipients and thus more valuable and action-worthy.

Links to preference updates, customer support and contact information, FAQs and other administrative functions can collect a fair number of clicks and are important to the user, even if they aren't the central feature of your email message.

Mobile adds another set of requirements. Because viewing email is the No. 1 Internet activity on mobile, you need to be sure your message can be viewed and acted on easily in all screen environments, from the 1x2-inch screen of a basic feature phone to a 15.4-inch laptop and a 21-inch desktop.

The single-column email design is becoming a popular approach to make it easier for subscribers using mobile – especially older devices. Testing is essential, not just on the message content but its usability.

Following are a few links that have become crucial to add in this new email environment:

1. Share-with-your-network reminders.
2. Invitations to follow/fan your company on social networks.
3. A preheader that states the email value proposition, call to action or link to the landing page and might be the only copy visible on a mobile screen.
4. Invitation to review or rate purchases.

Examples of Socially Savvy Emails

Many marketers are putting Web 2.0 imperatives into practice. Here are four examples:

A: A computer retailer invites subscriber comments with an invitation to submit questions or comments in its administrative footer.

B. Along with its social-network links, a travel newsletter links to its blog, which gives readers another avenue to provide input.

C. A food manufacturer adds content to its share-to-Facebook link: "Share the recipes and coupons in this email with your friends on Facebook."

D. An entertainment vendor adds, "Where's My Order?" to its administrative footer to reassure or solve problems for buyers.

These and other links can help you take your email up a notch or two and make it more useful and valuable to your email subscribers.

Ready for a Do-Over?

Ask yourself these eight questions when deciding whether your email templates need an extreme makeover:

1. How does my email look when I read it on a smartphone? Can I act on it easily?
2. Are my emails socially savvy? Am I inviting readers to join me in my social networks, and do I make it easy for them to share my content in their networks?
3. Do my emails include local information (store locations, hours, events) where appropriate?
4. Do my emails give my readers other options besides acting on my main content?
5. Does my email template reflect my company's personality and image?
6. Does my email message convey the value proposition and key facts even if it's viewed in a preview pane with images blocked?
7. Can someone unsubscribe from my email, get answers to questions or navigate to my website without searching or scrolling endlessly?
8. Does my email layout and navigation reflect my subscribers' email-specific interests and needs?

Just one "no" answer should be enough to drive a template redesign, and not just to keep up with the other emailing Joneses. An obsolete or reader-unfriendly design could cost you reader engagement and drive up inactivity.

One tip: If you do decide it's time to overhaul your template, introduce your changes gradually so that readers can reorient themselves to your new layout.

Life is Hard; Make Your Email Easy for Your Subscribers

Q: How can I tell whether my email design needs an extreme makeover?

A: Email messages today deliver more value than their 20th-century counterparts through improved design and content, images, branding, and integration with websites and social networks.

However, all those gains can come at a price: overly complex messages that sacrifice utility and usability for the latest email fad.

The result is a message with so many distractions that subscribers can't easily do the things they want to do as well as what we want them to do, such as responding to promotional offers.

Maybe it's time to consider that old design adage "Less is more" and simplify or streamline messages so that they serve both our subscribers' and our own needs without sacrificing the value that drives email's utility and ROI.

Simplify Without Sacrifice

Rather than continually adding new functionality as it emerges, consider a redesign of your template from the ground up. The list of questions below can give you some places to start:

1. Does your design replicate your Web navigation or reflect email needs?

Web navigation is designed to direct people who have already arrived on your site. Email navigation, on the other hand, while generally similar, might incorporate fewer or different links whose purpose is to drive people to your site.

Perhaps you use a primary and secondary navigation format or focus navigation just on higher-level site categories. Do you use the same navigation approach in all of your emails?

Transactional emails such as order confirmations probably should have completely different navigation links that are focused on the most common service and support questions.

If you're a B2B company, do you use the same navigation in your newsletter as you do your lead nurture or Webinar follow-up emails? Or does each reflect a recipient's likely needs and content focus?

For retailers during this holiday time of the year: Do you add secondary navigation for shipping deadlines and return policies?

2. Does your email design use a hierarchy that gives priority to content and functionality important both to your subscribers and to your marketing goals?

Offering multiple promotions in a single message can be good strategy, because if someone isn't interested in your primary offer, a secondary offer might catch his eye.

However, when these offers compete equally for the reader's attention, your highest converting offer or product might get lost in the fray. Your design should provide a clear movement through the message, highlighting your most important content.

3. Is your preheader out of control?

The preheader area of emails (content typically located above the masthead, navigation or brand logo) has evolved rapidly from its incarnation as a single link to aid viewing an email when images are blocked.

Today, many preheaders bundle three or more links or copy in this area, including:

- View Web version
- Primary call to action or repeat of subject line
- Add to address book
- View mobile version
- Share this email
- Follow us on Facebook and Twitter
- Unsubscribe

Where does this madness end? In another two years, will we see a few more administrative links and content at the top of emails? Some of this might make sense, but perhaps there is a better location for it.

I don't have the definitive answer, but will toss out a couple of ideas:

- Incorporate "view Web and mobile versions" links in a secondary navigation.
- Include "add to address book" in your welcome emails, but then move them to a secondary location in the email template.
- Move social links into the email body near the content mostly likely to drive sharing.

4. Is it time to rethink your administrative footer?

Down in the administrative footer, the "Unsubscribe" link often is next to the "Update Preferences" link and in the same font size. Why do you give these links equal weight?

Presumably, you'd prefer subscribers to change preferences rather than unsubscribe. So, consider redesigning the footer to direct people to stay subscribed, while still making the unsubscribe link easy to find.

While you obviously know what options are available in your preference center, your subscribers don't. Consider incorporating preference links for each of the core options you provide (update email address, change frequency, other newsletters, change interests, etc.).

Help us improve our newsletter. How would you rate the usefulness of this email?

Not useful 1 2 3 4 5 Very useful

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New Approaches to Holiday Email Marketing

Q: **What can I do to switch up my emails for holiday shopping?**

A: There are many ways to tweak your holiday emails to provide value and increase engagement. Here are three quick tips to get you started:

QUICK TIP 1: Include Shipping Options and Deadlines in Holiday Retail Emails

Shipping and shipping deadlines are a mixed blessing for many marketers. Free-shipping offers are incredibly convenient for the harried consumer. But procrastinators who wait too long will miss the delivery-date cutoff or miss the less expensive shipping deadlines.

Silverpop client King Arthur Flour uses a simple content tactic for helping customers navigate shipping deadlines that I love. It creates a table (below) of the different shipping options, deadlines and geographic availabilities.

Shipping deadlines for GUARANTEED Christmas delivery

STANDARD GROUND SHIPPING	LOWER 48 STATES*
Sorry, no longer available.	AZ • CA • CO • ID • MT • NM • NV • OR • UT • WA • WY
Sorry, no longer available.	KS • NE • ND • OK • SD • TX
Friday, Dec. 17 • 12 noon EST	AL • AR • FL • IA • LA • MN • MO • MS
Saturday, Dec. 18 • 12 noon EST	GA • IN • IL • KY • MI • NC • OH • SC • TN • VA • WI • WV
Sunday, Dec. 19 • 12 noon EST	DC • DE • MD • PA
Monday, Dec. 20 • 12 noon EST	CT • MA • ME • NH • NJ • NY • RI • VT

2-DAY DELIVERY • Wednesday, Dec. 22 • noon EST • 48 states only
OVERNIGHT DELIVERY • Thursday, Dec. 23 • noon EST • 48 states only
* **ALASKA and HAWAII** • Sorry, guaranteed Christmas delivery no longer available.

The chart is incorporated in the same footer area of every holiday email. As you might gather from the above example, the chart is then updated throughout the season to convey when specific shipping options are no longer available.

This is a creative and simple approach to help motivate subscribers to place their orders before deadlines pass.

QUICK TIP 2: Make Your Emails Shareable and Shareworthy

Holiday emails have natural sharing opportunities built into them, such as Black Friday promotions and nifty gift items at unbeatable prices. Too bad lots of email marketers have forgotten the keys to making their content both shareable and shareworthy.

Here are a few quick tips to increase the likelihood that your message will be shared — even without that piano-playing cat video — this holiday season:

1. Make your emails easy to share. It doesn't matter how great your content is. If you don't make it simple to share, it stands little chance of going viral. Here are a couple of tactics to make your emails more shareable:

- Limit the social networks to the one or two most popular and relevant to your subscribers.
- Ask your readers outright to share the content and tell them why/what's in it for them.
- Be descriptive with copy on the share icons/buttons: "Share on Facebook"/"Share on Twitter/"Forward to Friends."
- Make these buttons easy to find by placing them right in the copy block with the offer you want to promote.
- Use "bulletproof buttons" — HTML links behind the images so that a recipient can still click even when images are blocked.
- Test and analyze to learn which networks and approaches produce the most shares.

- In general, make sure your email is mobile- and touch- friendly so that even "fat fingers" can click the button accurately and easily.

Last holiday season, King Arthur Flour used email to promote sharing of holiday baked items on its Facebook page.

2. Provide "shareworthy" content. People share content to help others and to be seen as a knowledgeable information source, among other reasons. The holiday season presents a number of obvious sharing themes and opportunities, including:

- Black Friday promotions: Encourage subscribers to share details of your Black Friday promotion.
- Coupons: If you want your coupons to go viral, encourage subscribers to share the savings among their friends.
- In-store events and promotions: Photos with Santa or "meet the author" with a book signing.
- "Share with a friend" offers: Past campaigns or shopping/browse behavior on your site can tell you which offers shoppers are most likely to share.

- Wish lists: Promote several desirable products, perhaps even using dynamic copy blocks that incorporate a customer's past buying habits. Invite the subscriber to forward or post the email as hints for a husband/wife, parent, child, sibling or friend.
- "Shop with me" offers: These are traffic builders for retailers with physical locations to encourage shoppers to bring friends to their local stores or to send out-of-town friends to their own nearby stores.

3. Create stand-alone emails. Add a new email, or replace one of your regular broadcast messages with one designed specifically to be shared.

Instead of retrofitting your existing message template, create a new message design with simple navigation that focuses exclusively on a single idea and uses copy to promote sharing via email, "forward to a friend" and posting on social networks.

QUICK TIP 3: Do the Math in Discount Promotions

Take a look at this Amazon confirmation email. It deploys a useful email practice, one that I've been preaching for years to retail and other e-commerce email marketers.

This email specifies all variations of pricing and discounts on the product: the original price, the percentage discount and the total money saved. What's so great about that? You make it easier for your shoppers to decide to buy from you.

This underscores a key finding in a survey of moms and their email habits and preferences, which I conducted a several years ago. Moms, especially those with young children, have many demands on their time and don't want to pull out a calculator to figure out whether a 20 percent discount will save more money than a $10 price cut.

Other customers might have different motivations. Some will be attracted to a sizable percentage off, while others will act by seeing how much money they save or contrasting the original and discounted prices.

Doing the math for your customers is a start, but "make it easy" should be your email mantra every time you send an email. Every aspect of your email message – from layout to navigation and content – should help your customers decide to buy or act.

The "From" Name: One of the Success Drivers of Your Email Program

Q: **Should we use our company brand or a person's name as the sender name?**

A: The subject line gets a lot of attention, but I believe the "From" line is just as important, if at times even more so.

The "From," or sender, name, is the inbox field that tells your recipient who sent the messages. Some marketers use a company name, others a brand, publication or person's name, while others simply let the email address show.

It seems like a minor item, especially because it occupies less space and prominence than the subject line. However, the "From" name is critical, because most recipients look at the "From" name first and will discard or mark as spam messages from senders they don't recognize.

What's More Important: "From" Name or Subject Line?

This is hard to quantify, because they work together to affect trust and spur opens. I'm not a big fan of testing "From" names, although there are times when it might make sense.

As with the slogan "Volvo = safe," I usually recommend that people go with the obvious choice. That should be the one that recipients would expect to see. Then, stick with it to establish instant recognition and trust.

But even something as simple as a "From" name is more complicated than it looks and deserves consideration in selection and use.

The "From" name is a small field, but it does a lot of heavy lifting in the inbox:

- Forms the foundation of your recipients' trust and email relationship with you
- Is the email brand they use to recognize whether to ignore, delete or open your messages
- Stands out in the sea of subject-line sameness
- Helps readers find your message if it gets routed to the junk folder
- Differentiates individual message streams such as promotional versus transactional
- Is what the recipient uses to sort or search messages
- Embodies your ability to deliver on the recipient's expectation of value

The "From" name and subject line clearly go hand in hand. Anybody can write a catchy subject line, but a vague "From" name can doom the email to be deleted unopened or to provoke a spam complaint.

When that happens, you don't pass "Go" — and you don't collect clicks or conversions.

Why the "From" Name Matters More Now

Several changes in the email environment have made the "From" name more important:

- Attention spans and time spent on email are shrinking. People haven't lost interest in email; they're simply spending less time on irrelevant email.
- Consumer inboxes are getting flooded with commercial messages — many bearing repetitive or indistinguishable subject lines — as well as transactional messages and social-network notifications. Add to that the usual frequency ramping-up at the holidays, and the noise level is tremendous.

- Some inboxes on mobile devices cut off the subject line after only eight to 10 characters, or about 35 characters on iPads.
- Many email recipients use mobile devices to triage their inboxes and then read what they've saved later on their laptop or desktop computer.
- ISPs increasingly factor in relevance to their junk filtering algorithms and are adding prioritization features or enabling users to sort and view email according to whether the sender is a contact or connection.

When "From" Names Go Bad

The worst mistake marketers make with the "From" line is not to specify a friendly "From" name at all. Instead, they'll use a no-value "From" address such as "edeals@ bigbrand.com."

This provides poor branding, is harder to recognize and therefore trust, and looks like spam in an inbox full of well-branded "From" names.

Check your junk folder and you'll see what I'm talking about.

Although almost any email address is bad as a "From" name, the most heinous of these is the "no-reply@XYZ.com" address. Brrrrr! Almost any "From" name is better than "no-reply."

However …

When a sender does specify a "From" name, my biggest pet peeve is using a person's name, or several different individual names. Unless that person is your brand, it might be a mistake.

Every day I receive emails from some variation of "Mary Smith." I have no idea who "Mary Smith" is or what company she is with. Now I know many companies are claiming to have success with this approach, but many that do

also include the company brand name along with the individual name.

It's even worse if the company or brand name is so widely known that having a stranger's name attached to it makes it looks suspicious. Think of all those pitches in your junk folder for Viagra, computer software and Rolexes.

Even if you can show you have built up some brand equity or recognition by using a person's name, what happens when that person leaves?

General Mills doesn't have this problem with Betty Crocker, but your email program will suffer if you're changing your "From" name every time your "Mary Smith" leaves the company.

Why do companies do this?

- They don't know any better.
- They believe the urban legend that says that ISPs filter emails that come from companies but not individuals. This is perhaps the most illogical reasoning ever. Check your inboxes, folks.
- They believe some unknown person's name will stand out in a sea of popular brand names. Yes, it might stand out — but possibly as a spam indicator.
- "We've always done it this way. We aren't going to change now." This may or may not make sense, depending on how you handle a transition to "Brand X" from "Mary Smith."

Don't Confuse the "From" Name with the Signature

If you choose a personal name over an institutional identifier as a way to get your email noticed, you can end up just confusing the recipient. This happens when you change your "From" name to reflect a one-time or occasional change in message content.

I see this on messages where the content appears to be written by an individual: a message from the company president, brand manager or publication editor; an invitation to attend a live event; or other mass content written to look like a one-to-one message.

Resist the temptation to switch out a perfectly good "From" name, such as the company, brand or publication name, for the name of a person the recipient probably doesn't know.

Keeping the same institutional "From" name builds trust and recognition. Don't change it as a gimmick or attention-getter.

Do, however, "personalize" the actual content within the email, written in a letter style and "signed" by the appropriate individual from your company. You can even incorporate a scanned image of the person's signature to give it a more personal feel.

When Does "Mary Smith" Work as the "From" Name?

In two situations, using a person's name in the "From" line does make sense:

- The person's name is your brand or is so recognizable, especially in your business domain, that it actually makes sense (e.g. Guy Kawasaki, Martha Stewart, Seth Godin).
- You're a B2B company deploying lead-nurture emails, and the prospect has already had direct contact from a specific sales rep. Although ensuing emails might be automated, adding the sales rep's name to the "From" line works because of the direct relationship the prospect has now.

Other Do's and Don'ts of "From" Name Usage

- Do pick the most logical, recognized brand that would make sense to subscribers and that they would most likely expect to see in their inboxes.
- Do use different "From" names to differentiate among newsletter brands or email streams. However, incorporate a common style, such as the brand or company name, to promote continuity. For example, Delta Air Lines uses multiple "From" names, each of which clearly signals a different kind of message stream:
  - "Delta Air Lines" is the "From" name on promotional messages and frequent flyer account status notices.
  - "Delta Messenger" is the "From" name on flight-related triggered messages, such as check-in reminders.
- Don't change "From" names repeatedly on the same publication. Once you choose a name, stick with it.
- Do keep the "From" name as short as possible, while still conveying your brand correctly.
- Do test a few "From" names (over a few sends to increase confidence in the results) if you're starting a new email program or if you're planning to change your "From" name and are unsure of the best name.

Optimizing Email for Mobile: Trends and Expert Advice

Q: **How can I make my email messages look good on mobile screens?**

A: There are two equally important aspects of optimizing the mobile experience for your customers, which I'll tackle in separate sections:

- **Part 1:** Prepare for a mobile subscriber base
- **Part 2:** Design for a mobile-first email experience?

Part 1: Prepare for a Mobile Subscriber Base

Most "mocial" (mobile/social/local) email conversations have been about the impact of social media and networks. Participants range from the misguided, who suggest that social media would kill email, to the optimists, who believe that the two channels actually can support each other and make each other more relevant.

Social networks and media have had little serious impact on email marketing. The mobile aspect of the mocial trifecta, however, looks like it will have a monumental impact on our beloved channel.

9 Trends Driving Mobile's Impact on Email Marketing

1. Smartphone adoption: According to Nielsen research, 49.6 percent of the U.S. adult population now own smartphones, up from 36 percent a year earlier. This explosive growth is the driving force behind mobile's impact on email.

2. PC/Laptop sales: Forrester says sales of tablets (23 percent) will actually outpace desktop PCs (18 percent) and netbook/mini laptops (17 percent) by 2015 but trail laptops/notebooks (43 percent). Further, smartphones outsold PCs for the first time in Q4 2010, according to IDC.

3. Tablet sales: Gartner predicted in April 2012 that 119 million tablets would be sold in 2012 and 369 million by 2016.

4. Tablet content activities: A July 2011 study by IDG Global Solutions pegs reading emails (84 percent) as the second-highest activity on tablets after Web browsing (93 percent).

5. Platform email access: According to a June 2012 report from Litmus, mobile email opens (36 percent) passed desktop (33 percent) and Webmail (31 percent) in April. The number of mobile opens marked an 80 percent increase over the previous 6 months.

A recent Return Path report shows lower but similar numbers: Email readership on mobile devices accounted for 30 percent of all opens, up from 10 percent a few years ago.

6. Day of week usage: The Return Path study revealed a big dip in desktop email client usage over the weekend, with a corresponding rise in mobile and webmail use.

7. Specific email client opens: The Litmus study shows email opens doubled or more in the last year on iOS (10 percent to 20 percent), Android (2 percent to 7 percent) and iPad (3 percent to 8 percent) but plummeted 51 percent on Outlook (from 37 percent to 18 percent).

8. Touchscreens: An August 2011 report from ABI Research suggests that 97 percent of all smartphones will feature touchscreens by 2016, compared to 7 percent of touchscreen-equipped smartphones in 2006.

9. Multiple device opens: Of all this data, perhaps the most surprising comes from Litmus. It found that just 3.3 percent of users have viewed a single email on both a mobile device and either a desktop OR a webmail email client.

Not surprisingly, though, someone who opened email on a mobile device at least once in the past will do so again about 45 percent of the time.

Some of these statistics might vary widely from those for your specific subscriber base. You might even question their validity. The important thing to focus on is simply the general and rapid upward adoption of mobile usage.

Put Statistics into Action

Here's what these statistics mean to you:

- No matter what your subscribers' demographics are, more than half of them either own a smartphone or tablet or likely will by the end of 2013.
- Sometime in 2013 one-third to one-half of your subscribers will view your email on a mobile device often or almost exclusively.
- The finger is the new mouse. When viewed on a mobile device, nearly all interactions will be touch-based.

Now, what are the key implications for email marketers?

- It is time to consider taking a "mobile first" design strategy.
- Assume you have only one shot at persuading your subscribers to click on your CTA because so few view the same email on different devices.
- Ensure a consistent, simple and mobile-friendly experience at the destination, whatever device your subscriber takes to get there.

- Links and calls to action must work easily for the finger.
- Copy and layout must reflect mobile context. Your users are on the go and short of time.
- Add mobile to your testing strategy.

Part 2: Design for a Mobile-First Email Experience

Silverpop has tapped the know-how of four mobile email-marketing optimization experts for advice on optimizing emails for mobile devices and gathered their top tips, in their own words, for this section.

1. Justine Jordan, Litmus

Content and usability play equally important roles in creating mobile-friendly email:

Streamline content.
Screen real estate on a mobile device is rare and valuable, and mobile users are immersed in a constant stream of communications from work, life and family.

When creating (or modifying) content for a mobile audience, less can be more. Consider simplifying complex preheaders, navigation bars, social sharing and calls to action to keep your message clean and simple.

Use images carefully.
Image blocking, a problem in desktop email for years, affects mobile devices, too. iOS was the only mobile operating system to enable images automatically until Microsoft updated Windows Phone 7.

Other devices (Android, BlackBerry) prompt users to turn images on and sometimes ask them to confirm they want to download the additional content. Be sure your message is readable without images.

Create touch targets.
People navigate smartphones and tablets with their fingers and thumbs. Nothing is more frustrating than wanting to tap a link and hitting the one nearby instead.

As a result, bigger has never been better. Increase font sizes, line spacing, button sizes and white space to give your design breathing room and allow for fat-finger errors.

2. Len Shneyder, IBM (Blog)
To give readers the best experience, an email message has to be designed for cross-channel viewing. Below are three quick tips to consider:

- Keep your layout to 620 pixels or fewer to ensure your emails will be readable on more devices and in more email clients.
- Give your text and email contents some breathing room. Build your template with borders to keep text away from the template edge.
- Make the font size readable. If you have to squint to read it, so do your customers!

Note: Redesigning a traditional email often means shrinking a two-column format into one. Before you take that drastic step, test your content to see whether one column drives significantly more traffic than the other. Consider making that column your primary content in the narrower email format.

3. Alex Williams, Trendline Interactive
Readability, or scannability, is the key. You need to get the point of your message across quickly.

Evaluate the usefulness and importance of every link in your message. Rethink your "above the fold" content. Use that space to get readers engaged in your message.

Take design cues from the way apps and mobile websites look and function instead of duplicating your website's desktop experience in an email.

Use responsive email design for desktop, tablet and smartphone screen sizes. Through one single piece of HTML, you can alter the email for each screen size.

This requires a completely different approach from traditional email design (for example, design in Photoshop, then pass to your developer to code). Have your designer and developer work closely on a wireframe and prototype first before doing any visual design. I call this a "no compromise" approach.

4. Anna Yeaman, The Style Campaign
Don't disregard performance. Guy Podjarny tested 347 responsive sites on mediaqueri.es and found 86 percent were the same page weight on mobile as on the desktop. Media queries download both the desktop and mobile assets; so strive to keep your desktop creative lightweight.

One way to prevent bloat is to design your mobile draft first, then recycle those "lite" assets for the desktop. I've done this with clients that have 50 percent+ mobile usage, but I imagine I'll increasingly adopt this workflow. It curtails feature creep, lazy copy and the use of "display: none."

Although we can design for mobile first, the desktop is often the baseline when coding. Spotty desktop support for media queries makes progressive enhancement a difficult sell.

No one wants to serve a 320x2000px template to Outlook users, although I'm sure more "320 and up" emails will emerge as mobile usage grows.

Your Takeaway
These tips and commentaries present some key actions and strategies for a successful transition to a mobile-focused email program. It's not a comprehensive list, but you'll find the basics you need to get the wheels in motion and take your email program to a higher level.

5

Get Your Emails into the Inbox Where They Belong

The success of your email program rests on your ability to get your messages to the inbox. But the good news is that you have the tools to improve your deliverability yourself.

Consider the effects of poor deliverability:

- *It costs your company significant revenue from lost potential sales and from the money wasted on acquiring addresses and creating and sending messages that never reach their intended audiences.*

- *It stunts your email program's growth and could even choke it to near-death if you can't get messages delivered to your most important ISPs. Poor deliverability practices often raise red flags at the major ISPs and cause them to block or junk-folder your messages.*

Don't be tempted to paper over deliverability issues by pumping in thousands of fresh email addresses to make up for the ones that bounce or go inactive. You could make your deliverability problem worse and throw good money after bad.

Can you ever expect to achieve 100 percent inbox delivery? Probably not, but that shouldn't stop you from trying to increase your rate as much as possible.

A high delivery rate is within your grasp, though, because you control many of the factors that determine your deliverability.

The Unsubscribe Process:
Essential But Often Overlooked

Q: How can I reduce spam complaints from my subscribers?

A: There's no single thing you can do to reduce spam complaints, because people click the "report spam" button for many reasons. However, every time you spot and fix a spam-complaint trigger, you further reduce the chance that someone will click the button.

ISPs and Webmail providers use the percentage of spam complaints as a factor in blocking or bulk-foldering your messages. So, the fewer spam complaints your emails generate, the better your delivery rate should be.

Begin at the End

The unsubscribe process is one of the most overlooked aspects of an email marketing program. However, a good unsubscribe – a trustworthy and simple process that also offers alternatives to unsubbing – can help your brand's reputation, email deliverability and list churn.

Unsubscribing is better than clicking the spam button in the email interface, but Silverpop research from 2009 has found 3 of 10 subscribers still mistrust the unsubscribe link. That's one reason email recipients click the spam button; the "spam" button is the quickest, easiest and most trusted way to stop receiving emails.

Most marketers place the unsubscribe and preference-center links at the bottom of the email along with other administrative details, such as contact information, privacy-policy link, postal address, etc. For some, it's more convenient; others think that by tucking the link away in an unobtrusive place, subscribers won't click on it.

Radical Idea: Unsubscribe Link at the Top, Too

It sounds crazy, but there are times this might solve specific issues that drive spam complaints. Consider it if your email program suffers from the following problems:

1. High complaint rate at specific ISPs

If you see higher-than-average spam-complaint rates at a specific ISP, then consider adding the additional unsubscribe link at the top of emails sent to those subscribers.

2. Inactive subscribers

If you're trying to identify inactives and encourage them to re-engage by segmenting out your inactive subscribers, definitely put an additional unsubscribe link at the top of the emails sent to those subscribers.

3. Questionable acquisition sources

If you use aggressive opt-in practices such as co-registration, sweepstakes opt-ins or email append, consider putting an unsubscribe link near the top of your emails for those particularly problematic lists.

Unsubscribe Versus Spam Complaint

What drives a subscriber either to unsubscribe or click the spam button? Below are several situations:

Frequency/Cadence: 20 retail emails in 20 days, even from a well-known and trusted brand, is

(!) Your address (lmcdonald@silverpop.com) has been successfully unsubscribed.

probably too much for many subscribers, especially if they don't use personality and multiple styles of messages to differentiate them. Subscribers might get fed up and choose the spam button over the unsubscribe link.

Relevance: If that same company sends only three targeted and highly relevant emails monthly, but the consumer simply wants out, he might choose the unsubscribe over the spam button.

Trust: Is your brand highly trusted regardless of channel? If not, or its trustworthiness is questionable, you will likely have a tough time getting people to hit the unsubscribe link over the spam-complaint button.

List Composition: A B2B list typically sees fewer spam complaints because the report-spam button is an infrequent option. On the other hand, the spam button is more prevalent in some Web mail clients than others.

Unsubscribe Ease: How prominent is your unsubscribe link? Is it in tiny, gray font buried among a bunch of boilerplate legalese, or does it stand out easily in your email administrative footer?

Alternatives: Not everyone who clicks the unsubscribe link really wants to opt out. Some just want to update an email address but don't get any help in your email to do that. Here's where a preference center and descriptive copy ("Unsubscribe/Update Email Address/Manage Preferences") can help.

Time to Tackle Your List Churn

Q: **How can I keep more of my subscribers from turning over every month?**

A: Keeping subscribers active is one of the most challenging issues for email marketers today, given all the inbox competition for your subscribers' attention.

It sounds so simple, but it's so hard to do: Real list growth comes from reducing churn and, at the same time, retaining more existing subscribers.

Looking at List Churn

While every list is different, the typical rule of thumb is that about 30 percent of your list's email addresses will vanish each year from hard bounces, abandoned/changed email addresses, unsubscribes and spam complaints.

Just adding new addresses won't solve the problem, either. Consider these numbers:

Suppose you have a target to grow your list by 20 percent this year. But, if 30 percent of your list disappears every year, you actually need to grow it by 50 percent, which is your hurdle rate.

To grow a 100,000-record list to 120,000, you must net 50,000 new subscribers. To grow a 1-million-record list to 1.2 million, you need real growth of 500,000 subscribers respectively to reach your goal. Ouch.

Do you know and track your list churn/growth hurdle rate? If you don't, simply add up the monthly address churn, multiply by 12 and add your annual growth goal. Presto, you have your hurdle rate.

It gets tougher, too.

Up to now I have been describing measurable list churn. But a percentage of your list goes "silently" inactive each month. These people don't unsubscribe but basically check out and rarely, if ever, open or click on your emails anymore.

Although there are no firm numbers, it's estimated that 1 percent to 2 percent of your list may be going inactive each month. This adds another 10 percent to 25 percent to your annual list hurdle rate.

And Now, Lifetime Customer Value

Oh, sure, retention isn't as sexy as acquisition, but it takes a smaller bite out of your marketing budget and usually delivers a higher ROI.

While every company is different, a good rule of thumb is the Bain and Co. analysis that you spend about six to seven times more to acquire a new customer than to retain the ones you have.

Most companies use some form of a Lifetime Customer Value (LCV) calculation to understand the cost of acquiring a customer and the Net Present Value (NPV) of that customer's business during her useful economic life.

Simply put, LCV looks at what it costs you to acquire and market to a customer, their retention rate, average purchase amount and frequency, and other factors. This results in an average value of your customers over their lifetimes. You can download both a simple and complex LCV calculator from the Harvard Business School Toolkit.

Regardless of what formula or calculation method you use, you must know, even roughly, the value of your existing email customers to the organization.

From this starting point, you can better assess how much of your resources you should focus on acquiring new email addresses versus retaining and marketing to existing ones.

A Little Romance Can Plug
Your List-Churn Leaks

Q: **What are some strategies I can use to reduce attrition on my list?**

A: Think of the stages of the email relationship as like moving from dating to marriage or divorce. The choices you make along the way can entice or turn off your beloved – er, subscriber.

1. Dating

This is where a prospect makes a split-second decision, either to show up for your first date or get cold feet and walk on by. You can increase your chances of a positive outcome in that tiny window of time with these tactics:

- Make the opt-in process easy and trustworthy.
- Optimize your opt-in forms and process to reduce address loss during form completion and opt-in confirmation.
- Guide new subscribers how to add your email to their address books during the opt-in and welcome process.

2. Engagement

At this make-it-or-break-it stage, you win or lose subscribers according to how you handle the initial stage of the relationship.

Develop a welcome program, not just a single welcome email. A welcome program takes new subscribers through a multi-stage process of ramping them up so they are engaged and see value from the get-go.

If you handle this part well, you greatly increase your chances of a long-term marriage.

3. Marriage

Many factors go into making a successful email marriage, but at the core, you must create value for the subscriber and a mutually beneficial relationship.

Working to fulfill your subscribers' needs and occasionally delighting them will keep your relationship strong.

- Move away from batch-and-blast approaches and to lifecycle- and trigger-based programs.
- Make it easy for subscribers to update their preferences.
- Monitor subscriber activity and work to re-engage those who are checking out of the relationship.
- Delight your best and most active subscribers/ customers with rewards and exclusive offers and content. Let them know how special they are.

4. Divorce

It happens, but, aside from spam complaints, which are like restraining orders intended to keep you away, you can try to stay friends with your subscribers who want to say adios.

While some of your subscribers will simply want out of the relationship, most just want to change some aspect of it.

Make this easy for them and offer alternatives to unsubscribing, such as a different format or frequency, changing profile/interests and suggesting other lists you offer that suit their needs better. Even showing how they can change their address easily could help retain or reclaim the relationship.

Yes, acquiring fresh new subscribers is important. But, it's only one half of the list-building equation. Keeping the ones you have is equally or more important to continuing to generate the impressive ROI that makes email such a lucrative channel in your marketing program.

Your Next Challenge: Keeping Your Emails Visible in the "Prioritized" Inbox

Q: **How can I make sure my subscribers are actually seeing my emails in their inboxes, now that email services like Gmail are prioritizing messages?**

A: Inbox classification, which aims to highlight the messages recipients are mostly likely to value and open, is one of the strategies ISPs are using to make their email services more valuable and retain customers.

Gmail, Yahoo! and Hotmail are three of the services that sort email by "priority" (based on many factors, including recipient activity on previous emails from that sender), "contacts" (senders who are already in the recipient's address book) or "smart" filters.

Having generally minimized spam in the inbox, Gmail and other ISPs/Web email service providers are moving the battlefront to "gray" mail or "bacn."

Priority Inbox is designed to help Gmail users get control of their inboxes, spending less time on messages that aren't spam yet aren't meaningful or relevant for them at the moment.

Behind the Scenes: Gmail Priority Inbox

I'll look specifically at Priority Inbox, because it uses several rules to gauge how to classify a message.

Essentially, Gmail identifies which emails are more important to recipients, based on their previous actions (opens, clicks, replies) and recurring keywords across all their messages, and then groups these emails at the top of the inbox under an "Important" label.

Starred messages (Gmail's equivalent of flagging) appear in a second category. Further down, the "Everything Else" category contains all the other non-spam email in the inbox.

In addition to Gmail's algorithm, users can identify emails as "Important" or "Not Important" by hitting a "+" or "-" button in the Gmail navigation.

Users can also easily turn Priority Inbox on or off, but many users have overlooked the ability to simply toggle in the left navigation from the regular "Inbox" to "Priority Inbox." So at any time, a user can view emails by "last received."

Road-Testing Priority Inbox

After road-testing Priority Inbox for several years, I've come up with these insights:

Priority Inbox is simply inconsistent. I subscribe to several wine-related newsletters, and so

Read the "Important and unread" stuff

Star the stuff you need to come back to or keep handy

Scan "Everything else" when you have time (and mark a message important if it was missed!)
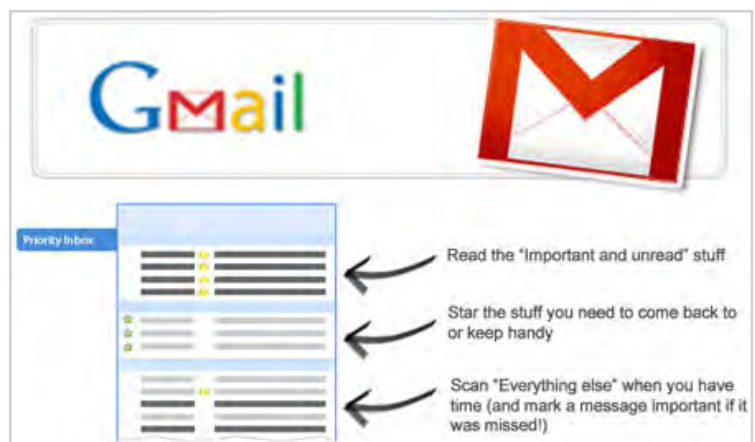
several of them are automatically showing up as "Important," apparently based on the "wine-related" content. But several are not, and my interaction, or lack of, seems to have little impact.

Even more frustrating, Gmail often doesn't recognize emails from the same sender. Many of the emails and newsletters I've marked "Important" continue to show up in "Everything Else."

These misidentified emails use the same "From" name and email address each time but are using different "reply-to" or "return-path" addresses.

Issues for the Email Marketer

Inbox classification clearly presents an additional challenge for email marketers. With Priority Inbox, the "Everything Else" category can be a virtual circular file because those who use the feature will become trained over time to look primarily in the "Important" category.

But let's be real here. No matter how or whether the email service classifies your messages, your recipients are already identifying your emails in their minds as consistently, occasionally or rarely of value.

What Can Email Marketers Do?

The inbox classification trend among ISPs factors in relevance when accepting, filtering or blocking email. While not new, getting more of your subscribers to interact with your messages regularly – not just once during the holidays or with those blow-out sales – is becoming paramount to success.

Your goal as an email marketer is to increase its value and recognition factor. That should draw more activity on your emails – more opens and clicks – which in turn will drive greater visibility in the inbox.

These strategies can help you reach those goals:

1. The "welcome" email is even more important. Whether you use a single welcome email, a series of messages or a comprehensive onboarding process, these emails will play an ever-more-critical role in setting expectations and conveying immediate value.

You might also want to consider some language for Gmail users on the subscription confirmation page and welcome email that promotes marking your message as "Important."

2. Slot new subscribers into a "newbie" track. Either as part of your welcome series or in addition to it, consider putting new subscribers into a special track that is designed to maximize engagement out of the gate.

3. Clarify your value proposition. What makes your emails valuable and different from competitors? Focus even harder on creating emails that can occupy a special spot in your subscriber's mind.

4. Use consistent branding. Stick with a recognizable "From" name and be consistent. Avoid using one brand for transactional or triggered emails and a radically different brand for your broadcast email program.

5. Establish and use personality. While not limited just to the use of humor, establish and create a personality with your emails that helps them "pop" in the user's inbox.

6. Get relevant. The biggest and most obvious action is simply to make your emails more relevant. Move your program more to one that's triggered by individual user behavior and data.

Your Email Deliverability FAQ

Q: What causes poor deliverability?

A: Your sender reputation is the No. 1 determinant of your deliverability. The two problems below can harm your sender reputation and cause more ISPs to block or bulk-folder your messages:

- Generating too many spam complaints from your recipients.

  Each click on a "Report Spam" button in an email client triggers a spam complaint, whether or not the clicker really mistook your permission email for spam.

  One spam complaint alone probably won't torpedo your program. However, crossing an ISP's complaint threshold (say, one to two for every 1,000 emails sent to it) can trigger either bulk-foldering or outright blocking.

- Too many bad addresses on your distribution list.

  Addresses go bad for many reasons. Users abandon them, or they type them in wrong. Or, they give you fake ones deliberately. When you email to that bad address, your message hard-bounces back to you as a permanent failure.

  These hard bounces can be as bad for your sender reputation as spam complaints. Hitting too many closed or nonexistent addresses too often makes you look like a spammer, or worse, to an ISP. Regular list hygiene can weed out these bad addresses.

Q: How do I avoid spam complaints?

A: People click the "Report Spam" button for many reasons. Some really do think your email is spam. Or, they find the "Report Spam" button before they see your unsubscribe link. Others don't trust your unsubscribe process. Reduce your exposure to spam complaints with the strategies listed below:

1. Email only with permission.

Your in-house mailing list, which you populate with email addresses of people who have opted in through channels you control such as your website or social networks, is your safest bet. Never buy an email list, and be wary of rental lists whose owners can't verify the permission level of every address on it.

2. Know the spammer's tactics and avoid them.

Your own inbox can show you what spammers do to get into your inbox. Review your messages to see how they stack up against true or suspected spam. Aggressive or vague language and excessive punctuation in the subject line or body copy looks suspect.

3. Choose a sender name that your recipients will trust and recognize instantly, and use it consistently.

Use the company or brand name most closely associated with your email program. Generally avoid using an employee's name or your sending email address, especially if it has "no-reply" or "do-not-reply" in it.

4. Manage expectations at opt-in, especially frequency, and stick to them when you email.

Let subscribers know at opt-in and in follow-up welcome emails what they'll be receiving and how often you will email. Don't send "unexpected" email, such as messages from your other brands or divisions without gaining additional permission.

Excessive frequency also drives many spam complaints. Stick to your promised frequency with your broadcast emails. If you want to make more frequent contact, consider adding highly targeted messages such as birthday or purchase-review emails that reach only a fragment of your database at a single time. (See Chapter 10 for more information.)

5. Make unsubscribing easy and trustworthy.

This is one of your best defenses against spam complaints. Post an unsubscribe link prominently and in the same location in each email message. Consider adding an unsubscribe link at the top of your email message if you're having a problem with spam complaints, and track clicks on it.

Q: What effect does HTML coding have on deliverability?

A: Spam filters will assess points against your email if they detect faulty or non-standard code, spammy content and a variety of other factors. If your message exceeds a specific point score (typically around four points), the filter will route your message to the junk folder, block it or delay delivery.

You can learn more about the type and variety of email message elements that many corporations, ISPs and spam filters evaluate at SpamAssassin.org.

Emails that are improperly coded or designed will render poorly (particularly when images are blocked) and make your messages look untrustworthy and spam-like, increasing the chance of a spam complaint or unsubscribe.

If you have access to email message-checking tools, use them to check your templates and each message before distribution. Alternative steps you can take include:

- Run messages through an HTML validator and spam content checker.
- Make sure your template and messages are W3C compliant.
- View messages on different platforms and Web browsers.
- View messages in various email clients and email provider interfaces such as those from AOL, Yahoo! Mail, Hotmail/LiveMail and Gmail.
- Check how messages render in preview panes and with images turned off.

You may find it necessary to redesign your message templates from the ground up. Consider programming the email by hand or using a "clean" HTML editor. Some of the more popular design programs will add "dirty" code to your emails that can cause rendering issues.

Other design tips:

- Design for the preview pane, putting important information such as calls to action and text navigation at the top of your emails.
- Don't over-rely on images – use HTML background colors, font colors/sizes and alt tags.
- Avoid single or multiple large images if possible.
- Be careful with tables and use fixed widths. Improperly coded tables will expand when images are blocked and turn your email into a visual disaster.
- Include an administration area that provides information and links for everything a subscriber needs to manage their relationship.
- Remove scripts and forms. Many ISPs and email clients will either remove scripts from your message, block them from working or they simply won't work correctly. For example, a commonly reported problem is forms in Hotmail not passing the data through to a website.
- Test each message in a rendering and message-checker tool before each distribution.

Q: Should I use a shared IP address for sending email, or is a dedicated IP better?

A: Many ESPs and companies might share a single IP address across multiple senders or divisions of the company. Because ISPs monitor mail streams by IP address, sharing IPs is generally not a good idea if you send large quantities of email messages.

When you share an IP address with other senders and they deploy a bad practice — intentionally or by accident — your messages will be filtered or blocked by an ISP along with theirs. Similarly, various block lists may add the shared IP to their blacklists.

Dedicated IPs cost more than shared IPs, but the additional costs ensure that you are in control of your sender reputation and are not affected by a "bad apple" client of your ESP.

However, you might want to use a shared IP address if your email volume is extremely low and/or very sporadic. This is because the ISPs now factor in the consistency of both volume and frequency of mailings from an IP. If they see inconsistency on an IP address, ISPs are likely to filter mail streams more aggressively.

Q: I just switched IP addresses. Will this solve my deliverability problems?

A: Not by itself. You must be careful when you begin to send email from your new IP address. Instead of just hitting "send," you should build up your reputation gradually on that IP address.

When the ISPs look at the mail stream coming from your new IP address, your previous sender reputation (good or bad) isn't associated with it. As a result, most ISPs now prefer that senders "build" their reputation gradually on a new IP address, typically over a period of three to four weeks.

While each ISP is different, a general rule of thumb is to start sending a few thousand messages a day and then double the amount every four to seven days. Once the ISP has monitored 50,000 to 100,000 or so emails over the period, you will have established your initial reputation.

At that point, you should be able to scale up to higher volumes.

During the ramp-up period, ISPs will be looking at several factors including:

- Number of concurrent connections attempted from one mail server
- Number of unknown users (hard bounces) attempted
- Number of old and inactive (disabled for 12 plus months) accounts being attempted
- Number of spam complaints from recipients

Q: How can the email delivery reports I receive during and after email sends help me with deliverability?

A: These reports can help you track your delivery rate into the inbox and pinpoint problems and positive or negative trends. Is your spam complaint rate rising, perhaps a sign of over-mailing? Did you have a spike in hard bounces — a result of someone uploading an old list?

Here are some delivery-related processes and metrics to monitor:

- Hard bounces
- Spam complaints
- Unsubscribes
- Blacklists you have been added to
- Inbox delivery rate by ISP

Where possible, examine these metrics by:

- **ISP or domain**
- **Types of emails** including welcome, confirmation, transactional, announcements/alerts, newsletters, etc.

- **Timing** including seasons, holidays, time of day or week
- **Email address source**
- **Opt-in incentives**
- **Content style and tone**
- **Frequency changes**
- **Permission level changes**

If you are having deliverability challenges, uncovering the specific reasons behind having high bounce, spam complaint and unsubscribe rates is critical to resolving your challenges.

Q: What's the best way to keep my email address list clean?

A: A "dirty" email list is guaranteed to cause delivery problems. That's why good list hygiene is a cornerstone of high delivery rates. A dirty list has addresses like these:

- Previously hard bounced
- Generated a spam complaint
- Unsubscribed but are still in the active database
- Old and have never been emailed
- Obtained without permission or have no relationship with your company
- Likely spam traps
- Have outdated domains
- Long-term inactive

Dirty mailing lists hurt your deliverability because ISPs will filter or block senders who mail repeatedly to "bad" addresses, either based on their own observations or via reports from real-time block lists (RBLs) who list names and IP addresses from senders they suspect of spamming.

Action Steps:

A: Remove all hard-bouncing email addresses immediately. These are permanent failure addresses that are invalid. Most ESPs will automatically move hard-bounced addresses into an "inactive" or suppressed list.

B. Remove addresses that generate spam complaints. Your ESP should have feedback loops set up with all of the major ISPs. Typically, all spam complaint addresses are immediately removed or suppressed from your list.

C. Don't overdo bounce retries. Most email marketing systems are set to retry bounces from one to three times over three days. Many systems will also not retry at all to certain ISPs such as AOL.

However, many companies insist on retrying bounces several times, which can lead to blocking problems. The challenge is a simple fact of time and math. ISPs will monitor your IP mail stream during a window of 24 hours, for example. If during a particular time window the only emails being sent are your bounce retries, to the ISP it looks like you are sending to 100 percent bad addresses.

Such a ratio of bad addresses may then cause your regular mailings to be filtered or blocked. Work with your ESP to determine the right retry strategy for your situation.

D. Reactivate inactive addresses. While not completely transparent, the ISPs have begun confirming or alluding to penalizing mailers for sending to inactive addresses. While you aren't likely to be blocked for having a high percentage of inactive addresses, your overall reputation score will almost certainly be negatively affected. To the ISPs, a high rate of inactive subscribers is a sign of poor list hygiene or irrelevant content.

E. Remove or suppress "institutional" addresses. Suppression means both removing these addresses and moving them to a separate do-not-email database so that you can't remail to them, even accidentally. Remailing can lead to blacklisting and ISP blocks. It also violates the U.S. CAN-SPAM law against mailing to an unsubscribed address.

Likely offenders are institutional email addresses such as info@domain.com, "support@domain.com," "help@domain.com" and any address with "spam" in it, such as "nospam@domain.com" or "spammer@domain.com."

6

Engagement: Why It's Vital to Your Email Health

Engaging your customers will build loyalty, increase message reach and drive revenue. Engaged subscribers also less likely to unsubscribe, go inactive or report your emails as spam.

Building engagement must be a key strategy for the health of your email program. It takes a two-pronged approach: You not only have established deeper connections with your subscribers, but you've also overcome the many negative factors eating away at your list every day.

The general term for these negatives is "list churn," which includes unsub-scribes, inactivity and spam complaints. Thirty percent or more of the names in your email database can turn over every year because of churn.

The good news is that whatever you do to reduce list churn can also help you increase engagement at the same time.

Most email marketers focus on what happens after the opt-in, but you need to look back much farther. The relationship begins where you first make contact, whether at your website, on your Facebook page or in a Tweet, in a confirmation message or a forwarded email, via a QR code, or through wherever else you promote your email messages.

Then, naturally, you build engagement with highly relevant, informative and valuable messages throughout the subscriber relationship. If your subscriber ultimately moves to opt out, that doesn't end your ability to engage. Instead, work to retain your subscriber, either in a different kind of relationship or in a different marketing channel within your company.

How Relevance Drives Engagement

Q: I know I'm supposed to send "relevant" emails, but I'm not sure what that means. Aren't they automatically relevant if the person signed up for them?

A: Ask three email marketers how to define "relevant email," and you'll get three different answers. Here's what I came up with after an informal Twitter poll of other marketers:

"Relevance in email, to me, means I get what I want (whether or not I know what that is), when I want, how I want it."

"Relevant email marketing delivers the right message at the right time. Timing + Interest = Relevance."

"Relevance = an email that I can personally relate/identify with and pertains to my customer profile."

Most agreed that a core principle of relevance is "the right message at the right time." With that in mind, here's how I define the elements that make up "the right message" and "the right time."

The Right Time:

Wanted. While there are exceptions, the foundation of relevant email is usually that a subscriber has knowingly and actively opted in to receive your emails.

Trusted and Recognized. Subscribers might have given you permission, but unless they trust your brand and email content going forward, they will bail. They must know at a glance that the email is from your company, division or specific message stream. Your sender ("from") name, subject lines and value of previous emails aid recognition.

Expected. Your subscribers check their inboxes specifically to see if your email has arrived. A regular sending schedule helps reinforce this expectation.

Delivered. Perhaps it's obvious, but if your emails don't reach the inbox or frequently wind up in your subscriber's junk folder, they're toast.

Timely. Your email cadence must fit what subscribers expect and what is appropriate for the content. The timing must match current trends, buying patterns, news events and other factors consistent with your value proposition.

Your emails must "know" (through profiles, segmentation, behavior, etc.) when a subscriber wants to book a trip to Hawaii or replace an old PC with a new netbook.

Surprising. Surprising in a good way, like when the counterperson at your local coffee shop yells out your name when you walk in. Your emails must delight subscribers with special content, discoveries, recommendations, reminders or even rewards, just like Cracker Jack once delighted us with a different toy in every box.

The Right Message

Usable. Do you make it easy for subscribers to do what THEY want to do, whether it's to get more information on a product or change their email addresses? Are your emails designed to render well on multiple devices, in the preview pane and with images blocked?

Personalized. The email reflects the subscriber's preferences (content, format, frequency, interests), purchase history and other details. Dynamic content, segmentation, Web analytics integration and trigger-based emails drive personalization.

Differentiated. The inbox has never been more crowded. Like a product on a supermarket shelf, your emails must be strongly positioned and differentiated from your competitors. They must break through to that "inner circle" of emails.

Valued. Your emails must provide clear value, whether strong content or great deals. They inform, notify and remind. They solve problems, from dispensing gardening tips to suggesting the perfect 25th-anniversary gift for one's spouse.

Humanized. Underappreciated components of relevance are personality and humanism. People don't want to read email from faceless corporations. The more "human" your emails are, the more your subscribers will anticipate and interact with them.

How Assumptions Can Kill Subscriber Engagement

Q: **Why is it in my interest to collect data on my subscribers?**

A: Hi there. My name is Loren. By the way, I'm a "he," not a "she." But you wouldn't know that if you looked at my inbox and mailbox.

Between one-third and one-half of the people who send me email or postal mail assume that Loren is a female (even though "Loren" more often is the male version and "Lauren" the female).

Similarly, my wife surprises people all the time when she meets them in person the first time after speaking with them only on the phone.

Most people assume that with a last name like McDonald, she's a blonde or brunette. Imagine their surprise when she turns out to be a tall, black-haired Chinese woman.

Speaking of my last name, you might be thinking, "Loren, ye fine Irish lad, whatever is your point?" Well, that's another assumption.

I'm three-quarters Swedish and one-quarter Lithuanian. Not a touch of Irish in my genes. And, anyway, "McDonald" is a Scottish clan, not Irish.

As humans and marketers, we have to be careful about assuming too much about our subscribers, especially when all we know about them is their email addresses.

The downside of wrong assumptions about your customers and prospects goes beyond potentially annoying them and even hurting your brand.

It can also hurt your bottom line by continually sending subscribers offers and communications based on "bad" data – or, worse yet, no data:

As marketers, we obviously have to make some assumptions about people in our database. If you sell mountain-biking equipment, it is probably a fair assumption that someone who opts in to your program is interested in mountain biking.

If you sell winter sports equipment, and someone's first purchase is a snowboard and boots, you might logically conclude he or she is a snowboarder and not a downhill skier. You might be correct, but, of course, the purchase could have been for a spouse, child or friend.

5 Tips to Reduce Faulty Assumptions

So, how can you avoid or minimize potentially embarrassing and costly mistakes by assuming the wrong things about your customers and subscribers?

1. Capture basic data:

I recently received an email promoting engagement rings from the most respected brand in jewelry. Sorry, folks, but I've been married for 26

years and have no use for an engagement ring. This kind of gaffe, caused by a lazy approach to marketing, could be rectified simply by collecting 3-4 demographics during opt-in.

2. Capture the right data out of the gate.

If you sell men's and women's apparel, capture gender. If your core offerings are downhill skis and snowboards, capture subscriber preferences. These baseline demographics and preferences can be overlaid with behavior and purchase data later on to create a more accurate profile.

3. Don't make careless assumptions.

A client of ours sells maternity and post-maternity clothing and captures the baby's expected birth date at opt-in. You might think this would trigger a "Congratulations on Your New Baby" email as part of the cross-sell transition to post-maternity clothing.

But, because not every pregnancy ends in a birth, this client refrains from sending a potentially poorly timed or hurtful email message. Instead, it bases its post-maternity transition emails on actual purchases.

4. Use preference centers.

While most marketers will tell you that behavior trumps preferences, capturing a customer's basic interests and preferences enable you to increase potential conversions simply by being more relevant and timely with your message.

EMAIL REGISTRATION
This email address is currently subscribed to the following Fabric.com emails. To edit your subscription information, make any desired changes and click the *Save Changes* button. Thanks!

*Required Information
*Email Address   loren.mcdonald@gmail.com
*First Name   Loren
*Last Name   McDonald
Birthday   March   16th
State   California

*Which Fabric.com emails would you like to receive?
☑ Deals and Steals - Never miss a special sale, coupon or discount!
☑ Just Arrived – Get the scoop on hot new items before they sell out!
☑ Deal of the day - New items discounted 10% to 30% off every day!
☐ Do not send me any emails

SEWING PREFERENCES
These fields are optional, and will only be used for promotional giveaways by Fabric.com. We **WILL NOT** share or sell this information to **ANYONE**. Your responses will provide valuable feedback so we can continue to provide the best fabric and customer service possible.
● What would you consider your sewing level?
  ⦿ Beginner ○ Intermediate ○ Expert

● Do you sew for business or pleasure?
  ○ Business ⦿ Pleasure ○ Both

● What type(s) of sewing/ crafting do you frequently do? (Please select all that apply)
  ☐ Apparel ☐ Home Decor ☐ Quilting/Craft ☐ Knit & Crochet ☑ Needlework ☐ Other

● How did you hear about us? (Please choose one)
  ○ A friend or family member   ○ Magazine
  ⦿ Internet search/ web surfing   ○ Television
  ○ A sewing club or guild   ○ Other
  ○ Tradeshow / expo

Click Here to Save

5. Capture additional information during purchase/conversion activities.

Add a field to your purchase form that indicates whether the purchase is a gift or for buyers themselves. If it's a gift, invite the buyer to fill out his or her own preference list.

Personality: An Essential Ingredient for Engagement

Q: **Is data all I really need to build stronger relationships with my subscribers?**

A: Data is a start. But remember the old adage that people buy from people, not stores or websites. Showing a human, personal side in email, blogs and other communications will lead to greater engagement with your customers and subscribers.

I believe subscribers are coming to expect corporate or commercial email to reflect this shift in tone, because they see it happening in other channels like Twitter and Facebook.

Personality-infused emails are rapidly becoming the norm. They aren't just a touchy-feely, nice thing to do, but a key driver of subscriber engagement and inbox recognition.

Even if you still think Twitter is little more than a major time suck, you can't deny that high-profile corporate tweeters like Scott Monty of Ford and Tony Hsieh, CEO of Zappos, have raised the communications bar.

These people bring their personal sides into corporate communications, using their personalities – their personal brands – to engage with others.

When you incorporate a human or personal side, people can internalize it to their own situations and be driven to share it with their tribes, whether loose groups of friends or co-workers or formal networks on Twitter, Facebook or the like.

These people become your buzz agents, the ones to light the viral fire and keep it going.

Whose Personality Do You Choose?

This can be the hardest part of shifting your corporate communications from personality-free to personality-driven. Not every company has, or needs, a charismatic, articulate CEO at the email newsletter helm.

You need to know what your human assets are, and what your corporate personality is perceived to be.

Finding the Right Face and Voice

Your goal is to convey the idea that your company is run by people, not by machines. How you do that depends on your own corporate image and personality. What works for another company might be a disaster for yours.

Your CEO or a company founder could be the face or voice of your emails, but you could also build a cult following out of an insanely dedicated product manager, customer support person (Frank Eliason practically launched customer support on Twitter when he worked for Comcast), buyer, e-commerce manager or whoever best fits the role.

Sometimes, an iconic image is more appropriate. Think Betty Crocker, Mr. Goodwrench, or the AFLAC duck. Now, you can give it a voice that befits your corporate image, and you don't have to worry about replacing it, because it won't leave your company for a better offer.

Even if you don't think your corporate culture lends itself to personality-driven emails, you can find ways to make your message less stuffy and formal.

A buttoned-down corporate newsletter for an investment bank or accounting firm can employ a simple, direct writing style, using conversational language instead of academic speech. It doesn't have to read like a quarterly report to convey that a human, not an automatic phrase generator, produced the message.

Tip: For more on adding personality to your emails, see Chapter 4, "Content Creativity: Design, Personality and Copy."

What's Your Preference?

Q: **What kind of data should I be collecting on my subscribers?**

A: Data is the foundation of a successful email marketing program, whether it's based on behavior or customers' expressed preferences.

Although some marketers say behavioral data is more valuable because it reflects what customers actually do in your emails and on your website, it really tells only half the story.

Someone who buys, say, a set of golf clubs at your site might be a golfer. But it also could be someone buying a gift for someone else. Behavioral data might lead you to send golf-related emails to someone who doesn't know a chip shot from a sand trap.

That's a compelling reason for offering a preference center, which allows the customer to specify which emails he/she wants to receive.

You really need to collect both kinds of data, because you will get a fuller picture of your customers. In this answer, however, I will focus on preference data, which gives you a baseline for initial segmentation, targeting and triggered programs until you can leverage and layer behavior data over preferences.

Preference centers also allow subscribers to update preferences, contact information and other important information more easily.

This can increase engagement early in the relationship and reduce churn in the long run.

Adoption of Preference Centers

Although capturing customer data and enabling easy updates of preferences and profiles have clear benefits, many companies still have not invested time or money in the effort.

Only 24 percent of *Internet Retailer'*s Top 500 e-commerce companies permit customers to specify preferences, interests or messaging options at opt-in, according to a 2012 Silverpop study. Barely a third of Top 500 retailers offered preference changes or alternatives at opt-out.

Perhaps some of those retailers ask for preferences further into the subscriber relationship. That's better than not asking at all, but if you could have already lost unengaged subscribers by the time you get around to it.

Why Preference Centers Matter Even More Now

With the principle that preference centers enable more relevant messaging and subscriber empowerment, below are some of the factors that now make adding or improving your preference centers more important than ever:

'Channel-choosy' consumers: They now expect communication options beyond email, including SMS, social and direct mail.

Address changes: With the launch of Facebook Messages, AOL's Project Phoenix and general email service hopping, enabling easy change of address has never been more important.

Increased relevance expectations: Call it the "Amazon Effect." As some marketers' programs have gotten more sophisticated and personalized, consumers have raised expectations that your messaging should be more personalized to their individual needs.

Inbox placement: With ISP/Web mail providers incorporating recipient engagement in their filtering and inbox placement

algorithms, relevance now helps determine whether your subscribers will even see your messages.

Centralization: As the number of divisions, departments, messaging channels and email streams increase, companies must provide a central point of control for subscribers.

Choose Your Own Preference Center

These are the three kinds of preference centers, based on intent and where the subscriber is in the relationship:

1. Opt-in. The opt-in process is key. Ask for too much information or the wrong type too soon, and your form completion rate will go down. Get it right, and you'll be able to provide messages that provide more value to subscribers from the get-go.

2. Updates. Subscribers' interests change. They might move or change their email addresses. Their children move from diapers to preschool, or switch from sleds to snowboards. Make it easy for subscribers to modify their profiles and preferences.

However, don't wait for them to come to you. Invite subscribers to provide additional interests and preferences with stand-alone surveys, cookie-activated "popover" surveys on your website,

or triggered follow-ups to purchases, returns and other events.

Also, format a series of progressive web forms, which pose preference-style questions that change according to respondents' previous answers, helping you to build or update customer profiles.

3. Opt-out. Subscribers generally opt out of your emails because you email too often, send irrelevant content, or both. Providing alternatives to unsubscribing can help you retain a decent percentage of these subscribers that are looking to leave – 10-25 percent on average.

These "unsubscribe preference centers" usually include alternatives such as changing an email address, frequency or format, modifying interests or opting in or out of message streams.

One innovation allows subscribers to put their emails on hold for a period of time, what we call "Snooze."

Time to Get Into the Game

The preference center is your starting point for collecting the data you need to drive relevant messages, and to give your subscribers the sense of ownership that keeps them engaged with your email program.

Ultimately, you must deliver on what your data and your customer preferences are telling you. If not, why bother?

Waking Up Your Zombie Subscribers

Q: **At least half of my email list is inactive, according to my best guess. What should I do with them?**

A: If you want to start a fight among email marketers, talk about how to handle email inactives. (It's almost as good a show as the single-versus-double opt-in debate.)

The heated debate that usually ensues tends to overlook some important considerations, however:

1. No matter how your company defines inactives, the problem typically is huge.
2. All inactives are not created equal.
3. Reactivation programs usually don't work well.
4. The focus should be on reducing the potential for new and existing subscribers to go inactive.

And that brings us back to engagement. Let's look at each of the above statements:

1. How big an Issue is inactivity?

Inactives are typically 30 percent to 40 percent of the database, but recently I've been hearing from a growing number of marketers that they estimate their inactivity rates are 50 percent to 70 percent.

Most companies should be deeply concerned that a third or more of their email database is lifeless.

It doesn't matter whether these inactives simply haven't unsubscribed or didn't update their email addresses, interests or preferences. Their presence muddies your true email performance and might affect deliverability.

Most important, their lack of engagement and response represents significant lost potential revenue.

2. All inactives are not created equal.

The inactives debate usually assumes that all the inactives in your database are alike. Not so.

Some inactive segments are either more or less likely to come back to life because of various attributes and factors, including these:

- **Acquisition source**: Inactives who opted in originally through transactional emails probably are different from co-registration subscribers.
- **Database age/subscriber tenure**: Someone who hasn't responded for three years should be treated differently from a one-year inactive.
- **Purchase cycle**: I might buy a new road bicycle once every four years, but I'll pick up energy gel every few months.
- **Purchasers vs. non-purchasers**: Would you treat someone who bought something 18 months ago but hasn't clicked on your emails in 12 months the same as someone who neither purchased nor clicked in the last 12 months?
- **Multiple touch points (offline vs. online or call centers)**: Some email inactives might engage or purchase in your other channels.
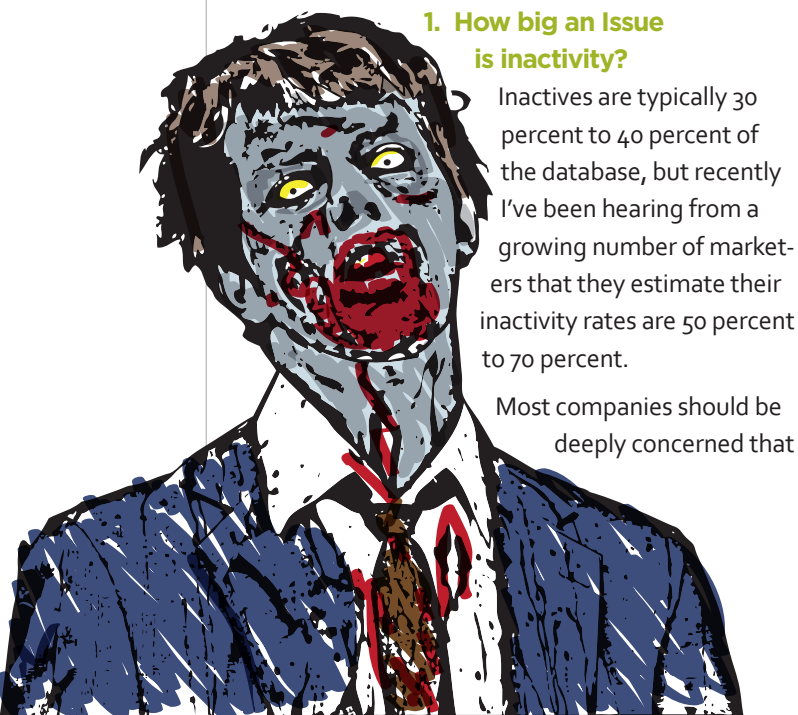
- **Demographics/past purchases**: You sell children's books. I haven't bought a book for five years, yet you still send me kiddie-lit emails. Hmm.

When you understand the commonalities that make up these inactive segments, you can start to fix the problems in your emails that encourage inactivity.

3. Reactivation programs usually don't work well.

Many marketers tell me their reactivation programs bring only 1 percent to 2 percent of their inactives back from the dead. Some are more successful, others less so.

What are your prospects? Let's do some math:

Suppose that 30 percent, or 300,000, of your 1 million subscribers are inactive. Now, suppose your reactivation program successfully re-engages 2 percent, or 6,000 inactives.

Yes, those 6,000 resurrected subscribers represent 6,000 potential revenue-producing customers. But wouldn't you rather spend your limited time and resources on generating more revenue from your 700,000 active subscribers?

That doesn't mean you shouldn't try to wake up your zombies. Just be realistic about the potential.

4. Focus on minimizing inactivity from the beginning.

If you don't want to watch 30 percent to 40 percent or more of your database go inactive, you must work to keep them engaged.

Here a few quick actions:

- Identify the commonalities and characteristics, if any, of your inactive subscribers and take corrective actions.
- Launch a welcome and onboarding program or improve your current one. Get new subscribers engaged – and purchasing if possible – as quickly as possible.
- Capture and use meaningful data to deploy targeted and segmented programs.
- Launch one-to-one triggered programs such as bounce-back, cart abandonment, replenishment/reorder, birthday, purchase anniversary and reviews/recommendations.
- Implement automated programs or tracks that deliver relevant content based on the customer's stage in the buying cycle, interests or actions.
- Enable change-of-email address, interest, frequency and mailing-list changes via a world-class preference center.
- Test content approaches, design, cadence and other factors that continue to increase engagement and ROI.

Although it's entertaining to debate whether you should suppress or send more or send less email to inactives, I say let's get to work and focus instead on reducing the number of subscribers who go inactive.

Tackle the Factors that Encourage List Churn

Q: How can I reduce turnover on my mailing list?

A: Turnover, or churn, is made up of three issues: unsubscribing, going inactive and filing a spam complaint. When you find ways to reduce each underlying issue, you will reduce churn in measurable ways:

1. Don't fear the unsubscribe.

People unsubscribe for many reasons. Some want to change an email address but can't figure out how to do it on your site. Maybe their needs and interests have changed, or your emails aren't what they expected. So, they unsubscribe, but at least they aren't ignoring your messages or clicking the spam button because it's easier or more trustworthy than going through your unsubscribe process.

Some marketers try to hide the unsubscribe link, but that won't keep engaged subscribers on your list. Instead, offer alternatives to exiting the list, such as changing preferences, reducing frequency or opting in to your other email streams that might be more relevant.

2. Tackle inactivity with a welcome/onboarding process.

A welcome message sent right after opt-in is essential to introduce your email program, set expectations and get your subscribers involved with your messages right away.

However, an onboarding program, which involves an automated and coordinated series of messages sent at calibrated intervals, will warm up your subscribers. Tracking activity, or the lack thereof and help you detect early signs of inactivity.

3. Eliminate conditions that could promote spam complaints.

You can't stop subscribers from clicking the "this is spam" button in their email clients, but you can reduce the factors that most often lead to complaints:

- Don't use opt-out, even if your country's law allows it. Someone who buys from you or downloads a white paper isn't necessarily asking to receive your emails.
- Beware of third-party acquisition sources unless you can confirm that they can verify that every email address they send you is a confirmed opt-in.
- Watch your email frequency. Test different frequencies, and offer subscribers the chance to opt down (or up) to a better frequency.
- Send your first email while the opt-in is fresh in your subscriber's mind. If you wait too long, the email might look like an unsolicited message.

Active Measures
to Reduce Inactivity

Q: **I understand that inactivity can cause long-term problems on my list, but what can I do to combat it?**

A: The best way is to engage contacts before they become inactive. Besides the welcome and onboarding programs mentioned previously, you can use Web tracking and your campaign builder to put new subscribers into specific tracks based on their website behavior and preferences gained during the opt-in process.

All inactive subscribers are not created equal, however. Some contacts might have never been active. Here are a few tips to engage and market to your inactives:

• Initiate an early warning system that uses reporting and scoring to identify inactive contacts within the first few months of opting in. Move these contacts into their own activation track designed to get them engaged through different types of content, by inviting them to update preferences or by completing a survey.

Other ideas include offering a purchase incentive, sending them emails that seek user-generated content or that contain highly recommended or rated items, or inviting them to engage on your social channels.

• For long-inactive subscribers, analyze your database to determine which subscribers could potentially come out of hibernation, going back at least two years.

Consider online and offline behaviors such as email opens and clicks, purchases/conversions, profile changes, Web browsing history and print catalog requests.

An emerging trend is to use third-party data providers that offer predictive analytics to determine which of your inactive segments are most likely to purchase in the future.

Address Updating Needs an 'Easy' Button

Q: **How can I keep email addresses up to date in my database?**

A: Make it easy for subscribers to update their email addresses. This keeps your database fresher and reduces the chance that an address will become outdated or inactive.

1. Add an address-change option to your preference center.

Do this ASAP. If you already have this functionality, make sure it is front and center, easy to use and actually works.

2. Add a change-address link to your admin center.

Position this with your unsubscribe link. Make it even more useful by locating your unsubscribe and change-address links with an "Update Preferences" link.

3. Add an update reminder to your "welcome" email.

Show new subscribers how to change their addresses and update preferences at any time. Include a highly visible link to your preference center.

4. Add a link to your preference center on Facebook or Twitter.

If you have an email opt-in form or link on your company's Facebook or Twitter page, consider adding a link to your preference center for those who might want to change to their new Facebook address. Remind your page visitors or followers in a post or Tweet from time to time.

5. Tune up your message design.

Be sure your message templates accommodate the following conditions, which already apply to many email clients:

- Design is optimized for blocked images
- Use alt text in image tags
- Use bulletproof buttons, which render even with disabled images
- Consider limiting message width to a max of 550 to 600 pixels
- Add text to the preheader, which recaps your value proposition or call to action and often appears in preview snippets in various email clients.

7

How Mobile-Local-Social Has Transformed Email

We call it the "mocial" factor: how mobile devices, location-based services and the immense power of social network is bringing changes to email that only the most farsighted marketers of the 1990s could have envisioned.

Mobile:

Smart phones and tablets create a very different experience than the office desktop or home laptop computers. They affect not only how your email renders on these smaller screens, but the context and how recipients interact.

Location:

Services such as Foursquare, Yelp and Shopkick, put you right where your customers are, and for the first time are integrating offline and online behaviors.

Social:

Email became the first social network the minute someone forwarded an email to a friend. Now they're sharing those emails with their social networks. As a marketer, your challenge is to send messages that compel your readers to click the "Tweet This" button and send those emails out to an audience that extends far beyond your mailing list.

These are tall orders, but you'll find tips and advice to take your email program to the higher level that life in a "mocial" world now demands.

8 Roles for Email in a World Gone "Mocial"

Q: **How can my email program compete these days now that my customers are using all competing channels?**

A: Two years ago or so, you might have heard marketers express comments and questions like the following as they tried to understand the changes coming to digital marketing:

- "@LorenMcDonald: Trying to figure out this Twitter thing: Is it a fad or the next big thing I have to deal with?"

- "So, a few hundred million people are on Facebook, but what do people posting party pictures have to do with marketing?"

- "Checking in on Foursquare? Why would I want to tell people where I am?"

- "Nobody wants SMS ads on their phones."

Today, the future is much clearer. For me, it's a concept I'm calling "mocial": the convergence of mobile/social/local/email, driven by a few key trends:

- Facebook has become the second Web.
- Mobile devices are the norm.
- Check-ins and daily deals are the new coupons.
- Smartphone apps are moving users off the Web.

These and other trends are opening opportunities for email to increase value in the marketing ecosystem. What separates email marketing from these other channels is its ability to deliver dynamically targeted messages in a true one-to-one fashion.

The challenge for email marketers is to upgrade their marketing programs to find a place in a "mocial" world.

8 Roles for Email in a 'Mocial' Environment

1. Connector/Identifier:

While younger people are increasingly using their mobile numbers as their unique identifiers, email is still the predominant identifier for companies. Marketers must figure out how to reconcile the multiple email addresses consumers use with their different social channels.

Despite these challenges, the email address will remain for some time the base for connecting an individual's email activity with his/her social accounts and activity.

2. Transactional:

Because social and mobile message formats offer a limited communication experience, email remains the best vehicle to deliver transactional messages.

3. Complex, personalized offers:

Social media might be the most efficient way to promote a coupon, discount or special offer to your fan base.

Email, however, is the only medium in which you can send highly personalized offers to customers based on demographics, recent Web, email and purchase behavior; incorporate cross-sell recommendations; pull in customer reviews of specific products; and serve up real-time A/B split test images.
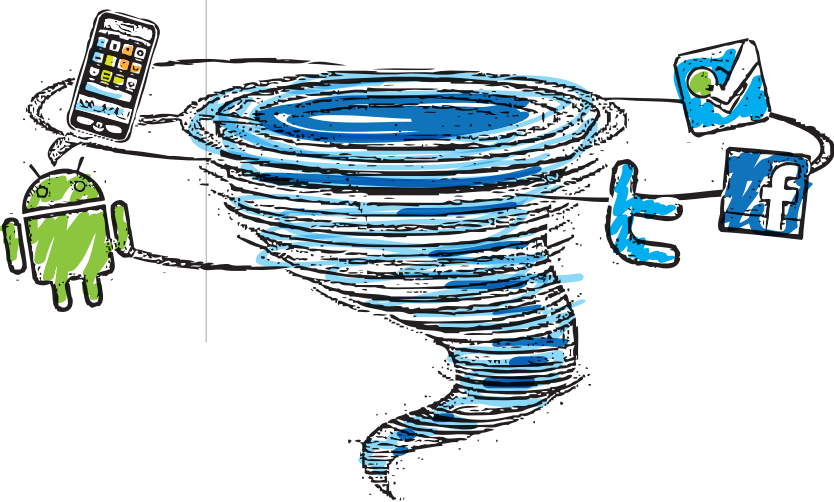
4. Cross Promotion:

Multi-channel marketing has been around for hundreds of years, but the digital world is making it even easier.

Consider this example: Brand X promotes a "buy one get one free" offer via on its Facebook Page to its 250,000 followers.

Emails promoting the deal go out on Tuesday, Thursday and Sunday to its 2 million subscribers, driving traffic to the Facebook Page. As a result, Brand X gets many times the coupon redemptions a social-only approach would deliver.

5. Reach:

While some brands have more than a million "Likes" (formerly known as Fans) on Facebook and hundreds of thousands of Twitter followers, many are still in the tens of thousands in these two kings of the social world.

These same brands might have 10 to 100 times these numbers in their email databases. Although social networks are growing as marketing channels, your brand might never reach the same number of customers and prospects that you can contact directly via email.

6. Conversion/Nurturing:

By its very nature, social communication has a greater personality, human and conversational element. While better email programs mirror social messaging in these areas, email continues to be the channel consumers prefer for promotional messaging.

Because of the ability to target, use dynamic content and put consumers into nurturing programs or tracks, email will continue to be the more successful channel at producing profitable conversions.

7. Share of wallet:

Increasing lifetime customer value is a primary marketing goal for most companies. The keys are increasing loyalty – share of wallet and repeat purchases – at higher margins than less loyal customers.

Email is the only marketing channel that can leverage customer data and targeting technologies to drive these activities and build higher LCV.

8. Channel Preferences:

I've become a Facebook fan of Chipotle. I use its iPhone ordering app, and I'm becoming a frequent customer.

Naturally, I signed up for Chipotle's emails, once I tracked down the opt-in page. I'm still waiting for those.

Because I'm in an older demographic, I check my email more frequently than my Facebook feed. Others like me, equally avid users of social media, also will prefer to receive certain types of communications from specific brands in email.

Those message types might vary dramatically. But brands that don't offer the choice via preference centers will miss opportunities to touch customers and prospects, consequently leaving money on the table.

9. Dual purpose:

Email and social work together to grow engagement in each channel. Email messages themselves can be designed to encourage social sharing and to build the company's social following. At the same time, the social channel encourages opting in to the email program and amplifies email content.

Marketers who can upgrade their email programs will find "mocial" won't kill email. Instead, it can shift broadcast-type messages to social channels and clear the way for email to live up to its promise as a highly targeted and one-to-one messaging channel.

How Location-Based Services and Email Can Play Well Together

Q: **My business is listed on Foursquare. Is there any way I can leverage those check-ins and recommendations in my email program?**

A: In today's mobile, multi-channel world, it's more important than ever to be where your customers are. Most often today that means on smartphones and tablets, where more and more people are checking in at retail locations or business events.

Foursquare, for example, is reportedly adding a million customers a month. A recent Digital Omnivores report indicated that in the last month nearly half of tablet users used location-sharing sites.

Location-based check-ins offer marketers an opportunity to deliver astonishingly relevant messages that engage customers and prospects based on where they are, build loyalty and drive revenue.

They also present exciting opportunities to integrate with other channels such as email and Twitter.

What Are Check-ins?

Check-ins are location-based sharing via mobile device, performed most frequently via services like Foursquare, Facebook Places and Google+ Latitude.

Once users "check in," their location is broadcast to friends in their network (if they choose), and the user can view tips, offers and other information about nearby places.

For users, check-ins provide a new social outlet as well as a chance to gather valuable information about the location and, in some cases, special offers. For marketers, they offer a valuable opportunity to reach customers in the real world, gather data and increase brand awareness.

For example, let's say one user checks in to a downtown fast-food restaurant for lunch four times a week, and another checks in to an upscale bistro on the weekend. These check-ins tell you volumes about their lifestyle and what services or goods they might want. This in turn helps you to tailor your marketing.

Check-ins also have a distinct social aspect, with people sharing tips and leaving reviews for their friends to read. For you as a marketer, adopting location-based marketing has an added benefit: Your customers actually do some of your marketing for you.

This adds a human voice and "social proof" that even your best promotional copy will have trouble matching.

For digital marketers, there are many different ways to work check-ins into your messaging mix, but here are four that clients have found particularly effective:

1. Sweepstakes

What They Are: Prizes based on when or how often someone checks in to a location with Foursquare or Facebook.

How They Work: Participants opt in to the sweepstakes using their Foursquare or Facebook accounts, and then your marketing platform confirms their sign-up with an automated email confirmation.

Participants then check in via Foursquare and/or Facebook, and you monitor the results and select a winner based on the check-in criteria you've established.

Benefits: Creates excitement around your brand, increases store and venue/event traffic, provides new opportunities to grow your email list.

Real-life Success Story: A retail client used a sweepstakes to drive 11,000 check-ins over a four-week period. And here at Silverpop, we offered a $100 American Express gift card for people who checked in at one of our events – and notched a 40 percent participation rate.

2. Loyalty Program

What It Is: Campaign that rewards customers for signing up and checking in to your locations using Foursquare or Facebook.

How It Works: Generally, participants will receive a reward at sign-up (e.g. "10 percent off next purchase" or "Free latte") and then will receive rewards at various intervals. For example, a free drink for the third check-in, a free sandwich for the fifth check-in and a free meal for check-in No. 10.

Benefits: Boosts store traffic, increases engagement and loyalty, provides valuable data on your most frequent customers that you can use to more strongly engage them.

Real-life Success Story: A retail brand utilized a loyalty program to successfully drive more than 10,000 check-ins in its first month.

3. Local Offers

What They Are: Special offers delivered to people when they check in nearby your locations.

How It Works: You set up a radius around a location and the offer you want delivered, and when someone checks in within that radius, they automatically receive the offer via email.

Benefits: Drives store traffic, builds brand awareness, keeps your brand top-of-mind

Real-life Success: Several restaurants have seen redemption rates between 5 percent and 15 percent.

4. Twitter messaging

What It Is: An automated or manual reply to guests via Twitter.

How It Works: You connect your Twitter account to your marketing platform. When someone shares his or her Foursquare check-in with friends on Twitter, your marketing platform tells your Twitter account to send a personalized response.

Examples might include, "@LorenMcDonald Thanks for visiting! Let us know how your experience was" or "@LorenMcDonald Thanks for visiting! Want to receive future deals? Sign up for our emails here: ow.ly/signup."

Benefits: Additional customer touch point, be where your customers are, expand message reach.

Real-life Success: Clients have seen a 30 percent click-through rate on Tweets sent to guests that check-in at brand-owned stores.

Check-ins also can be used to drive email sign-ups, facilitate customer service, increase product awareness and much more.

Regardless of how you use check-ins yourself, knowing where your customers and prospects are at specific times presents unique opportunities to deliver highly personalized, relevant content.

As a savvy marketer, you should set aside some time to strategize about how you can incorporate location-based campaigns into an integrated, multi-channel marketing strategy.

Social Sharing Expands Your Email Reach

Q: **Do you see social networks replacing email marketing and communicating anytime soon?**

A: Some email marketers say that the growth of social media directly challenges email's supremacy for communication. To me, now is a prime opportunity to expand the subscriber relationship to incorporate community, content sharing, feedback and user-generated content.

Why Social Media, Why Now?

This succinct explanation comes from Ground-swell, still the industry-standard guide to social sharing, written by Forrester analysts Charlene Li and Josh Bernoff:

"Right now, your customers are writing about your products on blogs and recutting your commercials on YouTube. They're defining you on Wikipedia and ganging up on you on social networking sites like Facebook. These are all elements of a social phenomenon—the ground-swell—that has created a permanent shift in the way the world works. You can see it as an opportunity."

Integrating Email with Social Media

Three aspects of social media integrate well with email:

1. User Community/User-generated content:
Readers post information and experiences about your products or comments content on your Web site, which you can reprint, with permission, in your emails.

2. Reviews/ratings/popularity:
Your customers can decide which product to buy or which article to read based on popularity (top sellers, most read or forwarded) with statistics posted in your emails.

3. Sharing and viral content:
Email has always been viral, whether users just forward your messages on or use your forward-to-a-friend function. But the forward rate is typically very low. Even when social sharing was still new to email, it outperformed FTAF .5 percent to .1 percent, according to a Silverpop study.

Adding a forwarding request or a link to your Web forwarding form might move the needle a little, but neither solves some basic problems:

- Sending to a large group of forwardees takes a lot of time.
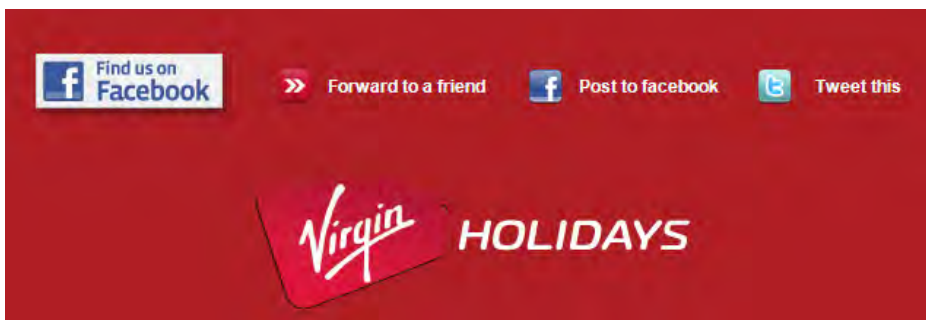
- Some recipients worry that companies will spam their friends if they use a Web form.
- Forwarding from the email client can break your HTML.
- Actions on forwarded email can be difficult to track.

Why Integrate Email and Social?

Retooling your email program for social media has these benefits:

- Your readers can generate buzz and brand awareness when they post your messages in personal spaces where they have control of content and trust of friends. A positive personal endorsement from a friend is the best possible introduction to your brand that you could hope for.
- Exposing your email program to new audiences can build your email list.
- You encourage more reader interest and involvement, which builds relevance and anticipation—both of which build inbox recognition.
- All of these together can lead to greater ROI without significantly greater expense.

Some Social-Sharing Best Practices

Here's what I've seen working for clients who have invested time and resources to add social-sharing links to their emails:

1. Educate your subscribers.

Don't just drop a button into an email and expect it to take off. Highlight it in your welcome emails and regular mailings.

2. Group all your viral features to capture both social networkers and email forwarders.

3. Don't despair if the clicks come slowly.

A list full of 20-somethings will likely take to it faster than a B2B list of C-level executives who are not as plugged in.

4. See what types of messages get reposted most often. As appropriate, tailor your content to encourage more sharing.

5. Designate specific messages to focus specifically on social sharing and list building, such as inviting your subscribers to follow or find you on a specific network.

Break out of your regular broadcast email template to make this message stand out. Design the emails from the subject line to the offer, copy and sharing link placement to encourage sharing—particularly from your most influential sharers.

6. Track shares, and see what you can learn about your most active sharers.

Understand who they are, what motivates them, and how they differ from your general subscribers—and then give them content they are most likely to repost.

We've seen social networking and social sharing blossom over just a couple years from an isolated trend to a necessary element of every effective email marketing program.

Social networking will not replace email for commercial messages. But marketers who have figured out how to integrate email with social will hold the advantage over marketers who keep their email and social channels securely segregated.

If you're still watching from the sidelines, it's time to get into the game.

New Email Metric:
Is It 'Shareworthy?'

Q: **What can I do to encourage more subscribers to share my emails with their friends on social media channels?**

A: The explosive adoption of social networking means you need to look at your emails in a whole new light: How "shareworthy" are they?

Your customers and subscribers are sharing content with their various social networks: bookmarking sites in Delicious and Stumble-Upon, networking in Facebook and LinkedIn or microblogging via Twitter.

Further, they're viewing your email content in many environments, including in an inbox, on a mobile device, in a social network or on a Web site.

Social networks, services like Twitter, and "share" links and buttons everywhere are motivating people to share content with friends, peers and the world at large.

But, as with forward-to-a-friend, simply putting share links in your emails, Web site or landing page will not suddenly make them go as viral as a YouTube video on Facebook.

Integrating a share function with your email program can deliver new subscribers, additional sales and greater engagement with existing subscribers.

Why Do People Share Emails?

Before exploring what makes email or other content shareworthy, we need to understand why people share. These "sharing" impulses are outlined in the book *Groundswell* (with my own interpretations, modifications and additions):

1. Contributing to the conversation:
The goal or impulse to share is to further a conversation. Sharing benefits people through the value of the information shared in return.

2. Self-Interest:
Sharing provides personal benefit in the form of points, discounts, freebies, etc. Sharing rewards the pocketbook.

3. Altruism:
People share content because they believe their network or friends will want to know about it. Sharing makes them feel good.

4. Validation:
Sharing certain kinds of content validates the sharer's sense of worth, expertise or views. Sharing feeds the ego.

5. Affinity:
When people have common interests, like fly fishing, muscle cars or California Zinfandels, they want to share news, articles and other information with like-minded friends and contacts. Sharing makes people feel more a part of the "community."

6. Prurience:
Think of videos of car crashes, plane crashes or nude movie stars that appear online and reach millions of eyeballs in a flash. Sharing makes people feel less guilty for gawking.

What Makes Your Digital Content Shareworthy?

These eight key factors make your emails and other digital content shareworthy:

Trustworthiness
Sharing content involves some risk for subscribers, because they are attaching their personal brand to

yours. If your brand's trustworthiness is questionable or in decline, sharing your email is likely to be the last thing on a subscriber's mind.

Tribal interests

Tap into the tribes within your subscriber base. Learn about the wide variety of interests, experiences, wants and needs that your customers bring to the table. Shareworthiness requires you to know what tribes comprise your list and what motivates them.

Simple and obvious

If something is complicated or requires an explanation, the recipient will realize that it will fall on deaf ears and will have little motivation to share. One exception: People who want you to think they are brilliant will be excited to show you just how smart they are.

Ease of sharing

If the recipient has to spend too much energy to share the content, few will bother.

Social acumen and adoption of subscribers

While social networks have gone mainstream, your subscribers' use might vary widely, from

near 100 percent to very low. Also, someone with a Facebook account might not know how to share.

Creates value

Your email must provide value to your recipients before they will share with their networks. One exception: when people know that a particular topic or offer is extremely relevant to friends, even though they don't benefit personally.

Reward/Incentives

Incentives or rewards can increase your forward or share rates, but they come at a cost. "Rewards" that tap into the reasons why people share, as outlined above, deliver a better ROI than a chance to win a free iPod.

Content

More than ever before, content is king, especially well-written, timely and relevant news articles or offers. Your copy must snap, crackle and pop off the screen (without reading like spam or late-night TV infomercials).

Social Media to Email: 'Get Real!'

Q: How has social changed email marketing?

A: Social media won't kill email anytime soon. But I do believe that it is transforming email marketing: both the content of the messages themselves and email's role and value within the marketing mix.

Essentially, social media is forcing email to make the message more of a one-to-one conversation and to make the benefits that email drives more real and visible to corporate decision-makers.

Social media is driving this "get real" movement in at least five ways:

1. Content that is human and more personable.

Social media has helped to humanize brands and companies by putting faces and names to the brand. Savvy consumers expect to see a similar human touch in email messages, whether it's humor or personality that reflects the company's brand or ethos – or hearing from and seeing employees who usually work behind the scenes.

Too many marketers are still talking at their subscribers or customers in email, not with them. Email marketers who don't gravitate their content and approach to more of a conversation will see more subscribers tune out for other channels or competitors that do it right.

2. Increased multi-channel integration.

Social media is becoming a catalyst that gets marketers closer to the holy grail of channel integration. Email is a key component in that integration.

Email and social media form a natural collaboration. Your email messages invite subscribers to follow your brand on social channels such as Facebook and Twitter, and enable the sharing of email content on subscribers' social streams.

Your social-network pages can also promote email content and invite fans to opt in to your email program.

Social media is more often where the conversation happens about your brands, products or services today. Email, however, is often the vehicle that alerts consumers to the social content – or is, in fact, "the right message at the right time" that converts the shopper into a customer.

3. Increased leverage of user-generated content in your email messages.

User-generated content (comments, testimonials, reviews, ratings, etc.) is the fuel that social networks run on, and it's spilling over into email messages. Consider this the flip side of my first point, the need to add personality and the human face and voice to your messages.

Adding user content gives your subscribers and customers the power to help sell, educate and promote your products and services to each other in your messages.

I call this "Sideways Marketing," and it's the direction in which I see digital marketing evolving. Consumers are increasingly making their purchase decisions based more on the opinions of their fellow consumers than on the adjectives in your marketing messages.

Thus, email becomes a platform for subscribers to talk to each other, but it's not the Wild West environment that can happen in a social network. In email, you choose the product reviews, testimonials or comments you want to promote.

This concept is already producing measurable results for King Arthur Flour, which found through A/B testing that emails containing testimonials

generated a significant increase in clicks and revenue over messages without testimonials.

4. Email marketers are thinking viral again.

Declining subscriber use of "forward to a friend" functionality pretty much relegated viral email ideas to the backburner.

Now, however, social networks have made wide sharing of email content even easier. The onus is on marketers to think more strategically about what they put in their email messages in order to promote sharing way beyond their subscriber base.

This means more than just slapping a few links to social networks at the top or bottom of your email message. That approach is working a bit better than FTAF links, but it doesn't take advantage of the opportunity.

Smart email marketers are designing separate emails from the ground up to be shareworthy, and targeting social influencers with specialized content. The potential of share-to-social will drive more marketers to create content that is so highly valuable or interesting, subscribers will happily share it with their network.

5. Proactive, strategic communications of email marketing's value.

Social media is forcing marketers to better measure, analyze and report all the ways that email supports key strategic objectives, whether generating revenue, building the brand, deepening customer relationships or reducing costs.

Social media and mobile marketing are getting all the buzz lately, but they still haven't proven themselves to be significant revenue generators the way email has. Social media is currently mostly about conversation, but email excels at turning conversations into conversions and, ultimately, revenue.

When you want to defend your budget and resource allocation against encroachments from these new kids on the block, you must more effectively communicate to management all they ways that email contributes to achieving corporate goals.

These emerging channels are forcing email marketers to hone their "communication to management" skills – a good thing for long-term success.

Email Versus Social? Take Both!

Q: **How can I persuade my company that we shouldn't abandon email for social networking?**

A: What's more valuable, an email address in your database or a Facebook "Like?" Is it better to excel at email marketing or social-media marketing? Pick one: email or social media? Which would you rather have: a click on an email link or a Facebook Like?

You can and should include both channels as part of your digital marketing and communications strategy. But it goes much further than that.

We live in a multi-channel world. Your customers might choose to interact with your brand and communications via radio, TV, newspaper, direct mail, catalogs, email, SMS, Twitter, Facebook pages, YouTube, mobile apps, telephone and more.

How you allocate resources and money to each of these and other channels varies not only by your business lines and markets served but also by the goal of the communication and stage of the individual customer or prospect relationship.

Click versus Like

These questions, which compare things such as the value of an email address with a Facebook Like, are missing the point, because they ask marketers to compare two wildly disparate things.

A Facebook action, such as a Like, is a public confirmation of the customer's affinity toward or past experience with your company, brand or product. It doesn't necessarily indicate a propensity to buy in the future.

Just because I "Like" the Ferrari Facebook Page doesn't mean you will be seeing a shiny red sports car in my driveway anytime soon.

In contrast, a click on an email message signals intent or interest. It might be just to finish reading an article on a website, to download a white paper, to check out the daily special being promoted – or to make a purchase.

Once you clarify for yourself, your program and your company what roles email, social and mobile marketing will play and how they interplay, you can allocate the appropriate amount of resources for each.

Ask the Right Questions

All companies have finite resources, especially when it comes to marketing. So, while pitting one channel against another in the abstract is somewhat fruitless, marketing executives do have a responsibility to continually monitor and analyze which channels and combinations provide the best returns.

Let's raise some of the current dialog up from schoolyard-level childishness and focus on the more meaningful and important questions.

Here are a few to get the conversation started:

- What is the role of email vs. social, mobile, print and other channels in our company?
- How do we make our emails more relevant by incorporating content, personality and lessons learned from social media?

- How do we integrate email, social and mobile marketing activities with each other to drive greater ROI across all three channels?
- How do we better leverage email to drive increased engagement in social and mobile channels?
- How do we grow our email database using social and mobile channels?

- How do we measure the effectiveness of each channel relative to its level of reach, adoption and investment?

How you frame your questions will determine whether you launch an interesting but ultimately fruitless discussion or spark a conversation that leads to the kind of insight we need to keep the email industry moving forward and realize its full potential.

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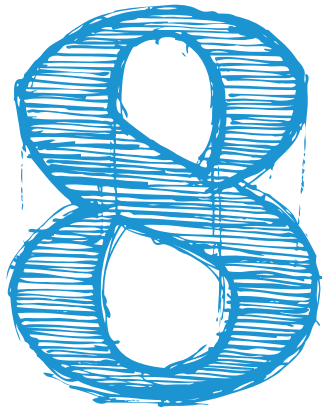
Testing, Measurement and Optimization

Your email marketing program is not carved on a stone tablet. You can review your decisions to see what's working and to make it run better, whether you're fine-tuning your email messages or remaking your entire program from top to bottom.

Optimization, then, isn't just an optional extra: It should be built into your email workflow, applied to everything from acquisition to message creation to workflow management.

Optimization starts with a simple question – "How could we do this better?" – and then uses testing to answer the question and analysis to find corrections.

Which subject line will get more opens and drive more conversions? Are we doing everything we can to retain our subscribers? Which improvement could help our program revenue break through to a higher level?

Testing, measuring and optimization are things many marketers know they should be doing but don't think they have the time or tools to do. In truth, if you aren't testing at least some of your most securely held beliefs about your email program, you could be wasting money on things that don't work and watching your competitors slip past you.

Many email programs and email service providers have built-in measurement and optimization tools. You need to dedicate some time – and, possibly, money – to use them, learn from them and apply them to your programs.

The tools are out there for you. You just need to pick them up and use them.

Strategies to Launch Your Optimization Project

Q: **Okay, I've figured out what we probably need to do to get our email program back on track. But how can I get started on this big optimization project when I'm already stretched thin on the work my boss expects me to do every day?**

A: Below are several approaches to help you win over management, not just to get them to see things your way, but also to secure the resources you need:

1. Make the case for focusing on a major goal.

You know your email program well enough to be able to identify what I call the fulcrum: the point in your email program that drives the majority of your future revenue, conversions, engagement or loyalty.

Even if your managers know little about email, they understand achieving or exceeding goals and improving results. Explain why your fulcrum point is so crucial to your email program, and build a model that demonstrates how improving this one area increases success downstream.

2. Use metrics that get your CEO's attention.

When building your case and communicating the value of email, it is critical that you focus on the metrics that matter to management, rather than basic email measures.

Focus on "output" metrics, which measure actual or anticipated performance against your company's strategic marketing or business goals, instead of "process" or operational metrics that measure individual tactics of your email program.

Do not base your case on tactics like improving open rates. Your C-level execs typically don't care. Show them the money instead.

3. Demonstrate how your email program contributes to company success relative to other marketing functions.

In many companies, poor budget or strategy decisions often happen because the people making those decisions are clueless about email's contributions.

As in the previous strategy, make the case by showing how email performs in your company. Use charts, graphs, entertaining infographics and any other techniques that articulate email's crucial role in achieving key goals, delivering high ROI and supporting and enhancing other marketing channels, such as search, social media and direct mail.

4. Enlist help from other departments.

One of the great things about email is how nicely it plays with other company departments. If you can show other departments how certain email improvements or programs can reduce costs, improve efficiency and achieve certain goals, you might be able to persuade them to cough up some budget or resources.

5. Create more automated programs.

Automation is your best friend. Temporarily reallocate resources for a one-off email and produce a simple triggered birthday program, for example, to help prove the value of more sophisticated email programs.

While getting the resources for automated programs can be a key challenge in itself, start small and build these programs gradually, generating your success and proof metrics along the way.

6. Provide external benchmarks to show where the company is leaving money on the table or overlooking other improvements.

These industry benchmarks can help you prove why you need the resources to turn that confirmation email into a welcome series, or launch a cart-abandonment program or post-purchase lifecycle series.

7. Educate management on what's possible.

Case studies, research and white papers can show those above you how other companies were able to deploy specific email programs that produce killer results. Be choosy in what you select, and highlight the key points to conserve your boss's time and attention.

Material is everywhere around you; you just need to find it and cull it into a small but powerful information set.

8. Use external resources to get the job done.

Beg, borrow or steal budget and resources. If you don't have the bandwidth to work on a specific goal or project, see if you can outsource it to a consultant with a track record on your issue or to your ESP or other third-party vendor that could help you get the project completed.

9. Carve out a specific time to focus on improvements.

This last item is also the hardest for marketers who get pulled in many directions. However, your journey to a more successful email program starts with this single step.

Block out a few hours each week – go on, lock it into your calendar – and use it to brainstorm, develop your case or work on that onboarding email series you've wanted to do for years.

25 Questions to Assess Your Email Program's Performance

Q: **I know my email program has some big gaps and weak spots, but how can I diagnose them without bringing in a big-time consultant?**

A: In my role as a marketing evangelist, I spend much of my time answering questions from email marketers, from the basic – "What's the average open/click-through rate?" – to increasingly more important queries, such as "How do we optimize our emails for mobile devices?"

However, I'm still not hearing many marketers ask the tough, strategic or root-cause questions that address core business issues, analyze challenges or identify opportunities.

Here are 25 questions (some with corollaries) that you and your marketing team should be able to answer, immediately or after some analysis or investigation. How many can you and your team answer?

1. **Goals:** What are our goals, and do we have the right email strategy and programs in place to support them?

2. **C-Suite:** Do we have senior management and IT buy-in for strategic initiatives? How are we minimizing IT or other departmental or organizational roadblocks?

3. **Revenue:** Are we leaving money on the table because we haven't implemented key programs?

4. **Expansion:** Are we missing opportunities to support other parts of the organization and contribute to key corporate goals through email initiatives?

5. **Data:** Are we capturing and/or integrating the right data to make our marketing programs more relevant and valuable to our customers, using customer behavior, profile data, purchases or recommended SKUs to drive dynamic content?

6. **Acquisition:** Are we acquiring new subscribers everywhere they are (mobile, social and local)?

7. **Multiscreen:** Have we optimized our messages to work well across multiple environments: PC, Webmail, smartphones, touchscreens, tablets, etc.?

8. **Benchmarking:** Is our email program performing as well as or better than our competitors, peers and best-in-class marketers, and are we learning from these marketers?

9. **Deliverability:** Do we have deliverability issues that are reducing ROI?

10. **Segmentation:** Do we have the right approach to segmentation or targeting?

11. **Automation:** Are we leveraging automation as much as we could? For example, are we sending behavior-based triggered emails at smart moments in our customer communication cycles?

12. **Partners:** Do we have the necessary or right technology, data, creative and consulting vendors/partners or internal resources? Are we taking full advantage of our existing email tool's functions and features?

13. **Personnel:** Do we have the right team members and expertise, and do we help them stay current on trends and emerging practices by sending them to conferences, having them attend Webinars and sharing industry knowledge?

14. **Optimization:** Should we continue to focus

on tweaking aspects of our program, or should we blow it up?

15. **Inactives:** Are we dealing with the growing challenge of inactive subscribers, focusing on minimizing inactivity early on rather than reactivating when it is too late?

16. **"Mocial:"** Are we truly leveraging the power of mobile, local and social and integrating with email?

17. **Alignment:** Do our programs work in harmony across all of our marketing channels, or are we deploying in silos?

18. **Testing:** Are we testing everything all the time – or only when we make the time?

19. **Content:** Are we incorporating more personality, content and the human element in our emails?

20. **Innovation:** Are we trying new things and questioning past ways, or is our program on autopilot?

21. **KPIs:** Are we reporting strategic KPIs to management or are we stuck in the "opens and clicks" rut?

22. **Engagement:** Are we speaking at our customers – or with them? How are we using personalization, dynamic content, preference and behavioral data to drive increased engagement?

23. **Budget:** Are we allocating enough resources and budget to maximize our ROI? Do we have a road map for continual advancement over the next one to five years?

24. **Compliance:** Does our email-marketing program comply with the latest privacy and permission regulations from around the world?

25. **Oversight:** Do other departments deploy emails that pose risks to our organization, provide a poor customer experience or miss opportunities to raise revenue or reduce costs?

Choosing and Using
the Right Metrics

Q: You have talked about "process" and "output" metrics. What's the difference between the two?

A: Both are sets of metrics you can use to measure your email program's performance. Each one provides valuable data, but you have to make sure you're using the right metrics for the most accurate information.

The scalpel is a handy tool, after all, but you wouldn't use it to carve a turkey. If you choose the wrong metric, you could overlook major problems that imperil performance or email's significant contributions to your company's performance.

Step One: Understand Process vs. Output Metrics

Process metrics are diagnostic in nature and should be tracked over time to determine how individual elements of your email program are contributing to overall success.

These are some email process metrics and what they measure:

- **Open rate:** Subject line effectiveness, trust and brand strength.
- **Bounce rate:** List hygiene and opt-in process.
- **Spam complaint rate:** Relevance, trust and opt-out ease.
- **Unsubscribe rate:** Relevance, customer engagement and delivery on expectations.
- **Click-through rate:** Relevance, offer and content quality, design and engagement.
- **Delivery rate:** List-building practices, list hygiene and ability to follow deliverability best practices.
- **Forward/Share rate:** Subscriber interest and viral nature of offer/content.
- **List churn:** Effectiveness at managing combined churn factors-bounces, spam complaints and unsubscribes.
- **Engagement/Activity:** Ability to keep subscribers engaged over time.

Output metrics measure your email program's performance against your company's strategic marketing and business goals, including:

- **Revenue:** Total revenue generated from your program over a given time period.
- **Cost savings:** Money saved by using email over higher-cost communications channels.
- **Share of wallet:** Use of email to increase greater share of customer spend.
- **Customer retention:** Use of email to minimize customer defection.
- **Leads generated:** Number of leads generated via email program.

Step Two: Determine Your Measurement Strategy and Choose the Right Metrics

These four approaches give you a basic understanding of where to employ measurement, along with the right metrics for the job:
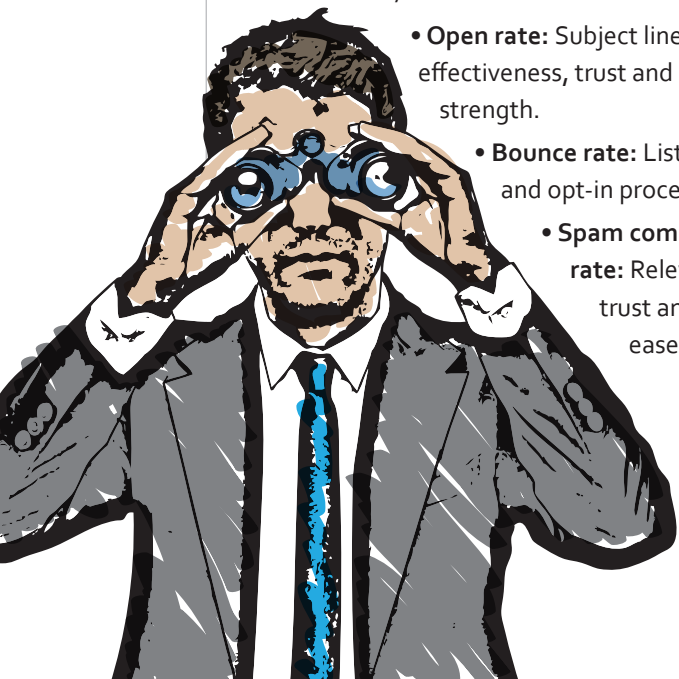
1. Message/Diagnostics

Use: Answer the basic questions "How did our last email message perform?" and "Did we meet our short-term or campaign goals?" It also helps you identify issues that may be causing reduced email performance, such as blocking or bulk-folder filtering at ISPs or high list churn.

Metrics: Open rate, click-through rate, bounce rate, spam-complaint rate, delivery rate, engagement rate, unsubscribe rate.

2. Actionable Insights

Use: Understand your customers' behavior by testing and analyzing segments of your list based on demographics, geography, past buying behavior, action on emails, list source, etc. For example, analysis by gender and age might reveal that women between the ages of 18 and 35 have the highest click-through rates on average, creating an opportunity for greater targeting and personalization to increase conversions.

Metrics: Open rate, click-through rate, conversion rate, forward/share rate, etc.

3. Benchmarking

Use: Compare your email program to your peers and to your own past performance to see how your email metrics stack up, or to look for trends. This is probably where most marketers currently spend a lot of their time, but the other three uses of metrics will provide greater benefits to your program.

Metrics: Open rate, click rate, forward/share rate, unsubscribe rate, bounce rate, conversion rate, etc.

4. Company Goals

Use: These metrics measure how your email program is delivering against your overall marketing and company goals. Of the four strategies listed here, this is the one that will best help you demonstrate email's value to your company.

Metrics: Revenue, cost savings/improved margins, share of wallet, customer retention, leads generated, etc.

Think Beyond Email

For email to grab increased management mindshare and resources, marketers need to think outside of the box and beyond the purview of opens and clicks. Think real business impact and helping solve some of your company's most-strategic issues.

Work with other departments to collect data that measures email's impact. For example, email can reduce call-center expenses by providing educational content, FAQs, operating instructions, contact information and procedures, payment reminders and other information, all of which can reduce your customers' need to call support for help.

When you expand your measurement horizon beyond benchmarking to include diagnostics, actionable insights and progress toward business goals, and when you work with other departments to measure impact and influence, you get a real sense of your email program's performance, which you can communicate to your senior management.

That's your best possible defense for your marketing resources.

Rethinking 'Best Practices' for Email

Q: **Does email still follow best practices, or should I just do what works for my company?**

A: Some marketers think the concept of best practices – the absolute best way to do something – is obsolete, while others argue we need a new name.

My take? I look at "best practices" as categories: those that apply to almost everyone, those that depend on the maturity of your email program or use of email and those that you should avoid at all cost.

1. FOUNDATIONAL PRINCIPLES

These are practices that the vast majority consider foundational to industry vitality and the success of individual email marketing programs. While there are sometimes edge cases, they are the exception and not the rule:

- **Permission:** In email marketing, permission is the foundation of a successful program, the first step in separating marketing messages from spam. While the common industry refrain "relevance trumps permission" is absolutely correct, it's difficult to achieve high inbox delivery rates and ROI without permission.

- **Transparent opt-in process:** Subscribers must understand that they are being subscribed and to what.

- **Easy to unsubscribe/honoring unsubscribes:** In most countries, making it easy to opt out of emails is the law.

- **Removing/suppressing abuse complaints and hard bounces immediately and never sending emails to those recipients again:** If you don't employ these practices, your subsequent emails may not be delivered.

- **Not using deceptive techniques:** Against the law in many countries, deception can also cause damage to your brand.

- **Email authentication:** Authenticating your emails with DKIM and SenderID is becoming critical to increasing the likelihood that ISPs will deliver your emails.

2. RECOMMENDED PRACTICES

These practices are highly recommended for increasing customer engagement and conversions:

- **Clear, recognized "From" names:** Unrecognizable or confusing "From" names will get lost in the inbox.

- **Welcome emails:** Delivering an immediate welcome email after a new opt-in can increase engagement and conversions earlier than no welcome email or series.

- **Segmentation and personalization:** Targeting subscribers based on their demographics, interests and behaviors is not a "must," but this approach generates many times the ROI of non-targeted emails.
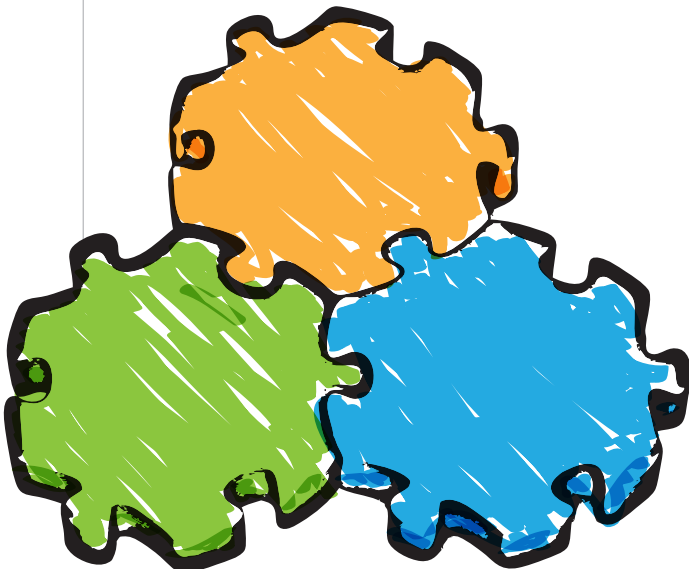
- **Designing emails for preview panes and multiple devices:** Using single large images without background HTML, for example, will render as a large blank in emails and could greatly reduce click-throughs and conversions.

- **Use of preference centers during opt-in and throughout the relationship:** Preference centers provide data and self-reported information that can be used for providing more relevant emails to subscribers.

- **List hygiene:** Poor list hygiene will cause deliverability problems.

- **Testing everything:** Testing is critical to determining which practices, content, offers, etc. deliver increased performance for your program.

- **Defining and identifying inactive subscribers:** Identifying disengaged subscribers enables you to segment your database, potentially removing or targeting inactives for reactivation and reducing possible deliverability problems.

- **Incorporating "administrative" links (Unsubscribe, Update Preferences, Change Email, Contact Us, Subscribe, Forward to a Friend, etc.) within every email — typically in the footer area:** Including these links in the same location in every email makes it easy for subscribers to take action.

3. BETTER PRACTICES

More sophisticated email marketers are deploying these practices to help take their programs to higher levels:

- **Welcome/onboarding process:** These typically deliver significantly greater results than single welcome emails.

- **Designing emails for touch:** Touch screens are becoming ubiquitous. Designing for the "finger as mouse" will soon not be optional.

- **Offering the subscriber alternatives during the opt-out process:** These typically include email change of address, frequency options, channel preferences, snooze and more and can retain a sizable percentage of subscribers who were considering leaving your list.

- **Focus early on inactives:** Waiting to attempt to reactivate unengaged subscribers after six, nine, 12 months or more is too late. Activate new subscribers who never become active from the beginning of the relationship.

- **Target openers who haven't converted:** Segment subscribers who've opened your emails but not taken the desired action and place them in a unique messaging track.

- **Integrate with social networks:** Use email to promote your social network content and grow followers, and use your social networks to promote your email opt-ins.

- **Distribute emails based on individual recipient engagement history or time zones:** Whether manual or automated, this approach can have a dramatic impact on engagement and conversion rates.

- **Implement behavioral-based triggered programs such as browse and cart abandonment:** These behavior-based programs are often the single-highest generators of revenue from email.

4. SITUATIONAL PRACTICES

These are practices for which the answer really is "It depends:"

- **Using pre-checked opt-in boxes instead of unchecked:** Pre-checked boxes provide a higher number of subscribers but often lower engagement versus unchecked boxes.

- **Employing double opt-in:** Required by law in some countries, double opt-in may also be appropriate for aggressive acquisition practices that might lead to higher abuse complaint rates.

- **Resending to non-openers:** Used sparingly, carefully and respectfully, resends can boost email results, but misusing this approach can sour recipients on your email program and lead to increased unsubscribes.

- **Adding first-name personalization to subject lines:** When combined with a message driven by recipient behaviors and/or containing highly relevant dynamic content, this subject-line tactic can increase engagement and help your email stand out in the inbox. But if the message is otherwise generic, this token attempt at personalization can reek of spam and may not improve response rates.

- **Placing the unsubscribe link at the top of emails:** Prominent (up top) placement is a good idea when deliverability issues exist or deliverability risk is high (e.g. emailing to a large list that hasn't been mailed to recently or frequently), but if deliverability is good, less prominent (bottom) is fine.

5. QUESTIONABLE/DEBATABLE PRACTICES

Although there may be rare exceptions, in general you should avoid these practices:

- **Sending emails as if they're forwarded as an FYI:** A growing trend among many B2B marketers, this approach is likely to become ineffective over time.

- **Sending fake "mistake" emails (often with goofy test subject lines):** Although these can boost short-term open rates, they're deceptive and can negatively impact your brand.

- **Rotating IPs:** A deliverability trick that most ISPs catch on to quickly.

- **Sending an opt-out confirmation message:** While well-intentioned, this practice can lead to increased spam complaints. (The exception to this rule is if you utilize a "reply-to" email opt-out process.)

- **Broadcast messages with attachments:** These may be mistaken as spam. Link to a landing page housing this content instead.

Given the history of email marketing, it's likely that the debate over what constitutes a "best practice" will continue to rage on.

But by starting to look at practices in terms of the categories outlined above — and approaching them accordingly — marketers can improve their email campaigns, increase engagement and boost revenue.

If It Ain't Broke … Fix It Anyway!

Q: **What should I be looking at in my email program to make sure it's keeping up with all of the changes in the industry?**

A: Most marketers figure everything is working fine if alarm bells don't go off every time they send an email campaign. "If it ain't broke, don't fix it."

I can't stand to hear that. It implies that something is working so well that any attempts to improve on it aren't needed and could even break the process.

I've always subscribed to the opposite view, also espoused in the book *If It Ain't Broke … Break It!: And Other Unconventional Wisdom for a Changing Business World*, by Robert Krigel.

The "leave it alone" philosophy might have worked in the business world at one time, but change happens too fast today. It also flies in the face of continuous improvement, quality management and other business philosophies that have proved their worth.

The last 10 years have brought massive changes to the email world, thanks to spam filtering, overflowing inboxes, mobile devices and a more sophisticated email subscriber. What worked a few years ago might not be irretrievably broken, but it's probably not generating the level of returns that it could.

So, it's time to look at your entire email process and see what you can "break" or fix to create emails that are more relevant to subscribers and deliver a higher ROI for your company.

What You Might Need to Fix

- **Opt-in forms:** Happy with your opt-in process? Perhaps it's time to test a progressive approach, capturing more data that enables better targeting.
- **Welcome email:** You've tweaked your HTML welcome email a few times and are stoked that it's driving better initial engagement than the previous text version IT developed. However, a two- or three-part welcome series might more effectively engage subscribers, leading to higher retention and average order value.
- **Frequency:** You've doubled your core message frequency the last few years, which has driven more revenue, though a much higher churn rate. Perhaps it's time to create new email streams, such as "Clearance," "Consumer Reviews" and "Daily Deals." You can potentially increase frequency while enabling subscribers to opt in and out of each email stream separately.
- **Pre-Header "administrative" links:** Did you add those "View Web Version" and "Add to Address Book" links to the top of your emails a few years ago? Have you ever analyzed how many people click on those? At minimum, perhaps it's time to move those down and place your CTA at the top so it's the first thing seen.
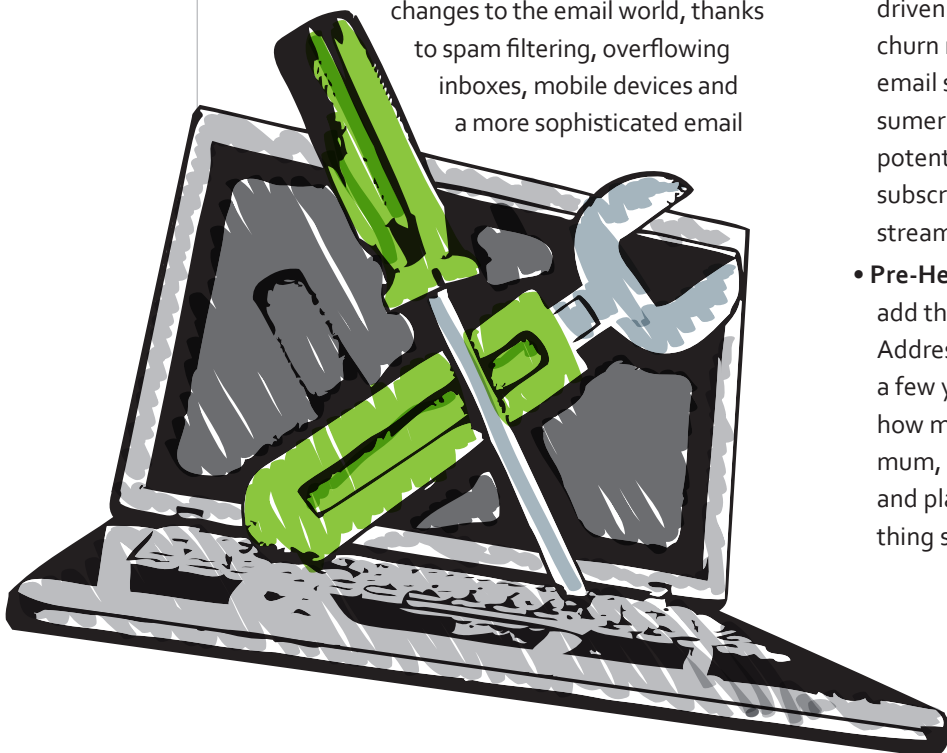
- **From name:** Changing up your From name can be dangerous. However, if you have different email streams, consider adding a descriptive word after your brand name to further differentiate each email type.
- **Width:** You've had good luck with your 700-pixel-width email template for years. With the explosion of small screens (e.g., smartphones and netbooks), you may want to test narrower emails to require less scrolling.
- **Layout:** Have you been using a single large image approach for years because it drives traffic and sales for the one key product you push in each email? Consider testing a multiple product/image layout that renders better with blocked images, causes fewer deliverability issues and enables use of dynamic content.
- **Minimizing Bounces:** While your bounce rate is reasonable, maybe it's time to test adding a second email address form field that confirms the email address. One client I spoke with recently said this approach has not negatively affected form completion rates, but has greatly reduced bad addresses.

There's a Gold Mine in Them There Email Analytics!

Q: **How can I use all of the data my email reports generate in order to make improvements?**

A: A wealth of data is hiding within your email reports, and all you have to do to unearth it is to slice up your numbers in a few different ways: opt-in source, time, demographics, activity and much more.

Use these metrics to diagnose problems and uncover improvement opportunities. Following are eight examples:

1. Metrics sliced by ISP domain: This can tell you whether, for example, AOL subscribers open, click or convert more or less often than Yahoo Mail or Hotmail subscribers. Segment your list by domain name and compare performances within each segment on these metrics. This analysis can help uncover deliverability or design and rendering issues at a specific ISP, for example.

2. Overall performance by opt-in source: Do subscribers who opt in on your email subscription page differ from those who found you through an affiliate partner, a co-registration site, paid-search or your purchase process? This analysis can reveal greater or less engagement from certain sources and drive changes to opt-in forms and processes.

3. Response rates by time of day/day of week: This can help you figure out the best time or day to send. Plot a graph comparing response rates to sending day and time and look for a pattern.

4. Response rates by key business demographics: This metric can tell you whether certain demographics are underperforming, leading to a need for better content and segmentation.

5. Engagement among new subscribers: Segment new subscribers from your general message stream, and track opens and clicks on your welcome email and other initial emails. Target those who don't act on these initial emails with a separate email inquiring about problems or questions.

6. Message activity: Measure how much activity each message generates—the average number of clicks per person clicking ("clicks per clicker"); number of opens per opener; which types of links consistently drive higher click activity; and more.

7. Metrics sliced by time on list: Conventional wisdom says long-time subscribers generate less activity than newer subscribers. Segment your list in varying time increments (two weeks since opt-in, one month, three months, six months, one year, two years plus) and compare segments on metrics such as opens, clicks, conversions, unsubscribes and spam complaints. Use the information to improve the welcome experience and plan re-engagement campaigns.

8. Active vs. inactive subscribers: Analyze subscribers by their activity level, such as no opens or clicks for at least six months. Incorporate this analysis with purchase behavior and other activities to drive re-engagement and list hygiene activities.

These are just a few examples of the types of analysis you can do by using the gold mine of email data you have at your fingertips. Let your imagination run wild and see how many nuggets you can uncover.

11 Tips for a Subject Line Testing Program

Q: **How can I be sure I'm testing my subject lines the right way?**

A: We at Silverpop often hear email subject line questions such as, "What's the sample size needed for subject line testing?" in conversations with clients and other marketers. Here are a few thoughts:

1. Testing is almost always a good idea: Just remember, though, that with a small sample size, you will have lower statistical confidence in the results (Is the winner really the winner? Is it repeatable?).

2. Don't completely discount small sample sizes, though. Smaller samples can be meaningful if you see results that vary by a wide-enough margin.

3. With a small sample size, test only two subject lines. This will keep the sample size as large as possible, as opposed to testing three or four options.

4. Test concepts and direction. Pick completely different types of subject lines you want to test, such as discount versus benefits, humor versus serious, etc. In the initial tests you'll want to test larger concepts that you can build on and refine with continuous testing.

5. Minimize variables. If you want to test discount versus benefits, for example, try to keep the number of subject-line characters the same or close to remove the variable and impact of length. Make sure that the call to action or key content is in the same location in the subject line (e.g., at the beginning).

6. Test the types of subject lines three times to increase confidence. However, don't test the same subject line over and over. Instead, test the style, with each subject line as close to the core/initial test as possible.

What you're testing is not necessarily a specific subject line but a type (in essence a template) of subject line that you can use again and again with different offer copy.

7. Think about the goal of your email program. If your subject line has a call to action, use click-through rate and/or conversion rate/revenue and not just open rate to determine the winner.

If the creative is identical in both emails, then this shows the impact of the subject line on actual conversion, which is more important than just number of opens.

I've seen this firsthand with tests I ran for a retailer in which the subject line with the lower open rate actually produced more revenue than the subject line with the higher open rate.

There are lots of tricks and approaches to increasing opens of subject lines, but this doesn't mean they produce the action you want.

8. Make sure you do a true apples-to-apples split test. Don't vary a single aspect of the two emails, send them at the same time and do an every "nth" split of your list.

9. Allow enough time for results. What's the life expectancy of your messages? You may find that your messages still garner opens and conversions days after they were sent.

If so, you may want to run your tests over a few days to see how they perform over their true lifetime. Of course, you may need to make a decision and send to the remainder of the list before then.

In that case, use the data available to you. However, don't forget that those tests are still running.

Examine the results in a week or two, and see if the final results differ from your earlier reading.

10. Consider segmentation. Examine your results as they apply to different segments in your list to see if specific subject line types resonate better with certain subscriber groups.

11. Take credit! Make sure to internally publicize your testing successes. Let others know the numbers on how your testing improved revenue by detailing (in dollar figures) how much your test improved results.

To do this, extrapolate the revenue that would have been earned if the losing version had been sent to the entire list, and take the difference between that and the actual results.

Share what you learned with your creative team and others (merchandising, sales, brand managers) and make sure they understand the benefits and can offer suggestions for future tests.

B2B and B2C Marketers: Not So Different After All

Q: **What could B2B and B2C marketers learn from each other to become better at email?**

A: Business-to-consumer and business-to-business marketers seem to exist in separate universes, each with its own sales process, marketing tactics and even marketing software, publications and events.

But are they really that different? While selling to consumers differs in some key ways from selling to businesses, the differences are declining.

Silverpop surveyed business and consumer marketers a few years back and found some shared goals as well as a few key differences. Most significantly, though, we found areas where each could really learn from the other to strengthen their own digital marketing programs.

B2B and B2C Marketers Share Goals and Tactics ...

Among them:

- Leveraging new channels: Both B2B and B2C marketers are coming to terms with how to best leverage new marketing channels, such as social, mobile and applications
- Increased upselling and cross-selling: An equal number of B2B and B2C respondents listed this as a top marketing goal.

... But They Differ on Two Key Goals ...

- B2C Goal: Build Loyalty. "Increasing customer loyalty" was a top marketing goal for nearly half of B2C marketers, compared to less than a third of B2B marketers.

- B2B Goal: Shorten the sales pipeline. Moving prospects through the sales cycle faster is a leading concern for more than half of B2B marketers but less than 3 of every 10 B2C'ers.

... And Can Use Those Differences to Learn from Each Other

B2B and B2C marketers share many email tactics, although consumer marketers not surprisingly use cart-abandonment emails more often.

Because B2B and B2C marketers have focused on different marketing approaches throughout the years, each group has developed techniques that the other could use, such as these:

- **Adopt automated marketing programs that incorporate contact scoring, nurturing and message tracks.** Scoring contacts for targeted messaging tends to prevail in the B2B marketing world. Contact ("lead") scoring uses both explicit data (actions taken or not taken) and implicit data (demographic and survey data) to assign a point score to a prospect.

Instead of putting all new prospects/email subscribers into the same message stream, scoring programs sort them into specific messaging tracks based on their scores and propensity to buy. As their scores change, prospects are shifted into different tracks that can help move them more quickly through the buying cycle.

While many consumer email marketers use database marketing techniques such as RFM (Recency, Frequency, Monetary) to segment customers and target their messaging, the combination of "scoring and nurturing" coupled with multiple messaging tracks is more common in B2B marketing.

- **Marry anonymous Web behavior to email addresses.** More B2B marketers are connecting anonymous historical Web behavior on their sites to an email address once visitors have opted into their programs.

This represents a tremendous opportunity to send targeted messages immediately and potentially identify a new subscriber with specific interests or characteristics.

Suppose you operate an online cruise business specializing in Caribbean, Mexican and Alaskan cruises. A prospect could browse your Alaskan cruise pages and then opt in to your weekly "Cruise Deals" newsletter.

If you didn't know her browsing interests, your first program email to her could focus on Mexican cruises instead. Your window of conversion could be lost to a competitor who better targeted her interest.

With this data, and knowing her contact score based on her explicit data collected and Web browsing, you can assign her right to your Alaskan-cruise track, leveraging dynamic content that matches her interest.

- **Post-purchase/loyalty marketing.** B2B marketing tends to focus on gathering, qualifying and warming up prospects. Marketing touches all too often end when the leads move to the sales staff

In contrast, B2C marketers understand that their best revenue opportunities (except for infrequent purchases such as cars) are with consumers that have previously purchased.

Many focus on building and rewarding customer loyalty, which creates post-purchase relationships and increases lifetime customer value.

Recouping acquisition costs and catering to the relatively small segment of customers who generate the highest value for the company are key concepts for consumer marketers.

Particularly in a world gone social, where customers increasingly praise or rant about products and services, using email to retain and increase loyalty will be key for B2B marketers.

Business marketers should incorporate these consumer-side strategies, such as using behavior and purchase data to identify the most loyal or valuable customers or those who are potential flight risks. This data can drive a variety of messaging tracks tailored to the customer's stage and value.

You could say that much of what I described above is basic lifecycle marketing. Perhaps, but our own study revealed that only a minority of email marketers deploy this approach.

This highlights another similarity: Both B2B and B2C marketers have much to do to leverage their data and refine their marketing programs.

How to Ask Key Questions to Get the Answers You Really Need

Q: What's the best day and time to send email?

A: "What's the best day to send email?" or "What's the average open rate?"

The problem with these questions is either that they are fundamentally unanswerable, or the answer won't lead you to a meaningful conclusion or action.

Further, I believe that a question like "What is the best time to send?" is simply the wrong question to ask. More on that later. First, let's look at five factors that make the "ideal send time" question so complex:

1. Artificial rules don't hold up.

Don't mail on Fridays. Never send B2B emails over the weekend. Send B2B emails on Sunday. Don't mail to moms in the morning. Tuesday at 10 a.m. works best (in which time zone, by the way?).

You've heard them all. Even if you believe one of those scenarios worked best at the aggregate level, have you really tested all scenarios to know for sure?

Years ago, I worked with a motorcycle accessories site and was convinced that its normal Sunday broadcast mailing times were not optimal. We tested several different scenarios, but Sundays did in fact perform best.

In hindsight, Sundays seemed logical to reach people who rode their dirt or touring bikes over the weekend. But I also believe that years of Sunday mailings probably trained recipients to expect messages then.

Rules are meant to be broken. A rule that works for one marketer might not hold true for your entire customer base, let alone your individual subscribers.

2. Mobile changes everything.

Email marketers got themselves all in a lather a couple of years ago over a Nielsen study that found social media and games were the most popular online activities, with email falling to third.

Overlooked in that study was a finding that showed email is far and away the No. 1 activity on mobile devices.

See all those people walking around and staring at their smartphones? Checking email regularly is clearly part of what they are doing, which complicates the theory that many consumers check their email at regular times throughout the day.

3. "In the inbox" isn't the same as "ready to buy."

The "best time" issue assumes either that individuals will immediately act on your messages when they open them or that there is at least a correlation between inbox receipt and conversion.

However, people who check their personal email frequently at work or on their mobile devices might not act on them until later at home. So, when is the best time?

In theory, then, a more accurate picture would be to correlate historical purchase/conversion time with time of email engagement. But at minimum, an "ideal" send time would have to incorporate testing dozens of scenarios and be tied to revenue or conversion, not opens or clicks.

4. Behavior determines/triggers timing.

The "best time to send" question is really one reserved for broadcast messages. Lifecycle and behavior-triggered messages eliminate the ques-

tion because the consumer's actions or profile - such as cart or browse abandonment, a purchase, posting of a review, birthday, purchase anniversary, etc. - determine send time.

The difference, or shift in thinking, is to move more of your email program to one where the consumer or recipient's behavior in essence tells you when to send the email.

5. Better emails lessen the timing factor.

The best time to send email is different for each of your recipients. Silverpop's Send Time Optimization will get you close to that goal by increasing the likelihood that an email is at the top of a recipient's inbox.

In addition to all of the variables and approaches outlined above, the final step is to simply create more valuable and relevant emails.

You may find that there are some less-than optimum send times for the majority of your subscribers, such as Sunday in the middle of the night.

Outside of that, however, if you have the right combination of cadence and value, truly engaged subscribers will likely dig your email out of their inboxes wherever it lies.

Ask This Instead: "How Do We Create Value?"

At its core, the "send time" question is really asking "How do we increase the likelihood that someone will act or convert as a result of our email program?"

So, consider a more fundamental and strategic question for your program, such as this:

"How do we create email programs that add value to the customer relationship and maximize conversions and revenue?"

This customer-centric perspective emphasizes message relevance over campaign schedule. The right time question cannot be separated from the other half of the equation: the "right message."

Using Metrics to Identify Potential Problem Areas

Q: **What metrics should I use to diagnose problems in my email program?**

A: There are lots of these diagnostic-type metrics, but let's take a look at four examples: share of email, list activity, subscriber drop-off and deliverability. They aren't designed to tell you if your email program met its goals. But they will help you uncover problems or weaknesses and develop strategies to improve them.

Most diagnostic metrics use standard message stats like opens, clicks, conversions, bounces and unsubscribes, but it is important to move beyond the individual message and plot say, six months or 10 messages, on a graph and study them over time to spot trends up or down.

Share of Email

Sure, you got a 15 percent CTR on your last message, and maybe you even know that's up 5 percentage points over your last six messages. But do you know which links (products, offers and articles) consistently drove the most traffic or conversions?

Maybe you have 20 total links in your last message. If you focus just on the CTR itself, you might miss a key indicator, like finding out just two of those links drove 75 percent of your activity.

Knowing that can help you redesign your emails to highlight the links (content and offers) that matter most to your customers and subscribers.

List Activity

Do you know how many readers are still opening and clicking six months after they sign up and which ones are basically just valid addresses in your database?

When we've analyzed inactive-subscriber reports for clients, we see lists that are typically between 33 percent and 75 percent dead. One financial-services client found out 58 percent of its main list hadn't opened or clicked on a single email in the last six months!

It was quite a staggering metric to them. But once you know that, you can deploy various means to re-engage your long-term subscribers.

Subscriber Drop-Off

This shows you when interest drops off to the point where subscribers don't actively open emails or act on them. Typically we see this drop-off after the first few messages or months, particularly if a program is not front-loaded during the welcome process and initial messages.

You can actually measure when subscribers start to lose interest by comparing activity according to opt-in date. Once you know when drop-off typically begins, you can develop incentives or strategies to keep subscribers engaged longer.

Delivery Rate

This is still a challenge for most emailers. It has never been harder to get messages both delivered to the inbox and rendered correctly. You first need to check your delivery rate over several months or messages, as reported by your email service provider, delivery-monitoring service or list-management software.

Is delivery going down steadily, or does it ebb and flow? You'll need to dig into more data to find out what's going on, such as unsubscribe, bounce and spam complaint rates at each ISP.

Yes, this is a lot of data to sift through. But if you're not looking at metrics like these, frankly, you are probably pretty clueless as to what's actually going on with your email-marketing program.

Should I Adopt the Latest Tactic that Everyone Else is Using?

Q: **I've seen so many innovations in email, but I can't keep up. How do I know which ones I should try without testing everything?**

A: In the days following Steve Jobs' death, I found myself thinking, oddly enough, about Apple's TV commercials, especially "Lemmings," in which briefcase-toting office workers march off a cliff until one man lifts his blindfold and sees what's happening.

Many marketers run their email programs like lemmings, because they copy a competitor's or peer's new practice without doing proper due diligence first.

As a result, an effective email design might evolve into a mishmash of uncoordinated additions that obscure the email's main purpose, like the call to action.

"Lemmingism" In Action

Several years ago, a well-known marketing publisher began adding the newsletter name to the front of the subject line: (From Name) "Publisher Name" (Subject Line) [Newsletter Name] "Newsletter content."

I don't remember why, but I think the rationale was that some older email clients showed the sender's email address instead of the friendly "From" name in the inbox. This added an additional level of branding and helped differentiate among their multiple newsletters.

Thereafter, many other publishers and marketers began adding brand names or newsletter titles to the subject line. This might or might not have been the right practice; other from name/subject line combinations might work better for your company.

Other trends followed, such as putting "add to address book," "view Web version" and "view mobile" links at the top of the email. Now it seems like everyone is adding "preheader" text at the top of the email message or scattering social network icons like breadcrumbs.

How many marketers simply adopted these practices without thinking through the options and benefits?

Measure Your Lemming Likelihood

Many or all of these practices might make sense to address specific subscriber challenges or increase email results. But you should ask yourself some tough questions before you simply bolt on a new element in your emails.

1. Why would we want to do this?

Does preheader text really drive more clicks or conversions? Why can't an email be wider than 550 to 600 pixels?

Don't simply accept that a suggestion from another marketer or a consultant is the way to go. Question everything, including what I've written here.

2. Does this problem affect us?

Practices will emerge that solve valid but specific challenges. A few years ago, some email marketers began adding an unsubscribe link at the top of their emails. While this practice was not widely adopted, many marketers started asking if they needed to do this as well.

In most cases, an unsubscribe link at the top of your email is unnecessary unless you experience higher-than-acceptable abuse complaints overall or with specific ISPs. This practice can reduce spam complaints for some emailers, but for others it might simply take up valuable pre-header real estate.

3. Will this change benefit a significant percentage of our subscribers or just a small minority?

B2B marketers have struggled to design HTML emails that render well in Lotus Notes. One helpful practice common in B2B email – adding anchor links to teaser headlines that take the reader right to the content – apparently doesn't work well in Lotus Notes. So, many marketers or publishers did not include them.

This might make sense if you estimate 20 percent of your subscribers use Lotus Notes, but perhaps not if only about 5 percent do.

4. Can we find a better way?

Years ago the trend to add a "View Web Version" link to the top of emails became common practice in response to ISP and Web clients that blocked images by default.

While this is a logical and harmless practice, the better solution might be to design emails to render well without images. Another variation is to hyperlink the call-to-action copy to your website version.

Can we support this change? What will happen if we don't?

If you have a lot of early version BlackBerry users, then a "View Mobile Version" link might make sense.

But before you dive in, consider how easily your team can create and host mobile versions of your emails. Does your CMS system easily support it? Do you believe your production team simply doesn't have the time?

You could rationalize not adding a mobile version link and content given BlackBerry's declining market share and a more HTML-friendly email client on newer models/operating systems.

'Think Different' in Email

My point here is not to denigrate email innovation or any of the aforementioned practices. Rather, question them. Understand what problems these emerging practices fix, how they fit into your email workflow and what not changing might cost you.

Don't change your email program just because a competitor did or because the smartest people in the industry say you should.

Real-Time Content Optimization: Testing on Steroids

Q. **We regularly do testing, but it adds several days to our campaigns. What can we do to shorten the time from creation to launch?**

A: Every time someone proclaims the death of email, new technologies emerge that make email fresh and new again, ready to retain its title as the technological heavyweight of the marketing world.

The next generation of email is at the gate, even as we speak. It is evolving into an even more highly optimized channel that pulls in customer data and offers services and functions now available primarily on Web sites.

For marketers, this means that recipients will potentially be further down the purchase decision path when they click through to the site, giving you and them a shorter path to conversion, whether it's a sale, site registration, product download, demo request or completing an application.

This isn't pie-in-the-sky conjecturing, either. It's happening right now, with technologies that operate in real time:

- Testing services (e.g., Omniture Test & Target and 8Seconds) that perform A/B split or multivariate tests on live content and automatically serve up the winning combination within the same campaign.
- Personalized product recommendations served into the email body reflecting a recipient's preferences, past buying history or other interactions with a company (Certona, Baynote, etc.).
- Up-to-date customer reviews personalized to reflect the recipient's interests, previous purchases, transactions and other variables (BazaarVoice, PowerReviews, etc.).

Real-Time Testing Optimizes Email on the Fly

What's exciting about this isn't just the "ain't-it-cool?" aspect (although it is pretty cool to watch in action).

This technology allows marketers to test content in real time, using automation that serves up the winning combination in the campaign during the send, instead of doing it piecemeal on samples of their lists and then applying the results to the list at large.

This cuts the lag time between testing and optimization to hours rather than days. Think how that could have improved the last campaign you sent where the results didn't quite meet your expectations.

The software delivers the test emails randomly throughout your list and then tracks actions on the messages. As recipients open and act on the messages, the software calculates a winner and then delivers it to the balance of your mailing list once it reaches a desired confidence level (typically a 95 interval).

Dynamic Content Moves Off the Web

Serving Web content personalized for customer data such as pages visited, past purchases, demographics and preferences is standard operating procedure, and dynamic

content in email introduces a new layer of relevance and credibility to email.

The ability to draw in fresh recommendations and customer-generated reviews allows you to create and send highly targeted, personalized and timely email messages, which are more relevant, engaging and credible than yet another generic broadcast free-shipping offer.

Add in send-time optimization, and you have the potential for real-time content based on when your recipients open their email messages, not just when you send it.

Optimization Evolves Beyond Occasional Testing

We talk a lot about optimization in email, testing various aspects of each message along with your email program as a whole, and then applying what you learn to move your program to the highest level.

However, real-time content optimization takes this concept farther, going beyond simply "testing," but rather serving up image-based content assets with confidence that one approach will beat out another. This approach makes testing technology an integral component of every email you send.

13 Keys to an Effective Correction Email Process

Q: **What's the best way to rescue an email message with a mistake in it?**

A: "Mistake" emails are simply a fact of life for digital marketers. The question isn't "If" but "When?," "How often?," "How severe?" and "How will you respond?"

"Mistake" emails can be as simple as a glaring typo, wrong pricing, a bad link or bad subject line. Or, they can be near disastrous by sending out the wrong offer to your entire list.

Another mistake, however, is not being prepared for the inevitable. Creating an email "disaster plan" is a necessary strategy in any email program. Knowing what steps to take when a mistake happens will help you minimize the damage from being caught off-guard and help avoid future mistakes.

Lessons Learned from Email Mistakes

Like many email marketers, I've had the pleasure of sending and correcting emails gone awry. I've also advised clients on their approaches to corrections and apology emails.

So, here are my 13 elements of a good email correction program:

1. Discover the mistake or problem. Monitor "reply-to" addresses, social media like Twitter and key metrics such as conversions and registrations. The faster you uncover the problem, the sooner you can respond and minimize any negative impact.

2. Assess the potential impact. Was it a simple goof, like a misspelled word, or a critical error that could affect your respondents' ability to buy or take a key action? Or, was it embarrassing, such as leaving in a swear word from the proof email subject line?

As early as possible, determine whether and how you need to respond.

3. Focus on your response. Save the blame for later. Focus your team's energies on the response process and needs of your customers and subscribers before worrying about assigning blame.

4. Create an action plan. If you must respond, outline the key message points to make in your correction email, including any possible incentives or other make-good actions.

Map out which departments of your company might be affected by the mistake or need to be involved in the correction/apology process. These can include customer service, sales, e-commerce or corporate communications.

5. Keep management and other stakeholders in the loop. You obviously don't need to tell the CEO about a simple typo (unless it's extremely embarrassing or misleading). You likely will need to get management support if your make-good efforts will have a financial impact (offering discounts, special pricing, offer extensions).

6. Act quickly. You should be able to turn around a correction email within an hour or two if you simply need to send a corrected version of the original email and brief note.

More complex mistakes might take a day or more to fix. In those cases, a quick "We are working on fixing the issue" email is a good bet.

7. Consider responding only to those affected. Not all subscribers will be affected by the mistake. If a product's price on your Web site differs from

the price in your email, consider sending the correction email only to the people who clicked on the affected product link.

Create a trigger-based correction email that is sent only to recipients who click on the specific product link.

8. Apologize in other channels. If the error is significant enough, you'll probably want to use your other channels to apologize, post the correction or provide updates. These include your Web site, social media and blog.

9. Use a personal tone that matches your recipients' expectations. Your apology should reflect your company or corporate personality. Be humble, especially if the mistake could jeopardize your subscribers' faith and trust in your brand.

Use humor if the mistake lends itself to it. But be sure your humor is directed at yourself and doesn't sound as if you're taking customers' concerns lightly.

10. Find a way to turn the error into an opportunity. The combination of an original error-laden email followed by a well-executed correction/apology email might increase your total revenue, conversions or other goals.

While deliberately sending erroneous emails is not a good long-term strategy, design your correction email to support the original email's goal. Margins aside, an additional incentive in the correction email can drive incremental conversions.

11. Proof the correction email. Pull in people outside your team to review your message for typos and bad links and to be sure the tone and content convey your desired impact. Sending a correction email with another error is clearly something to avoid. Also, send a "proof" email first and include the other departments that might be affected on the distribution.

12. Measure the impact. Measure both process metrics (e.g., opens, clicks, unsubscribes and spam complaints) and output metrics (conversions, downloads, registrations, etc.) on your mistake and corrected/apology emails.

Analyze whether your approach and any incentives generated positive results. Also, understand how the two emails affected unsubscribe and spam complaint rates. A markedly higher-than-normal rate means that your response did not line up with expectations.

13. Learn from the mistake. Once the dust settles, determine how it happened. Was it a simple user error from lack of training on your email platform? A poor review/proofing process? Did someone circumvent your standard process? If needed, revise your creative and production processes to minimize future mistakes.

9

Email In Your Organization

I've always believed that to be fully successful with email, you have to think outside your own department.

Yes, your marketing team needs to work like a well-oiled machine (even if you are a marketing department of one). You have internal needs to meet and manage, such as time, budget and other corporate resources, along with challenges to meet and opportunities to exploit.

However, your department is part of a greater corporate ecosystem, and it relies on help and cooperation from others around and outside of your company:

- *Your executive suite for budget resources*

- *Your email service provider*

- *Your IT department for in-house help, troubleshooting and integration with other platforms*

- *Other departments where you can export your email expertise in exchange for potentially funding projects*

- *Outside agencies that provide creative, list-management or optimizations services*

This section will discuss strategies you can use to get the resources you need to produce an effective and efficient email marketing program, one that has a measurable, positive impact on your company's bottom line.

Email Evangelist: Your Other Marketing Role

Q: **I can see many places in my company where email, or a better implementation of email, could solve so many problems. Should I offer my team's email expertise, or does that cross too many boundaries?**

A: As marketers, we get so wrapped up in the daily issues of email, such as promotions, deliverability and list growth, that we often don't see all the ways email can help meet other departmental goals and objectives.

But that immersion has also taught us more than anyone else about how email works and what its possibilities are. We need to find opportunities in other departments where email can drive value and achieve business objectives.

By turning into the resident email expert, you not only get the chance to solve serious problems in other departments but also to shore up email as a valuable channel.

You'll need to spend time with other department heads, finding out their pain points, learning what they hope to achieve, and devising ways to incorporate your email resources into the process.

These may be standard goals such as working with finance to determine ways to help increase profit margins. Or it might be helping reduce customer support tickets for frequently asked questions or issues.

The following are just a few examples of areas where you can use email to help other departments achieve their business goals:

Finance/MIS/HR:

Finance and MIS are typically looking to reduce costs, while HR is focused on employee retention, satisfaction and recruitment.

- Identify and promote higher-margin products or premium services and match your subscriber database with purchase history or Web activity to identify good prospects.
- Timely and cost-effective communications to investors and other stakeholders.
- Your CFO is probably very focused on reducing travel costs, underutilized software licenses, etc. Employee newsletters can be extremely effective in educating your workforce and communicating these corporate initiatives.
- Beyond the employee newsletter, human resources can tap into other external newsletters to help communicate corporate values and open positions to help in recruitment efforts.

Customer Support/Training:

Email can help trim costs without sacrificing customer contact by driving subscribers to automated services, online customer support/FAQs and online bill payment.

One of our clients has calculated that outbound email costs 1/60th of what it costs for call-center reps to make outbound calls.

- Promote surveys via email to measure customer satisfaction and use of products and services.
- Newsletters can educate customers on how to use specific features, with links to user forums and social-media channels where users can post questions and advice.

- A "getting started" email series can includes links to a welcome kit and answers to the most frequently asked questions.
- Payment reminders can have links to Web-based payment centers.

Product Marketing/E-commerce/Merchandising:

These departments are typically looking to increase customer share-of-wallet, new product adoption, retention rates, etc.

- Cross-sell and up-sell emails can educate customers on other products and services that may be of value. These may also be triggered off previous behaviors.
- Offers to try premium services (free to paid, or basic to premium paid service).
- Reactivation program for subscribers who haven't converted from free trials or basic subscriptions.

Sales/Business Development:

If you are a B2B company, the sales team wants more qualified leads and knowledge of marketing programs.

- B2B marketers are realizing the power of using email as part of a lead-nurturing program that helps move the 70 percent of your leads that are long-term in nature (according to MarketingSherpa) into sales-ready leads.
- Sending regular internal newsletters to the sales team keeps them in the loop on competitors, new sales collateral, marketing programs and other information that increases sales effectiveness.
- Email is a great channel to keep partners in the loop on new products, company information and changes and enhancements to your partner initiatives.

Your email team might not drive the bus on many of these initiatives. Nonetheless, they can benefit from your considerable email marketing expertise.

Your HR department might run the employee newsletter, for example, but your email team can provide great value in ensuring good design and well-written copy, and by tracking actions on the newsletter in order to offer feedback on which type of content is actually being read or ignored.

The goal is to help people rethink email's place in your organization, not just a revenue generator but also as a key driver of employee education, customer retention, cost reduction and other corporate and departmental initiatives.

What NASCAR Can Teach You About Email Organization

Q: **I want to revamp our email program for greater performance, but how do I know whether I have the right technology, resources and creative partners in place to reach our goals and achieve success?**

A: One key to answering this question is determining how much you'll need to have your own hands in the marketing mix.

The old enterprise email marketing model, where most correspondences were one-off broadcast messages, is being replaced.

That approach, basically, was this: "We've got five product emails we've got to push out this week, let's toss them over to the agency or creative ESP team, send them off and move on to the next communication." That isn't going to work much longer.

In its place is a move toward multifaceted programs and campaigns that are triggered by customer behaviors. That relates directly to one of the biggest trends among savvy email marketers: creating more behavior-based and automated programs.

These campaigns are much more strategic, requiring a deep knowledge of the business. They need to be designed, tweaked, monitored and continually optimized by someone who understands the intricacies of the company.

In addition, transitioning from batch-and-blast emails to more behavior-based automated programs typically requires working closely with your IT team as you're pulling data from multiple sources (CRM, e-commerce, business intelligence and more).

Much of this work is front-loaded as your email strategy changes, but it's also critical that you have internal control over these relationships so you can make changes quickly.

For these reasons, sophisticated campaigns are more difficult to fully outsource. Think of email marketers as NASCAR drivers. Their pit crews are essential members of the team, but during the actual race, the driver is the one in there with his hands on the wheel maneuvering a high-tech piece of machinery at high speeds and in heavy traffic.

A race-car driver has to adjust on the fly to track conditions, vehicle performance and other drivers. So, too, must an email marketer juggle many different messaging tracks and data points simultaneously, requiring quick mid-course adjustments to keep a few laps ahead of the competition?

So, while a full-service model might make sense for some of those "throw-it-over-the-wall" companies, others will want to focus on improving efficiency and performance by maintaining greater control of their integrated email marketing efforts.

That's because YOU know your audience best and will benefit from a solution that puts the power in your hands so you can, for example, modify post-purchase email campaigns that drive revenue on the fly.

How does that translate in terms of making sure you have the right tools, team and resources in place? In my experience, it's difficult for a vendor to be both a best-in-class software provider and a world-class agency.

So, if you need both top-tier technology and agency services, you might want to consider going with the best of breed from each discipline.

The good news, from a technology perspective, is that the best marketing technology solutions today are both sophisticated and easy to use, enabling you to improve efficiency by reducing the need for external campaign and deployment services.

My advice is to dig beyond analyst reports and get demos of the marketing technology platforms you're considering to see how they stack up in terms of ease of use, data collection options, behavior-driven features and integration of mobile, social, local and email.

How do you know if you have the right elements in place to reach your goals and achieve success? That's a tough one to answer, because one size doesn't fit all, and different companies use email with different goals in mind.

But if you're looking to think big employ more of the types of behavior-based, automated emails that can often boost revenue to exponentially higher levels, remember this:

It's easier to win the race if you're actually driving the car.
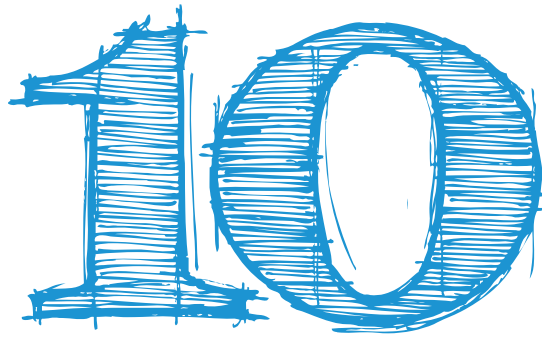
10
Better Email Through Automation

In the beginning, there was broadcast email: one message to your entire distribution list, whether your recipient was male or female, a skier or a golfer, a first-time customer or a regular buyer.

At first glance, broadcast email is easy to do. You create the message. You send the message. But it also has inherent limitations:

- *It treats all of your customers the same way, with no provision for customer history, preferences, interests or experiences. As a result, they're less relevant on the whole to your subscribers.*

- *Broadcast emails require a lot of time to research, create and test fresh messages every time if you send more frequently than once or twice a month.*

- *You have to deal with delivery-optimization issues such as finding the best day and time to send as well as the optimum frequency that balances inbox visibility against burning out or annoying your recipients.*

What's the alternative? Automated messages that trigger according to a customer's actions or preferences. That makes them much more relevant and openworthy to your subscribers.

Broadcast emails – and their cousins, which are targeted messages sent to specific segments of your database – always will have a place in your email program. They deliver significant results because of their sheer volume, frequency, brand reminder and luck of timing.

Also, most triggered messages for e-commerce companies go to existing customers. So, you need broadcast and segmented emails to convert prospects into paying customers.

A model that blends broadcast/targeted email with a carefully selected set of triggered messages covers the most revenue and engagement bases for your email program.

Moving Beyond 'Batch and Blast' Email

Q: **What is a good strategy to transition from broadcast email to one that uses more targeted or triggered email?**

A: Although it might be a challenge to persuade your upper management to invest time and money to upgrade your email program, this story of a company that boosted its conversion rate 40 percent using segmentation and targeted messaging might help loosen up the budget.

First Challenge: Move Beyond 'One Size' Email

Fabric.com, a provider of customer-measured fabrics, operates a custom-tailored business but at one time offered customers only a basic "one size fits all" email service.

The company, founded in 1999 and acquired by Amazon in 2008, had no way to customize its messages or segment its database; thus, its messages didn't reflect what it had learned about how its customers bought its products.

Its homegrown email service also didn't provide detailed reporting or analysis on email delivery to subscribers' inboxes. Without the infrastructure to capture this kind of information, you have no way of knowing how well your program is performing and can't justify seeking more budget or company support.

Strategic Mix: Segmentation, Triggers, Preferences, Analytics – Even Broadcast

Fabric.com began by segmenting its database according to customer behavior, from most active to least active. It began sending out offers customized to each segment, intending to keep loyal customers engaged and entice back inactives.

The company also created a preference center that asked subscribers for birthdates, email and frequency preferences, and details about their sewing habits (experience level, preferred kind of sewing, whether for business or personal use).

One important aspect of this email program makeover is that Fabric.com uses the data it collected, both in its preference center and through integration of a Coremetrics LIVEmail analytics program.

Too many marketers still fail to leverage the data they collect, such as gender and birth date.

The birth date it collects at opt-in generates the Happy Birthday email. The analytics program generates a "Happy Anniversary" email on the anniversary of the customer's first purchase from the company.

It also sends shopping-cart reminders for those who leave the site with items still in their carts or who buy fabrics swatches but don't return within two weeks to buy the full fabric.

These are three key approaches that help get Fabric.com email messages noticed in the inbox, where yet another 20 percent-discount or free-shipping offer might fade into the background.

Even with the highly targeted and personalized messages that Fabric.com's email marketing team produces, broadcast messages still have a place, promoting sales, new products and "Deals of the Day" for subscribers who opt in to those lists.

Results: Higher Conversions, and Benefits Beyond Email

First, the automated lifecycle emails helped Fabric.com double its open and click-through rates and led to a 40 percent increase in conversions.

Next, the cart-abandonment program helped generate a 20 percent increase in order size on conversions from cart-abandonment reminders.

Finally, the improvements in the email program had a ripple effect in other departments at the company.

Besides bringing in additional revenue, Fabric. com's triggered email campaigns also generated orders during normally slower periods. This helped the company to plan better, thanks to a steady stream of revenue, and also helped with workflow at the company's warehouse.

Birthday Emails: The Goodwill Ambassador That Can Also Make Money

Q: Would you explain how birthday emails work and how I could set up one?

A: We at Silverpop are big on birthday emails, and not just because we enjoy receiving them on our special days.

A well-designed birthday email program has the potential to generate high ROI on a relatively low level of effort. Birthday emails also give you another opportunity to reach out to your customers with a highly relevant message.

Despite these benefits, Silverpop found in a recent study that seven in 10 email marketers don't send birthday emails. On top of that, three out of the four email marketers who don't send birthday emails say they don't intend to start.

We put these findings and much more in a report, "Birthday Blueprint: How to Build a Top-Tier Birthday Email Program," which looks at the state of birthday email marketing and addresses the reasons why some marketers don't do birthday emails.

Blueprint for Building Your Birthday Email Program

The report also includes our seven-step Birthday Blueprint and loads of examples and illustrations. Here's a condensed version. I invite you to check it out and then download the complete report.

Step 1: Set your birthday program goals.

Your birthday email program can serve one or both of these basic goals:

- Build branding and customer engagement: You send an attractively designed message that doesn't include a purchase incentive with the "Happy Birthday" greeting. This approach dings your marketing budget the least, and you might even realize some incremental revenue.
- Drive online or offline visits and revenue: Using a purchase incentive such as a discount, upgraded service or no-strings freebie generates measurable results but can also affect your margins or marketing budget.

Step 2: Determine a delivery schedule.

Generally speaking, the more effort a recipient has to expend to benefit from your message, the farther in advance you should send it.

If you don't use incentives, you can send the message on or near the recipient's birthday. At the other extreme, a travel company sends its birthday emails six weeks early to give recipients time to plan a trip.

Phone Number and Birthday

Note: Your phone number will only be used to contact you about an order.

Daytime Phone: [ ] - [ ] - [ ]

Birthday: [mm ▼] [dd ▼] Receive special birthday greetings.

Step 3: Collect the data:

Decide where and how to collect your data, whether to require birth date and how much data to collect. Your delivery schedule and the number of other required fields drive some of your decisions.

Requiring day/month/year data will give you the richest amount of data but can reduce form completions. A/B split tests on your registration form might show you how much data your customers are willing to provide.

Step 4: Greeting or incentives?

If using incentives is a common part of your email approach, then incorporating them in your birthday messages should be a no-brainer. More than half the marketers in Silverpop's benchmark study provide some incentive.

Without an incentive, your email content must be strong and creative to make an impression.

If you're unsure, or you need to sell management on the benefits, test both approaches side by side for a few months.

Step 5: Single or multiple emails?

Sending a single birthday wish is the most common and easiest strategy. However, sending multiple emails can motivate your subscribers to redeem an incentive before it expires.

Step 6: Design your message.

Because birthdays are usually fun days for subscribers, your creative approach should reflect this. Push your designer to create something fun and engaging that's distinctive from your other messages while still following your graphic standards and email design best practices.

Copy styles can take many forms. Be sure the copy drives the action you want, is simple and straightforward and meshes with your brand or corporate image.

Step 7: Test and optimize.

Although listed last, testing and optimization should be part of every step in your pilot program as well as after as you refine it.

Here are some facets to test:

- **Data capture**: Try different form layouts and data-field locations to see which ones deliver the most completions.
- **Incentives**: Try at least two to see which drives the best combination of conversions and margin impact.
- **Subject lines**: Consider whether tactics such as first-name personalization or listing the incentive in the subject line affect conversions or opens.

Rescue Those Abandoned Carts with Email

Q: Does it really pay to send cart-abandonment emails, or do customers just think they're kind of creepy?

A: Yes, because this fact of e-commerce life has become a regular stage in the online shopping process, something that opens up new opportunities to use email marketing to close the deal.

We already know email reminders can bring shoppers back to purchase. However, a study by remarketing technology provider SeeWhy, a Silverpop technology partner, delves deeper into why shoppers don't buy right away and the value they represent to retailers.

Below are a few facts you probably didn't know about your cart abandoners, as reported in "The Science of Shopping Cart Abandonment," which studied 250,000 online transactions of 600,000 shoppers:

- "Serial abandoners" often come back and buy more: 42 percent of shoppers who abandon carts do so an average of 2.4 times over a four-week period. However, nearly half of them will respond to remarketing or cart-reminder emails, compared with only 18 percent of those who abandoned their carts only once. When they do come back, they spend 55 percent more than less-frequent abandoners.

- New customers abandon more often but respond better to reminders: Only 5 percent of first-time buyers return to buy again, and they abandon their carts more often than other shoppers (an average 2.2 times per purchase compared with 1.3 overall). However, more of them (57 percent) come back to buy when reminded via recovery emails.

- Three of four cart abandoners will respond to recovery emails: 25 percent of cart abandoners are gone for good, but the rest will keep coming back when prompted via email, whether to purchase or just to browse.

"Price and timing are two of the primary reasons people abandon shopping carts online," says Charles Nicholls, SeeWhy's founder/ Chief Strategy Officer. "We can't do anything about that on the website, but we can absolutely address that in email.

"People are so comfortable now with leaving items in the cart because they know they can come back. If you make it easy for them, they'll come back, and a greater proportion will buy."

Rethink Email's Role in Remarketing

Here are three takeaways for email marketers:

1. Welcome program is key. Your welcome program can be crucial to bringing back more first-time shoppers and potentially reducing the factors that cause them to abandon carts more often than other shoppers.

Although the research doesn't specify which percentage of returning shoppers also are new email subscribers, it stands to reason that effective, value-filled messages will motivate shoppers who have already shown intent.

Thus, the process of on-boarding new subscribers – sending unique welcome messages, redeeming incentives after confirmation, even changing cadence or message content – becomes even more important.

2. Upgrade remarketing for permanent carts. If you already have a remarketing program, it might be time to retool it for long-term cart-parkers.

In addition to the recommended series of three cart-reminder messages (for example one sent within a few hours after abandonment, the next within 24 hours and the third up to a week later), consider testing periodic reminders for shoppers who leave items in carts for extended periods beyond your regular remarketing window.

With so many subscribers using your shopping cart as a wish list, you may also want to test including gentle cart reminders into your regular broadcast emails, either by linking to the cart if you have that level of e-commerce and email integration, or by segmenting out those customers and including a general cart reminder, minus the link.

3. Create a new customer class. The term "cart abandonment" is obsolete for many online shoppers. They're not really abandoning their carts; they're just using them as makeshift wish lists.

Why not give them that functionality instead, complete with an email message stream that promotes the items they've singled out?

Send Email After the Purchase to Stay in Touch

Q: What kinds of emails should I send after someone buys from me?

A: Triggered emails can help you build your email business after the sale as well as before it. They can help you learn whether your customers are happy with their purchases, encourage future purchases and invite customers to become extensions of your marketing department.

About three-quarters of marketers have added these triggered emails to their regular email programs, according to Silverpop research.

The list below presents some of the most frequently used post-purchase email messages and how you can implement them.

Note: Many of these messages require pulling data or content from your e-commerce, Web analytics, review or personalization/recommendation systems.

1. Service Satisfaction Survey

What: A follow-up message asking the customer to complete a brief survey on the purchase experience: order process, shipping, etc.

When to send: Typically sent a few days after the customer has received the shipment. Test several time periods to see which generates the highest response.

Why: Provides additional customer touch point and important customer-satisfaction feedback.

Benefits:

- Alerts you to potential problems in the transaction/fulfillment process and areas for improvement, plus minimizes customer defection.

- Can identify content for possible testimonials.

- Post-purchase survey emails deliver 20 percent higher revenue per email than a standard broadcast message for Silverpop client Tafford Uniforms.

2. Product/Service Review Request

What: An email sent after a purchase inviting the customer to post a review of the item(s) purchased. Purchases can include products, travel, a service or other activity. Incentives can be offered, but test to see how they impact quantity and quality of reviews, as well as follow-on purchases.

When to send: Send times vary by the kind of product purchased and whether it would have a specific use day, such as travel or a purchase the customer identified as a gift.

Use common sense initially. Monitor response rates. Test different numbers of days after purchase to send the emails.

Why: Reviews are becoming a key source of purchase-process content, and email is typically the top means to encourage posting reviews. Customers increasingly use them when evaluating possible purchases.

Benefits:

- Generates significant percentage of your posted reviews.

- Additional touch point, engagement and brand awareness.

- Additional revenue from follow-on purchases.

- Fresh customer-generated content can help boost your website's search-engine rankings.

- While results can vary widely, Silverpop client S&S Worldwide sees follow-on purchases from 14 percent of customers that click on purchase-request emails.

3. Review Posted Notification

What: Message that thanks the customer for posting a review(s) and typically includes a link to the review and redemption of any incentive promised in the review-solicitation email. Can include links to follow and share comments on social networks.

When to send: As soon as the review goes live.

Why: Boosts your trustworthiness by providing evidence that the review is public and can be seen by others.

Benefits:

- Provides another touch point with the customer.
- Offers opportunity for customer to broadcast review or comments on social networks.
- Silverpop client S&S Worldwide found 12 percent of recipients who click on the message go on to make another purchase.

4. Cross-sell/Recommendation

What: Recommends related products or services based on the customer's most recent purchase, generated from your e-commerce, Web analytics or personalization/recommendation systems.

When to send: Time varies according to product lifecycle and customer's buying frequency. Test intervals to determine optimal times.

Why: Encourages repeated purchases.

Benefits:

- Provides another touch point with customer.
- Highly relevant because it relates to a product or service the customer already purchased.

5. Replenishment Reminder/Short-Supply Notice

What: Replenishment email reminds customer to repurchase a consumable product. "Short-supply" email notifies existing customer that consumable or similar-style products are on short supply.

When to send: Shortly before the product is likely to run out based on expected product life; reminder preferences from customer.

Why: Value-added service to customer to avoid disappointment and to remind customer to repurchase product.

Benefits:

- Content written with service orientation is distinct from a standard promotional email.
- Reminds customer to repurchase the original product from you.
- Silverpop client Fabric.com realizes a 53 percent increase in average order value on low-stock purchase reminders and open, click-through and conversion rates that are double those of broadcast email.

6. Bounceback

What: Special offer or incentive sent to recent or first-time purchasers to encourage them to return and buy again.
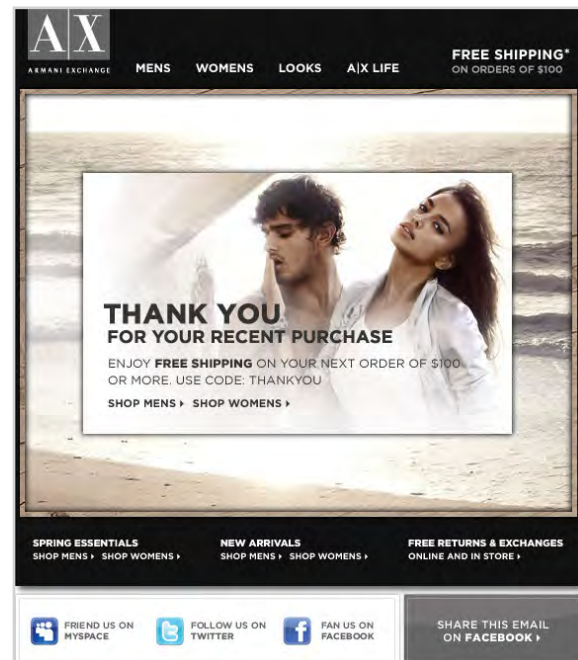
When to send: Depends on product or purchase cycle, but typically within one month of purchase–some retailers send within a week of purchase. Test to find optimal interval.

Why: Intended to reward purchasers and encourage repurchasing from your most engaged customers/subscribers.

Benefit: Additional revenue and another opportunity to engage and say "thank you" for buying.

7. Purchase Anniversary

What: Sent on a logical anniversary date (typically one year). Invites the customer to repurchase and typically includes an incentive, cross-sell/upsell, replenishment or other inducements.

Why: Reminds customer of previous purchase and offers an incentive to return and purchase again.

Benefits:

- Can be part of a reactivation campaign for inactive/non-responding customers.
- Provides another touch point for contacting customers outside of the regular promotional calendar.
- For one client, purchase anniversary emails deliver a 15 percent higher conversion rate than standard broadcast promotional messages.

When One Email Isn't Enough

Q: **How can I send more email to stay in touch with my customers without annoying them?**

A: The simple truth is that one email message often isn't enough to persuade people to take the actions you want. Sometimes, consumers just need to be reminded about the subscription that's expiring or the software they downloaded but haven't tested yet.

A series of related emails can help you build engagement with a new customer, move a prospect onto the right track or nudge a good lead closer to a buying decision. The four approaches below use automated messages to prompt your customers into acting:

1. Resend the original message. Emails get lost or overlooked all the time. Or, customers just aren't ready to act when your message arrives. Try resending the original offer one to two days or a week later to recipients that didn't record an open. However, you must handle this practice carefully to minimize unsubscribes and abuse complaints:

- Test this approach with a portion of your list first, if possible, to see what impact it has on increased response and ROI as well as list churn.
- Try sending at a different time of day.
- A variation is to use a different subject line that might catch the attention of previous non-openers.

Warning: This approach requires minimal effort, may annoy a segment of your subscribers and likely produces the lowest return of any reminder efforts.

2. Send reminders with modified/different creative. A second reminder approach is to send a series of emails, often two or three, with modified copy and creative, but with the same goal as the first email. This might include a reminder-focused subject line and message copy that advises the recipient to act on your offer before it's too late.

This kind of reminder would work with just about any kind of deadline-based email such as a survey request, subscription renewal, event invitation and sale.

Birthday reminders are a great, but underutilized, opportunity for this approach. I recently received about 15 birthday emails, many with excellent offers that had expiration dates. Surprisingly, not a single company sent me a reminder email before the offer deadline.

Another common example is the cart abandonment series. The marketer might deploy a three-part series over a week, with the first message taking a service focus, the second a free-shipping offer and final message with a "last chance and 20 percent off" offer.

Urgent: Suppress all recipients from successive messages when they take the desired action.

3. Scheduled email series. This is a group of email messages designed to drive one or more actions or improve engagement. Each succeeding email builds on the previous one with a different but related message.

Consider the "welcome" message. One "welcome" message is better than none, but a series of messages will give you more opportunities to introduce your company, brands, value proposition, acquire more customer information, and drive immediate sales through an offer.

A key goal in this scenario is to create a predetermined and controlled onboarding experience for the new subscriber.

4. Behavior-based tracks. Here, you create a sophisticated set of business rules that apportion customers into different tracks based on their actions or lack of action.

This approach requires a marketing automation platform that enables the marketer to map out a series of "if-then" statements, and deploy messages or other actions such as sending a direct mail piece or call from a sales or call center rep. The program automatically moves each subscriber into different tracks based on their ongoing behavior, such as:

- Opening or clicking on an email, or not
- Making a purchase or not
- Visiting a Web page
- Downloading a white paper

- Logging into your account
- Speaking with a call center rep

More is Better

The simple fact is that sending more emails to subscribers works. Better yet, of course, is to leverage individual recipient behavior and automation to nurture them down the conversion path.

But basic math also works here. One client sends a fairly simple three-part cart abandonment reminder series with only minor creative changes and a modest gift offer in the final email. Conversion rates for the emails are 22 percent, 15 percent and 24 percent. If the client only sent a single cart reminder, they would be leaving millions of dollars in revenue on the table each year.

Add Value to Your Transactional Emails

Q: **We are going to juice up our transactional emails, as you have suggested many times. How should we do that?**

A: Relevance is email's holy grail, and no email is more relevant than a transactional email, which relates directly to something the recipient did.

People love them, too: Transactional messages generate an average 47 percent open rate and 20 percent click rate, according to several industry studies.

For U.S. email marketers, CAN-SPAM defines a "transactional or relationship message" as any email "facilitating, completing or confirming a previously agreed upon transaction."

The law permits what it calls "dual-use" messages, which combine transactional and promotional content, as long as the transaction remains the email's "primary purpose," with the subject line and message body emphasizing the transaction.

Transactional messages are a golden opportunity to engage with customers: to introduce or extend the email relationship with customers or subscribers, to anticipate and answer questions or to cross-sell or up-sell products or services.

The 'First' First Impression

The email relationship doesn't always start when someone signs up to receive promotional email or newsletters. Your first email contact with your customers could be an order confirmation, shipping notice or account registration.

This first email will affect how they think about you and your brand or company and even whether they'll continue to do business with you.

So, what do they usually see? The message has an unfriendly inbox face: an unfamiliar "From" line and a default subject line, like "Order Confirmation" or "Payment Reminder." Brrrr!

The content isn't encouraging, either: no greeting, boilerplate message, poor design, and no branding, contact information or attempt to extend the relationship beyond the transaction.

Marketing Should Own Transactional Emails, Too

Many marketing departments don't control the content and design of transactional emails. These messages often go out from an email system other than the email-messaging platform and with little thought given to content and design.

These messages probably don't have the same "From" line as your emails or generate the same kind of reporting that you get on your marketing messages.

You might not know open, click or delivery rates, whether anyone is monitoring blocks, bounces, inbox or bulk delivery or spam complaints and if the messages are authenticated.

Creating Best-Practice Transactional Emails

1. Move responsibility for transactional emails into the marketing department and consider using an email system designed specifically for transactional messages to realize better reporting, personalization and high delivery rates.

2. Set up your transactional message stream on a separate IP address.

If an ISP, receiver or blacklist blocks your promotional messages, your transactional messages will not be affected.

3. Redesign the inbox presence:

- Use a friendly "From" name, such as your company, brand, newsletter or department where the transaction took place, such as "SportsBobs Orders".

- Make sure the subject line reinforces your brand and conveys the key information resulting from the transaction: "Your order from SportsBobs shipped on 4/23."

- Because first-time email messages can go to the bulk folder rather than the inbox, strong "From" subject lines help recipients spot them quickly in their junk folder.

4. Position the transactional message content front and center in the message body.

Add promotional content below it or to the side.

CAN-SPAM doesn't specify what percentage of the message body must relate to the transaction, only that the reader should "reasonably conclude" the message was primarily transactional.

However, common sense says you should keep promotional content to well under half of the message real estate.

5. Use HTML design elements to create an attractive and organized message:

- Don't pack key content into images or banners. The transaction information must appear even if images are blocked.

- Use background colors, tables, boxes and type fonts to differentiate transaction from promotion even more clearly. Including a few images is fine, but make sure that a recipient can click all links and view all key information even if images are blocked.

6. Add personality that supports your brand or company image, expresses your thanks that they're customers and invites them to engage further.

The customers just spent money or registered for something with your company. Show them real people are behind your company, and imply that doing business with your company will be a pleasure for them.

7. Use the transactional message to initiate or expand the customer relationship:

- Invite the user to sign up for your promotional emails or newsletters. Include a brief value proposition and succinct details; link to the registration page.

- Cross-sell order transactions by suggesting products or services that fit with the purchase, such as accessories or extra supplies for consumable products.

- Up-sell by suggesting premium versions of the product or service – or what related products other customers bought after they purchased that particular product.

- Invite registered customers to update their personal information on your Web site, and list contact information.

Santander Consumer USA, an auto finance company, says adding update requests to its email payment reminders has helped it achieve a 40 percent increase in customer data accuracy, with each email costing 64 times less than a phone call to the customer-service center.

Look Beyond the Typical Transactional Message

A transactional message can be any email that launches from subscribers' preferences or actions, such as notifications from their social networks, reminders, alerts and publication of content that matches specific keywords, etc.

These aren't what we usually think of as transactional emails, but they are highly valued and can break through the clutter in an inbox teeming with the usual promotional email.

Receipt in the Bag or In Your Email?

Q: I recently experimented with getting my store receipt in email instead of having it printed out at the cash register. Does this have a future in email marketing?

A: It might never replace the register slip, but receipt-via-email has promise both as a customer service and as an acquisition tool for your email program.

The travel industry has emailed receipts to time-pressed travelers for years, while Apple Stores pioneered the practice at the retail level using iPhones. Now more mainstream brick-and-mortar stores have added it or are testing it.

The pros and cons of emailing receipts boil down to convenience (no more paper receipts to lose) versus privacy (some customer say they think it's a sneaky way to add addresses to a database).

My own experience with emailed receipts has been a mixed bag. When they show up on time, are accurate and stand out in my inbox, they're great.

But sometimes they don't show up. And if they do arrive, they often do nothing to enhance the brand relationship.

So, if you're willing to spend some time and money to build in extra value, the email receipt could be a great way to integrate your offline transactions with your e-commerce program and bring in new subscribers.

Email Receipts = Transactional Emails = Marketing Emails

Email receipts are essentially a different kind of transactional email, but they face the same issues. Many of these emails, whether from in-store or online transactions, are text-based, ugly and lacking in branding/marketing value.

Of course, these emails are supposed to provide an electronic record of a transaction, notify customers their orders have shipped or are out of stock, or fulfill other transaction-related purposes. But they don't have to look as outmoded as an eight-track tape.

Transactional emails are among the most relevant emails you can send because they relate to a purchase or related process. They are among the emails your recipients read and value the most.

Transactional emails can also upsell, inform, brand and market to customers just like regular promotional emails, but to more engaged recipients.

Where Receipt/Transactional Emails Fall Short

Consider my two recent experiences with emailed receipts:

- The Missing Receipt: I bought a pair of shoes at a store in a California outlet mall and agreed to the email receipt (and promotional emails). Weeks after the sale, neither has shown up. Did the employee type my email address in wrong (I spelled it twice) or did the POS-to-email system fail somehow?

- The Horrible Email Experience: I couldn't track down a crucial hotel receipt in my inbox. Once I finally unearthed it and got the information I needed, the message gave me little reason to engage further with the company.

Whether you're looking to add receipts via email to your POS process or spruce up your order confirmation emails, make sure you optimize the

message for everything from delivery to inbox presence to content.

Look for these opportunities to provide the best email experience for your recipients and the best benefit for your marketing program:

1. On-time inbox placement

Reliable delivery is the single most important aspect of a transactional email. Many companies rely on homegrown transactional systems or e-commerce platforms that lack the authentication, delivery and bounce processing infrastructure common to email marketing or dedicated transactional email systems.

Make sure your email system has no major challenges or blocks at key ISPs. Or, consider upgrading to a dedicated transactional email system. When possible, the transaction should trigger these emails immediately.

In this instant-message age, waiting two days to get a hotel statement is unacceptable.

2. Easily recognizable "From" name:

Searching for my missing hotel receipt dredged up only irrelevant emails. After scrolling one by one through hundreds of unread emails, a message from "DoNotReply@BigHotelChain.com"surfaced. (Name changed to protect the cluelessguilty). Bingo!

An email address in the "From" field instead of a name makes the message look spammy. Instead of a "gobbledygook" email address or something obscure, like "Accounting," use a logical, trusted and easily recognizable "From" name that includes your company or brand.

In this example, the "From" name could have been "Big Hotel Chain"(or "BigHotelChain" if the email software doesn't permit spaces) or "BigHotelChain Service."

(See Chapter 5, "Get Your Emails into the Inbox Where They Belong," for specific advice on choosing and using a from name.)

3. Informative subject line:

Subject lines that just say "Order Confirmation" aren't horrible, but they provide neither context nor clarity.

When possible, go beyond the basics, like this subject line from Costco: "Your Costco Photo Center Print Order Is Currently Being Processed."

4. Attractive design and clear branding:

No law says transactional emails can't use HTML or images or look as sharp as your best promotional emails. Yet so many look like circa-1992 email messages sent to my AOL account.
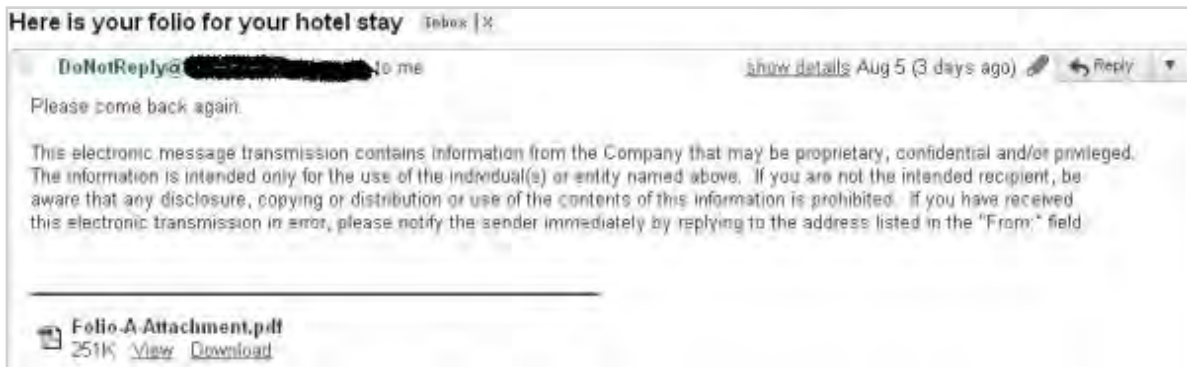
Incorporate relevant branding in your messages. Make appropriate use of HTML and images to deliver a message that represents your brand well and packs an informational punch.

5. Value-added content:

Go beyond the basic transaction or receipt information and provide additional content that provides value to the consumer. This might include delivery tracking information, loyalty program status updates or product usage tips.

My hotel receipt (screenshot below) has one line of marketing-related copy ("Please come back again") followed by an 80-word legal disclaimer. The receipt itself was a PDF attachment that looked exactly like a printed hotel bill.

Besides my bill, it listed my loyalty-point reward, pitched the hotel's branded credit card and gave me a chance to win time with a personal trainer. All or most of that copy should have been in the email's message body, leaving the ""folio" " for the PDF.

Here is your folio for your hotel stay Inbox | ×

DoNotReply@   to me   show details Aug 5 (3 days ago) Reply ▼

Please come back again.

This electronic message transmission contains information from the Company that may be proprietary, confidential and/or privileged. The information is intended only for the use of the individual(s) or entity named above. If you are not the intended recipient, be aware that any disclosure, copying or distribution or use of the contents of this information is prohibited. If you have received this electronic transmission in error, please notify the sender immediately by replying to the address listed in the "From:" field

Folio-A-Attachment.pdf
251K View Download

6. Cross-promote your email program:

Many transactional-email recipients might not have opted into your email program when they bought from your company. Use your receipts to invite these new and valuable paying customers to sign up for your email program with a link and brief benefit statement.

7. Cross-selling:

These emails are a great opportunity to promote related products and services. An email receipt for a camera purchase can include a promotion for a camera bag and zoom lens based on like-minded purchases.

Silverpop Resources for Digital Marketers

1. Silverpop's Marketing Best Practices & Resources

Begin your information quest at Silverpop's Resource Center. Browse Silverpop's library of recorded Webinars and download white papers for up-to-date research and strategies, like these:

- 2012 Top 500 Retailers Study
- Abandonment Issues: Turning Lost Carts, Incomplete Forms and Interrupted Browse Sessions into Revenue!
- Birthday Blueprint: How to Build a Top-Tier Birthday Email Program
- "Standing Out in the Inbox: Secrets of Successful 'From' Names and Subject Lines"
- In the Zone: 10 Tips for Delivering the Right Message at the Right Time
- Get Your Mocial Mojo Working: Effectively Integrating Email, Social, Mobile and Local

2. SlideShare Presentations

Visit our SlideShare channel to view and download nearly 100 presentations, such as the following:

- Why Unsubscribe Doesn't Have to Mean Goodbye
- Almost Everything You Wanted to Know about Email Marketing

- Everything You Need to Know for Cart Abandonment Email Remarketing Success
- Saying Happy Birthday: How to Build a Top Tier Birthday Email Program that Delights and Drives Revenue
- How SmartPak Equine Uses Lifecycle Emails to Engage Its Customers Every Step of the Way
- Social, Mobile and Local: Why They Matter for Email Marketers
- Inactive Email Subscribers: Tips for Taming the Beast
- Mocial Acquisition: Growing Your Email Database through Mobile, Social and Local Initiatives
- What the Internet Top 500 Do Well in Email Marketing: Email Practices of the Top Online Retailers

3. Silverpop Blog

Knowledgeable Silverpop employees and guest experts blog regularly on news, advice, strategies and tips for today's digital-savvy marketers.

4. Email Insider

Your daily dose of email insight featuring a biweekly column by Silverpop's Loren McDonald, published by MediaPost.

About Silverpop

Silverpop is the only digital marketing technology provider that unifies marketing automation, email, mobile, and social. Its customers achieve superior Return on Relationship by uniquely engaging each individual based on their behaviors and then automating personalized experiences that increase revenue, improve ROI, and deepen brand loyalty. Silverpop's commitment is to offer a platform that is complete, not complex-so that marketers from any size organization can easily achieve digital marketing success. The company offers a world-class services team, 24/7 customer support and a network of partners to ensure that every client gets the right mix of solutions for their specific digital marketing needs. Silverpop is trusted by more than 5,000 brands around the globe. Visit us at silverpop.com.

Like our content? You'll love our unified digital marketing platform. Check out the demo at Silverpop.com/demo.