A Beginner's Guide to Email Marketing

Version 1.0 **Released October 2012**

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Introduction

This guide provides a basic overview of the key considerations a marketer should take when starting out in email marketing. It covers key legal implications, best practice suggestions, tips and hints and areas that should be considered and investigated. It is not an exhaustive guide but provides someone new to email marketing with a basic understanding that will help them to get started as well as giving links to further resources where required.

The campaign

So you have decided you would like to do some email marketing, there are a few key things to consider and decide before you get started.

Consider the following questions to help you get started:

- What are the campaign objectives?
- What do you hope to achieve through this email campaign? (e.g. lead generation, relationship building, profile raising etc)
- Who are you targeting? Existing customers or new prospects? Which markets, industries, etc?
- What are you trying to promote/introduce/describe? Therefore what are your key messages?
- What are your timescales? Then you will need to work back from any deadlines to make a schedule of activity and set deadlines.
- How are you going to send these emails? Are you going to use an email marketing system (recommended)?
- What is your budget for this campaign?
- How will you measure success?

Once you have answered these questions you should have a more structured plan of action. At the very least you should know what you hope to achieve, what your messaging is, how you are going to send the emails out, who you are going to send them to, how much you have to spend and what your deadlines/timescales are.

Email marketing systems

If you plan to send a large number of marketing emails on a relatively regular basis then we would always recommend you use an email marketing system. There are many options available on the market, which cater for varying requirements and budgets, most of which have a number of key features that are essential for good email campaign management. Sending via your own email client just simply won't be up to the job. It will look unprofessional and may even get your own email servers blacklisted by SPAM filters etc. By using your own email clients you also won't be able to track your emails or analyse your performance, so an email marketing system really is the best way to go.

Timing & frequency

Another key point for consideration is timing and frequency. One off shot in the dark type emails very rarely work, you will achieve much better success by undertaking a structured campaign that

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comprises of 2-3 emails (minimum) that build the message up over time and continue to promote your brand and build trust. Repeating these email series several months later has also been proven to work. Depending on the product and messaging, timing is often key and what might not have been of interest a few months ago could now be a key consideration as a service is up for renewal or circumstances have changed. Unfortunately, there are no golden rules when it comes to timing, it's just one of those things that you have to try and see what happens as every market, database and email campaign is different.

When it comes to frequency of emails, more is less and it is a bit of a balancing act. Don't send too often or you'll irritate the recipient and they will probably end up unsubscribing or marking you as SPAM in frustration. However, if you only send once a year they will forget who you are and ignore you. We would suggest one email per week over a month long period or so per campaign. You could then repeat the campaign a few months later or send an alternative campaign a few months later.

There has been a lot of research about the best times of day, week and month to send emails but it comes down to trial and error again to discover what works best for you. At Entanet we have found that usually, emails sent on a Monday and Friday perform poorly compared to midweek emails and our highest rates are received when we send around lunchtime, but every campaign is different.

The database

One of the first considerations when considering any email marketing campaign is the database. Who are you going to send the emails to? There are two main options here; you can create your own list (e.g. of existing customers) and develop and expand this over time or you can purchase a database.

Building your own list

Most companies have their own lists which they build up over time. These usually comprise of existing customers and/or previous prospects/leads that have enquired about their services etc. You can build your list easily by adding new customers that have agreed to receive your emails or you may even consider adding an option to your website where prospects can sign up for emails. Remember to make sure your contacts have agreed to receive your promotional emails though.

Double opt in process

When building your own database you can choose to implement a single opt in process or a double opt in process, the latter is becoming more popular as it provides the marketer with more evidence of consent. A single opt in is where you simply ask the contact if they wish to receive your emails, they agree and they get added to the database. Most companies ensure they have a way of saving that agreement in their systems as proof in case they need it in the future. A double opt in asks the customer if they wish to receive your emails and then when they agree it sends them a confirmation email with a link. The contact clicks the link to agree to receive the emails and then this information is automatically saved in the company's systems. Depending on how you collate this information and which systems you use, some email marketing systems have this functionality built in. The latter option obviously provides an additional level of consent and is often preferred.

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Purchasing a database

An alternative option is to purchase a database of contacts. This is a perfectly acceptable practice but be careful who you purchase your list from. Make sure it's from a reputable company that can guarantee your contacts have opted in to receive emails from third parties, DO NOT buy lists in response to random emails from unknown companies promising you 000's of contacts for only a small price.

When purchasing a database it's also important to make sure you select the right contacts. Work with the list broker to explain your campaign objectives and the types of contact you are hoping to find and they will often help you to build a list. Quotes are usually based on the size of the database and the terms of the license e.g. 12 month license etc. You should also check how often your license allows you to contact this database, as many have restrictions to ensure their contacts are not emailed too frequently.

It's also important you find out how they cleanse and update their database and how they can prove their contacts have opted in to receive the emails. If you receive any complaints it's important you can answer these questions. Find out what happens if you do receive a complaint – who handles it? Is it simply passed back to them to deal with or are you expected to take responsibility for it?

Cleansing your lists and keeping them up to date

Whether the database is self generated or purchased it's important you cleanse it and keep it up to date. If you don't, it will negatively affect your current campaign success and any future campaigns. If the database is purchased, the broker will often advise how recently the database was cleansed and the process for cleansing. They may also send you regularly updated files. If they do make sure you use these updated files as the old versions may have expired or unsubscribed contacts in them.

However if you are generating your own list then you will need to do your own cleansing. Most email marketing systems will have automatic tools to help you with this. For example most automatically remove all hard bounces and unsubscribes and help you manage your soft bounces. We cover unsubscribe requirements later in this guide.

The email design

The actual email design and content is critical to the success of the campaign. The email MUST be eye catching, informative and encourage a further action from the recipient. The email should be short and snappy, encouraging the reader to use the 'action' (e.g. click through to the landing page) to find out more, which is where you then track the performance. That is also why a single call to action is usually advised, to avoid confusing the recipient or splitting the trackable actions (e.g. click through to landing page and number to call).

The use of and placement of imagery is also a key consideration. The email should be designed with skim reading in mind, using headers and bullets etc to portray the most important information quickly and effectively. Large blocks of text will simply be ignored. When designing the email you should also consider the 'F shape'.

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What is the F-shape?

Eye tracking research has shown that users read web pages (and emails) in an F shaped pattern as shown in the image to the right. This demonstrates that users start by reading the main title at the top of the page/email and then read down the left hand side scanning for information in what has been deemed an F shape. This leads us to believe that the use of strong titles at the top of the page followed by the most important information in the next few sentences and then the use of images, bullets, sub headers etc optimises the amount of information absorbed by the reader when quite clearly skim reading the content. When designing your email (and your accompanying web pages) it's important to consider this information.

http://www.usability.gov/articles/newsletter/pubs/032010news.html

The preview pane

Another key consideration for email design is the preview pane. Most emails are read within the preview pane rather than by being opened. The preview pane is a much smaller display, therefore you must consider if your key information will be displayed correctly in this view. This is further complicated by the fact that preview panes come in various shapes and sizes and locations within the email client (e.g. the option of right hand side or bottom in most Outlook programmes). For example, if you decide to use a large image at the top of your email and this is not automatically downloaded and the recipient is viewing this email in a preview pane at the bottom of their email programme the chances are all they will see is a large white space with a box with a small red cross in it, which will not encourage them to open the email and read on.

How will the email look without the images downloaded?

That brings us nicely on to our next point, designing for display with no images. By default most recipients' email clients will not automatically download the images (unless they have you marked as a safe sender). Therefore, you also need to consider how the email will look when its images are not displayed. Will the important information still be portrayed clearly? How will it look in the preview pane? The only way to know is to test the email and make changes. You should of course use Alt tags on all images in the email too but the location and size of the images also plays a key part. For example, should your company logo be placed at the top or the bottom of the email? Where should your main title be located? The most important thing to stress is that emails should NOT be built as one large image or split up into a series of images and any text used in the email should be coded as text and should not be part of an image. If you ignore this advice this is how your email will look 99% of the time...

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Why would anyone want to do anything but delete that?

Consider varying email clients and devices

In addition to considering all of the above, you also need to think about the various email clients that may receive your email and how it will look in each version. The only way to find out is to test in multiple clients and versions. Some email marketing systems have preview and testing tools built into them which can help with this.

Similarly, with the continued growth in smart phones you should also consider how the email will look if it's viewed on a mobile device and again test across multiple platforms and devices if possible. It's obviously not possible to test against every single client, device and system but if you can cover the major and most popular ones then you should be just fine.

Further resources:
http://mailchimp.com/resources/guides/email-on-mobile-devices/
http://patrontechnology.com/blog-consumers-favor-email-marketing/

Design checklist

So to recap when designing your email and drafting your content you need to remember the following:

- Keep it simple! You don't want to give everything away on the email or they won't use the call to action.

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- Keep it short, snappy and eye catching- it needs to catch attention and make the recipient want to open it.
- Keep it relevant – this refers back to the database information too. If the email content and message isn't relevant to the recipient then they won't open it.
- Use images but use them wisely- DO NOT create an email as a single image or an image that has simply been chopped up. Where you can use text, use it!
- Include a single call to action and make sure you track this. We recommend linking through to a landing page with further information and an enquiry form.
- Consider the F shape and the preview pane when locating text, headers and images in your email and use bullets and sub headers to make it easy to skim read the content.
- Test in multiple email clients and across mobile devices to ensure your email is delivered correctly.

Coding the HTML email

When it comes to the actual coding of the HTML email, best practice HTML email design goes against most of the best practices for web design. For a start you will need to make the email using tables rather than CSS (some CSS will work but it can be fiddly). Here are some of our top suggestions:

- Use tables for layout. As we said above, it goes against all web best practice but unfortunately for HTML emails it's the best approach.
- Use a maximum width of 600 pixels (the average preview pane size) and try to minimise horizontal scrolling. As we said earlier - keep the email content short and snappy, use the landing page to provide more detail.
- Use alt tags. Images don't usually auto download in emails so make sure you have alt tags which will be displayed instead.
- Use inline styles. Another no no in the web world but a must when it comes to HTML emails.
- All images must be hosted on a publicly available server and must be linked to using an absolute path.
- Don't try to use anything clever like embedded videos, Java Script etc- you'll just get stuck in SPAM or it simply won't work. Remember to keep it simple for the actual email! You can get more creative on the landing page.
- Avoid using background images, stick to block colours instead.
- Wrap the email in a 100% width table especially when trying to add a background colour.
- Try not to nest tables (apart from the 100% width wrap). Use the stacking system instead.
- Encode all characters to ensure they display correctly in ALL clients.
- Include a 'view in browser' option. Most email marketing systems will add this automatically for you.
- Test in multiple email clients to check how the email is delivered and displayed.

http://net.tutsplus.com/tutorials/html-css-techniques/20-email-design-best-practices-and-resources-for-beginners/

The importance of a plain text version

So you have your pretty and eye catching HTML email all ready to send, but you're not finished yet. You also need a plain text version. Why? Because some recipients will have opted to only receive

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plain text emails and will block HTML. Some SPAM filters will also block HTML emails but your plain text version may still make it through and some email clients will only allow plain text emails.

Most email marketing systems will prompt you to supply a plain text version and will give you an upload tool where you can add this. The plain text version should replicate the HTML content as closely as possible but may need some re-formatting. For example, you will not be able to use bold, headers, colours etc so you may need to use your spacing more wisely. All links will also be displayed in full rather than shown as 'click here'. When testing your HTML email, make sure you also test your plain text email to make sure it is clear and easy to read.

The subject line

Many email marketers underestimate the importance of the email subject line but this is a critical component to the success of the email. This is the first piece of information that suggests what the email is about and is the first opportunity to capture the recipient's interest. There are many suggestions as to what does and doesn't work when it comes to subject lines but in truth it really does depend on your message, your database and your market. What works for one company may well not work for another, the only way to find out is to test.

There are some key pieces of advice that we would like to share with you which might help you to get started though:

- Keep it relevant. This is the first opportunity to tell the recipient what your email is about, so do just that- tell them what you are promoting clearly.
- Keep it relatively short. The DMA has previously advised the key information should be shown within 60 characters and most experts aim for approx 50 characters.
- It needs to catch attention. We all get hundreds of emails every day- you need to make yours stand out from the rest so be imaginative.
- Consider SPAM. Try not to use obvious SPAM words like free and special offer etc. Whilst your email may still get through most recipients will ignore you by default.
- To personalise or not to personalise? The jury is out on this one. Some experts think it works, some argue it doesn't so try it and see what happens to your results. Also consider localisation e.g. by town or county etc.
- This brings us nicely to the need to test. Use split testing to see which subject lines work best for you and your database. Analyse your findings and use this information to refine your campaigns in the future.
- Should you use CAPS? Again experts are split on this one. Using CAPS throughout your subject line is undoubtedly a bad idea but capitalising certain words can sometimes be effective or using capitals ImaGinaTiveLy can sometimes work- although be careful as spammers also try this trick. Again, it comes down to testing. It's also widely recognised that its harder to read content displayed in CAPS.
- Continuity. If you are sending a monthly newsletter for example, keep a consistent subject line e.g. 'Entanet Newsletter – 10 top tips to email marketing' for issue 1 and then 'Entanet Newsletter – Why you should be reselling Ethernet' for issue 2 etc. This enables to recipients to recognise your emails more easily and hopefully read them.

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- Try posing questions to the recipient. Again the success of this tactic depends on the database, market etc but it's worth testing. With questions you can often capture the interest of the recipient and maybe strike a chord with them.
- Put yourself in the recipient's shoes. Would you open an email with that subject line? If the answer is no then try again.
- This stuff changes all the time - keep up with the trends. Best practice in email marketing is a constantly evolving beast as we as recipients become increasingly intolerant of SPAM and our reading habits change, so keep up to date with the latest trends and recommendations. For example, the latest trend we have heard of is the use of symbols in the subject line. Will it work? Who knows but it's worth testing.

Further resources:
http://kb.mailchimp.com/article/best-practices-in-writing-email-subject-lines

http://www.dotmailer.co.uk/blog/email-marketing/10-top-tips-for-writing-winning-email-marketing-subject-lines/

http://www.smartinsights.com/email-marketing/email-creative-and-copywriting/7-email-subject-line-myths-exploded/

http://permissionbasedemailmarketing.org/email-marketing-subject-line-tips/

The trust factor

What do we mean by the trust factor? We mean the sender's email address. If the recipient recognises your email address or at least your company name within the email address then they are more likely to trust your email isn't SPAM or a malicious virus and open it. If you use an ambiguous email address then they are likely to delete it as soon as they see it, which is often before they have even bothered to read the subject or look at the preview pane. That is why the sending email address is so important.

Don't use a personal sending address

It's best practice to avoid sending from a personal email address e.g. firstname.surname@companyname.com because a recipient is less likely to recognise a specific person, unless they are very famous of course but then that often raises SPAM concerns. Instead most email marketers use emails such as marketing@companyname.com or newsletter@companyname.com etc.

Another concern for using a personal address is the risk of it being marked as SPAM and that person's emails no longer getting through to the existing customer or new contact etc.

Keep it consistent

By using the same email address to send a specific type of email from, you build trust and your brand becomes more recognisable so try to use the same email address across all of your emails.

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Protect your informative emails

If you send regular informative emails to your customers and are concerned that by also sending promotional emails you may compromise the deliverability of the important informative emails we suggest using a different email address for each type of email. However both email addresses should contain the company name to be instantly recognisable.

For example, at Entanet all promotional emails are sent from marketing@enta.net whilst all informative emails are sent from communications@enta.net. This means if someone marks our marketing@enta.net email address as sending SPAM our informative emails should still get through correctly. (We also maintain different databases for each type of email we send which enables recipients to unsubscribe from just one type of email rather than all at once.)

Safe senders

If you can get your sending email address added to your recipients' safe senders list then you have won half the battle. From that point on your emails are pretty much guaranteed to get through and any images included will be automatically downloaded (in most email clients). However, getting your recipients to add you to their safe senders list is difficult and usually only works with databases of existing customers to whom you are sending useful information such as newsletters etc rather than promotional emails.

Very few recipients will automatically think to add you to their safe senders list- you have to ask them to. Maybe include it in the footer or even as part of an article on a newsletter. Another option is to put it within the 'having trouble reading this email?' section as a possible solution to the problem.

Avoiding SPAM

Every email that is sent that hits a SPAM filter is given a SPAM score. Depending on what the score is and what the SPAM filter is set to allow affects whether or not your email gets through or is marked as SPAM and trapped. The SPAM score is calculated by checking through the HTML email for anything that could be considered a SPAM marker e.g. particularly SPAM related words such as Free and Special offer, images without Alt tags, even the use of an unsubscribe link can add to your SPAM score. To make things more difficult each SPAM filter rates these factors differently and the score threshold can be set differently by every user so once again the only way to be sure you can get through is to test your emails thoroughly. However, there are some more obvious words, phrases and design features that you should avoid:

- Avoid the obvious ones like Free, special offer, discount, limited time only, buy now, etc
- Avoid using 'click here'. Instead try alternatives such as find out more, discover more, learn more etc
- Avoid using 'unsubscribe'. Unfortunately SPAM filters have got wise to the fact that we must include an unsubscribe link in our emails. Try an alternative phrase such as 'manage my preferences' or 'remove me'.
- Don't use too many exclamation points!!!!!!!!!!!!
- Don't use all capitals. Capitalising the occasional word is fine, but avoid capitalising whole phrases.

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- Don't use poorly coded emails- keep the HTML code clean to avoid the SPAM trap.
- Don't use coloured fonts (e.g. big, red and bold font)
- Don't send emails that are one big image or have been chopped up into multiple images. Make sure your email contains text and make sure where you do use images you also use Alt tags.
- Don't talk about money too much e.g. avoid providing lots of pricing options- save that for the landing page.

Further resources:
http://kb.mailchimp.com/article/how-spam-filters-think

Honouring the unsubscribe

It's extremely important that you a) give the recipient a method of unsubscribing on your email and b) honour that unsubscribe once selected. If you don't you are breaking the data protection law. As we mentioned above though you don't have to use the word 'unsubscribe'- you can call it something else to avoid the SPAM filters.

There are also different theories on how easy you should make unsubscribing. Some experts argue that it shouldn't be easy and you shouldn't make the unsubscribe option too obvious whilst others argue that it should be prevalent to avoid being marked as SPAM (which is worse in the long term). We tend to agree with the latter but there are still things that can be done to discourage unsubscribing.

A common and quite effective approach is to link the unsubscribe option to a preference centre where rather than automatically unsubscribing them they are asked to manage their preferences e.g. which lists they wish to opt in and opt out of. As it's not a simple one click unsubscribe, this can sometimes encourage recipients to simply change their preferences or only unsubscribe from a specific list rather than all. Most email marketing systems offer this service by default.

You should also always track your unsubscribe statistics. When using a newly purchased list it's not unsurprising to get a relatively high level of unsubscribes to start with but if you are getting a high rate from a list of customers then you may have an issue that needs investigating further e.g. maybe they are not recognising your brand.

Tracking performance

You can only improve if you analyse your previous results so get tracking your emails. By sending your emails through an email marketing system you will gain access to a number of useful stats which will help you to compare and analyse your performance and improve as you go.

Most systems will give you the read/open rate (including multiple reads/opens by the same contact), unique read/open rate, click through rate, unsubscribe rate, bounce rate and bounce information. Several years ago marketers tended to focus on the read/open rate information but whilst this is still important a key performance indicator we now tend to pay more attention to is the click through rate (CTR) and the number of actual enquiries. After all, whilst its great people are reading your

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emails, that's not as good as them actually clicking through for more information and/or enquiring about your service/offering.

It's difficult to say what your read/open rates and click through rates should be as once again it depends on the database, market, messaging etc. Once again it comes down to testing and experience, tweaking your emails and tracking them to see what difference these minor adjustments make to the performance.

So, how does email tracking work?

When you send an HTML email the email marketing system you use will automatically add a small (and usually invisible) image, often just 1px x 1px. This is called a tracker image. When an email is opened by the recipient this image is downloaded from the server and that counts as 1 open/read. It is sometimes possible to track plain text emails too based on the links that are used in the emails- it depends on the email marketing system. Similarly, the email marketing system will also track click throughs to your landing page by tracking the link in your email.

Analysing bounces

As well as looking at the open/read rates and CTRs you should also analyse the bounce information. If you have purchased your database from a broker they will often have a bounce threshold written into the contract that means that if your emails obtain a higher bounce rate than the agreed threshold you may be entitled to a part refund or discount etc as most guarantee the quality of their data.

However, it's more complicated than simply sending them the basic bounce figure from your report. For a start there are different types of bounces; hard bounces and soft bounces. Hard bounces are permanent bounces e.g. the email could not be delivered because the email account was incorrect or has expired etc. In other words it doesn't matter how many times you try to send to it, your email will never work. Most email marketing systems automatically remove these immediately from your database to help keep it clean. On the other hand, soft bounces can be because of a more temporary problem e.g. the server was down for maintenance, or the server was full, etc. The email marketing system usually tries to resend these emails automatically on your behalf a couple of times. A basic rule of thumb is, if an email address soft bounces 3 times or more across different emails then it should be removed from your database but it's down to you to make that call really.

Most email marketing systems will provide you with a bounce report that will detail which emails bounced and the reason for the bounce where it is known. You can then use this information to make database cleaning decisions. Some bounce reports provide details of the email clients that are used by your recipients too. This can be useful information especially if you notice a particularly high bounce rate for a certain email client, which may encourage you to test your emails more thoroughly in this particular client or change your design, coding etc to help the emails get through.

The follow-up

So you've spent lots of time, energy and probably money designing, testing and sending out your campaign. You've got lots of nice hot juicy leads through but there's a problem, you have no-one free to follow them up! When planning your campaign at the early stages you need to consider the

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sales resource you have to follow up any leads you manage to generate quickly and efficiently, the longer they are left the colder they become and the more difficult the sell.

So before you send that email, check with the sales team (if you have one) or ensure you allocate some time to following up these leads.

Test and improve

We've gone on about this a lot throughout this guide but really cannot stress the importance of testing. Testing to make sure everything works as it should, testing in multiple clients and devices, testing multiple versions, split testing to see what works best, testing tweaks and improvements to see if they help the performance....test, test and test again. It's the only way to succeed and improve. Like anything, email marketing is about practice and experience, the more you do it the better you will get, the more you will learn and the more ideas you will generate. So give it a go!

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