

E-mail marketing

09

More often than not, e-mail marketing is not seen as part of your branding efforts, other than in terms of the design used for how the e-mail is presented. I couldn't disagree more. E-mail is one of the most personal and adaptable forms of digital marketing and, when done well, gives us a huge opportunity to engage and influence. Unfortunately, it is also very easy to do badly.

If we go back to the idea that your brand is the sum of all of the experiences or touchpoints that you have with an organization, product, etc, then e-mail can be a highly targeted and direct touchpoint. The problem is that most e-mail is poorly targeted, badly designed and not at all personalized. In this chapter we explore how we can make the most of e-mail marketing as part of our digital toolkit. In Chapter 10 we will explore how we can take this even further with customer relationship management (CRM) integration and marketing automation systems.

E-mail isn't exciting

I don't agree with this statement one bit, and I'll explain why in a moment, but let's start with an example. If I run a webinar or a conference talk and I include the phrase 'social media' I am fairly sure I'll fill the room (virtual or otherwise). However, if we talk about some element of e-mail marketing, it just won't get the same level of response. Most of us are interested in what's new and what's changing, and many of the core principles of e-mail marketing have been the same for some time. The issue is that not many of us are following these principles and we would rather try something new than improve what we are already doing.

Ease of iteration

The single greatest thing about e-mail, in my opinion, is the ability to test, learn and change quickly and easily. Trying different versions of pages on your website or creating different apps can be expensive, time consuming and often fraught with technical problems. Trying different e-mail subject lines, calls to action and length of copy are all extremely easy to test, assuming you are using the right e-mail service provider (ESP).

An ESP will allow you to store e-mail lists, create and send e-mail campaigns and track results: how well-suited your ESP is to your needs will have a direct impact on how effective your e-mail campaigns can be. There are dozens of different ESPs out there, ranging from basic through to highly sophisticated systems that could be used as CRM systems in their own right. We'll explore what we need from an ESP in more detail in a moment, but first we need to look at the state of the e-mail market and dispel some myths.

The state of e-mail marketing

It would be very easy to jump to the conclusion that e-mail marketing is on the decline – for two key reasons. First, social media allows for all kinds of interactions that previously we may have used e-mail for. For example, I certainly don't e-mail my friends any more. Also, we're always hearing complaints about e-mail spam – what a huge problem it is and how all e-mail accounts receive a deluge of it. This may be true to some extent, but before we jump to any conclusions we really need to look at the actual numbers and understand how people are using e-mail.

The Direct Marketing Association (DMA) carried out their annual e-mail tracking report and found that the number of people receiving e-mails from brands they trust remains at a stable 90 per cent and that consumer approval of e-mail marketing has remained the same for the last 12 months, with 28 per cent saying that more than half the e-mails they receive are relevant to them (DMA E-mail Tracking Report, 2013).

Interestingly, the same study looked at mobile usage and found that for 75 per cent of consumers, desktop/laptop was the primary access device for e-mail. However, 57 per cent said they also access their e-mail on a smartphone device. The most telling figure was that 68 per cent said they would wait until they were on their desktop/laptop to make an online purchase. This is a clear indication that the mobile experience isn't matching up to consumers' requirements in terms of trust or convenience. There is also a clear difference between general consumer usage and business use of e-mail, with 47 per cent of all e-mails being opened on a mobile device, according to Litmus (E-mail Analytics, Litmus, 2013).

So why are we seeing such large differences between reported statistics on e-mail marketing and how many of us are using a mobile device to read our e-mails? It really comes down to one of the key principles we need to embrace with e-mail, and that is that every e-mail list is different and will respond slightly differently. Although at first this sounds problematic, in that we can't make too many assumptions about the behaviour of people on our lists, it is in fact one of the greatest things about e-mail. I can learn what works for my target audience and adjust things over time. What kind of subject lines do my audience respond to? How likely are they to share content via social media once I have e-mailed them? What is the correct length of e-mail to send? The list of variables goes on and on, and this is something we'll explore more when we look at testing later in this chapter.

We know that consumers are still using e-mail, but what about the marketing industry? Are we still embracing e-mail marketing? According to DMA both B2B and B2C brand marketers are confident that e-mail expenditure will rise over the coming 12 months (DMA National Client E-mail Report, 2013/14).

So consumers are using e-mail, the industry is confident, but what about the issues with spam that we talked about earlier? Actually, the amount of spam we are receiving is going down (although I know it often doesn't feel like it). Although spam still accounts for more than 70 per cent of all e-mails it is down from over 85 per cent in 2012 (SecureList, 2013). Bear in mind that this is detected spam, which means it will have been filtered from your inbox one way or another. This decline in spam is down to two key factors: 1) advances

in technology in detecting and filtering spam so that it doesn't reach us in the first place; and 2) we are generally wising up to spam, which makes it less effective.

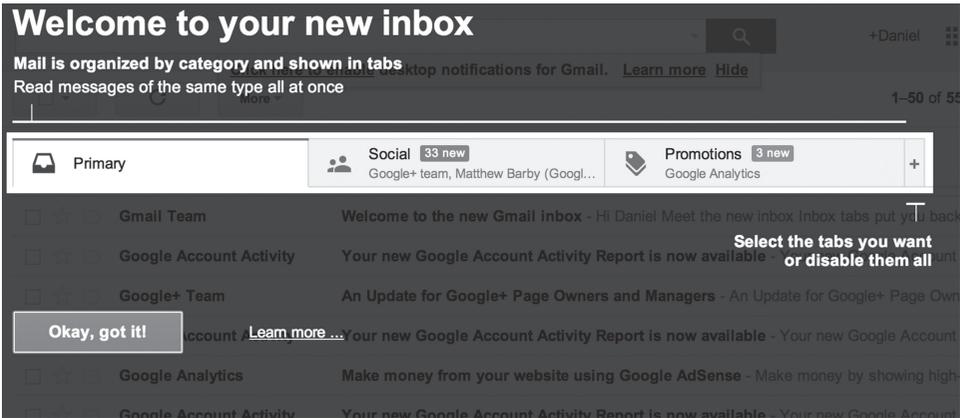
Another thing worth understanding is how spammers achieve much of their e-mail volume and why security organizations can have such a big impact on their capability. Spammers don't sit there sending huge volumes of e-mails from their own systems, as this would be easily detected and they would be shut down very quickly. What they actually do is use various forms of malware (malicious software) to allow them to hijack other people's computers and send e-mails from them. These systems of hijacked computers are known as botnets.

The decline of spam and rise of BACN

You are probably very aware of the concept of spam, defined as unsolicited e-mail communications. As we have said, spam is actually on the decrease and a range of security and technology solutions are helping to progress this fight. What is generally on the rise, though, is BACN (pronounced bacon). BACN is defined as the range of e-mails that we have signed up for but don't see as relevant and never read. Over time we subscribe to more and more newsletters, we get service and social media updates that we never read, and are generally getting more e-mail, which although not truly spam is not relevant or useful to us.

Increasingly, web-mail clients such as Gmail are trying to separate this kind of e-mail from e-mails that are relevant, by placing these e-mails under separate tabs. Different systems have different ways of judging the relevance of an e-mail, but very often it is based on user behaviour. If you regularly open and click on e-mail from a particular address, these systems will learn your behaviour and identify that an e-mail is relevant and they are more likely to place this e-mail in your main inbox. Therefore, getting engagement and clicks on every one of your e-mails becomes even more important as it will impact on whether your future e-mails are seen.

FIGURE 9.1 Gmail's tabbed e-mail in action, separating key e-mails from social messages and promotional messages



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It is not just the security companies that are fighting back against e-mail spammers, however. Many e-mail systems, including Google's widely used Gmail, not only filter spam but also try to separate your most important e-mail from other types of e-mail, such as social messages and newsletters. This is achieved using tabbing and some smart filtering (shown in Figure 9.1). The aim is not only to get rid of the spam, but also to separate the essential e-mails from your less important content and the BACN.

Focusing on relevance

This movement towards separating essential e-mails from promotional e-mails means that if we use e-mail as a broadcast channel, focusing on sales messages, we are likely to get lower and lower response rates. We need to focus on using a range of techniques and technologies available to us to make our e-mail as tailored, relevant and useful as possible to our audience, and that's what we'll explore in this chapter.

This doesn't mean that you can't send promotional e-mails with products and special offers. If I ask you to send me special offers, then that is what you should do, but they need to be the right offers for

me, sent at the right time and at the right level of frequency. And if I've signed up for a newsletter, don't just send me sales messages. The general approach I apply to e-mail marketing when not working on an e-commerce basis, and an immediate online sale is not the proposed outcome, is to consider the principles of content marketing. There should be a ratio of commercial and non-commercial content in your e-mails, and by that I mean really providing value through your e-mail content. Many of my clients work on a 70/30 rule – that is, 70 per cent non-commercial useful content and 30 per cent about stuff they want to sell you. I would suggest that you go even further and aim for a 90/10 or 100 per cent non-commercial content. Providing useful content is the single best way to get your e-mail known and remembered, increase the likelihood of future e-mail opens and to drive traffic to your site. Once you have the site visitor, you have the opportunity to build trust, awareness and potentially drive someone along your sales funnel.

E-mail and the user journey

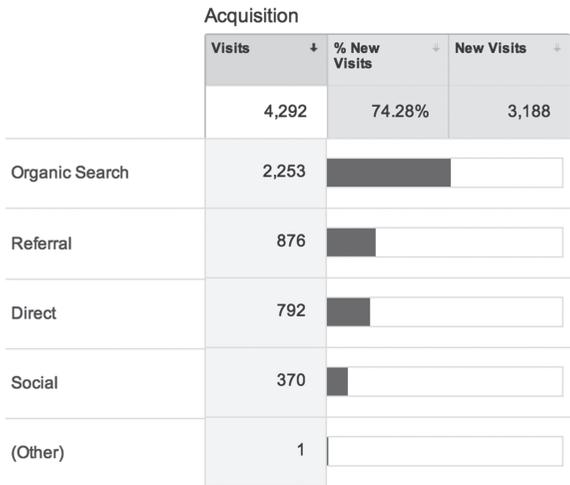
Once we understand the impact that e-mail marketing has on our potential user journey, and how effectively it can work as one of our digital branding touchpoints, we can start to really look at the great ROI that e-mail marketing can offer.

The importance of tracking code

When we look at our web analytics to try and understand where our web traffic is coming from and how it is impacting our bottom line, our traffic sources are an essential report. In Google Analytics these are found under the acquisition reports, and as you can see in Figure 9.2, they are broken down into some key areas. Organic search is traffic from sites such as Google (but not paid advertising from these sites), referrals are visits from other websites, social are visits from social websites and then we come to direct visits. Supposedly direct traffic is traffic that comes to your site when someone types your web address directly into their

browser or has bookmarked your site and visits by selecting that bookmark. What direct traffic actually represents is visits where your analytics package has no idea where they have come from.

FIGURE 9.2 Acquisition reports in Google Analytics showing where website traffic is coming from



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This is a really important thing to understand in regard to e-mail, because unless we add tracking code (which we'll explain in a moment and cover in more detail in Chapter 14) to the links in our e-mails, then people clicking on these links will show up as direct traffic and we won't be able to differentiate where they came from. So when we send out our e-mail campaigns, we will see an increase in direct traffic, but we won't be able to 100 per cent identify that as being a result of our e-mail.

Tracking code basically involves adding some information to each of our links, so that when a visitor arrives on our site we can use our analytics to identify exactly where they have come from (Figure 9.3 shows the Google URL Builder that allows us to generate this code). It is also possible that your e-mail service provider will give the option to automatically add tracking code, which can be a great time saver.

FIGURE 9.3 Using Google URL Builder to generate tracking code for an e-mail campaign

Step 1: Enter the URL of your website.

Website URL *

(e.g. http://www.urchin.com/download.html)

Step 2: Fill in the fields below. **Campaign Source, Campaign Medium and Campaign Name** should always be used.

Campaign Source *

(referrer: google, citysearch, newsletter4)

Campaign Medium *

(marketing medium: cpc, banner, email)

Campaign Term

(identify the paid keywords)

Campaign Content

(use to differentiate ads)

Campaign Name *

(product, promo code, or slogan)

Submit

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http://www.mywebsite.com/mypage.html?
utm_source=Newsletter+Dec+2014&utm_medium=Email&utm_campaign=Em
ail1
```

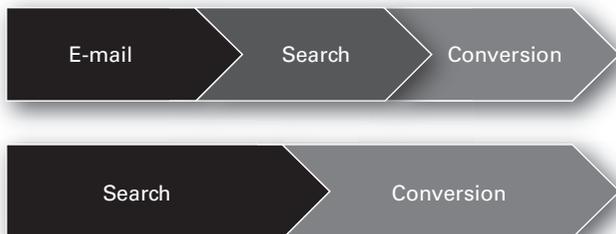
(Google and the Google Logo are registered trademarks of Google Inc, used with permission)

A host of resources on analytics and tracking is collated on the website that accompanies this book: <http://www.targetinternet.com/digitalbranding>

Going beyond last click

To understand how e-mail is having an impact on our overall digital branding, we need to understand where it fits into the user journey and how it is impacting the bottom line. We may expect someone to read our e-mail, then immediately buy our product or fill in our lead generation form (a form on our website that indicates a query or desire to buy). However, it is more likely that e-mail will be one of many touchpoints that build up our digital branding over time. For this reason, we need to consider the analytics results from our e-mail campaigns carefully and make sure we are going beyond the last click. We explore this idea in more detail in Chapter 14, but it is necessary at this point to understand each step of the journey that leads someone to carry out an action that we desire. For example, as we can see in Figure 9.4, there may be a number of different paths through to conversion. As we can see at the top of Figure 9.4, I may get an e-mail, some time later do a search trigger resulting from something I experienced in that e-mail, and then go on to carry out some form of online conversion. Alternatively, as we can see at the bottom of Figure 9.4, I might have just done a search and immediately converted. In both cases, if we looked at analytics from a ‘last click’ perspective, in both cases the source of the conversion would be seen as the search, as this was the last click before conversion. By that logic, we might challenge why we are even bothering with e-mail marketing and pull the plug on this activity. But if we do that we won’t get the search that followed and we won’t get the conversion.

FIGURE 9.4 Considering each step in the user journey and going beyond a ‘last click’ mentality



So in order to really get the most from analytics when we are thinking about e-mail marketing, we need to have tracking code in place and make sure we are looking beyond the last click. Happily, Google Analytics provides some excellent reports to allow us to do this in the shape of ‘multi-channel funnels’. We look at this in more detail in Chapter 14, but essentially it allows us to see what channels were used by a visitor to our site up to 90 days before they convert. That is, what the different steps and channels are that were used in any of the user journeys that ended with one of our goals being completed.

Selecting an e-mail service provider

To really get the most out of e-mail marketing we have said we need to focus on relevance. In order to do that we need to think about segmenting our data, targeting the content, testing different elements of our campaigns and really making best use of the channel. To do that, and to make it easy to do, we need to select the right tool, and generally that will be some form of e-mail service provider. These tools generally work around three key areas: building, segmenting and targeting your e-mail list, building and sending your e-mails and, finally, giving you reporting on the results. Each of these areas can be extended to offer all sorts of functionality such as scheduling, automatic triggering and social media integration, all of which we’ll explore more of later.

The key thing is: you don’t want to get stuck with a system that limits your capability but you also don’t want to pay for things you don’t need. There are new ESP entrants all the time and many are very similar. To help you choose, some of the key considerations are listed below.

Enter the monkey

Mailchimp is a very popular and very low cost ESP. It has a very intuitive interface, loads of advanced functionality and is one of the cheapest ESPs on the market. They charge by the size of your list, rather than by how many e-mails you send, which can be a real cost saver if you are sending a lot of e-mails.

So what are the downsides? First, all support is done online, meaning you don't have an account manager you can call on. Also, it is a self-service system, and although the interface is very straightforward, it's down to you (although there is nothing stopping you from bringing in a third party to assist you). You need to pay using a credit/debit card, meaning if you can't pay this way then it's not for you. Also, if you need some form of customization or really advanced integration it may not be the right choice (although they do have an application programming interface (API) that lets developers do all sorts of things with the system).

I love Mailchimp, I use it for my business and I love the fact that it means I can test and learn quickly and easily. There are lots of other ESPs out there, but Mailchimp is often a very good starting point.

<http://www.mailchimp.com>

Requirements and functionality

There is such a dizzying array of things that your ESP could do, it is often hard to know where to start. A good place is by benchmarking the tools you are considering against each other in order to look at what functionality is offered. The list below is not a complete list of each tool and its functionality (as by the time this book is published it would already be out of date), but it provides a checklist of some of the key things you need to consider when selecting an ESP:

● **Requirements:**

- How many e-mails are you going to send and how often?
- How will your lists need to be segmented?
- How much do you want to manage yourself?
- Will you provide design or use a pre-created template?
- What reporting do you need?
- What is your maximum budget?
- Do you need an account manager?
- Do you want someone to do everything for you, including campaign analysis and planning?

- Do you need real-time reporting?
- Do you want a system you can log into and access directly?
- How do you want to get support – e-mail, phone, live chat?

- **Costs:**

- Is payment calculated by period of time, by size of list or per e-mail?
- What are the payment methods?
- Are there any initial set-up costs?
- Is there a minimum fee if priced per e-mail?
- Is there a minimum contract period?

- **Functionality:**

- Can I upload my existing e-mail templates?
- Do they provide e-mail templates and are they any good?
- Do they provide responsive templates?
- Can I edit templates visually or do I need to edit code?
- Can I add analytics tracking code automatically?
- Can I integrate with my existing systems easily, such as CRM?
- Do they offer A/B split testing easily?
- Do they offer options for understanding what time of day works best for an individual e-mail or list?
- Do they offer an API so that I can interact with the system with any software we may develop?
- Do they offer an inbox preview to see how your e-mail will look on different systems when delivered?
- Do they have a spam checker to show the likelihood of your e-mail being delivered?
- What do they do to increase deliverability?
- Do they have relationships with internet service providers and spam filter organizations?

- Can I set automated triggers based on data such as birthdays and renewal dates?
- Can I integrate the system into my site so that I can react to a user's behaviour on my site?

- **Lists:**

- How can I segment my lists and what level of complexity of segmentation is offered?
- Does the system do any automatic de-duplication when I upload a list? Am I able to upload my own lists and what are the rules in terms of how this data was collected?
- Do they automate the double opt-in process?
- How secure is my data?
- Can I manage and edit my lists myself?
- Can I build sign-up forms for my website and social websites?
- What types of data can I collect and is there a limit to how many fields?
- Can I cross-reference my lists against social media data to understand what social channels my lists are using?

- **Reporting:**

- What reports are available?
- Can I compare different campaign results?
- Are there any benchmarking tools or data?
- Do they try to compensate for the inaccuracies in 'open' rates (the percentage of people who open our e-mail)?
- Can I access my reports at any time or are they sent to me?
- Do they analyse the results and offer advice?
- Can I see what content has been most popular?
- Can I see the history for an individual e-mail?

Gaining opt-ins and building a list

In order to do any e-mail marketing we need to collect an e-mail list, and the rules on how we can collect data change from country to country. It is also not just a matter of following the rules, but really about following best practice in order to assure the quality of our lists and avoid annoying our target audience. Like many things in digital marketing, we tend to get distracted by volume when carrying out e-mail campaigns, and the question often asked after each campaign is ‘How many e-mails have we sent?’ and ‘How many people are on our lists?’. What we should really be focusing on is the quality of our lists and the actual results our campaigns get. We actively don’t want people on our list who don’t want our e-mails, otherwise we are just creating a negative touchpoint that will damage our digital branding. I’m sure you can think of at least one company that keeps e-mailing you with irrelevant or overly sales-based content, and over time it creates a negative impression of that brand.

Best practice in regard to opt-in is to follow a ‘double opt-in’ approach – that is, to allow someone to fill in a sign-up form (more on that below) and then send them an e-mail that they need to click on in order to confirm their opt-in. This might sound like a slightly laborious process but most ESPs will fully automate this process for you. Also, the fact that the user has filled in a form and bothered to click on a link achieves two things: 1) they have self-qualified by showing they are actively interested in what you offer, based on the fact that they have actually made some effort to sign up; and 2) this sign-up process gives you actual evidence they have signed up, otherwise anyone could take your e-mail address and sign you up for any e-mail list!

Sign-up forms

Rather than trying to collect huge amounts of data at the point of sign-up, which will be a barrier to getting opt-ins, I generally recommend that you keep the amount of information you ask for initially to a minimum. You then have the opportunity to prove the value of your e-mails and then ask for more information by using surveys, questionnaires or polls on an ongoing basis. You also need to consider the types

of data you may want to collect, whether you will really use that data and if your ESP is capable of storing it and using it. You may also want to think about how you are going to move this data between your ESP and your CRM (this topic is covered in detail in the next chapter).

The two key things that concern people when they are signing up to an e-mail list are: 1) what you are going to do with their data; and 2) how often you will e-mail them. Ideally, at this stage you will clarify both points with a statement along the lines of ‘We will never pass on your details to anybody else and we won’t e-mail you more than once a week’. You can also have a link through to your privacy policy that outlines clearly what you do with data, but in my experience very few people actually read these.

Buying in data and collection tactics

It is possible to buy in lists – but my general advice is don’t! I should caveat that and say, if you can find a list on a niche group from something like an industry event or a controlled circulation magazine, you may have some success, but generally the results from bought-in lists are poor. Anyone on an e-mail list that is for sale is likely to be getting a lot of e-mail; also, it goes against our principle of focusing on data collected via double opt-in. There are plenty of other ways to collect e-mail data, and although building a list will take more time, the results should be very much better.

The first way is to have a website full of great content that is useful to your target audience. This will draw in search engine traffic and you can then offer access to even more content if they sign up to your e-mail list. This is an ongoing approach that should be present in all websites to allow interested parties to register their interest. It always bewilders me as to how many sites make it hard or even impossible to sign up for an e-mail newsletter.

The other, more direct approach is to use a pay per click (PPC) ad on a search engine or social media site to encourage sign-up. The basic process for collecting e-mail via PPC works like this:

- Step 1 – target the ad according to where it will be shown.
For a search engine it will be by keyword; for Facebook by

interests, location, age and so on; and for LinkedIn it will generally be around location and job role.

- Step 2 – create an ad that offers something useful for free on a relevant topic for the target audience. For example, if I've searched for 'digital marketing' you could offer me a free e-book, podcast, report or similar piece of content.
- Step 3 – when I land at your website I am presented with information on all the benefits of the offered content and then asked for an e-mail address in exchange for the content.

Not everyone is going to sign up, but those who do have qualified as being actively interested in the topic, and if you continue to e-mail them content on similar topics it will have a great positive impact on your digital branding.

Leading by example

A really great example of an e-mail company putting content at the heart of their marketing strategy is ExactTarget. ExactTarget are an extremely advanced ESP (in fact they offer a lot more than just being an ESP) and their marketing is centred around constantly publishing great research and content. It's well worth looking at the resources they provide, and they have some really useful e-mail marketing guides. As ever, I have no commercial connections to the companies I mention!
<http://www.exacttarget.com/resource-center>

E-mail sign up versus social connection

The value of an e-mail sign up shouldn't be underestimated, especially when you have grown your list organically as suggested, and have used a double opt-in sign-up process. If you consider this against gaining a Facebook Like or a Twitter follower, the effort involved to sign up to an e-mail list is much greater, and therefore those signing up are likely to be of a more qualified nature. This doesn't mean that those

social media users who actually engage with you are less valuable than e-mail sign-ups, but offered a Like or an e-mail address I'd take the e-mail every time (but don't forget, there is no reason you shouldn't have both!).

List segmentation

As you build an e-mail list, you need to consider what differentiates the individuals on your list and what kinds of different content may be relevant to each of these segments. It is essential that your ESP allows you to collect data and add fields of information to your list in a way that will be practically useful for segmenting your lists in the future.

For example, you may want to send different e-mails to people living in different geographical locations – you will therefore need to collect and store that data. It could be that you want to store this data separately in your CRM system (we discuss these options in the next chapter), but for now let's assume we are adding more information to our ESP list. Different ESPs have different approaches and limitations to this, but increasingly many ESPs allow you to add a huge number of additional fields (in some cases an unlimited amount) that you can then use to segment and personalize your e-mail.

The benefits and risks of personalization

Personalization in e-mails generally often refers to the process of inserting personalized content such as your name, job role, company name or location into an e-mail. It can also refer to the process of segmentation or dynamically building content (these concepts are explored more below).

So if we are talking about inserting your name into an e-mail in order to personalize it, what actual impact does that have? Different studies show different results, and it certainly has to be seen in the context of your overall e-mail efforts, but there is generally a small increase in CTR. However, if you get the data wrong and insert the wrong job title or name, the damage will far outweigh any good you would have done. Therefore, only do this form of personalization if you trust the quality of your data 100 per cent.

We can segment our lists in a number of different ways, but we are generally talking about segmenting our lists based on collected data and by preference. That basically means that we have collected some information from an individual on our list and then use this to personalize their e-mail. This may be in the form of sending particular content, sending a particular format of e-mail or sending at a particular time or frequency, all based on the data you have collected.

This approach can be very effective in making e-mails more relevant and improving open rates and CTR. In fact, improvements of around 15 per cent in both open rates and CTR are entirely possible when taking this approach (Mailchimp, 2013).

Open rates and click-through rates

Two of the most commonly discussed statistics we get from our e-mail campaigns are open rates and click-through rates. It is worth understanding these in a bit more detail so that we understand where they are useful and what their limitations are.

Open rate tries to tell you how many people have actually opened your e-mail. I say tried because, unfortunately, due to the way it is calculated, it is inherently inaccurate. An e-mail is registered as open when an image in that e-mail has been loaded. So, you bring up an e-mail in your e-mail client, one of the images loads, and that tells the ESP that the e-mail must have been opened. This image is generally a single pixel image hidden at the bottom of the e-mail, often referred to as a web beacon. There are two problems with this approach. The first is that even if you open an e-mail for half a second and then delete it, as long as the image loads the e-mail will show as being opened. Although this is technically true, the open rate doesn't really paint a true picture of what happened. The other problem with relying on images being loaded in order to indicate an e-mail being opened is that when an e-mail is viewed by an e-mail client who doesn't load the images, you won't know it has been opened. It has been suggested that around 50 per cent of users don't see images automatically, which could mean some fairly unreliable data being reported as open rates.

However, this doesn't mean we should abandon looking at open rates. In fact, we are still using them as a benchmark – as at least we are comparing like for like from one campaign to the next or within split testing (discussed below). We just cannot rely on them as an entirely accurate representation of how many people open our e-mails.

Click-through rate (CTR) is the other key measure we tend to look at, and although a far more accurate measure, we can rely on it too much. Obviously, getting a click on your e-mail and driving a visit through to your website is great, but that is just part of the journey. It is entirely possible that everyone who clicks then gets through to your website takes one look, doesn't like the look of it and leaves immediately. You could therefore have a campaign with a 100 per cent CTR that was a complete failure!

So CTR is a useful measure but we then need to look at the visitor's behaviour on our site in order to really understand the true impact of our e-mail campaigns. So, for true commercial insights we will need e-mail reporting, web analytics and for goals to be set up in analytics. We also need to understand how these goals impact our business outcomes (and that is what Part Three of this book is all about).

This does highlight one of the potential weaknesses of e-mail marketing, however: even if you have the best e-mail campaigns in the world, if your website doesn't match that standard then your campaign won't be as effective as it could be.

E-mail templates and design

We could fill an entire book with discussions about e-mail design best practice, what works and what doesn't. The reason for this level of discussion is that how effective the design is will depend on your target audience, the e-mail client and device the e-mail is being read on, and a host of other factors. What that means is that we need to test for our particular list, and in fact we may find that different designs are more or less suitable for different lists and even segments of our lists. We explore all the different things that you can test for your particular list in the testing section of this chapter, but the key principles that every e-mail should take into account are highlighted here:

- **Header images above the fold:** don't place large header images at the top of e-mails. They push your content further down the page, and when images are switched off your audience will not see anything apart from a missing image.
- **Blocked images display:** consider what your e-mail will look like when images are switched off. Make sure you have a 'click to view online' link (most ESPs will add these automatically). Also make sure that all of your images have alt text, as for many e-mail clients this will display in place of the image when images are switched off.
- **Call to action placement:** consider where on the page your call to action will appear in various e-mail clients and try to keep it visible above the fold (before a user needs to scroll down to see the content). Bear in mind that the bottom right, where many calls to action end up, may not be the most suitable place; you may need to have multiple calls to action.
- **Scanability:** users try to assess the relevance of an e-mail as soon as they open it – and decide if it is worth reading properly or not. Make sure your e-mail is scannable and that the key message comes across clearly and easily. Avoid large blocks of text, complicated layouts and poorly defined calls to action.
- **Unsubscribe:** every e-mail should have an unsubscribe link in the footer; this will generally be automatically inserted by your ESP.
- **Footer:** the footer of your e-mail should also include your physical postal address if you wish to be compliant with US e-mail regulations (CAN-SPAM act 2003).

Responsive e-mail design

Responsively designed e-mails attempt to adapt the e-mail according to the device you are displaying it on and the size of screen display. This means that an e-mail will display differently on a smartphone, a tablet and a laptop screen. However, just as there are limitations in what we

can do with e-mail design versus web design, there are limitations on the effectiveness of responsive e-mail design.

This limitation is because most responsive design principles rely on the support of media queries, a technique used to understand the size of a screen and then adapt things accordingly. Unfortunately, media queries are not supported by all e-mail apps. At the time of writing the most noticeable of these are the Gmail apps for iPhone and Android phones.

For a great summary of which apps do and don't support media queries take a look at the guide on the Campaign Monitor website:

<http://www.campaignmonitor.com/guides/mobile/>

E-mail templates

There are a few options to consider when creating e-mails and the templates that you use. You can design your own templates from scratch, edit an existing template from your ESP, or use a template from another source. Each of your e-mails could be different, but in terms of brand consistency it makes sense to modify a particular template for a particular style of e-mail each time you send one. So, for example, you may have a newsletter template, a commerce template, etc.

Most ESPs will provide a set of standard e-mail templates that you can modify for your own use, and many also provide a visual editor that lets you edit these templates without any coding skills. Alternatively, you may need to edit your template code yourself and upload the HTML. You can do this yourself if you have the skills, or use a designer/developer to do it for you. There are a lot of ESPs that offer these kinds of services at an additional cost, or you could use a freelancer website such as Elance.com. Always remember, though, that e-mail template design is a very specific skill, and just because someone can design a website doesn't mean they know all the peculiarities of design for the wide range of e-mail clients.

The most important thing for your e-mail template is to make sure it displays properly on different e-mail clients and devices. To do this there are two options, one easy, one hard! The hard option is to

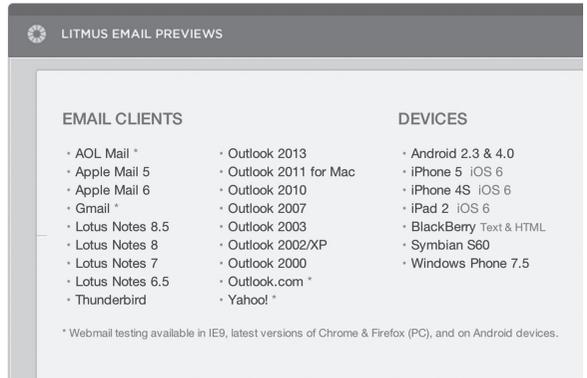
FIGURE 9.5 Litmus.com allows you to preview what your e-mail will look like on a wide range of clients and devices

EMAIL PREVIEWS

Comprehensive design testing

Designing emails can be hard. We've got you covered. Preview across 30+ email clients and devices in minutes. See how your message looks in the preview pane, and with images on and off.

» See all supported clients



manually test your e-mail template on every possible different e-mail client and possible device combination. This very quickly becomes an impractical task because of the number of possible options. This is why inbox inspectors were created, in order to simulate what your e-mail will look like on each of these different display possibilities. Many ESPs have these built in, but if your system doesn't you can use a system such as Litmus (shown in Figure 9.5).

Spam checking

We've already discussed the improvements in technology that are leading to the increased detection of spam e-mails. Unfortunately, the side effect of this is that your e-mail could be mistaken for spam by the many spam filters in operation – and never reach its intended destination. In order to minimize the chances of this happening you can use a spam filter testing tool. This will try to gauge the likelihood of your e-mail ending up in a spam filter and will point out the key things you may want to change in your e-mail.

Your ESP should have one of these tools built in but, if it doesn't, Litmus.com also offers this service.

Sending and testing

Once you have created your great e-mail content and built the perfect targeted list, you can start sending your e-mails. There are quite a few things to consider at this stage and a range of testing options are available.

Many ESPs will now allow you to carry out A/B split testing very easily, or you can manually split up your list in order to do this. The basic principle is that you take two segments of your lists and send each a variation of your e-mail, testing a particular feature of the e-mail (this could be subject line, copy length, etc). You then learn from these tests, work out which one got the best results and then apply this learning to the remainder of your list. For example, you could take two segments of your list, each consisting of 15 per cent of the total list, and run a test (making up 30 per cent of your list overall). You then learn from these segments and send out the better variation to the remaining 70 per cent of your list.

Open rate or click-through rate

When carrying out these tests, depending on what element of our e-mail we are testing, we will need to look to the open rate or the CTR for our results in order to judge which was the most successful. We can split these two measures as follows:

Open rate: subject line, time send, from address.

CTR: all variations within the e-mail content.

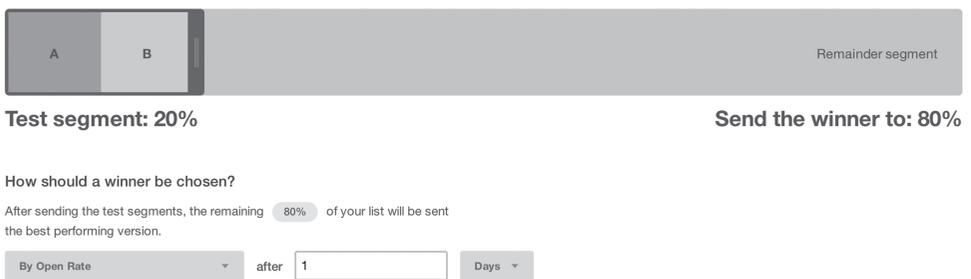
Once we decide what element of our e-mail to test, we also need to decide how long to wait after sending the initial two tests before we judge which is the most successful and send to the rest of our list. Figure 9.6 shows how easy some ESPs make this process.

Something you do need to consider, however, is the period of time you wait after sending your initial e-mails before you send to the remainder of your lists – and how this will impact your results. If you send out the test segments on a Tuesday and then send out to the remainder of your list on Wednesday, you will potentially skew

FIGURE 9.6 The easy-to-use interface for sending A/B split test campaigns using Mailchimp.com

How should we split the campaign?

We'll run your test on a segment of the list. When the winner is determined, we'll send it to the remaining portion of the list.



Test segment: 20% Send the winner to: 80%

How should a winner be chosen?

After sending the test segments, the remaining 80% of your list will be sent the best performing version.

By Open Rate Days

your results, because people react differently to e-mails on different days of the week.

You could wait a clear seven days then send your follow-up e-mail at the same time of day and day of the week as your test e-mail, but even then you may find that things have changed over a week, due to the time-sensitive nature of your news story or similar.

There is actually no 100 per cent ideal solution to this problem, but what you should do is understand which days of the week work best for you and how different days of the week compare. You can then choose to send your test and follow-up e-mail on days of the week when your audience reacts in similar ways.

So let's consider the different elements of our e-mails and what we can vary and test.

Judged by open rate:

- **Subject line:** different subject lines with different tones can have a significant impact on your open rate and you need to understand what kind of thing works best for a particular list.
- **Time of day, day of week, month:** different groups react differently at different times, so we need to understand what works for a particular list and even an individual e-mail

address. Bear in mind that time of day will be different dependent on where someone is in the world, so you may need to also segment by country.

- **From address:** the ‘from’ address can have a big impact on how likely it is that your e-mail will be opened. Should you e-mail from an individual, such as Daniel@mydomain.com or use an address like newsletter@mydomain.com? Again, you need to test for your particular list. However, you don’t want to keep changing your ‘from’ address as it can cause problems with spam filters.

Judged by CTR:

- **Headings:** breaking up your content with headings can have a big impact on the ease of scanning your e-mails. The heading in your e-mail is therefore essential and a good area for testing different approaches.
- **Length of copy:** there are no absolute rules on how long your e-mail should be, other than not using long continuous blocks of text. You therefore need to break up your copy, but how long the e-mail should actually be is open for testing.
- **Image variations, size and placement:** fairly straightforward, but it can have a big impact on the results of your e-mail campaigns.
- **Call to action:** should it be in-text or a button? Should it be in different colours to ad placements?
- **General design:** the list could go on and on – and every visual and layout element of your e-mail is open to testing.

Dynamic content generation and rules

So far we have talked about building a list, potentially segmenting this list and then sending out content, with various testing opportunities. Many ESPs allow you to take your e-mail marketing a stage further and generate even more well-segmented and personalized e-mails. They

do this by not only looking at preference data, that is data that has been collected from the individual, but by also collecting behavioural data and dynamically generating e-mails based on this.

This could be as simple as triggering one e-mail per month since the last e-mail click-through. It could, however, be a lot more complex and look at behaviour on your website then use this in order to adjust what content is sent out in an e-mail. If an individual looks at a particular product, why not send them an e-mail about that product? If they put an item in their basket but didn't buy it, why not send a follow-up e-mail? Based on what they have clicked on in the last five e-mails why not customize the content in the next e-mail, based on these interests? Different ESPs allow you to do different things, so it is worth considering from the outset the kind of dynamic personalization you may want to carry out. Some ESPs take this even further by thoroughly integrating with CRM systems, and we could even then start to look at the topic of marketing automation. We will look at these two topics in more detail in the next chapter.

Message banks and business logic

An increasingly common approach to solve the problem of sending too many e-mails on various different topics to the same individual is to use a message bank system. The basic concept is that we send a single e-mail that contains a number of different stories or pieces of content, but these pieces are selected and prioritized dynamically for a particular individual based on a set of rules we define.

The rules we define can be simple or complex, but they dynamically select content and place it into a particular order in a 'bank' of messages. This is only possible in some ESPs – and there are some key challenges to consider. If the rules are too complex, we may need too many pieces of content in the bank in order to meet all of the requirements we have set. It is also possible that some parts of our list never receive a particular type of content because other pieces are always prioritized. The key here is to build your rules carefully, not get too complicated and test all of the possible outcomes.

E-mail marketing conclusions

E-mail marketing is a hugely flexible area of digital marketing and can be an extremely effective part of our digital branding. It is also something that can be done badly very easily, so a suitable level of planning and resourcing is essential to get it right. Selecting the right ESP will impact everything you do in your e-mail marketing efforts, so select carefully and then make sure you are making full use of the various targeting and testing opportunities available.