EMAIL MARKETING
CHEAT SHEET

How To Turn A 'Dead List' Into A Rabid Buyers List

Legal Notice

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Email Marketing

Cheat Sheet

Introduction

Email marketing helps businesses see instant sales from existing customers, but more importantly, it maintains and builds long-lasting relationships with loyal customers - which are the core of most successful businesses. Despite the business benefits of email marketing, many businesses are either still not using it or they are under-utilizing its power. If you're already marketing via email, this guide provides useful tips to improve the results of your email campaigns and ideas to build long-term relationships with loyal customers. For those of you who haven't started email marketing, you'll learn how to do it efficiently and effectively in the right way!

Sending email is a fun and rewarding experience. You know how awesome it is when people comment on your Facebook posts or respond to a tweet? Well, email newsletters are better with a greater reach! Don't lose sight that this is all supposed to be something you enjoy and hopefully grow to love.

Chapter 1: What Is Email Marketing?

Email marketing, it is a business tool that enables you to communicate with your staff, your suppliers and your customers by sending out emails. When considering a definition for email marketing, there are a number of ways to define it from the broad to the specific. Here are some key components to what a successful email marketing campaign does:

- Direct Email – Emails that are directly to current and potential customers

- Retention Email – Frequent and regular emails are sent to current customers

- Email Placed Ads – Marketing ads are placed within emails sent by others

Let's look further at each of these components.

Direct Emails

It is a call to action on the part of the customer. Let's say you receive an email from a business. You may or may not have heard of them, and you may have never signed up for any of their email lists. Business can obtain these lists by buying them. Either way, the business sees you as a potential customer and wants to entice you with a good deal. You may even have done business with them before and they want to do business once more by offering something you might be interested or a better deal than before. The purpose of direct emails is to be promotional. They might offer you a product or service, or they ask you to sign up for something. Potential customers are more likely to get these types of emails.

Retention Emails

Retention emails are the equivalent of printed newsletters. While still promotional in nature, retention emails attempt to retain customer loyalty by offering the customer something. This could range anywhere from coupons to up-to-date news on the latest products. These types of emails are sent out on a regular basis. It could be a

weekly or monthly basis, but usually the business tries to send out emails weekly to retain customer interest.

Email Placed Ads

Another way to do email marketing is to get some advertisement space within another email. Many times, business that send out retention emails reserve space for other business to place their advertisement. This can be beneficial for you as a business, especially if you have studied the demographic that you are marketing to and the potential customers you could gain. Knowing what other types of businesses you potential customers go to and listen to, is a great advantage because it allows you to strategically place your ads in emails and to get clicks. It is also a benefit for the business with which you have an ad placed because they will know that their emails are being read and they can also do a bit analytics work to determine where their customers are clicking.

Does Email Marketing Works?

Simply out, yes, email marketing works. Of course, there is the stigma of SPAM that keeps people wondering whether or not email marketing is still effective. Email marketing, just like other forms of Internet marketing such as social media marketing, it is fast paced and must be adapted.

As you can see, many companies put quite an investment in their email marketing campaigns. They are willing to spend the money because they have seen the return on their investment. Your email marketing campaign can also be monitored once you have sent out emails to customers, both current and potential. The data can be analysed in a number of ways, including web analytics, downloads, search inquiries and visits to promotional events and offline stores.

Chapter 2: Why Email Marketing?

Even though this book is on email marketing, you need to come to terms with some truths about it. For one, email marketing is not as effective as it used to be. To be more exact, email marketing started to lose the effectiveness it used to have prior to Facebook's popularity.

As of this time of writing, more Internet users spend more time checking their Facebook and Twitter account daily. Slightly more than half of the global Internet users have a Facebook account and people aged 20 and below prefer to check their Facebook account for messages than their email! You can say the same for Twitter in spite of its 140 character limitations per direct messaging.

And get this: Gmail, one of the leading email providers, had recently implemented the 'priority markers' feature allowing their users to mark selected emails as important and thus change the ways people prioritize their emails for reading consumption every time they check their Inbox. And let's be honest: promotional emails rarely ever reach PRIORITY status!

Then they a smart system that detects and filters spam emails and it gets tweaked frequently, therefore making even legit email marketing harder.

In the recent past, email marketing quickly became the preferred method of contact for businesses looking to cut expenses, connect with buyers and increase profits. However, as the dynamic world of marketing has progressed, analysts are have encountered some disadvantages to e-mail marketing that have made other alternatives like direct marketing campaigns or text campaigns look more appealing. The advantages are as below:

Most Of What You Invest, You Get

Recent research shows that for every dollar invested in E-mail marketing, you can expect that according to the Direct Marketing Association, E-mail marketing in 2009, acquired for $ 43.52. So E-mail Marketing has the highest return on investment than other marketing methods.

It Is Very Meaningful

You can customize messages for different customers and provide contents and promotions that are consistent with their profile. Finally, your customers acquire what they want and thus they obtain better view about what each section of current business will respond. So you can continue to send more relevant emails.

Measurability

By email marketing, you can easily find the number of E-mails sent, number of E-mails that have been opened and that those who have opened up, the number of people who are not registered, and click rate (which includes the link been effective and who clicked on it)

It Is Easy

Creating a marketing message via E-mail is almost as easy as writing an email.

It Is Automatic

Email marketing has a tool called an "autoresponder". For example, if you want to send a campaign message to your recipients on special days you just create the messages and schedule it.

It Is Fast And Efficient

Timing is everything, so it can be said: this is a quick and efficient way. Offers promotions through E-mail with a clear call to action, can have tremendous impact on earnings. Channels cannot provide any possibility for you in a short period of time so as to obtain the customer directly.

E-mail marketing is known as a permission marketing and it is one of its advantages because it allows customers to decide whether they want to be reached via email. Mass customization are enabled by E-mail marketing so each message is unique to each customer, it helps marketers to inform the success of their promotions easily and quickly, it provides a major insights into the recipient's actions through measurable events such as message open, hyperlinks clicked.

Chapter 3: How To Plan Your Email Marketing Campaign

Before you get started actually creating your email campaign and designing the layout of your email, you first need to think about the purpose of the campaign and what you are trying to achieve. The types of things you need to think about include:

What Am I Trying To Achieve?

This is where you think about the purpose and goals of your email marketing campaign. You may have a long term goal, whereby you want to communicate with your customers on a regular basis to keep them informed of the latest offers, new services you have added to the hotel, and so on. Alternatively you may have a short term goal where your occupancy level is low in the last 2 weeks in October and you want to increase bookings by offering a last minute deal.

Who Do I Want To Target?

Identify who you want to send the email to. Your existing customers, such as, families or couples who have stayed with you before. You may even want to split up all your e-mail subscribers to groups and tailor communication based on the group.

How Will I Get People To Subscribe To My Mailing List?

By law you have to get specific permission from people to send them a marketing email. This is sometimes referred to as an "opt-in" and there are many ways you can get people to subscribe (or opt-in) to your mailing list. For example, you could have a sign-up form on your home page so that people can subscribe to your newsletter. Alternatively, you can build it in as part of the purchase process where you suggest to your customer to give their consent to receive further communication from you while they are making a booking on your website.

How Frequently Will I Send These Emails?

How frequently you send out your emails will depend on their type and purpose. For example, you may send out special offer and promotional emails as and when they are available, whereas you may send out a newsletter once a month. But try and keep the number of promotional communications to a minimum (1-2 a month) as too many emails could potentially annoy and alienate your subscribers causing them to unsubscribe.

Calls To Action

This is what you want to get the reader to do once they have read your email. When designing your email you need to lay out exactly what you want the recipients of your email to do, and design it to make that path clear and easy to follow. For example, don't distract with too many links or offers, and make not only the call to action clear but also what recipients can expect when they click through. This can be as simple as "Click here for a 20% discount on your next weekend trip".

Landing Pages

Once you have gotten your readers to click on your call to action or one of the other links in your email, you want to make sure that the page you direct them to on your website provides the reader with information relating to the link. This will help increase your chances of converting the click into a purchase.

Tips And Tricks

- Address Recipients with Their Name in Email Campaigns — personalize your marketing mails to greet and address recipients individually with their name. Often, you will use the first name only, but for some campaigns the last name will be more appropriate.

- Pick the right time of year to send your emails — avoid marketing during the holidays. People tend to be away from their computers and not check their email regularly. This means that they will probably get your message when they return together with a ton of other email that has piled up during the holidays. Chances are all but the most important messages will be deleted in a rush, without a second look.

- Keep your newsletter relevant, short and interesting. Always include at least one image to brighten up the newsletter. Use an interesting subject, a question can increase open rates e.g. "Would you like a week-end treat with a 50% discount?"

- If you start off sending it monthly, stick to this. Make sure you keep the rhythm going.

Chapter 4: Email Segmentation Strategies

The product or service that one customer can't live without is one that another has no use for. The key selling point for one prospect is a weak point for another. Simply put, people care about what's relevant to them, and don't want to weed through what's not. So why send irrelevant content? Send only information that matters to recipients, and watch your response rates rise. The key is to determine what content is relevant, and then divide your list into groups of people interested in the same information. Don't know what that is? Ask them. We'll discuss ideas on how to easily collect this information from your subscribers at the end of this chapter.

Divide And Conquer

Once you know what content your subscribers find relevant to them, divide your list into segments that make sense to your company or business model. You are probably already used to segmentation in your traditional marketing efforts, but many organizations overlook segmentation in their email initiatives.

Customize To Maximize

When you've segmented your list according to what works for your business model, maximize action and conversion by sending customized messages to your different audiences. Customize the message content, customize the offer, the subject line, the time of day you send, etc.—all in a way that is directly relevant to the audience you're sending to.

Using Dynamic Content To Send Targeted Information

Dynamic content can make sending targeted content to recipients easy. Dynamic content allows you to create a single email message that delivers multiple versions based on recipients' demographic profiles or other data. The possibilities are limited only by the data you have for your subscribers and the content you have that is

relevant to that data. Messages can be customized to replace groups of text or images based on variables such as:

- A recipient's personal data (state, status, etc.)
- Past purchase history
- Past email activity
- Website activity
- Any other data you have about your email recipients

The possibilities for customizing messages with dynamic content tools are almost endless. For example, an electronics retailer could use dynamic content to deliver an email newsletter with an opening paragraph about computers on sale or a paragraph about new MP3 players. The actual paragraph that was delivered would depend on the recipient. Here are some more real-world examples of how marketers are using this powerful technology:

- Customizing updates by state, province or other geographical characteristics
- Substituting entire paragraphs of text or graphics based on demographic data
- Creating cross-sell offers based on previous purchases
- Alerting customers of consumable products (items or components that need to be replaced on a regular schedule) or recurring services (which need to be performed at specific intervals, such as oil changes and tune-ups)

Taking Personalization Past First Name

Personalization is a simple execution that inserts data elements or content held in your database into an email message. At its most basic, personalization inserts a salutation such as "Dear First Name." We encourage you to think beyond first names. Personalization allows you to insert any text for which you have a data field. Here are some other examples for using personalization:

- User-specific information, such as customer number
- Contact information for a salesperson in the recipient's region
- Location information for the store closest to the recipient

In its most sophisticated uses, personalization can even enable you to customize images based on personal data.

Measure And Modify

This should be nothing new since you're already tracking your email campaigns for response and conversion rates. Certainly your overall response rate should rise when you send relevant messages to carefully selected audiences. If a particular segment isn't responding as well as the others, review and make adjustments to improve response. If you don't see a significant overall increase in response rates when you send to segmented lists, continue to explore possible hypotheses, test them and only when all else fails, save resources by sending only one email.

Easily Elicit The Information You Need

At Signup

Collect information and ask your subscribers what is most useful to them while they're signing up to receive emails from you. This can be handled several ways.

1. Make the info required in order to sign up. This is advisable only if the information is absolutely necessary. Otherwise, you risk losing signups.
2. Include the additional fields but make them optional. However, be careful not to add too many fields to the page or the mere length of the form may scare people away.
3. After they've signed up, ask them to provide additional information on a separate page to avoid losing signups.

Re-register

If you've been publishing for a while, periodically ask subscribers to re-register. Advise them that you want to make sure their info is up to date. This is also a good way to make sure your list is fresh.

Survey

Send an email and ask subscribers to complete a short survey. To increase response, offer a premium or fun prize.

When you incorporate segmentation into your email marketing strategy, you should see significant gains from sending relevant, targeted content to specific audiences. Specifically, you should notice an increase in opens, click-throughs, conversions, and ROI. You should also see a decrease in list attrition since you are sending content that readers are genuinely interested in receiving. With tools like personalization and dynamic content readily available, segmentation becomes a strategy that is simple to execute. Combine simplicity with significant gains, and segmentation becomes a strategy you can't afford to ignore.

Chapter 5: How To Optimize Your Landing Page

Landing pages are the foundation of great inbound marketing strategies. These pages literally serve as the location of your prospect "land" on your website. If you are trying to generate new leads or sell products online, landing pages are the place to that happen.

And in a world where the average attention span online is about eight seconds, it is critical that our landing pages are optimized for instant conversion. With such a short time to make your first impression, you need to ensure every piece of your landing page is well-planned and working correctly. In addition to that, many repeat visitors will come across your landing page. Optimizing your landing page will ensure these folks continuously see the information they expect, helping them become your brand advocates!

What Is A Landing Page?

Even in an intermediate guide, it is best to start with the basics. Let's begin with a quick review of some core concepts in landing page optimization. A landing page is a web page that allows you to capture a visitor's information through a lead form. It is where your visitor "land" after clicking on a call to action button. This is the crux of your inbound marketing strategy. It is the point on your conversion path where you collect the information that generates a lead.

As a rule of thumb, a landing page usually includes a compelling header, interesting copy, minimal navigation and an optimized form. In addition to good design, a good landing page employs great strategy. The best landing pages target a particular audience, such as traffic from an email campaign to promote a particular offer or visitor who click on a pay-per-click ad to promote a specific campaign. It is important to build a unique landing page for each offer you create. You can build landing pages that allow visitors to download or opt-in to receive your content offer such as

coupons, e-book, gift or sign up for offers further down the funnel such as free trials and product demos.

Why Are Landing Page Important?

As I explained above, landing page is where you capture your leads or sell your products. Therefore, designing an outstanding landing page experience is critical to effectively converting a higher percentage of your visitors into leads and sales. Landing pages make it much easy for your website visitors to receive an offer, since they are taken directly to the offer itself rather than having to navigate around your website to find it. Landing pages also help to clarify what visitors must do to receive your offer.

The best marketing is about delivering the right information, to the right person, at the right time. That's how you create a marketing that people love. By directing your visitors to a landing page, the exact page with the offer and the form they must complete to get it, you increase the likelihood that they will complete your form and convert into leads.

Types Of Landing Page

Since landing pages play such a critical role in driving leads and consequently, revenue, many online marketing firms are building entire consulting arms with the sole aim of optimizing company landing pages. However, there is one thing you need to know. You need to know the type of your landing page that suits your website. Landing pages come in three main flavours.

Main Site

The landing page might be part of your main corporate website. Such pages have the same navigation and page layout as all of the other pages on your site. The specific landing page might be buried several layers deep within your site organization, or it might be your home page.

Microsite

The landing page is part of a microsite specifically designed for a single audience or purpose. A microsite usually has one main call to action and all of the information on the site funnels the visitor back to this desired conversion action. A microsite usually contains a few pages of supporting information that allow a visitor to make an educated decision about the topic in question, and request further information or buy something. Such information includes a detailed description of your product or service, buying guides or wizards, downloadable whitepapers, comparison to similar products or services, case studies, testimonials, and other validation. Microsite can branded as part of your main company or can have their own stand-alone brand.

Stand-alone

Some web pages are specifically designed for a particular marketing campaign. Such pages usually have specific information related only to the offer or action that you would like your visitor to take. Usually there is a clear, single call to action. If the desired action is not taken, stand-alone landing pages may employ an exit pop-up window with a secondary desired action, or a repeat of the original call to action.

The type of landing page that you deploy is largely dictated by your traffic source, as well as the type of product or service that you offer. Ideally your traffic can be specifically directed to a particular page and tracked in significant detail. For example, a PPC campaign allows you to specify the exact landing page for each keyword. This information can be tracked through the conversion process, and allows you to calculate the ROI at the keyword level. Such traffic should generally be directed at goal-oriented, stand-alone landing page. The advantage of stand-alone landing pages is that they are targeted. They do not overwhelm your visitor or distract them with irrelevant information. This usually result in the best bang for the buck and highest conversion rates.

Understanding Your Landing Pages

So now, what parts of your site are mission critical? Mission critical activities on your sites can easily be identified. All you have to do is ask yourself the following question.

Does the content create a meaningful transaction or deepen your relationship with the visitor?

A meaningful transaction does not have to be your ultimate conversion goal. It can be a small incremental step that creates psychological momentum toward that goal. Deepening your relationship means that you have been given a higher level of trust by the visitor. Tangible evidence of this includes spending more time on important parts of your site. So does increased page views of key content. Of course, the most important indicators are the sharing of information by filling out forms, calling or chatting; downloading written materials or computer programs; signing up for free trials and promotions or actually buying something.

Besides, this will be an important question that you will need to ask yourself which is, who is your target audience? Your business attracts a number of possible visitor classes to your site. These may include prospects, clients, current business partner or investors. The usual practice is to provide a comprehensive view of your company and to give each of these visitor classes equal billing. The company is often portrayed along product lines or as client-facing functional departments. Your landing page should be modified to best serve the mission critical visitor classes. Everyone may want real estate on the home page, but they do not necessarily deserve it in equal measure.

Conversion actions are measurable events that move a visitor toward the mission critical activities that you have identified. Examples of conversion actions along with their measurement and efficiency metrics follow.

Advertising

This includes advertising online, such as banners, text ads and sponsor links. Measuring advertising effectiveness usually involves tracking the number of times that an ad was seen or clicked on. Another measure is the average advertising revenue per page view for alternative ad page layouts.

Education

Some websites have ultimate conversion steps that require a lot of up-front education. They provide resources and online guides to fully explain their products and services. If education of visitors is your primary goal, the key metrics are the time spent on your educational pages and the number of page views.

Purchase

Many companies measure sales efficiency by looking at their sales conversion rate, or their shopping cart abandonment rate. In many circumstances, the revenue per visitor and profit per visitor are more useful metrics. For example, if you sell multiple products at widely varying prices, you can bias the mix of products that you sell intentionally. This may mean that you choose to lower your sale conversion rate to focus on higher-ticket items. Conversely, you may seemingly raise your sales conversion rate by emphasizing smaller-ticket items. The merit of the trade-offs involved in such situations can be evaluated by focusing on the revenue per visitor metric.

Understanding Your Audience

We are all familiar with the Golden Rule: "Do onto other what you want other do onto you." This ethical guidepost exist in many variants the world's major philosophies and religions. But it is missing an essential component by presupposing that everyone is the same. Moreover, it makes your behaviour and beliefs the standard by which all conduct should be judged and measured.

"Do onto others as you would have you do onto them." The Platinum Rule, by Dr. Tony Alessandra. I ran across this more powerful formulation at a sales training workshop many years ago and it resonated deeply for me. Here was the missing component: empathy. People are not all the same. If we want to understand them, we should try to step outside of our own needs and experience the world from their perspective.

Like a solid news report, you must understand the basics of the story and be able to articulate the following particulars about your audience. Let me further explain.

Who Is Your Audience?

The who of your audience is defined by their demographics and segmentation. Because you can't meet every visitor toy our site in person, you re limited to use aggregated information. You understand the traffic source hitting your website and the specific landing pages. Exclusive information is also available about these visitors and their behaviour. From a landing page optimization perspective, it is important to exactly determine what subset of your traffic will be used for the test. You should pay particular attention to its stability and consistency over time.

Where On Your Website Does The Interaction Occur?

As you learned in the previous chapter, the "where" of your landing page optimization test should occur on your previously identified mission-critical landing pages. Sometimes the where may be an offline call-to-action such as a phone call or an in-store sale, but the mechanism for it (e.g., displaying a special dedicated toll-

free number, or creating a printable coupon for redemption in a store) is still part of the website.

When Do Your Visitors Make Their Decision?

The when should be seen not as a specific time event, but more generally as a position in a decision process. Some visitors feel a vague unease about a concern that they may have, but have just begun to look around and try to formulate a response to their problem. Others know exactly what they want, and may only be concerned with completing whatever transaction is required to obtain their specific product.

Why Do Visitors Behave The Way They Do?

You do not have intimate and accurate information about your individual visitors. The "why" can be understood by imagining the categories of behavioural styles.

What Is The Task That You Are Asking Them To Complete?

The "what" is the specific task that your visitor is trying to complete on your website.

How Does Your Site Operate In Order For Visitors To Complete Their Tasks?

The "how" is the actual design of your website or landing pages. It is medium through which each task must be accomplished. Specific page elements include layout, organization, and emphasis of key information, text copy, the call-to-action and hundreds of other factors. All of them combined to influence the effectiveness of your landing page.

Information about your site visitors comes in two main flavours: objective and subjective. Because almost everything on the Internet can be logged or recorded, it provides a wealth of objective information. The goal of the effective online marketer is to determine which specific metrics are good predictors of success, and to monitor them properly to focus your programs in the right direction. As with all numeric

information, you should treat demographics with proper respect and be aware of the following issues:

Data-gathering Methods And Limitations

Depending on the exact technology used, software packages will track the activities of your visitors differently and come up with different numbers for the same metrics. Be aware of the limitations of the software that you choose.

Gathering Enough Data

Many online marketers do not wait to gather enough data before making decisions. Just because one out of the first four visitors to your website bought from you, it does not mean that you have a 25% conversion rate to sale. Wait to gather enough data to get statistically valid answers.

Chapter 6: 7 Email Strategies

Whether you are new to email marketing or have been refining your email strategies for years, there are seven initiatives that are essential for your continued email marketing success.

Increase Your Segmentation Efforts

Email marketing data offers incredible segmentation power and the ability to take advantage of small audience segments that might otherwise be financially or technically difficult to reach. If you haven't started segmenting your list and sending more targeted messages based on recipient data or behaviours, start today. Most of the research in the email industry indicates that segmentation yields significant gains in email conversions. Some typical strategies for segmentation include:

Geography. This is an easy, fairly obvious segmentation strategy. For example, your customer in Florida is unlikely to be interested in a snowmobile. And your customer in Minnesota probably isn't interested in a jet ski—in the winter, anyway. Geography can also be a powerful indicator of buying patterns and other influences on the purchase cycle. Take the high tech industry, for example. In high tech pockets like Silicon Valley early adopters are far more common.

Demographics. This is another easy one, and can make a lot of sense. For example, we know men and women can interpret information quite differently. Younger vs. older audiences take in information in different ways as well.

Job title and function. Are you emailing potential users with no—or all the—buying power? An owner or CFO may want to know about ROI. A middle manager may just want to make his or her job easier. And an engineer or programmer wants to find better ways to work. And so on.

Purchasing frequency. Less frequent purchasers may require a time sensitive offer to encourage them to act. Or maybe you want to reward frequent buyers with exclusive privileges via email.

Monetary spending. Adjust resources so you're dedicating your efforts toward customers who spend the most money with your company.

If you have been segmenting your email audiences, don't stop. Try to find new ways to segment and look at segmentation based on historical email activity, perhaps treating people who are frequent "clickers" or "openers" differently.

Rethink and Refine Your Opt-in Campaigns

Perform a check-up on your opt-in processes. Review everything from the data fields you're collecting to the confirmation email you are sending afterwards. Small changes can mean big gains in new audiences, as well as setting the proper expectations for subscribers.

- Can you increase opt-ins by reducing unneeded data collection?
- Are you prominently directing Web visitors to sign up for email? Can you place this on more pages, or in locations that are more visible?
- Do you clearly define significant and relevant benefits for subscribers signing up for your email? Does the email you send confirming the opt-in restate the benefits?
- Do you set expectations and ask subscribers to "add this address to your safe list" in the opt-in process?

The language you use, the support graphics, and the staging techniques you employ can make a huge difference—between being totally ignored and creating an evolving, dynamic relationship that can enhance database precision, enrich dialogue, and help you showcase a larger scope of services. Furthermore, if you're not using strict opt-in policies, start now. As recipients continue to tire of unwanted email, you'll continue to see declining response rates if you are not using an opt-in-only process.

Clean Your Lists and Try to Maintain Them

Perform a thorough cleaning of your email lists. This does not necessarily mean blindly deleting a bunch of names, but rather using segmentation strategies to treat historically inactive recipients differently than people who are actively opening and clicking on your email messages. Here are some suggestions for periodically cleaning house:

- Take a close look at your lists and list segments. Are there some list segments you are never using? If so, clean them out.
- Review lists of people who have not responded to messages in the past few months and contact them in a different way than the rest of your list. If they still do not respond, consider removing them. Remember, today's email success is about quality and not quantity.
- Review any new list segments you may want to make. Are there any ways to segment and strengthen messages to various groups? If so, segment them now and start communicating more effectively to those groups.

Design for Disabled Images and Preview Panes

Audiences are increasingly looking at your messages without images turned on. (It may not be their choice, but rather the default of their email client.) Make sure your messages are still readable and compelling without images. This may mean designing messages using fewer images, or including a short list of articles at the top of your newsletter. This technique works well for people who are viewing your message through a preview pane as well. Making sure enough content is placed in the upper right hand of the message to give recipients something to act upon will be important to success rates.

Institute Authentication Standards

Email authentication has reached critical mass, and will continue to grow in importance for email delivery. If you haven't already, make sure you set up SPF records, Sender ID records, and mail using Domain Keys Identified Mail (DKIM) authentication whenever possible. Proper use of these authentication methods will help your deliverability and will contribute to building a positive reputation for your domain. Your IT department and/or email service provider should be able to provide specific steps on how to set up these authentication methods. They can also verify which authentication methods are set up already if you're not sure. The chart below shows a very simplistic and conceptual view of email with and without authentication.

Expand Your Email Testing Efforts

One of the best ways to refine your email strategy is through testing. If you're a beginner at this, the simplest form of testing is splitting your email list into A and B segments, and sending each segment a message where one element, and only one element, is varied: subject line, copy, image, layout, offer, call to action, etc. Then analyse the results to determine which variation was more successful in increasing response, and optimize future messages accordingly. Whenever you're testing, remember the six steps for email testing success:

1. Ask a question
2. Form a theory
3. Create the test
4. Segment the list
5. Measure and analyse results
6. Make changes

If you're already a testing pro, or have performed some tests in previous years, keep refining what you have learned to continually improve your campaign performance. As with many of the other initiatives we've outlined, small and continual gains can provide major dividends.

Rethink Tired Campaigns

Marketers are increasingly seeing the power that email marketing can have when used properly as part of the marketing mix. We encourage you to go beyond the status quo with your over-arching email efforts and aggressively build your campaigns to deliver better results and new opportunities. Rethink campaigns that have run for a while, and look at analytics to uncover new avenues of content or functionality that your audiences may respond to. Email offers a unique platform to quickly and cost-effectively change campaigns for the better. Take advantage of these unique abilities to maximize your efforts.

Chapter 7: The Opt-in Process - 10 Steps to Success

Understand What Constitutes an "Opt-in"

As email has grown from a communication vehicle to marketing superpower, the industry has fought to keep up with best practices. While marketers would like to believe recipients are all overjoyed to receive email from them, that's not always the case. To this end, the Email Sender & Provider Coalition (ESPC), an association of email industry leaders, has composed its Email Marketing Best Practices Guide. Among other clarifications, the ESPC defines "opt-in" as "the point of email address collection at which a person has affirmatively requested to be included on an email list to receive commercial email." Furthermore, the ESPC establishes that commercial email should not be sent without:

1) Prior affirmative consent of the individual, as defined by the CAN-SPAM Act of 2003; or

2) Prior consent of the individual as defined by the European Commission Privacy and Electronic Communications Directive.

As defined by CAN-SPAM, "affirmative consent" means that:

1) The recipient expressly consented to receive the message, either in response to a clear and conspicuous request for such consent or at the recipient's own initiative; and

2) If the message is from a party other than the party to which the recipient communicated such consent, the recipient was given clear and conspicuous notice [of this] at the time the consent was communicated.

The ESPC maintains that even with a prior business relationship, the opt-in best practice is to:

1) Notify the person of the sender's intent to communicate with him or her at the point of address collection or in the first communication to the person, and then

2) Upgrade permission to opt-in status, preferably confirmed as soon as possible.

Establish Your Privacy Policy

Before beginning to collect opt-ins, establish a privacy policy if you don't already have one. If you have a policy, review it and be sure it covers collecting email addresses. Let recipients know if you plan to share their email addresses with a third party, and how the shared information will be used. If your policy states that you won't share email addresses, live with your commitment. Make sure your privacy policy is easily accessible on your website, and that you provide links to it at every step of the opt-in process. Be sure to keep your policy updated and reviewed by legal counsel when necessary.

Create the Opt-in Page

Your opt-in page is very important because it is the place where consumers will decide if they will or will not give you their email addresses to receive email from you. It also sets the tone for future email communication. When done correctly, it can drive future email activity; and when done poorly, it will result in lower email activity. To these ends, the most important thing to do when constructing your opt-in page is to focus on building value and setting expectations.

Build the value of opting-in by focusing on what's in it for them, not for you.

- "Be the first to know"
- "Free, timely market updates"
- "Special offers" or "special discounts"
- "Save money with weekly coupons"
- "Strategies to improve your…"

Set the proper expectations up front by explaining on the opt-in page:

- the types of messages recipients will receive
- message content
- frequency of messages
- if they'll receive third-party offers

Other considerations to take when building your opt-in page include:

- Will you use a short or long sign-up form? A short form will garner more sign-ups, but a longer form will collect more information.
- Will subscribers need to create a password to opt in? A password could give subscribers access to an account, but you are likely to lose subscribers who do not want to create a password just to receive email from you.
- Will you provide options for subscribers to choose what types of messages they receive? Asking subscribers to select their interests allows you to send targeted messages, but requires more work to create separate lists and content.

Don't make these important decisions blindly. Test your opt-in page for higher conversion and/or more qualified opt-ins. Aspects to test include:

- Incentive to sign up vs. no incentive
- Long vs. short opt-in form
- Copy (value statements)
- Sign-up options vs. global opt-in
- Create password vs. no password
- Placement of opt-in box on website

Know What Information to Collect

When deciding what information to collect initially on the opt-in page, keep in mind your email marketing strategy. If you haven't established what your strategy will be, spend some time thinking about it.

- What's your segmentation strategy? Will you send targeted mailings based on demographic information such as gender, age, and location?
- What's your personalization strategy? Will you send personalized content such as "Dear First Name"? Personalization could also include sending targeted content based on location or other demographics as identified above.
- What's your marketing strategy? Will you send strictly monthly messages on your time frame, or will you send customized messages based on a recipient's birthday or anniversary?

Knowing the answers to these questions up front will help determine what information should be collected on the opt-in page. The best practice is to collect only the information that is necessary. For example, collecting postal information if you never plan to send direct mail is a useless step that could lose you opt-ins. Consider collecting additional information that is not imperative to the opt-in process after the opt-in has been collected. This could also be collected in periodic follow-up surveys.

Create the Opt-in Confirmation Page

Drive future email activity by setting expectations on your opt-in confirmation page. This page should include the following important aspects:

- Text that asks subscribers to add your "from address" to their safe list or address book. Consider providing a link to a page with specific directions on how to do this for each of the major email clients. This is the point at which you should ask subscribers to do this, as they are at their most active stage of involvement with you, having just signed up for email from you. Being added to their safe list ensures your messages will always be delivered to their inbox.

- An image of your welcome email so recipients will recognize the message in their inbox when they receive it. Be sure to specifically point out the confirmation link if using double opt-in, with directions to click on the link to confirm their subscription.

Send the Welcome Message

The welcome message is another step in the opt-in process where you have the opportunity to reinforce value and expectations to drive email activity. It should be sent immediately after the opt-in and be a branded HTML message that accurately and positively represents your organization. Your welcome message should include these key elements:

- Copy that restates the value of their opt-in, the type of messages they can expect to receive, and how often they should expect to receive messages.

- Copy that again asks subscribers to add your "from address" to their safe list or address book.

- An image of the newsletter they will receive so they will recognize it in their inbox.

- A link to your privacy policy, to again reassure subscribers of how their information will be used.

- A confirmation link, if using a double opt-in process, with a strong call to action that directs subscribers to click to confirm their subscription.

Drive Traffic to the Opt-in Page

Once you have your opt-in page, confirmation page and welcome message set, you can now focus on driving visitors to the opt-in page. You should have a strong call to action on your home page in a prominent location that directs visitors to the opt-in page. A popular way to construct this email sign-up box is with a form field where visitors can fill in their email address directly on the home page, then be directed to a second page (your opt-in page) to collect additional information. This sign-up box or call to action should include strong copy on the value to the potential subscriber of receiving your company's email.

Additionally, your sign-up box and benefits should be prominently displayed on every page of your website. You may want to consider using an incentive to drive opt-ins, such as a cash giveaway, drawing for a coveted prize or valuable coupon to be used toward their next purchase. You will certainly increase the number of opt-ins collected with an incentive vs. no incentive: however, you may also see a lower quality of opt-ins as people sign up for the prize rather than your email. On the down side, these people may not turn into active recipients and may thereby lower your response rates. On the up side, you now have the opportunity to turn people into active recipients who otherwise may not have chosen to receive email from your organization.

Collect Opt-ins from Other Points

- Your opt-in page should be your main focus for collecting opt-ins, but it shouldn't be your only opportunity to collect opt-ins. There are many other contact points with consumers where you could solicit an email address. Here are some good examples:

- **Contact form:** Add a checkbox asking for an email sign-up on other web forms on your website. For example, a contact form for more information, a webinar registration form and a whitepaper download form, etc.

- **Product opportunity:** The checkout process on your ecommerce site is a great time to ask purchasers to sign up for email from your organization. These are your most active web visitors who have already shown an interest in your company.

- **Co-registration:** Look into co-registration opportunities that would make sense for your business model. Be sure that your main focus remains on collecting qualified opt-ins, rather than grow a list of email addresses for people who may have no need for your product or service.

- **Transactional messages:** Transactional messages present another opportunity to include a call to action that prompts users to opt in to receive promotional email messages from your company. Again, these are people who have already shown an interest in your company.

- **Brick and mortar:** If your company or organization has a brick-and mortar business front, use this opportunity to collect email addresses from prospects either with a sign-up box on a counter or by asking directly for them. Again, be sure that the value of the opt-in is clear to prospects.

When adding a checkbox to a contact form, the checkout process or a co-registration process, you have the option to make this checkbox either pre-selected or unselected. It is a best practice to never have this checkbox pre-selected. Furthermore, it also makes good business sense. Using a preselected checkbox will

add uninterested people to your list, and they'll end up skewing your results by opting out or generally never responding to your message. And it could be worse: they could end up reporting your messages as spam since they will not have recalled signing up for your email.

Evaluate Using Double Opt-in

Double opt-in—or confirmed opt-in as it's also known—is the process whereby following an opt-in request, a confirmation email is sent. This email requires the person to confirm the opt-in before he or she will receive any future email messages. The person must respond, usually by clicking on a double confirmation link, in order to be considered confirmed.

Using a double opt-in process ensures you are sending to only your most qualified, most interested, and most active recipients. The potential downside is that you will almost never have as many confirmed double opt-ins as you have single opt-ins. However, lists that are confirmed through this double opt-in process consistently produce much higher open rates and click-through rates, and offer lower complaint rates. If you decide the double opt-in process makes the most sense for your business model, you can increase the number of subscribers who confirm by following up with non-confirms two to five days from the initial opt-in.

These are people who may have forgotten to act on your initial welcome message, but with a reminder message may confirm. Depending on your email service provider, this could potentially be set up as an automatically recurring message. This would ensure the highest rates of double confirming while removing the work of sending additional messages.

Deliver on Your Promises

After you've diligently set expectations about the emails you will be sending (on the opt-in page, confirmation page and welcome message), be sure that you then deliver on those promises. If you've promised weekly tips, be sure that the message type you're sending is a "tips" email and that you are sending them weekly.

Additionally, be sure that you don't deliver something that was not promised. For example,

- A different type of email than what they opted in for
- Weekly emails if you stated emails would be monthly
- Third-party emails if this was not explicit during the opt-in process

If your strategy shifts and you want to deliver something other than what was promised during the opt-in process, send an email asking subscribers to opt-in to this different type of email or send an email letting subscribers know of the change and giving them a chance to opt out.

A smooth opt-in process from start to finish will ensure that you are collecting subscribers who know what they are signing up for and who will be active recipients when they receive the content they are expecting. Delivering on promises made during the opt-in process and refining your strategy to send targeted mailings will keep your attrition rate low.

Wrapping Up

This has been a simple little guide to email marketing. It's by no means all you'll ever need to know but it's certainly everything you need to send emails successfully and responsibly, while, at the same time, enjoying yourself.

If sending emails ever feels like a chore, then it's time to focus on what you love about it. Remember to connect to your readers and let them connect to you. Everything else is just gravy.