

Best Practices in Email Marketing Handbook

Note: This is an authorized excerpt from the full MarketingSherpa 2009 Best Practices in Email Marketing Handbook. To download the entire Report, go to: <http://www.SherpaStore.com> or call 877-895-1717

Director's Note

April 6th 2009

Recently, I was speaking to a conference of marketing professionals from the education industry. The questions were varied but often returned to the hot topic of social and emerging media. Marketers wanted to know whether they should be using Twitter, Facebook or even SecondLife. My question back to them was, "How's your email program?" That's because email, along with search and an effective website, is at the heart of online marketing. When those three can't be improved upon, then it's time to fire up that avatar.

Email suffers a public relations problem – it's viewed through the lens of the lowest common denominator. When people think of email they think of the stream of useless, undifferentiated junk that's arriving from companies they thought would provide valuable information. And there's the rub; we're letting down our customers and prospects in a fundamental bargain. If someone gives you access to their lives by opting in to your list, they have every right to expect something in return.

Of course, the goal of relevance is easier to recommend than achieve, and that's what this book is all about. It was written to provide one-stop guidance on building a 'best in class' email program, whether you're managing an enterprise level marketing department or a small business.

In fact, one of the recurring themes in the handbook is that you don't need a huge budget or advanced technology to field a great email campaign. What you need is good planning, creativity, and, above all, respect for your list members. Add a wealth of best practices and a dose of inspiration from the marketers whose case studies fill this book and you're off and running. That said, some budget and a little technology wouldn't hurt.

It's not easy to pick out highlights in a book of this size; 580 pages hold a lot of great ideas, best practices and tips. Even so, there are a few sections you shouldn't miss because they explore areas of extraordinary opportunity for email marketers big and small:

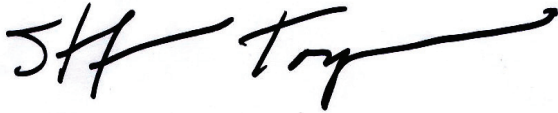
Growing your list – in uncertain economic times, companies turn to email just as many people are changing jobs and email addresses. That means it's more important than ever to jumpstart efforts to increase your opt-in rate. Chapter 1 offers up 80 pages of ideas for increasing the traffic to your registration pages and optimizing your site to make the most of it.

Automated messages – in email marketing, relevance equals success and automated messages are inherently relevant. Welcomes, triggered emails and transactionals are a huge, largely untapped area of email marketing. Chapter 3 covers each of these with the detail you need to start using these powerful tools, or to take your current program to the next level.

Reputation – deliverability is the bane of many email marketers' existence. Fortunately, the emerging science of reputation promises to simplify and improve the email landscape. But to take advantage, you've got to understand what relevance is, how to manage it and ensure that your email reputation is stellar. Only you can control your reputation and Chapter 5 explains how, along with a host of additional information on getting your emails to the inbox.

If you're reading this, chances are that you already know that email isn't dead, as some would have you believe. You probably also know that it's not as easy to get great results as it used to be. Smart marketers use the analogy of farming; if you plant the same crop in the same field year after year, the yield goes down. Constantly dumping fertilizer on them won't work. To achieve continued success, you've got to treat your list as a precious resource, taking care of your subscribers, giving them the information that they want and constantly checking to see how they're doing.

Over the course of a year, we get questions, suggestions and feedback from thousands of marketers. Their enthusiasm and curiosity inspires us as we try to provide practical information on what to do and how to do it across the many disciplines of marketing. Email raises more questions than any other topic. From how to raise clicks and increase list size to the all-time most popular – the best day to send emails - we get hundreds of specific questions about the issues and opportunities in email marketing. This book attempts to answer all of them, but we know you'll come up with new ones. When you do, please email us at research@marketingsherpa.com and we'll add them to the list for the next study or article and, of course, future editions of the Email Marketing Handbook.

A handwritten signature in black ink, appearing to read 'Stefan Tornquist'. The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Stefan Tornquist

Research Director, MarketingSherpa

Author's Note

Welcome to MarketingSherpa's Email Marketing Handbook.

You have in your hands (or on your computer, if you're reading the PDF), the sum total of almost a year's worth and 580+ pages of research, interviewing, and organization of email marketing information, tools and data.

And unlike the umpteen white papers, reports and blog posts about email, your copy of the Email Handbook gives you something you won't find anywhere else – a comprehensive, well-organized encyclopedia of email marketing, including 86 of MarketingSherpa's best email Case Studies.

Who is this Handbook for? It's written for senior marketing management and the mid-level marketer, as well as the junior marketer just starting their career (those of you with enlightened colleagues may find yourself sharing it with members of your Sales, IT, Customer Service, and other departments). Only useful, practical and independent information was allowed into the Handbook. Whenever possible, real-world examples with actual metrics were included.

In other words, you'll find this Handbook quintessentially "Sherpa."

The purpose of this Executive Summary is to share with you some of the major lessons from the Handbook; overarching themes worth keeping in mind.

But first, here are 5 ways we hope you'll personally benefit from the Handbook:

- #1: Information – the basis for your email marketing decisions
- #2: Results – examples to emulate and inspire
- #3: Tools – checklists, worksheets, tables and spreadsheets to make your job easier
- #4: Confidence – tactics and strategies used successfully by other marketers
- #5: Power – the ability to think about email marketing differently

Please let us know if we have helped you. And if you find you've invented, tweaked or changed any aspect of your email marketing as a result of using the Handbook, we'd love to hear about it. Just drop us a note at editor@MarketingSherpa.com

Carol Meinhart

Author, Email Handbook

P.S. Be sure to check out the Audit Checklists in the Handbook's appendix. You and your staff will find them highly useful.

5 Key Lessons of MarketingSherpa's Email Marketing Handbook

#1. Own your email reputation

Whenever we talk with marketers, we detect a latent yearning for “permission” to use a specific tactic that might possibly hurt their email reputation. Those questions include:

“Can I pre-check an opt-in box?”

“Can I send an offer in my welcome email?”

We've also found that some marketers refrain from taking action that's required by law...

“What could happen if my email isn't CAN-SPAM compliant?”

“Do I have to change my unsubscribe function?”

But the real question, which rarely gets asked, is: “How do I manage my email to ensure that I don't alienate my list or ISPs?”

Please notice the difference between that question and “How do I make my email relevant”? Relevant email does drive superior email results. Yet you can craft a highly-relevance email program, yet still have a weak email reputation due to technical and other issues with your email.

All your email practices – everything from opt-in, privacy policy, CAN-SPAM compliance, server management, HTML design, authentication practices, new subscriber practices, bad address management, email frequency, list hygiene – all of these elements and more, can and do affect your email reputation. And your email reputation is what ultimately drives your email delivery.

The good news? It's not hard to institute and stick to the best practices that contribute to an excellent email reputation. The Handbook has two entire chapters (Deliverability and Email Operations) to help show you how.

#2. The 5th “P” of marketing – Politics

Email marketing is no longer the sole province of the marketing department. The truth is, it never has been. So learning how to manage the politics of email marketing needs to be hard-coded into your game plan as much as any opt-in or triggered email initiative (although those campaigns are covered in this Handbook too.)

How do the politics of email marketing differ from other marketing politics?

For one thing, execs may think that because they receive email marketing, that they understand it. It looks simple from the outside. Even the most intelligent and successful company management can misconstrue the meaning of certain metrics. For example, some execs use email list growth as a proxy for market influence, when other market research-related metrics, such as customer perception measurement, or ROI metrics, may be more appropriate.

You will need to set expectations as to which marketing metrics are important to furthering strategic growth of the business — a topic covered in the Measurement section of this Handbook, as well as tips throughout.

You’ve probably already have learned (maybe the hard way) that the CEO and key company execs need to be on-board with your email marketing program or you’ll risk getting your staffing and budgets cut. We’ve included specific SherpaTips and Case Study examples on how to institute email-related programs that will earn high visibility with all of your stakeholders.

Email marketing is also affected by the politics of your own marketing team. Brand and product managers are charged with ownership and responsibility for product results, yet the intricacies of your email database management may create a division between your brand management and database staff. Our chapter on Email Operations can help you to bridge the gap between brand/product managers and your email data and transmission specialists.

B-to-B marketers have long known that they’ve got to get the sales force’s buy-in at the ground level of almost all marketing campaigns. We’ve included examples of B-to-B email marketing campaigns showing how other email marketers have involve their field forces in the conceptualization and execution stages of lead gen campaigns and sales conversion.

Lastly, with the introduction of the CAN-SPAM Act in 2003, and the update to the Act in 2008, combined with the growing sophistication of ISPs, the bar has been raised on marketing best practices. You’re going to need the commitment of your CEO, and active participation of your legal department or outside counsel, for your company to implement all the requirements of CAN-SPAM.

#3. Think beyond opens and clicks

We're all guilty of relying exclusively on open and click data. After all, you're getting those handy reports from your ESP or IT department, and it's easy to download or flow that data into a spreadsheet (we even show you how, complete with formulas, in the Measurement section.)

And that's not to say that open and click data isn't important. Far from it. For example, open and click data is vital for certain split tests (check out the Handbook's section on subject lines, for instance). Bounce, open and click data is also critical for your trend analysis, and your ability to quickly spot problems such as list deadwood, decreased deliverability or weak email creative, just to name a few.

But your prospect and customer perception and response cannot be totally captured by your email stats, or even your online stats. Email recipients are not always obedient — they're going to respond through channels and in ways that your open and click stats can't reflect.

Also, it's easy to forget that email marketing is a form of advertising. Even if someone never opens your email, there is some residual value to the impression left by the message.

Throughout this Handbook, you'll see how and when to incorporate other metrics into your evaluation of your email program. It's not quite as nearly as simple as the plug-and-play metrics that you'll get from your ESP or IT department. But ultimately, you'll get a better handle on your customer's response to your email, and how to better anticipate, measure and react to the true effects of your email program.

#4. Email plays well with (and needs) other marketing

During the recessionary period while this Handbook was being written, it seemed as if the general media stumbled upon online marketing as the answer to the marketer's budget woes. Email marketing, in particular, was singled out as a phenomenally profitable marketing channel, especially when compared to offline channels such as print, TV, etc.

The impact and cost-effectiveness of email is no shock to any marketing practitioner in the 21st century. But what is shocking is how email response is considered to be independent of brand advertising, other marketing channels and PR efforts.

Most marketers wouldn't dream of creating a perfectly sterile environment – no marketing, no advertising, no PR – in order to measure the true effects of email marketing. Yet the evidence suggests that email marketing is measurably less effective when unsupported by other marketing channels.

As you read through the examples and Case Studies in the Handbook, note how the role of brand plays a critical role in execution and results, and how other marketing channels influence and contribute to the email campaign results.

#5. Innovation counts

How are superior email results achieved?

Following best practices is no doubt the foundation of email marketing. You'll stay out of hot water if you keeping your email reputation strong. Many Case Studies in the Handbook show that refraining from poor email practices, fixing your "weak links," and even seemingly small, positive tweaks can improve your email performance, sometimes as much as 100%, 200%, or even 400%.

One step up from following best practices is great execution. Outstanding implementation in just about any area of email marketing, but especially database segmentation, creative and testing can improve your results exponentially.

When planning your budget for the year, or developing pro-forma budgets for special projects, be sure not to underestimate the cost of quality execution. A finely honed subject line, for example, can take literally hours to write. An opt-in incentive may take weeks to put together. Choosing just the right list rental selections can be an advanced strategy, depending on your target audience. Plan and budget accordingly.

And the secret to achieving superior marketing results?

It's you.

How you think about your marketing overall – how well you understand your brand, your knowledge and understanding of your target markets and your ability to invent – counts. Your fortitude and skill in rallying your team and others to actually get it done – counts.

Innovation is what distinguishes the marketing superstars and produces sales that no one, especially your CEO and CFO, can ignore. While you read the Case Studies in this Handbook, examine not only how the marketer achieved the results, but how the marketer thought about their initial challenge. You'll see how high-quality thinking leads to better performance.

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