

Guru's Guide to Email Marketing Success

Introduction

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

But achieving optimal results from your email marketing programs requires experience, planning and advanced technology. Planning and execution of successful email marketing programs can become quite complex at times, leaving you feeling like enlisting help from an expert on the subject. That's why we created this Guru's Guide to Email Marketing Success as your handy, personal reference for advice on all things email. This Guru's Guide to Email Marketing Success includes tips for:

- Reviewing past programs
- Planning
- Re-engaging customers
- Building your list
- Increasing deliverability
- Analyzing metrics

Lyris has been providing tools and advice on email marketing for over 15 years, employs some of the best email marketers in the business and advises some of the savviest marketing professionals around.

We hope you find the Guru's Guide to Email Marketing Success useful and informative. Enjoy!

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PLANNING, TRENDS AND CONTENT

Conducting an Email Marketing Review

Resolutions: Exercise more often, read more books, spend more time with significant others and improve email marketing performance. Sound familiar?

It's always a perfect time to look at your email marketing efforts and see what worked, what didn't work and what steps are necessary to take your program to the next level.

Your look should include:

- Analysis of key performance metrics
- Review of recipient feedback, surveys, Web site analytics
- Comparison against internal and relevant external benchmarks
- Review of creative/content

After completing your review or internal audit, now it is time to map out your improvement plan.

Elements of your plan should include:

- List building and maintenance
- Creative
- Segmentation and personalization
- Testing
- Reporting and analysis

In this section we'll focus on what to collect and analyze in your review.

Analysis of Key Performance Metrics

Your first step in the review process is to pull together in a spreadsheet the campaign or newsletter results for the past 12 months (or shorter period if you distributed an overwhelming number of messages). Include all relevant statistics from opens, clicks, referrals, bounces, unsubscribes, spam complaints, etc. Once assembled, calculate your overall averages and determine the best and worst performing message for each metric.

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

Depending on your objectives, sample metrics include:

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

Factors to look at include:

- **Priority Metrics:** What are the most important metrics for your email marketing program? If you are a retailer it is probably things like conversion rate, number of orders/emails sent, average order size, etc. For newsletter publishers it might be net subscriber growth, referrals and open rates. For companies sending corporate newsletters it could be click-through percentages on specific/recurring topics/links and subsequent conversions to information or demo requests. The key, however, is that you determine the critical measures of success, and not simply focus on open and click-through rates.
- **Consistency:** Were your key metrics consistently within a certain percent range? If your open rates varied significantly then you might have had some delivery issues or variations in your from line and subject lines may have confused recipients. Wide variances in click-through rates would likely suggest that the relevance of your article topics, products, offers or content varied significantly.
- **Highs and Lows:** Find your message highs and lows for each key metric and compare to your overall average. If the low or high varies dramatically, then there is likely a lesson - positive or negative - to be uncovered. An off-the-charts conversion rate, for example, would suggest that a promotional email fired on all pistons - timing, subject line, design, offer/price, product relevance, Web site content, etc.
- **Message Metrics Variances:** What if you have a combination of great and horrible metrics resulting from a single message? For example, you might have a low open rate, but very high click-to-open rate. This can happen when you have a weak subject line, a delivery problem or change your from address, for example, but the message content has very high relevance (offer, content, etc.).

If you find this happening, focus on fixing the cause of the problem and continuing and optimizing the positive trait.

[Review of Recipient Feedback, Surveys, Web Site Analytics, Sales Statistics](#)

If you have a feedback email account or feedback form, review the responses you've received throughout the year looking for both

positive and negative comments. If you receive little feedback, you may not be making it easy for readers to provide feedback, or it just maybe that you haven't established enough of a "personality" that motivates your readers to respond.

Have you conducted any reader surveys during the year? If so, what were the key findings upon which you can act in the coming year?

Next, analyze your Web site statistics. If you publish a newsletter, which types of articles are most visited on your Web site? If you are selling online, which product categories are most visited and which products and categories produced the most orders and revenue?

Comparison against Internal and Relevant External Benchmarks

If your organization produces more than one email newsletter or campaign, see if your fellow email marketers will share their data so you can benchmark key metrics. Additionally, comparing your performance to "industry averages" can provide confirmation that your program is on track, or in need of some first aid. Be careful when comparing against these industry averages. Use them as general guides - not as precise benchmarks that you should compare your efforts to.

Review of Creative/Content

Next, pull together samples of your actual messages and subject lines. With the above benchmarks and analysis in mind, review each of the following creative areas looking for what approach drove the best results:

- **Subject Line:** Length, tone, style and whether you included company or publication name
- **Layout/Format/Length:** Did you change formats? Compare the various formats over time - not just one or two messages? Did you switch from full articles to teasers, or postcard to a multiple product format?
- **Content Style:** Do some newsletters have more personality than others? Is your style full of humor, just the facts or conservative in nature?

Segmentation/Personalization: Did you send special messages that had a higher level of personalization or segmentation than others? Were the results significantly different?

Review of Competitors and Best Practice Examples

Finally, pull together samples of email messages from your competitors and your favorite newsletters and campaigns - no matter what industry. What things knocked your socks off - subject line style, design, personality and style of writing, great approach to offers, etc?

Next Steps

Hopefully that more than covers everything on the intake front. So take the time to assemble all of this information, conduct your analysis and reflect on the “big picture.” Then establish your goals for the coming year and map out your improvement roadmap.

PLANNING, TRENDS AND CONTENT

Email Myths Busted!

“Don't believe everything you hear.” This wise old saying certainly applies to many things, and email marketing is no exception. From spam legislation, filters, email client rendering issues to response rates -there is frequently a lot of conflicting and confusing information floating around the industry. So in this section we are going to try and straighten out a couple of common misconceptions in email marketing.

Misconception: “An incorrect interpretation or understanding.” So with that definition in mind, we've whittled a number of misconceptions down to the three we hear propagated most often.

- **Never Use the Word “Free”**
- **Don't Send Emails on Weekends**
- **Improve Results by Growing Your List**

While there are varying levels of truth to each of the above statements, they are not universal truths. As some product warnings state, “your results may differ.” So let's look a little deeper at these three commonly held email-marketing truisms.

Never Use the Word “Free” – Perhaps the most common misconception in email marketing is that you should “never use the word free.” By itself, the word free will not cause any of the major spam or content filters to reject your email. (Though it is possible that some corporations or user-driven spam filters might be set to delete emails containing the word “free”.) So why then would you risk using free when there is a chance, albeit small, your email might be filtered? Quite simply, better results. In our experience across various clients, when used correctly, the word free can provide a powerful boost to your results.

Not convinced? – Ok, let's look at a popular spam content filter to see how it actually works and treats your free-laden emails.

Spam Assassin – Spam Assassin is one of the leading “test-based” spam filters and many of the large ISPs model their own filters after Spam Assassin's test algorithm. The Spam Assassin filter assigns points - positive and negative - to the content and coding

of an email. An email is run through the filter and is assigned positive points (in this case positive means potential spam) and negative points (content and coding believed not generally used by spammers). (A legitimate email that is filtered as a result of these positive scores is referred to as a “false-positive.”) The score is totaled and if it exceeds a certain level it is filtered. Users of Spam Assassin can change the test score values and determine the level at which emails are filtered. It is generally believed that most companies/ISPs use a total score of around 10, but that some may go as low as 4.

So, what does this mean when using free? Review the Spam Assassin list and you will see that a number of phrases that use free do receive fairly high scores of 1 and higher. But phrases commonly used by legitimate marketers such as “free shipping,” “free e-book” and “free white paper” are not affected.

Your Take Away – Yes, you should be careful when using “free” in your email communications – but when used correctly and strategically, you will generally see greater results than by not using this powerful word. The bottom line – test, test, test. Additionally, to help you navigate the complex world of spam filters, use the spam content checker in your email application. This feature enables you to test your message for potential problems prior to distribution.

Don't Send Emails on Weekends. – In general, distributing your emails on Tuesday, Wednesday or Thursday is a good rule of thumb. In fact, in an analysis of mailings, roughly 73 percent of all emails were distributed on those three days. Additionally, about 64 percent of all messages were opened Tuesday to Thursday. Further, while there are not hard statistics to support this, we believe that most people (consumers) receive a greater volume of spam email on weekend days than they do on weekdays.

So why would you ever send an email on the weekend, or even Monday or Friday? Putting aside breaking news, announcements, daily newsletters and the like, weekends can be the best time to motivate some readers or customers to take a specific action.

Consider sports fans, music buyers, movie buffs, weekend sport warriors and others that may be more likely to take an action on the weekend - when they are engaged in, or actively think-

Sign-up of your product service or content topic. For example, a sports-related client tested sending its emails on Sunday mornings versus weekdays. While open and click-through rates were sometimes higher for emails sent during the week, the emails sent on Sunday always resulted in a higher number of transactions. The conclusion with this client was that their customers were in a “purchasing mood” on the weekend, or early in the week after receiving the email and by ordering early they could receive their merchandise in time to use them on the ensuing weekend.

Additionally, depending on the frequency and content of your emails, distributing consistently on a Monday, Friday, Saturday or Sunday will generally lead to strong results. If subscribers come to know and trust that your newsletter will arrive every Monday at 5 p.m.; or Sunday at 7 a.m., - your open rates are likely to be higher than if you distribute inconsistently on Tuesday through Thursday.

Your Take Away – In general, Tuesday through Thursday are optimal days to send emails. However, if your company’s offering is relevant to your subscribers’ or customers’ weekend lives, consider testing different distribution times on Saturday and Sunday. And try to establish consistency so that you readers come to expect and anticipate the arrival of your email.

Improve Results by Growing Your List – Because of its lower distribution costs relative to other forms of marketing, many email marketers mistakenly place too much emphasis on growing the size of their email list. Obviously, increasing the size of your email list is a good thing, but a quality list of active, interested and motivated subscribers/customers is really the end game on which you should focus.

Let’s take a look at some sample math.

List Size	Open Rate	CTR %	#	Conversion %	#	Revenue
100,000	35%	10%	10,000	3%	300	\$30,000
80,000	40%	12%	9,600	4%	384	\$38,400

In the simple example above, an online retailer selling products at an average order size of \$100 could see an increase of 28 percent in revenue by taking steps to improve relevance and conversion. Consider taking steps to clean out the dead wood in your list, but at minimum, reduce the energy you spend on your inactive members.

So how do you get more out of your golden subscribers/customers? Relevance! Here are a few tips:

- **Switch to double opt in.**
- **Never pre-check the sign-up boxes.**
- **Deliver on whatever promises you make in the sign-up process.**
- **Collect as much information on subscribers as you can that will enable you to deliver segmented and personalize messages, without driving too many away from the sign-up process.**
- **Segment your subscribers into a modest number of groups for which you are then able to deliver relevant, targeted and personalized messages.**
- **Test, test, test. Try different offers, formats, and types of subject lines, distribution days/times and other variables.**
- **Don’t stop at open and click-through tracking; use Web-site action tracking to accurately understand what variables are driving the most desired actions.**
- **Consider follow-up campaigns and trigger-based emails that are sent to subscribers when they do or do not take a specific action such as not opening an email or clicking on a specific link.**

Your Take Away: Focus as much, if not more, of your resources and energy on getting a greater response out of your interested/motivated list members. Do take steps to build your list, but place increased emphasis on quality and the collection of more demographic and preference information that will enable you to deliver more targeted and personalized emails.

PLANNING, TRENDS AND CONTENT

Kick Your Email Marketing Program up a Notch

In the words of Emeril Lagasse (of the Food Network show Emeril Live) “Let’s kick it up a notch.” While trying not to take the analogy too far, email marketing and cooking share a few things in common. They are both easy to do, but to do them exceptionally well requires time, quality tools and expertise. They also require that a number of ingredients work well together to produce the best result.

OK, so enough with the cooking analogy. In this section we will suggest a number of activities that email marketers should consider deploying as part of their program - to help “kick it up a notch.” Some of these suggestions are fairly easy to implement and others require advanced tools and techniques. But no matter what resources and tools you have available, establish a roadway (or recipe) that outlines the time frame and steps necessary to take your program to the next level.

The following are a few key ingredients in your efforts to kick your email marketing program up a notch:

Design: Improving the design and layout of your email is one of the easiest improvements you can make that can deliver an immediate huge return. Design and layout are critical to pulling your reader through the email and motivating them to take action. Your email marketing communications are also a key brand touch point of your company and should directly reinforce your company’s brand personality and essence. We highly recommend that you utilize the services of a designer experienced in the email marketing environment. The payoff can be big, as we’ve seen some ecommerce clients’ revenue from email double after redesigning the layout of their emails.

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

a newsletter, announcement or ecommerce email, but improved results are generally the outcome.

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

Testing: The ability to test variables is one of the greatest benefits of email marketing. It is also an activity that is rarely deployed. If you can muster the energy, we recommend testing at least one variable in each email campaign or newsletter issue (assuming one or two distributions per month). Test variables can be design/format changes, subject line elements, time of day/day of week, use and style of graphics, copy style, amount of copy, offers and more. Of course, don’t just test for testing sake. Testing should form a key foundation of your overall improvement program and help move you forward toward your end goal. The simplest approach to testing is to split your list into two random but equal groups (“A/B splits”) and test one new variable against an existing constant.

Profile/Demographic Segmentation: If you have more information than name and email address on your customers and email subscribers, why not use it? If you haven’t collected information, perhaps this is the key ingredient currently missing from your program. For example, if you are an online retailer of bicycle apparel, parts and accessories, capturing demographic information such as sex, age and biking preference (road, mountain or both) would enable you to conduct fairly targeted campaigns. Using this data you could develop customer profile segments (i.e., males over 40 who ride mountain bikes) who then receive emails with specific products, offers and messaging that appeals to this demographic profile group.

Behavioral-Based Segmentation: Targeting email recipients based upon actions they've taken ("behavioral-based segmentation") is probably the dream of many email marketers. Why? Quite simply this approach probably portends the single greatest opportunity for dramatic improvement in results. Examples of behavioral-based segmentation include sending emails to recipients who have or have not opened an email or series of emails, who have clicked on a specific link, who have visited specific pages on your Web site or who have purchased a specific type of product. Sound daunting? Actually it is not that difficult to implement, but it does require some strategy and a little extra effort. Consider getting started with a simple program such as sending a follow-up email to recipients that did not open your most recent email or who clicked on a specific link.

Web Site Activity Tracking: But open and/or click-through statistics can sometimes provide a misleading or incomplete picture of your email results. By using Web site action tracking (a line of code placed on each Web page you'd like to track), you are able to connect all the dots all the way through to purchase or other desired actions. This complete picture is particularly critical when conducting split tests.

Automated Trigger-Based Emails: Trigger-based emails can be generated when a recipient takes an action such as opening an email, clicking on a link or submitting a form. Additionally an email can be triggered if a customer or subscriber's profile changes or matches a particular demographic. Triggers can be used for a variety of scenarios such as to automate sales lead notifications, confirmation emails, send thank you messages for completing a survey or to send a follow-up offer to a recipient that clicks on a specific link.

Data Integration: So you've captured data on your customers and prospects in your ecommerce, sales force automation, CRM, customer support or other system. Have you integrated this powerful

information into your email marketing system? By using an API (Application Programming Interface), for example, you can automatically have this customer data uploaded to an email marketing application. Integrating this data enables you to implement a highly personalized and targeted email program and also ensures up to date data and eliminates the need to manually upload your data.

Dynamic Message Assembly: So now you are really cooking. Your data is uploaded automatically in real time, your design template is dialed in, you've segmented your database and tested multiple variables. Dynamic message assembly is an email marketing technology that can bring all of these activities together and automate the personalization and production aspects of your emails. With dynamic message assembly you create a single template and combine "content blocks" and if/then statements which then dynamically match and assemble the specific email content to the recipient profiles you've identified.

If you are looking to kick your email program up a notch, the key is to not feel overwhelmed by the technology or perceived complexity. Pick one of the activities from above that you and your team can easily implement - and just get started. Or to complete the cooking analogy, select your ingredients and start creating that masterpiece of a dish!

PLANNING, TRENDS AND CONTENT

Email Corrections and Why They Make Cents: Strategies for the Inevitable Email Goof

Sooner or later, it will happen. Whether you are an experienced pro or email marketing newbie, you will eventually make a mistake that might necessitate a correction email. Perhaps a key hyperlink sent people to the wrong location, you had the wrong pricing or product information in the email or on your Web site, incorrect date for an event - or yikes, you sent a message to the wrong list.

Once you discover your gaffe - what next? In this section we'll explore:

- **When to send a correction email**
- **What approach to take**
- **And steps to reduce mistakes in the future**

We'll look at a recent email mistake and the results of correction emails. We've also developed a list of hints to help you reduce mistakes in the future.

When to Send a Correction Email

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

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

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

How to Approach the Correction Email

So you've decided your mistake does warrant sending a correction email. Now you need to determine the logistics: When to send it? What format? What style? What is the message? And who gets it?

- **When to send it?** In general, get the correction email out as soon as you can. In many cases recipients might just open the correction email and delete the original. But if they've already opened the email, you want to reach recipients while the email is still fresh in their minds.

- **What format?** Determining what email format primarily depends on whether the mistake was in the email or on a Web site (or an offline location). If the mistake was in the email itself it probably makes most sense to resend the email (with the corrections), a brief intro note above the main email message and a subject line that refers to the correction. Mistakes on your Web site suggest that you send a simple plain text email notifying recipients that the error or problem on your site has been corrected.

- **What style?** Serious, humorous, apologetic? It obviously depends on your organization, the type of relationship you have with readers/customers and of course the nature of the mistake.

- **What is the message?** Whether it is an intro to the corrected email or just a resend of the corrected version" the message should be concise and to the point. "We made a mistake", "Here is the fix" and when appropriate "Here is an offer to make it up to you." In the case of an online retailer, for example, a make-up offer could be free shipping, \$XX off your next purchase, etc.

- **Who gets it?** Last and most important, who receives the correction email? If the email contains the mistake, then it would make sense to resend the corrected email to your entire list. For Web site mistakes (now corrected), send the email only to recipients who have either opened the email or clicked on the relative (affected) links. This approach spares those recipients who are not actually affected by the mistake from receiving another email.

Case Study

An Internet-Based Retail Client

- **What:** An Internet-based retail client, operating an ecommerce site selling power sport equipment and accessories, typically sends two emails per month (every other Sunday) to its customers and opt-in email subscribers.

- **The Mistake:** Two featured products were offered at a reduced price in the email - but the Web site showed the products at a higher price. The company's email coordinator had committed an easy oversight - he simply forgot to change the price on the Web site.

- **The Response:** The Monday after the emails were distributed, the client found the price error. Reviewing the link click-through stats for the two products, we saw that roughly 700 customers had clicked on one or both of the links (among about 20 links total in the email).

Using a 3% conversion rate, we estimated that the error may have resulted in about 15 or so lost transactions (due to customers not completing the transaction after seeing the incorrect price). The client agreed that it was worth a correction email, even though the pricing had been corrected on the Web site. We crafted an email that explained the mistake and offered customers an additional \$10 off their next purchase over \$100. Using the click-through stats for the two links, on Tuesday morning the correction email was sent to only those recipients who had clicked on one or both of the product links - 832 people at that point.

- **The Results:** Phenomenal. The correction email resulted in a 76% open rate; 26.3% click-through rate; a 9.1% conversion rate; 22 orders; 0 bounces; and 1 unsubscribe.

How to Reduce or Eliminate Future Mistakes

After you've gone through the mistake/correction process, the most obvious question becomes: How do I reduce or eliminate mistakes from happening in the future? There are three means to reduce/eliminate mistakes:

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

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

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

The Downside of Sending Correction Emails

So what, if anything, is the downside of sending correction emails? First, some percentage of recipients will simply be annoyed that you sent them another email into their already overloaded inbox. For this reason, only send the correction to those people that have been affected by the error when possible. Secondly, the correction email brings the mistake to the attention of people who may not have noticed otherwise. And lastly, you risk generating a few additional unsubscribes. But in my opinion, anyone that unsubscribes because of a correction email was not getting what they wanted from your emails and would leave anyway.

So while we hope issuing correction emails is an activity that you rarely have to undertake, they clearly can make sense (and cents!) for your company.

PLANNING, TRENDS AND CONTENT

20 Tips for Better B2B Newsletter Content

For most B2B companies email newsletters are an extremely effective vehicle for building prospect and customer relationships, establishing thought leadership and generating leads. Achieving these goals, however, requires that these newsletters contain valuable content for the readers, or your clients, partners and prospects will simply stop reading your newsletter.

Most B2B newsletter subscribers opt-in looking for best practices, tips, trends, news and a viewpoint, but not necessarily to be overwhelmed with marketing/sales messages. The objective of your newsletter is to establish or enhance a relationship based on trusted content. This content then drives readers to your Web site where they take a desired action – register for demo, call a sales person, download whitepapers and in some way move the prospect or customer to the next level of the relationship.

To ensure that your B2B newsletter continuously delivers value, consider the following 20 tips for better approaches to format and content.

1. Opt-In Page Expectations - An effective content strategy starts with your opt-in process. Be certain you manage subscriber expectations at the start. Describe in a sentence or two the type of content your newsletter contains and the value it will deliver to readers. Also provide a link to back issues so that prospective subscribers can see exactly what to expect.

2. Identify and Stick to an Editorial Focus - Your recipients only have room for a limited number of newsletters on their list of “must read” newsletters. Identify the core focus of your newsletter, establish an editorial approach and then stick to it.

3. Establish Regular Columns and Features - A key to sustaining ongoing value is to institute recurring columns and topic features. Subscribers will know what to expect and it also allows you to plan and focus the content and develop a real position and expectation in recipients' minds.

4. Table of Contents - If you have more than two articles include an “In This Issue” section at the top of your newsletter. Give them a quick sense of what the articles are about and provide a link down to each article within the newsletter.

5. Use Short Teaser Articles - For articles longer than three or four paragraphs, use short “teaser” introductions that whet your reader's appetite and motivate them to click through to the entire article posted on your Web site. This makes it easy for readers to determine their interest in the topic and enables you to track which articles and topics are of most interest.

6. Sidebars - Use sidebar boxes and columns for promotional and supporting information that is not the primary focus of the newsletter. This includes company and new product information, news, events, resource links, brochure links, etc. This enables the reader to easily find this information while clearly separating it in their mind from the primary editorial value of the newsletter articles.

7. Have a Personality - Just because you are producing a corporate newsletter doesn't mean it can't have a personality. You want the reader to have a sense that there are humans on the other end of the newsletter. Establish someone as the editorial face of the newsletter and don't be afraid to have them interject some humor and personal flavor. Humor can be great, but be careful not to offend.

8. Tips and Best Practices - In our experience B2B readers love “tips” and can't get enough of them. No matter what profession, workers are always interested in practical ideas and best practices they can put to use. Consider including a Quick Tip feature and focusing some of your articles around actionable tips.

9. Benchmarking and Statistics - Your customers and prospects are keenly interested in how they are doing compared to other companies. Providing benchmarking information and industry statistics will keep readers coming back for more each month.

10. FAQ/Ask The Expert - Columns devoted to answering questions are a great way to generate reader interest and feedback, while simultaneously enabling your company to establish its expertise in particular areas.

11. Case Studies - Customer case studies are always of interest to readers. They provide practical examples of success stories and strategies, and enable you to convey your company's value proposition.

12. Use Click-Through Stats to Refine Editorial Focus - Continuously monitor which columns and type of articles are driving the most clicks. Use this information to refine both topics and editorial style.

13. Monitor Web Analytics - Check your Web site log files on occasion to determine which articles and content on your site are most visited. Use this information as key input into your editorial focus.

14. Reader Surveys - Consider conducting reader surveys a few times a year. An annual survey can uncover changing needs and interests among your readers. Additional reader surveys can be conducted on specific topics on which the results form the basis of future articles.

15. Ask Sales and Support - Other employees are great sources of ideas for content. Sales and support staff in particular can have great insights as they are dealing directly with customers and prospects on a daily basis.

16. Competitor and Industry Newsletters - Read industry and competitor newsletters and make a list of future story ideas based on interesting topics in these newsletters.

17. Subject Line is Key - Tie your subject line to a specific article in your newsletter that will generate the most opens. Don't feel limited to use the same words used in an article title. Think newspaper headline style and craft a subject line that will stand out in your recipients' inboxes.

18. Subtle Self Promotion - While educating your readers with tips and best practices, insert subtle, but supporting, references to your company, product or service. Done well it won't seem out of place for your readers and helps achieve your overall goals for the newsletter.

19. Feedback - Provide a "Feedback" link after each article so that readers can easily send you feedback and suggestions for other articles.

20. Partner/Customer/Expert Articles - Solicit articles from your clients, partners and industry experts. Using these external sources will help position your newsletter in readers' minds as having greater interest and value beyond your company's self promotion.

PLANNING, TRENDS AND CONTENT

Tips To Re-Engage Your “Inactive” Recipients

Based on some preliminary analysis, we estimate that 25 to 33 percent of the typical email list may be comprised of “inactive” recipients. In this context, we are defining inactive recipients as those who have not opened AND clicked on a single email over a given period of time/number of emails. Here are some thoughts on what this means and what to do about it.

Why Are They Inactive?

Why does an email subscriber become inactive (we are not including bounced addresses in this definition)? Here are a few causes of inactivity:

- **Disinterested/Changed Interests** - These are subscribers who for various reasons are no longer interested in your products, services or news/content. They are not unsubscribing out of laziness, lack of trust in the process or they are waiting for their situation or interest level to change/return.
- **Badly Written Subject Lines** - Your subscribers are busy and have many choices among competing email messages to satisfy the need your emails have promised. For example, a few months ago we reviewed a newsletter that provides “personalized” marketing news and articles. The subject line reads the same every day - “Your Personalized Marketing News.” While the content of the newsletter may be personalized, this subject line does nothing to entice readers to open the emails.
- **Dormant Email Accounts** - These are email accounts that are still active, but the user rarely, if ever, accesses the account anymore.
- **Spam/Content Filters** - Perhaps your message includes some recurring content that causes it to get filtered by a spam filter - either at the ISP, corporate or end-user level. Since a bounce message may not be returned, your emails will continue to be sent, but not reach recipients.

- **Bulk Folders** - Your emails are delivered, but to a “bulk” or “potential spam” folder in the recipient’s in box. Many recipients may choose to ignore these folders assuming that all emails in the folder are spam messages.

- **Image Filters** - Many ISPs and email clients now include filters that disable images from loading and display warnings that the message may contain inappropriate images. As a result, some recipients may simply delete the message rather than enabling images and opening the message (disabled images also means that the email will not be counted as an open).

How to Determine Who Is “Inactive”

There are no hard and fast rules regarding what qualifies someone as inactive, but here are a few rules of thumb and steps to determine inactives:

- Pick a period of time, such as the most recent six months, that would provide recipients a reasonable period of time for someone to show interest in your email messages. This time frame should also encompass a fair number of messages being sent, the number being dependent upon the frequency of your emails. But a minimum of 10 is probably a safe bet.
 - Run your most active report and download it to Excel. Sort your list by number of messages sent to recipients. Delete all recipients that have received fewer than a certain number of messages during this time frame. If you’ve sent 10 messages you may want to delete everyone who has received anything fewer than 10, or you may feel that eight messages, for example, is a good sampling.
- Then sort your list in descending order by unique opens and messages with clicks. Then delete everyone except those that have not opened AND clicked a single link.
- You now have your list of inactive subscribers. Create an “inactive” demographic field in your email marketing system and Excel sheet and then upload these records from the Excel list.
 - You now have the ability to segment your campaigns with specific messages and frequency to your inactive members.

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

Here are some tips on what you can do to re-engage your inactives:

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

PLANNING, TRENDS AND CONTENT

Top Tips for Improved Subject Lines

Subject lines are one of the most important components of a successful promotional or newsletter email. This section outlines six principles and 14 tips to help you write subject lines that produce higher open and click-through rates.

Working in tandem with the from line, the content of a subject line is the key determinant for whether a recipient will open an email, delete it immediately, ignore it, file it for future access, report it and/or filter it as spam. The subject line content is also a major component in the algorithm of many ISP and recipient-level spam filters. In other words, a poorly written subject lead may not only go un-opened, it may not even reach the recipient's inbox in the first place.

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

- **Inform:** Subject lines should convey something important, timely or valuable, and should say to the recipient: "If you don't open and read this email, you'll miss out on something of real value."
- **Intrigue:** Your email is competing with 50 to 100 or more other emails for the recipients' attention. To increase the chance of having YOUR email be opened it must intrigue the recipient, the same way a well written headline does. It must stimulate some part of the recipient's brain, prompting them to open the email immediately.
- **Entrust:** Your subject line can support or hurt your brand image. Subject lines that over promise or mislead will ultimately destroy trust with recipients, damaging your brand and driving customers away.
- **Action:** Subject lines are a major driver of click-through rates, as they "direct" recipients to pay attention to specific articles, products and information. Every email you send should have an overt or implied strategy behind it. You hope that specific products are purchased over others or that recipients read a specific article and then visit your Web site seeking additional

information. Subject lines should reflect your goals and help direct recipients to take the desired action.

- **Empathy:** While your emails may be distributed to thousands or millions of recipients, they are being received by individuals. Subject lines must recognize this and "speak" to the needs and interests of your recipients as individual customers, readers or prospects.

- **Togetherness (Subject Lines and From Lines Must Work Together):** Largely because of the dramatic increase in spam email in the last year or two, recipients increasingly look at a combination of the from and subject lines to determine whether it is from a trusted source. As a result, the job of a subject line now must not only entice someone to open an email, it must discourage the recipient from deleting it as an unwanted email.

Following are 14 tips for writing better subject lines:

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

2. **"Brand" Your Subject Line - {Newsletter or Company Name}:** A practice that has really taken hold in the last year or two is including the name of your company or newsletter/promotion in the subject line, usually at the beginning and enclosed in brackets. An example would be: {Intervention Report} 15 Tips for Better Subject Lines. This practice reinforces the from line, ensuring recipients that it's coming from a trusted source.

3. **Use a Consistent Style:** While subject lines should obviously be different each time, from and subject lines should become immediately trusted and recognized by recipients. After testing and learning what style works best for your recipients, stick with that approach, whether humorous, provocative, incentive-based, tip oriented, etc.

4. Have Someone Else Write, Edit or Review Subject Lines:

Have someone other than the person who creates the email itself write, edit or at least review the subject line. Use this person like a newspaper headline writer and have them push your copy to another level of relevance and creativity.

5. Send Subject Lines to Yourself: One of the best gauges of the strength of a subject line is to send sample emails with different subject lines to yourself. What kind of response do they warrant when they arrive in your inbox – “gotta open it immediately”, “delete/ignore” or “read it later”?

6. “Listen” – Monitor Your Inbox for Ideas: The greatest inspiration for writing subject lines may come from monitoring your own inbox. What type of subject lines intrigue your interest and motivate you to open them immediately? Which kind do you not delete or file, but generally never go back and open?

7. Track Which Subject Line Types Work Best for You: Track and analyze the type of subject lines that produce the best open and click-through rates. Open rates are the most obvious measure of the success of subject lines, but click-through rates are also an important measure of how well the subject line drove recipients to take action and click on a specific link or links. Categorize and assess your subject lines by various approaches you may have used or tested such as long versus short, use of certain words (“\$ off” versus “% off”, “tips” versus “steps”, etc.).

8. Think Context: Put yourself in the mind of your subscribers. What are they thinking about, what’s in the news, what events and holidays are coming up? One of the best subject lines we’ve seen in years was one that was appeared in WebProNews. The subject line was simply “Google Apologizes.” The newsletter had been covering developments in search engine marketing and optimization, particularly the changes in Google’s search ranking algorithm that sent many Webmasters and search engine optimizers into anywhere from a tizzy to panic or outrage. In that context, the subject line “Google Apologizes” was brilliant. It was clearly at the top of readers’ minds at that moment, it was intriguing and it portended the answer to a key question – what happened with Google’s search rankings?

9. Know What Might Get Filtered: It’s important to be provocative but if you cross the line your subject line may trigger a spam filter. Always use a spam content checker if your email technology has this feature. Additionally, send proof messages to your AOL, Yahoo, Gmail and other test accounts to ensure that your content doesn’t trigger a content filter.

10. Test Length: Short Versus Long: Analysis of data from our client base suggests that subject lines of less than 50 characters achieve higher open rates than those of 50 or more characters. That being said, there is much debate about shorter versus longer subject lines that encompass more information for recipients. Test various styles and lengths and see what generates the best results with your recipients. But in general don’t stress having a longer subject line, but do check to see how your subject line appears in various email clients to ensure that key information is not cut off awkwardly.

11. Focus: Avoid The Generic and Boring: Don’t be afraid to be very specific in subject lines. Many marketers use broad and generic subject lines, such as “May 2008 Newsletter” because they fear that a specific subject line may not resonate with all readers. First, remember that generally only 25 to 50 percent of your recipients are opening your emails to begin with. Secondly, your subject line should be targeted to each segment (if you are segmenting your list) or be relevant to the vast majority of recipients. It’s your job to figure out what topics, offers or products are of most interest to majority of your recipients and then deliver that information on an on-going basis. As such, your subject line should be as narrow as possible to generate interest and action from a majority of recipients.

12. Write It Early: Perhaps the most common mistake marketers make is waiting till the last minute to write their subject lines. Don’t start thinking about the subject line shortly after your previous email goes out and the results start to pour in. While everything is still fresh, jot down potential subject lines for your next email. As you pull together your email content, continue drafting up various subject lines allowing you to just tweak or decide which version to use - rather than starting from scratch at the last minute.

13. **Push the Envelope (or Inbox as the case may be):** Don't be afraid to try subject lines that are more aggressive, creative, tantalizing or specific than you're currently using. Try some new styles and test them via split tests. Monitor the results across all metrics open rates, click-through rates, spam complaints, bounce rates and unsubscribes to make sure that a bump in your open rate didn't lead to an increase in unsubscribes, bounces and spam complaints.

14. **Test, Test and Test:** Like every facet of email marketing, the most certain way to know if something is working is to test it. Subject lines are, in fact, the easiest component of email marketing to test. Split your list in half, thirds or even quarters and test a different type of subject line in each split. A key is to test types of subject lines so that you can carry the learning into future distributions. Secondly, you should test at least a few times to make sure your findings were correct.

PLANNING, TRENDS AND CONTENT

When is the Best Time to Send an Email Promotion or Newsletter?

Perhaps the most frequently asked question in email marketing is: When should we send our email promotion or newsletter? The short answer -Tuesday through Thursday mornings are generally good times. The long answer is much more complicated, and like most all email marketing questions, depends on numerous variables and your specific situation.

When determining the optimum time to send (we're defining "send" as when to schedule your email for delivery) emails, you need to break the question down into three parts:

1. When do you want recipients to actually receive your email?
2. What factors drive how long it takes for the emails to actually reach each recipient?
3. Do you have the resources necessary to continuously send emails at a regular predetermined time?

To help answer question #2, we've developed the following "Time to Send Formula" and then discuss in detail the factors that drive all three of these questions.

"Time to Send Formula"

$$\text{DOT} - (\text{IF} + \text{SD} + \text{QF}) = \text{ST}$$

DOT = Desired Open Time - the first hour time period in which you want your readers to receive and open your email

IF = ISP Factor - the duration it takes ISPs to actually deliver emails

SD = Send Duration - the time it takes software/ASP solutions to send a given volume of emails

QF = Queue Factor - the period of time emails may be in the queue behind other email campaigns

ST = Schedule Time - the time emails are scheduled for distribution

Ok, now you are saying to yourself, I didn't realize I needed a calculator to determine the best time to send emails. Well you don't. The point of the above formula is really to get you to understand and think about the many variables in the email delivery process that may be beyond your control. And in particular, that you consider how long it takes for emails to actually reach your recipients in box.

Let's look at each of these five formula factors in detail.

1. Desired Open Time - DOT

Before determining when to send your emails, you need to understand when recipients are most likely to open your emails or when they will take your desired action. Let's look at four key drivers of "Desired Open Time" - Recipients; Open Concentration Period; Environment; and Message.

Recipients: When are your recipients not only most likely to open your email, but take a desired action? Recipient factors to understand include:

- **Business or Consumer Relationship:** According to recent analysis, the majority of emails are opened throughout the day -about 80 percent between 5 a.m. and 5 p.m. (PST), with roughly 62 percent being opened between Tuesday and Thursday. Clearly most business-oriented customers are more likely to open emails during their workday, while consumer-based subscribers may open emails at any time. Though many people check their personal email accounts during the day, many do not, and so sending in the evening or on the weekends is clearly not out of the question when emailing B2C subscribers.

- **Time Zone:** Do they live all over the world or mostly on the East Coast of the United States? People in New York, for example, (in my experience) tend to start work later and leave later than people on the West Coast. Consider using The World Clock tool from timeanddate.com to help you understand when your emails will reach your recipients.

ACTION: If you have a significant number of subscribers all over the world, consider segmenting your subscribers according to major time zone periods - and schedule each segment accordingly.

- **Demographics/Psychographics:** If you are reaching teens, then late afternoon when they get home from school is a good time, whereas homemakers might be most likely to open emails in the middle of the day. Many people may work in occupations where Internet/email access is either not available (i.e., construction, factory and restaurant workers) or time makes it difficult (doctors, nurses, teachers). Differences in sex could be a factor as well. While the gap is apparently closing, a higher percentage of males versus females are more likely to be online during the prime evening television viewing hours.

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

Open Concentration Period: When is the highest concentration of opens?

- **This is the period of time:** the first few hours after delivery - with the greatest concentration of opens. For example, in two recent newsletters, 37 percent and 38.5 percent of opens occurred within the first three hours of distribution. The newsletters were sent at 10 a.m. and 2 p.m. PST, and not surprisingly the email sent at 2 p.m., saw a much larger drop in opens in hour four - which would be 8 p.m. East Coast time. So understanding this open concentration period is key to determining that ideal delivery time - and ensuring you maximize this initial "open burst."

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

Environment: What environmental factors are your emails competing with?

- **Competing Time-Sensitive Newsletters:** If your content is time sensitive, do you need to get your information in the hands of recipients before competing newsletters? Or does your content provide more analysis such that being first isn't why your readers subscribe to your newsletter?

- **Offline Media:** Do you publish a magazine, for example? If so, do you want your subscribers to receive your newsletter before, at the same time or after they receive your print publications?

- **Peak Spam Waves:** While spam arrives at all times, it seems that a lot of spam is sent during the middle of the night and on weekends.

If you send late at night or very early in the morning, you risk getting lost among your recipients spam bloated inboxes.

Message: What type of message are you sending and how often?

- **Message Type:** Most recipients of corporate newsletters expect to receive them during the heart of the business day, say 10 a.m. to 4 p.m. News-oriented newsletters are generally expected early in the morning with the previous day's news, or in the afternoon with news from the current day. The key here is timeliness of the information. Promotional and consumer ecommerce emails might be appropriate in the evening, on weekends or during the business day. It really depends on what you are selling and to whom. For example, one client has found that Sunday at 7 a.m. is the optimum "send time" for its mostly adult male motorcycle-riding customer base.

ACTION: If you aren't sure what the optimum open time is for your emails, test different days of the week and time periods. Make sure, however, that you test against a control group and that you measure not only open rates, but click-through percentages and Web site actions such as transactions and downloads.

- **Frequency:** For emails sent frequently (and the frequency is known and expected by recipients), then consistency is really more important than time of day or day of week. If you send a newsletter at least two-times per week, then sending at the same time for every newsletter is recommended. You want recipients to almost be able to set their watches by your emails. For example, two newsletters we've been receiving for a few years arrive at about 3:15 p.m. and 5 p.m. respectively - times some would suggest are bad for email. But when the Outlook bell goes "ding" at about these times in the afternoon, we almost always check to see if it is one of these expected newsletters. For monthly newsletters and irregular ecommerce emails, a consistent day or time may be of little importance - but the right time/day could make a huge difference depending on the recipients' demographics and the nature of your content.

2. Send Duration (SD)

Are you sending out 4,000 emails or 4 million? Depending on the technology solution or provider you use and volume being sent, it might take anywhere from a few minutes to many hours for your software or ASP solution provider to actually send the emails out to ISPs for delivery to the end recipient.

ACTION: Monitor and understand this duration period and make sure you factor it into your calculations.

3. Queue Factor (QF)

Are you are using an ASP solution or sharing a mail server with others in your company? If so, keep in mind that when you've pressed the send button your emails will go "in the queue" to be sent. If you schedule them on a day and time such as Tuesday morning (when a large percentage of emails are sent), your emails may be in the queue behind many other companies or departments of your company, and may take longer than you anticipated before they are actually sent.

ACTION: Understand if the "queue factor" applies to you and add this estimated time into your calculations.

4. ISP Factor (IF)

Not all ISPs are created equal. Some ISPs deliver emails they receive immediately, while others may take an hour or in some cases 12 or more hours to process emails. Secondly, some ISPs utilize volume-based filters, so sending too many emails to a single ISP within a short time frame may cause your emails to be blocked - and sent to the ISP blackhole.

ACTION: Consider sending test emails to seed email accounts with ISPs such as AOL, Gmail, Yahoo and others that comprise 5 percent or more of your list. If one or more consistently shows a significant delay in delivery, consider segmenting those subscribers out and scheduling them for an earlier delivery time.

5. Schedule Time (ST)

If you've followed this far, you now have a good understanding of all the factors that may affect email delivery and open times. So let's put the formula to work with an example:

Formula: $DOT - (IF + SD + QF) = ST$

Example: 1 p.m. - (1 Hour + 1 Hour + .5 Hour) = 10:30 a.m.

In this example, through exhaustive research and analysis you've determined that the ideal time for your emails to reach all or a sub segment of your list is at 1 p.m. But for this to happen, you'll need to actually schedule your email to go out at 10:30 a.m.

Even if you don't take the time to undertake the analysis outlined above, at minimum you should do the following:

- **Put a stake in the ground as the ideal time you want your recipients to open their email**
- **If you are sending a high volume of emails schedule your emails well in advance of the desired open time. If your volume is fairly low, then perhaps an hour or so in advance might suffice.**

BUILD AND MANAGE LISTS

28 Ways to Build Permission-Based Email Lists

Developing a cost-effective email list poses a challenge for all email marketers. Because email addresses change at an annual rate of 20 percent or more on most lists, marketers must adopt an aggressive approach to expand their list and yield a significant return on investment.

As you browse the list below please keep these helpful tips in mind:

- **Consider All Touch Points:** Use every point of contact with customers and prospects.
- **Obtain Permission:** Always obtain permission with the confirmed (double) opt-in method for online contacts. For offline contacts, update your database with when, where and how the contact was initiated. Confirm their permission in the first email.
- **Required Information:** Obtain email address, name, format preference and logical interests/preferences.
- **Focus Equal Attention on Existing Lists:** Implement strategies and incentives to transform inactive subscribers into active ones.
- **Provide Valuable Benefits:** Convince potential subscribers of the valuable benefits they'll receive.
- **Convey Trust:** Clearly state your privacy/email policies.

28 Tips:

1. **Feature a Sign-Up Form on Each Page of Your Site:** Be sure to remember this basic concept. Sign-up opportunities should be ubiquitous throughout your site.
2. **Promote Benefits on the Sign-Up Page:** Enhance subscription value with sample emails, testimonials and strong call to action copy.
3. **Offer Opt-In Incentives:** Incentives like white papers, discounts and special reports significantly increase conversion rates.
4. **Optimize Your Site for Search Engine Placement:** Optimize current and archived newsletters for search engines to increase traffic and subscriptions.
5. **Pay for Search Engine Services and Promote Your Email on the Landing Page:** If you use Pay Per Click, be sure to include email subscription information on the landing page.
6. **Add Opt-in Check Boxes on Demo Requests, White Papers and Registration Forms:** Well-executed forms and pages may improve conversion rates by 50 percent or more.
7. **Include "Send to a Friend" Options:** Generate new subscribers with minimal effort if bundled with promotional campaigns.
8. **Use Direct Mail and Catalogs:** Encourage email subscriptions on all print ads.
9. **Direct Employees to Include Messages and Links in Email Signature Line:** Add "Subscribe to the Company X Email Newsletter" to employee email signatures.
10. **Direct Call Center and Sales Employees to Obtain Permission and Capture Email Addresses Over the Phone:** Instruct call center and sales staff to ask customers and prospects if they'd like to receive newsletters or promotional email.
11. **Send Post Cards to Customers Encouraging Them to Subscribe to Email:** If you have postal contact information for customers but not email addresses, send a post card with opt-in sign-up offer and URL.
12. **Hand Out Sign-Up Forms at Public Speaking Engagements and Seminars:** Promote your newsletter in presentations and handouts.
13. **Implement Rented List Campaigns and Subscriptions:** Promote your company in email campaigns and landing pages when you rent email lists.
14. **Promote Sign-Ups in Confirmation/Transaction Emails:** Add messages and links to opt-in pages of all confirmation and transaction emails.

15. **Include Opt-in Line on Credit Card Receipts:** Not an obvious method, but may be quite effective.
16. **Add Opt-in Message:** To Warranty and Product Registration Cards.
17. **Add Sign-Up Message:** To Invoices.
18. **Display Opt-in Forms at the Cash Register:** An approach used by restaurants and retailers to advertise weekday discounts, catering services etc.
19. **Promote Your Email/Newsletter in Articles and Article Attribution:** Include a reference and link to your newsletter after the byline on articles in trade and consumer publications.
20. **Include Opt-in Message and Check Boxes on Shopping Cart Pages:** Remember to ask for email format and product/information preferences.
21. **Promote Your Email/Newsletter in Other Company Publications:** Promote online newsletters in print newsletters, magazines and brochures. Add “Sign up for our monthly newsletter at www.companyX.com/subscribe.html” after “Visit www.companyX.com for more information.”
22. **Include Newsletter Subscriptions in Trade Show Lead Generation Forms:** Obtain permission to send your monthly newsletter to booth visitors.
23. **Promote:** Your Newsletter/Promotional Emails in Industry Directories and Sites.
24. **Distribute Press Releases Based on Newsletter Articles:** Newsletters with topical articles may warrant a press release. Make sure the press release includes links and information on how to subscribe.
25. **Include Information and a Link to Your Newsletter in Press Releases:** A good option for smaller companies. Include your company newsletter and other resources in press release copy.
26. **Include Opt-in Information on Customer Satisfaction Surveys:** Ask permission to communicate valuable information via email newsletters and promotions.
27. **Include Opt-in Forms in Product Shipping Boxes:** Advertise email promotions on packing slips and direct mail cards with links to your site. Many retailers and catalogers also include promotional offers from non-competing companies.
28. **Employ a Reputable Email List Service:** List services obtain email addresses and permission to email existing customers. Be sure you obtain permission before – or as part of – the first email you send.

BUILD AND MANAGE LISTS

Optimizing Email Opt-in Pages

Optimizing your email opt-in process is one of the most important, though often forgotten, parts of your email marketing program. How you present your opt-in pages and forms determines the rate of list growth, the quality of your list and establishes subscriber expectations that subsequently drives email performance. In this section we'll look at:

1. Getting People to the Opt-in Page
2. Copy and Design/Layout of Opt-in Page
3. The Opt-in Form
4. Other Opt-in Pages

1. Getting People to the Opt-in Page

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

- **Don't Hide the Link** - If your email newsletter/promotion is key to your business, make sure that it is easy and obvious for Web site visitors to find the sign up page. Consider including links in main and secondary navigation and promotional boxes in side bar areas. Don't make your visitors search to see if you offer an email newsletter. Include some form of link on every page of your site.
- **Don't Disguise It** - When referring to your email in links and navigation areas, don't use some name or term that isn't obvious to all. For a link, "Newsletter," "Enewsletter," or "Email Newsletter" is fine.
- **Home Page** - If appropriate, promote articles and news from the current issue on your home page - and then link to article/issue.
- **Back Issues/Articles** - For newsletter publishers, make sure you have an area of your Web site such as a "Knowledge or Resource Center" where you house archived issues and individual articles pulled from the newsletter. Then promote subscriptions to your newsletter throughout this area.

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

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

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

2. Copy and Design/Layout of Opt-in Page

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

- **Clean and Simple** - The page should be designed in such a way that the images, copy and form instill confidence, trust and value.
- **Samples** - Always include a link to a sample copy or copies of your email and consider including a hyperlinked small screenshot of your email.
- **Testimonials/Awards** - Use testimonials in pull-quote format, either text or as an image, that highlight awards or kudos that readers and third parties have bestowed on your email publication.
- **Incentives** - Offering up an incentive or discount is a great way to increase conversion. Whether it is a "free white paper" or "\$5 off your next purchase", incentives work.
- **Value Proposition** - Subscribers are happy to provide you their valuable email address, but only in exchange for something of value. It is important that your opt-in page copy and images convey the core value of your emails. For example, if you are a retailer you should highlight things such as "email only specials", advance notices of sales and other value they will receive as an email subscriber.

Newsletter publishers should stress things such as the type of content, timeliness, your expertise and the content relevance to readers.

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

Newsletter Publishing Inc. will not use your email address or information for any purpose other than distributing the Special Report newsletter and related special reports.

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

3. The Opt-in Form

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

- **Don't Ask for Too Much Information** - Your email opt-in form is not the place to qualify prospects or make them jump through hoops. Don't ask for information that you cannot use for email delivery and personalization/segmentation. If you are concerned that you may have too many fields, consider denoting some of them as optional.

- **Don't Ask for Too Little Information** - By the same token, plan for the future. While only asking for someone's email address makes the sign-up process extremely quick, you have not obtained information that will help you deliver more relevant emails to your subscribers. This includes format preference, name and other preferences/demographics key to your program.

- **Address Validation** - To ensure that subscribers enter their email address correctly, include a script that checks for syntax errors upon submission. Additionally, consider a secondary box that requires them to re-enter their address. This will minimize invalid addresses due to input errors.

- **Form Fields – The Minimum:**

- First Name
- Last Name
- Email address

- **Form Fields – Optional:**

- **Secondary Email Address** (Since approximately a third of your list will change their email address every year, consider asking for a secondary email address. Then when their primary address bounces you can send a follow-up email to the secondary address.)

- **Frequency** (Many sophisticated retailers and publishers give subscribers the choice of how often they wish to receive emails, i.e., daily, weekly, monthly.)

- **Demographics** (gender, age, location, etc.)

- **Interests/Preferences** (topic, rock vs. jazz, etc.)

4. Other Opt-in Pages

In addition to your actual email opt-in form pages, there are other means on your Web site of gaining new subscribers, including:

- **Download/Registration Pages** - Always include an email subscription check box as part of your registration (download white papers, membership, demo request, etc.) forms. This approach can generate a subscription conversion rate of 50 percent or more.

- **Purchase/Shopping Cart Pages** - Be sure to include product/shopping preferences in your shopping cart form and a clear opt-in check box for your email. We recommend that you NOT use pre-checked boxes.

BUILD AND MANAGE LISTS

Quick Tips on How To Reduce Email Bounces

If you are an active email marketer, managing and reducing your email bounces (see definition below) has never been more critical. Actively managing your bounces can reduce your email delivery costs and increase conversions/transactions - improving the ROI of your email campaigns.

Here are 14 quick tips to help you manage and reduce bounces:

1. **Clean Your Lists:** Whether manually or via a list-hygiene service, check for incorrectly formatted addresses, invalid domains and typos (i.e., alo.com).
2. **Consider Using An Email Change of Address (ECO) Service:** With many companies experiencing email address churn of 20% annually, an ECOA service could pay huge dividends.
3. **Confirm Email Addresses:** Send an auto-reply confirmation when a user subscribes, registers or makes a purchase. If that message bounces, you can attempt to correct it right from the start. Additionally, you may want to consider requiring a second email address line (in your online forms) that confirms the correct address was entered.
4. **Include Subscription/Account Management Links in Your Emails:** Make it easy for your customers and subscribers to update their email addresses by including a link in your emails to your Web site account/subscription management page.
5. **Prompt Customers to Update Information:** When a customer is completing a transaction in the shopping cart, for example, prompt them to verify and update information - particularly their email address.
6. **Use the Mail or Phone to Update Information:** If you have postal addresses or phone numbers for customers/subscribers with bad email addresses, consider contacting them via mail (such as a postcard) or telephone.
7. **Monitor Delivery Rates By Domain:** Track your open and bounces rates by major domain, such as AOL, Hotmail, Yahoo, Gmail and others. If one is significantly different than the others, or your experience a sudden change, you may have a filtering or blacklist problem.
8. **Monitor Blacklists:** Regularly check the major spam databases and blacklists to ensure you or your email provider has not been added. (You will not receive a bounce message as the result of a blacklist, even though the email has not been delivered.)
9. **Understand and Monitor Spam Filters:** Get to know the more common things that most spam filters look for and modify your emails accordingly. (Spam filters also will not generate bounce messages.)
10. **Remove “Spam Flag” Addresses:** These are often added maliciously. Examples include: abuse@somedomain.com, postmaster@somedomain.com and nospam@antispam.net.
11. **Pretest Your Emails:** Prior to distributing your email to your entire list, send a test to yourself and others (make sure you include all the major email services used by members of your list).
12. **Understand How Your Email Provider Processes Bounces:** Gain a thorough understanding of how your email provider classifies and handles soft and hard bounces - and manage accordingly.
13. **Monitor Changes Among ISPs:** After mergers, financial troubles and other announcements, many users of a particular ISP may decide to switch to a different account or ISP for their email. Consider sending an email to members of your list with the domain name in question, asking them if they would like to update their email address and other information.
14. **When All Else Fails, Suppress or Delete Recurring Bouncers:** Determine an appropriate bounce suppression/deletion strategy for your email program.

Defining Soft and Hard Bounces

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

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

DELIVERABILITY

Optimizing Your Email for Deliverability

Email content that looks great but doesn't actually reach its intended recipients can't be called successful. Therefore, it is necessary to optimize your messages for successful delivery, a key issue in today's highly charged anti-spam climate. "Successful delivery" has a couple of different meanings; in this section, we describe critical first-tier efforts you can make to optimize your messages' chances of reaching your list members at all. We will also cover second-tier actions you can take to help your messages get to recipients' inboxes.

Use a professional, dedicated list management software or service.

This will sound obvious to most readers, but we'll state it anyway: the first step towards successful commercial email delivery is to use a professional, dedicated software application or hosting service.

The days of using a desktop email client and sending a "BCC" message (or worse, a "CC" message) are over; even if you only have a couple hundred people on your list, don't do it! Sign up for a monthly service that offers proper list management, and you'll save administrative time, minimize the risks of alienating both list members and ISPs, and position yourself well for future list growth.

If you use a hosting service or are in the process of selecting one, confirm that the ASP requires all of its clients to follow industry Best Practices. Ask about the service's blacklist record: when was the last time they were blacklisted and by whom? Why were they blacklisted in the first place, how long did the block last, and what did they do to resolve it?

If you use a hosting service that's less than selective about the clients it takes on, you may find that your legitimate opt-in email is filtered or blocked due to the failure of other clients to follow Best Practices. Remember though that every email sender may be blacklisted at any given time, no matter how scrupulous they are. The real issue is how often this occurs and why.

Create good—complete and consistent—headers.

The headers of your email messages are critical components for successful delivery. Some of the most important headers are the From, To, and Subject fields, all of which are scrutinized by automated anti-spam filters that protect ISPs and individual mailboxes. The human beings you're trying to reach also scan headers, of course.

First, it's very important to use a clear and consistent From header in each of your mailings. Use your organization's name and a valid email address, and then make sure you stick with that choice in each mailing; this consistency will help you encourage list members to "white list" your address, better insuring that your legitimate, opt-in mail will pass through successfully. If you want recipient replies to go to a different address than your From address, make sure the Reply To field is also valid.

Next, the industry standard is to include recipients' name and email address in the To field (e.g., "John Doe" <johndoe@example.com>). You can obtain names via the subscribe form on your Web site and then use a "merge tag" in your email marketing or list management tool to personalize the To field for every recipient. The syntax of such a tag might look like this: %name% %email%; when you send your mailing, the email management application will merge each list member's name and email address into the To field.

Lastly, your subject line should be accurate and, ideally, compelling. Accuracy is a key Best Practice; otherwise, you may appear to be intentionally deceptive and misleading. Compelling isn't necessarily a requirement, but it will certainly help increase the number of recipients who open your mail.

Some list owners include a special Subject prefix for each mailing to increase the ease with which recipients may identify their messages (or to help aid passage through anti-spam filters). For example, the publisher of a daily foodservice newsletter could add the prefix "[The Daily Dish]" to the subject line so it can be readily identified in a recipient's inbox. If you distribute adult-oriented material, you may be legally required to include such a prefix to warn recipients of the content within.

Headers are also a key mailing component with which to experiment, for example, to determine which From address or Subject text is most effective at increasing your delivery or open rates.

Write content that doesn't look like spam.

As a legitimate, permission-based publisher or marketer, it's very likely that you have substantive content to share via email. That said, your mail can still appear to be spam if you inadvertently use certain words or formatting that's indicative of truly unsolicited email. These days, words such as "free", "mortgage", and "prescription" are so commonly used by spammers that your mail may be undifferentiated if you use them without caution.

The Best Practice here is to create messages that have a good balance of text, graphics, and links, avoiding excessive use of words that are typically associated with spam. You might be able to gauge this on your own, but the true test is to...

Test your messages against spam filters.

Use an online "content checker" that processes your draft message and then gives you a report of how it did against anti-spam rules. These tools often use a points system and score your message against a large number of rules. Every time your message triggers a rule, its assigned additional points; messages that accumulate more than a certain threshold of points are tagged as spam.

Adjust your headers and content to minimize chances of blockage.

After you've run your test message through an anti-spam filter, edit your content to reduce definitive red flags. Note that some of your copy may have characteristics representative of spam, but it may not be worthwhile (or possible) to remove all of them. For example, if your business provides marketing consulting services, you may have no choice but to use the word "marketing" and accept the fact that some anti-spam filters may flag your mail because of it. (And if that's the only area of concern in your test messages, you likely have little to worry about!)

Optimize for the Inbox.

Once you've optimized your messages for general delivery – e.g., testing them with a content checking service to see how much they appear like spam – you're ready for the next step in fine-tuning. These days, many ISPs and mail providers offer their users a folder for mail deemed spam, junk, or otherwise "bulk." Unless your subscribers are diligent readers, they may simply delete mail that's automatically routed to these folders. You, therefore, want to do as much as possible to insure that your legitimate opt-in mail reaches the inbox.

Use test or "seed" addresses at key domains.

First, see what domains are predominantly used by your audience and get at least one address at the major ones. Most list owners have many members at Yahoo!, Hotmail, AOL, and Gmail, but you may find others on your list. Sign up for at least one account at each of these providers, and then send your email campaign to yourself as part of your testing process. Make sure to use the same email marketing solution for this test that you'll use for your actual mailing in order to keep that important variable constant.

After you've sent the test message, check your various seed addresses to determine if your mailing was delivered to your inbox or to the spam, junk, or bulk folder. If the message was delivered to your inbox, you're likely in great shape to launch your campaign. In contrast, if the message was automatically routed to your spam folder, you should reevaluate and edit the headers and content. (You should also consider speaking with your internal IT department or that of your email hosting service to see if the problem lies not with your message, but rather with the relationship between your hosting service's domain and the receiving ISP.)

Consider using a third-party delivery analysis service.

If you send very large and/or frequent marketing campaigns, you may want to consider outsourcing the seed address process to a third-party. This kind of testing can be time-consuming, and it's possible that your hosting provider can do it for you.

Cultivate industry relations.

While it's tempting to see ISPs and other email providers as an obstacle between you and your target audience, they, like you, want to make sure that their subscribers receive legitimate opt-in email. Any ISP that didn't care about this and rejected too much valid mail would soon find itself losing clients. But unlike you, they also need to protect their subscribers from the current tidal wave of truly unsolicited, unwanted mail. As spammers get craftier, ISPs are forced to enforce stricter rules to filter out mail that looks like spam. Sometimes, despite your best efforts, it's your mail that gets filtered. How then do you make sure that your mail isn't such a "false positive" on a regular basis?

Be sure you're missed.

ISPs are in the business of delivering email people want—so make sure your email is something your customers want. When your message is interesting and relevant every time, recipients are unlikely to report it as spam to their ISPs. Indeed, if your customers look forward to receiving your email, they're more likely to miss it when it's not there and to let their ISP know they're unhappy that it's been blocked.

Establish your own relationships.

If you send your email campaigns from your own servers, establishing contacts at major ISPs and email providers can help you resolve delivery problems more quickly—or even preempt them from happening in the first place.

If you have a very large list or send high volumes of opt-in mail on a regular basis, it's worthwhile to establish a point of contact at each major ISP or email provider. Some of these mail receivers maintain "white lists" of known senders who have met certain permission-oriented criteria; mail sent by white listed senders may not be filtered as aggressively as that sent by unknown senders.

Don't think of white listing as free license to send anything you want. No ISP will give you total autonomy; if you rack up enough complaints or bounces, you'll be blocked like everyone else.

Also, use an email marketing solution that provides good delivery and blacklist reporting. It's not enough just to know that you're having a problem; you need access to detailed information about why mail isn't getting through so that you can explain your situation clearly to the ISP or other domain in question. For example, there's a difference between mail that's blocked and mail that isn't getting through due to technical difficulties.

Once you've identified the reason your mail is being blocked, you can contact the ISP to resolve the problem. If you've been following these Best Practices, and if the ISP knows you to be a reputable sender, you should be able to get back on track fairly quickly.

Ask your hosting service to represent you.

If you're using a list hosting service (ASP) or Email Service Provider (ESP) to send your email, find out what kind of relationships they have with the major ISPs and email providers. Ask your current or prospective ESP about its relationship with the major mail receivers and find out what procedures it has in place to identify and resolve delivery problems. ESPs that are "white listed" may help deliver more of your mail, but remember that such a positive relationship with the ISPs does not mean that you can send unsolicited or unwanted mail without negative consequences.

In Conclusion.

Deliverability can be quite a challenge these days and often a moving target when trying to proactively address the issues that arise. However, if you consistently follow these Best Practices, you'll find the challenges of deliverability to be not quite the burden they once were. Master these practices and apply them consistently, and your deliverability problems will become a thing of the past.

Deliverability

Branding Your Subject Lines to Avoid the Junk Folder

Email Filtering has become a standard anti-spam tool in the email administrator inventory. While some filters are better than others, even the best filters can throw a false-positive and trash a legitimate email. If this happens to one of your messages, successfully branding your subject line can give you another chance to reach the recipient.

Most filters are configured to segregate offending messages to a junk folder rather than the inbox, with the intention of letting the user scan for valid emails caught in the crossfire. An email user will probably give their junk folder a quick look-over occasionally for immediately recognized emails, but rarely opens the messages found within. Unfortunately, your snappy subject line will be lost amongst all the crudely spelled vulgarities and spammer lingo meant to mislead. To grab your user's attention, you need to show him something immediately recognizable.

Here is where subject-line branding comes in. By placing your branding or company name at the very beginning of the subject line, your message becomes easier to identify even to those who work with ten inch screens and can only see the first 13 characters of the subject.

If your company name is prominently displayed in the subject line, you have a good chance of the user noticing the familiar name and plucking your message from the email junkyard. This also gives the user an easy keyword to add to their filters' white list, ensuring that your messages are sent to their Inbox.

DELIVERABILITY

How Geeks Can Increase E-Mail Delivery

Ensuring permission-based e-mail is delivered to recipients' inboxes requires an equal amount of effort on marketing and technical fronts. This section focuses on the technology behind e-mail sending and ways to ensure your e-mail delivery doesn't resemble a spam attack.

Following, 10 tactics to help increase the likelihood your e-mail messages will be accepted by the receiving ISP and avoid future deliverability problems.

- **Create a reverse DNS.** Make sure your outgoing mailing IPs have valid RDNS entries set up. This ensures when a receiving e-mail server checks who owns the IP trying to connect to it, you'll come up as the result, passing one of the many basic checks ISPs do to deter spammers.
- **Set up an SPF.** SPF is an additional step to verify an e-mail sender's identity. The protocol is fairly easy to set up; your network administrator should be able to do it in under five minutes. SPF adds another layer of authentication to your outgoing e-mail and protects against phishing attacks on your brand.
- **Make only one connection.** When connecting to an e-mail server, send only one message per connection. Some systems still try to shovel as many messages through one connection as possible, akin to throwing 500 e-mail addresses into the BCC field. ISPs frown on this technique, as spammers who want to get as many messages in before being blocked typically use this approach.
- **Limit sending rate.** Just because you can send a million messages per hour doesn't mean doing so is prudent. Large spikes in traffic can be seen as dictionary or denial of service attacks. Though the ideal send volume depends on the list's nature (e.g., B2C or B2B), a good rule of thumb is to limit your transmission to 150-200K messages per hour. Keep in mind you will also need to accept feedback in the form of bounced messages; your outgoing speed shouldn't hamper your ability to receive bounces.
- **Accept bounces.** Some e-mail systems, especially older ones, have a nasty habit of rejecting bounce messages. These "bounced bounces" arrive at the receiving ISP and can raise red flags.

Nothing irks an ISP more than sending a response that a recipient doesn't exist, only to have the notification rejected and the mailings continue.

- **Validate HTML content.** One of the dirtiest tricks in aammer's arsenal is invalid, broken, and malicious HTML code, used to obfuscate his payload. If you use HTML in your messages, make sure your code is error-free and follows W3C HTML guidelines.
- **Avoid scripting.** Security risks due to script vulnerabilities in e-mail browsers have increased over the years. The result is most scripts, such as JavaScript and VBScript, are stripped out of messages. Some e-mail systems reject messages outright if scripting is detected. For greatest compatibility, avoid using scripts in messages. Instead, drive your readers to your Web site, where dynamic components are easily rendered.
- **Understand content filtering basics.** Ignorance of filtering approaches is no excuse for not getting messages delivered. Though no one can be expected to keep up with the nuances of common content filtering, you should understand the different kinds of filters and types of content considered high risk. Read bounce messages, track which messages had high bounce rates and low open rates, and see if you can reverse-engineer offending content.
- **Monitor delivery and bounce rates by ISP/domain.** Periodically (if not after sending every message) run reports by major ISP and domain on your messages. Look for unusual bounce, unsubscribe, spam complaint, and open rates at specific domains. A domain showing off-kilter results likely has a filter or blocking problem.
- **Monitor spam complaints.** Even the best permission marketers with world-class practices receive spam complaints. Monitor the number of spam complaints for each mailing, and establish a benchmark average. Look for mailings with spam complaint percentages that vary from the norm. See if you can determine what may have caused the problem. Was it an overly aggressive subject line? Too many messages sent within a short time? The fact you sent an unexpected type of e-mail? Another factor? A high percentage of spam complaints may result in an ISP blocking current, or even future, messages.

DELIVERABILITY

How NongEEKs Can Increase E-Mail Delivery

E-mail marketing success includes ensuring your e-mail messages are delivered and have a shot at being opened. This requires competencies in marketing strategy, creative, technology, and more. This section looks at delivery improvement tactics easily implemented by marketers and other right-brain personalities.

Delivery issues include messages the recipient confuses with spam, simply misses, or doesn't recognize, along with filtering, blocking, and bulk-folder challenges.

Here are 13 tactics and approaches that increase the likelihood your recipients will get, and consider opening, your e-mail messages:

- **Double opt-in subscription process.** Many marketers are leery of moving to a double (confirmed) opt-in process for fear of losing a large number of new subscribers. But a well-executed double opt-in approach will likely capture 80 percent or more of the subscribers and provide additional benefits. These include a cleaner list with fewer bounced addresses from input errors; an audit trail in case of subscriber spam complaints; and a higher quality list due to recipients confirming their interest in your messages.
 - **No prechecked boxes.** Prechecked "subscribe" boxes may lead to a higher number of initial subscribers, but a lack of affirmative consent leads to lower-value subscribers/customers, reduces customer trust, lowers response rates, and potentially hurts the brand. Most important, recipients may not recall subscribing and don't expect that initial e-mail, resulting in a spam complaint, an unsubscribe, or simply being ignored
 - **Visible "update e-mail address or preferences" link.** It's estimated roughly one-third of the average e-mail list churns each year due to address changes. Make sure your messages include a very visible "e-mail address change," "update preferences," or similar link to an update page on your Web site.
 - **A recognized, expected, consistent sender name.** When scanning overloaded inboxes, recipients may look at the sender line, subject line, or both. Use, and stick with, a sender name that's simple, easily recognized, trusted, and expected by subscribers. When possible, use a sender e-mail address that's recognizable and in plain English, such as newsletter@company.com.
 - **"Branded" subject lines.** Subscribers may receive a few hundred e-mail messages a day, much of it spam. As recipients scan their inboxes, they're probably looking for messages that are either clearly spam or opt-in e-mail they trust and want. You want your message to be easily, immediately categorized as "recognized and wanted." It helps to brand your subject and reinforce it in the sender name.
- For example, if your e-mail is sent by "Global Inc. Newsletter," the subject might include "Global News Update" at the beginning of the subject line. Though this approach uses up valuable subject line real estate, it makes your message stand out and reduces the chances of being missed, ignored, filtered, and unopened. Consider conducting a few A/B split tests to determine what works best with your subscribers.
- **Subject line content.** In addition to the above approach, ensure copy is creative and compelling but doesn't trigger spam filters or get deleted by users who confuse your message with spam.
 - **A message content checker.** Many e-mail marketing software/ASP solutions have built-in content checkers to rate the likelihood messages will be filtered and to check content or code that may trigger a filter. Use them. Although far from perfect, these checkers are a decent indicator of potential problems that may have gone unrecognized by the marketing team.
 - **Content filtering.** Basics ignorance is no excuse for messages not being delivered. Though no one can be expected to keep up with the nuances of common content filtering, understand the different kinds of filters and content that is high risk. Read bounce messages, track which messages have high bounce rates and low open rates, and see if you can reverse-engineer offending content.

- **Message proofing and pretesting.** Always send proofs of your message to yourself, coworkers, and, if possible, a larger seed list. Proofs help uncover typos, missed changes, bad links, incorrect image paths, and potential blocking or filter problems. If you send very large volumes, you may want to send test messages to a small percentage of your overall list, testing variables and potential delivery problems. You may also want to subscribe to an inbox seed monitoring service.
- **Personalization and segmentation.** The more relevant and personalized a message, the better the chance it will be recognized by a subscriber, not missed or deleted. Start small and simple. Use click-through activity, for example, to segment subscribers based on links they clicked in the past. Then send those people messages with subject lines targeted to each interest segment.
- **Images instead of text.** Some industries are very offer- and discount-driven, such as travel and hospitality. These have continuous problems with content filtering because they repeatedly use certain terms. We're seeing a number of companies facing this challenge move to an image-based content format. Certain content is contained in images rather than as text. The approach has potential downsides, including image blocking, increased file size, slower loading, and potentially more work for the design/production team.
- **Managed user expectations.** On sign up, clearly convey to subscribers the frequency, e-mail type, content/purpose, and value proposition. Ensure recipients aren't surprised when they receive your messages.
- **Send time.** As most spam is sent in the middle of the night, avoid sending messages then, if possible. Your message is much more likely to be missed as recipients comb through inboxes and bulk folders in the morning.

EMAIL METRICS

Click-to-Open Rate: A Better Metric?

Open rates - boring. Click-through rates - yawn. Is it time for some better, or at least different, metrics for email marketing? The answer, we believe, is yes. In this section we'll look at the "click-to-open rate", a metric that no one talks about, let alone uses, yet it may be one of the more meaningful process metrics available to email marketers.

Open and click-through rates (see definitions and comments below), the most commonly used and benchmarked email marketing metrics, provide marketers with a quick and reasonably accurate snapshot of how an email message performed. By combining these two metrics into the click-to-open rate, however, marketers have an additional and perhaps better tool to analyze and benchmark email performance.

Click-to-open rate (CTOR) is simply the ratio of unique clicks as a percentage of unique opens. The CTOR measures how effective your email message was in motivating recipients who opened it, to then click a link. In other words, the click-to-open rate expresses the measure of click-through rates as a percentage of messages opened, instead of messages delivered.

This difference is meaningful and important for a couple of reasons:

1.If a recipient doesn't "open" your message, they also can't and don't click a link. So why do we care about the notion of click throughs on unopened messages?

2.By removing unopened messages from the picture, the CTOR then becomes a better measure of the value and effectiveness of the actual email message content, messaging and layout. Specifically, the CTOR measures:

- **Relevance of the message content**
- **Effectiveness of offers**
- **Effectiveness of the copy**
- **Effectiveness of the message design and layout**
- **Timeliness and immediacy of the content or offer**

- **Effectiveness of the number and location of text and image links**

- **And to some extent, the level of trust recipients place in your brand and value proposition (the open rate is the better measure of trust since if trust is lacking, the recipient will not even open the email).**

CTOR as Diagnostic Tool

The CTOR's greatest value may be as a diagnostic tool for email messages. For example, if you compare the CTOR across ISPs, key domains or customer segments you might uncover potential issues or trends that need to be addressed.

For example, a segment that had a significantly higher or lower CTOR than the rest of your segments could be attributed to:

- **A high number of text versions opened (opens are not trackable but links clicked are)**
- **A high use of a preview pane function**
- **Delivery issues with an ISP/domain (spam filtering, black lists, junk folder)**
- **Significant demographic or behavioral differences for that segment**

Getting Started With CTOR

So if you are intrigued by the concept of the click-to-open rate metric, what next? Here are some tips to get going with CTOR:

- **Run reports on some recent messages by key ISP/domain and/or segmentation of your list.**
- **Analyze the click-to-open rate and determine if there are any positive or negative issues or trends for a particular segment or domain.**
- **Then analyze those messages with your highest CTRs and CTORs. See if you can hypothesize what drove a higher percentage of recipients to click a link in those messages.**
- **Establish your current average benchmark CTOR and set a target goal to reach.**
- **Then using your hypotheses, modify, optimize and test future messages to reach your target CTOR.**

METRIC DEFINITIONS AND COMMENTS

Open Rate:

- **Definition:** Open rate measures the number of unique opens as a percentage of the number of emails delivered.
- **Equation:** Open Rate = Unique Opens/Emails Delivered (Sent – Bounced)
- **What it Measures:** Trust, strength of relationship, effectiveness of from and subject line, timing and frequency, etc.
- **Strengths:** It is a simple and reasonable metric that provides marketers with a general sense of how effective an email was in motivating recipients to open it. A meaningful decrease in open rates compared to a message's historical average suggests delivery issues, bad timing or poor subject lines. Increases may mean you found the “e spot” with your readers or solved a delivery issue, among other things.
- **Weaknesses:** The open rate metric can be very inaccurate in that it can under or over report actual opens due to:

- **Preview Panes:** Many people scan emails via their preview panes and if images are blocked this view will not be reported as an open. If images are not blocked then the message would be counted as “opened.” Some messages should truly be considered opened as the recipient scanned and scrolled through the message in their preview window. Other times, however, the message is counted as an “open” even though the recipient was merely scrolling through their overloaded inbox. Perhaps it evens out in the end.

- **Blocked Images:** With many ISPs and email clients blocking images, recipients may scan or read a message without being counted as an open (open tracking image does not load).

- **Delivery Issues:** Undelivered, junk folder, spam filtered and other “missing” messages that don't generate a bounce message from the receiving server, will be reported as delivered.

Click-Through Rate:

- **Definition:** The CTR measures the number of unique clicks as a percentage of the number of emails delivered.
- **Equation:** Click-Through Rate = Unique Clicks/Emails Delivered (Sent – Bounced)
- **What it Measures:** Relevance and effectiveness of message content, layout, offer, links, etc.
- **Strengths:** Long-time standard, simple.
- **Weaknesses:** CTR is based on messages delivered instead of opened.

EMAIL METRICS

Email Metrics: Lies, Damn Lies

The Common Untruths in Email Marketing

“Our email campaign got a 108% open rate.” “Average industry click-through rates are 4.2%” “Our email campaign generated a response rate 5 times greater than direct mail.”

Lies, Damn Lies.

While perhaps not actual LIES, there are a number of email metric white lies and half truths that continue to pervade the industry. Paradoxically, accurate and detailed metrics are one of email marketing's greatest benefits. It is important then, that email marketers take a critical look at (their own or others') email statistics before making key decisions or benchmarking their program's performance. This section will explore a few of the most common untruths in email marketing, including:

- **The highest open and/or click-through rates in a split test wins.**
- **Industry average open and click rates are XX% and XX %.**
- **XX% of recipients opened our email.**
- **“Response” rates for email are X times greater than postal mail.**

The white lies come in two basic flavors:

- **Definitional:** Many companies define differently terms such as open rates, response rates and conversion rates.
- **Misleading:** These can be incomplete statistics that point to a potentially incorrect conclusion. Or, in the case of industry averages, the base statistics are too narrow or biased toward the source's clients to be considered “industry averages.”

Many of the untruths in email marketing actually involve a combination of misleading and definitional statistical lies, making it even more challenging for the average marketer to make sense of things. To help you navigate the murky waters of email metrics, we've attempted to shine some light on four of the most common email metric lies.

The Top Four Email Metrics Lies

Lie #1: The highest open and/or click-through rates in a split test wins.

A common technique with email marketing is to conduct split tests to compare the effectiveness of subject lines, creative approaches, offers, etc. Marketers will often then email the rest of the campaign or the next campaign with the version that had either the highest open rate or click-through rate (or both). The reality, however, is that the email opened or clicked on the most may not be the version that produces the best results.

For, example, we have seen ecommerce split tests where the email with a lower click-through rate will produce a higher number of transactions.

The reason frequently is that the lower CTR email was of greater interest - but to fewer people.

So how do you make sure your stats aren't lying to you? It is important to track results beyond open and click-through rates all the way through to your desired action - whether it is a purchase, downloading of a white paper or registering for an event. One of the simplest methods is to use Web site tracking, which entails putting a single line of code on each Web page that you'd like to track. This enables you to track the actual actions taken on your site, such as a visit to an order confirmation page.

Lie #2: Industry average open and click-through rates are XX% and XX %.

Various companies report “industry average” email metrics such as open, click-through and bounce rates. We all love these statistics, but let's be clear - they are not industry averages. What the statistics usually are is a snap shot into the average results from one company's client base. Unless your profile is similar, then the “average statistics” are probably not a good benchmark for your company's program.

Factors that influence these “average” statistics include: types of emails sent (newsletter, notification, ecommerce, etc.), industries, sophistication of senders, size of lists, source of addresses, amount of personalization, nature of relationship with recipients and how they define their metrics.

So how do you use these reported industry stats? We suggest using them as goals rather than clear benchmarks. For example, if your first newsletter generates a 25% open rate, but you read of a 40% industry average, establish internal targets and steps to achieve open rates of 30% and 35%.

Lie #3: XX% of recipients opened/read our email.

Open rates are tracked using a transparent one pixel gif image hosted on a server just like the viewable images in an HTML email. As a result, any action on the recipients' part that attempts to load the “open gif,” will count as an open. This includes the Preview Pane in Outlook, for example.

The generally accepted definition of open rate is “unique emails opened as a percentage of emails delivered.” Some companies measure open rates based on total opens rather than unique opens (many people will open an email several times), leading to inflated open rates. Additionally, many companies report open rates based on the number of emails sent rather than emails delivered (delivered = sent - bounced).

Some marketers also falsely assume that an “open” actually equates to an email being “read,” which is often far from reality. For email marketers, what is important is to set a definition that works for your company, and then consistently benchmark against your program.

Focus on how to get your open rate to 40% from its current 30%, and don't worry about reports of a 70% open rate.

Lie #4: “Response” rates for email are X times greater than postal mail.

Many companies in the online space loudly proclaim that email “response” rates are several times greater than traditional postal direct mail. For example, one company claims common response rates are 5-15% for email versus 2-3% for postal mail.

The first problem is the definition of “response” rate. In direct mail, response rate is the percent of people who responded by calling, returning a business reply card, registering online, visiting a store, etc.

In email marketing, the metric known as “conversion rate” is generally more consistent with direct mail's “response” rate. Email click-through rates typically range from 2-15 percent, with conversion rates (actions taken as a percentage of unique click-throughs) generally running in the single digit percent range. Rates can vary widely, however, based upon what is being offered, the strength of the landing page, etc. For ecommerce, for example, an email campaign with 0.25% to 0.50% of orders sent is generally considered pretty good.

So the reality is that email “response” rates often may or may not be higher than direct mail. But because emails cost significantly less to create and distribute, email marketing generally produces a much greater return on investment.

Lastly, though, pitting email against direct mail is a short-sighted argument. Smart marketers know that there is a role for both postal and email marketing. Integrating telemarketing, direct mail and email marketing together generally produces the best results.

There are of course, many other white lies or half truths in email marketing that we haven't addressed. The keys for email marketers are to resist benchmarking your program against the “industry average du jour” and to base critical campaign decisions only on facts, not assumptions.

Email provides marketers with an incredible number of available metrics - just be careful how you use them.

ABOUT LYRIS

Lyris, Inc. is the online marketing expert delivering the right mix of software technology and industry knowledge to help its customers simplify their marketing efforts and optimize campaign ROI. Through the delivery of the industry's first on-demand integrated marketing suite, Lyris HQ, and knowledge-sharing community, www.lyrishq.com, to secure and reliable on-premise solutions, including Lyris ListManager, Lyris provides customers the right tools to optimize the management, collaboration and execution of their online and mobile marketing initiatives. These sophisticated, yet easy-to-use tools provide marketers a suite of best-of-breed applications for managing email marketing campaigns, publishing and managing Web site content, creating landing pages, optimizing Web sites and search engine marketing. Lyris' solutions are available as software or as hosted applications and are used by agencies and more than 5,000 customers worldwide, from Fortune 500 corporations to fast growing startups.

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