



Digital
Marketing
Institute

EMAIL MARKETING

Study Notes

Email Marketing

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LESSON 1: EMAIL MARKETING FUNDAMENTALS

KEY CONCEPTS

Email marketing

Let's begin with key concepts in email marketing. Email marketing is a commercial channel used to deliver advertisements, offers, education and other marketing content directly to the interested user's email inbox. It is a segment of digital marketing that works in conjunction with other marketing channels.

Email use

Next, we will look at how email works across these channels. Here are some statistics around the use of email marketing and how mobile is more popular now than ever.

Email use continues to grow among companies and drive revenue width.

- 82% of B2B and B2C companies use email marketing.
- 75% of email revenue is generated by triggered campaigns.
- 53% of all emails are opened on mobile devices.
- 33% of emails opened are on iPhone devices.

There are plenty of email statistics out there. It's very important to remember that email has not died.

Cross-channel integration

Email works very well across different channels. Cross-channel marketing is very effective, and this is what you should be aiming for, especially in terms of inbound marketing.

Cross-channel integration can involve email crossing with:

- Social media
- Display and retargeting
- SMS
- Mobile app
- Direct mail
- In-store
- Website
- Geo-location tracking

So what do each of these mean in terms of cross-channel integration?

With **social media**, you can use social media and email to fill each other, in terms of you can use social media to improve and increase your subscriber list. And also, you can use email marketing to increase your social media following through social media share and follow icons.

With **display and retargeting**, you can now include a line of HTML codes simply in your emails to understand who's engaging with your email and then display ads across the internet to them through this.

SMS marketing can be integrated with your email to provide your customers or potential users with updates, and then follow on based on their behavior with email marketing campaigns.

Within **mobile apps**, based on behaviors, you can trigger email sends based on actions taken.

With **direct mail**, in terms of direct mail which is a physical mail sent to a person's doorstep, having the same communication, graphics, and branding experience, as well as similar offers can then match with the email experience that same person is having through their mobile devices and their computers.

In-store, more and more, especially for B2C companies, POS systems have to be taken into account. As a person is shopping within a store or passing a store, automated email campaigns can be triggered based again on their buying behavior at the till, or even in the future based on their passing by a certain smart window.

On the **website**, of course, naturally, email plays a part in that channel. It is going to be based on all your marketing automation activities. Did a person abandon a cart? Did a person download a piece of content? How would you follow up with them?

How would you understand what they need to receive in an email afterwards? **Geo-location and tracking**, and naturally, for example, if you are going to be attending an event or hosting an event, or if you have stores or access points in any particular area, you can trigger emails to send based on a person's location which will be fed to you through your email marketing data.

Types of email

What type of emails can you have?

- Announcements
- Product updates
- Newsletters
- Event invitations
- Social media updates
- Internal updates

Remember, one size does not fit all. You do not send the same email to all your recipients.

You need to create different types of emails to each person individually. These are a simple list of six which you can have, but it's really up to you and knowing your subscribers to know what they need and knowing why they need it.

So, what's an **announcement** email? It's when you are announcing your next webinar or an event, or a sale. A **product update** lists the latest features you now have in your product or service offering.

A **newsletter** is a summary of your latest blog posts or your latest content offers. With an **event invitation**, you may be attending one, or you may want to inform your customers or your subscribers of an event of interest to them or of a partner, for example.

A **social media update** might ask them to share your great posts on social. There's no harm in asking for a little help from your fans. And finally, **internal updates** keep your employees informed about what's going on within the company.

Types of automated email

While you can manually send emails, the power of email marketing also comes from automated, repeated emails. When a user performs a certain action on your website, for example, you can automatically trigger an email to send to them.

These can be:

- Welcome emails
- Onboarding emails
- Confirmation emails
- Form responses like thank you emails
- Abandoned cart emails

The **welcome** email is automatically sent when a user first signs up to your email list. The **onboarding** email is a single or series of emails providing helpful tips and tricks on, for example, how to use your free trial or how they can learn about you and your service at a fundamental level so they understand what they're in for and what they can expect.

The **confirmation** email might be a confirmation when a user registers for an event or a webinar, or even for double-opting in to hearing from you. A **form response** or a thank you might be sent when someone completes a form to access an offer you have that you send an email saying, "thank you. We acknowledge that you have completed the form and requested this content, and we will now send you the details."

And finally, the **abandoned cart** email. The customer has added products to their basket, but hasn't actually bought them. You can send triggered emails to remind them that they may want to complete their purchase or additionally, offer alternatives if that wasn't really what they were looking for.

Subscriber lists

Before you can send an email, you will need to know who you are sending the email to. This is where subscriber lists come from. A subscriber list is the contact information of all the users who have requested emails and are allowed to be emailed. This is the list you will use to send your marketing emails.

Opt-in permission

Next, we come to opt-in permissions. It is extremely important to remember you cannot just email anyone. You can only email people who have opted in or subscribed to your email list.

There are two types of opting in or subscribing which you can offer to users, and it is up to you at this point to decide whether it is single opt-in or double opt-in.

- For **single opt-in**, the user submits their email on a form on your website, and they're immediately subscribed to your list. There is no confirmation required from the user.
- The **double opt-in** is when the user submits their email on a form on your website, receives a confirmation email to their inbox which prompts them to take an action, such as clicking on a link to say, "Yes, I agree to receive communications from this company."

There are benefits to both types of opt-ins.

- For the **single opt-in**, it's very easy for the subscriber and very easy for the business. It is fast. It is quick. It is efficient.
- The benefits of **double opt-in**, however, are that it results in a higher-quality list, more engagement, and basically you have a list of people who really do want to hear from you. You also have a very good data hygiene set. You can prove and show that people really do want to engage with your business.

INBOUND EMAIL MARKETING

What is it?

What is inbound email marketing? As we first defined, email marketing is a commercial channel used to deliver advertisements, offers, education and other marketing content directly to an interested user's email inbox. It is a channel popularly used in inbound marketing which places marketing material where it will be found by users looking for information on a relevant topic.

Using email within inbound marketing is essentially inbound email marketing. It is permission based and focuses on creating quality content, pulling people towards your company and product. By creating quality content that your customer is interested in you will naturally attract inbound traffic.

What is it valuable?

So why is inbound email marketing valuable? Here are some points that would support the case that email should be used for inbound marketing campaigns.

- **Targets specific buyers:** It targets specific buyers through customer relationship management. Rather than an outbound method of fire and forget, such as an email blast.
- **Easier to personalize:** It is easier to personalize once you have a specific audience targeted. You can personalize each email by sending based on time zone or location or historical viewing habits, their mobile device and so on.
- **Low cost and high return:** It is a low-cost, high-return channel for businesses of all shapes and sizes. To this day because email is so cost efficient, it is a preferred option for almost every business when conducting acquisition and retention campaigns.
- **Generates high ROI:** The ROI is based on competing for the most qualified of targeted users.
- **Cheap in terms of CPL and CPA:** Email marketing isn't a pay to play space so this is why it results in a much cheaper cost per lead and cost per acquisition. It is a very efficient channel.
- **Fast, effective, and measurable results:** With email you can get fast, effective, and measurable data that helps you to monitor your campaigns' statistics in real time and watch how your customers respond.

LEGISLATION AND REGULATIONS

Email marketing regulations

Many countries now have laws concerning what an email marketer is allowed to send, and how they are allowed to send it. These laws aim to reduce unwanted, abusive, fraudulent, and other malicious types of email – often referred to as spam.

Data protection and email permissions

Email marketing regulations are in place to protect the user from fraud and abuse, as well as giving him or her control over email permissions. These regulations are important for keeping data secure and protected from harmful use. If you are sending to a worldwide audience, you must ensure each regulation is adhered to – regulations are not based on where you are sending the emails from, but where your subscribers are located.

There are three core pieces of legislation that every email marketer must be familiar with, whether inbound or outbound.

- **CAN-SPAM** is the Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003. CAN-SPAM established certain mandatory opt-out practices and requires email senders to clearly identify themselves.
- **CASL** relates specifically to Canada, the Canadian anti-spam legislation of 2014. It requires marketers to obtain permission from a user before they may send marketing material via email or SMS.
- **GDPR** is The European Union's General Data Protection Regulation. It is very important to familiarize yourself with the core tenets of these pieces of legislation and understand the impact they will have on your email marketing should you be reported for misuse.

CAN-SPAM constraints

Let's take a look at the CAN-SPAM Act of 2003. This act covers commercial email messaging in the United States. These are the constraints that the CAN-SPAM Act enforces. The marketer must identify themselves with a physical address. The opt-out process must be simple and any opt-out must be permanently honored within 10 business days. The marketer cannot send to any user who has opted out. The subject line must accurately reflect the content of the email, and if they identify the message as an ad, this must be clear.

CASL constraints

Next, we're going to look at the CASL law. This is a Canadian anti-spam law that applies to all electronic messages – for example, emails and texts – that organizations send in connection with a commercial activity.

The following are the constraints in email that the CASL act enforces:

- You can only send an email to a user who has explicitly consented. For example, a pre-checked box is not an express opt-in.
- Implied opt-in and pre-existing business relationships are considered valid consent only for 24 months after initial contact.
- Social media interaction and conditional opt-in are not valid.

Implied and conditional opt-in

An **implied opt-in** is where an individual provides his or her email address during some form of business communication but not necessarily for the purpose of signing up to an email marketing list.

A **conditional opt-in** is one that implies that the user must opt in to an email list if they want to access a page or website.

What happens if you do not comply with CASL?

Organizations that do not comply risk serious penalties including criminal charges, civil charges, personal liability for company officers and directors, and penalties of up to C\$10million.

GDPR constraints

The General Data Protection Regulation 2018 is a regulation that requires businesses to protect the personal data and privacy of European Union citizens. GDPR has been enforceable since the 25th of May, 2018, and replaces existing outdated data protection directive from 1995.

Here are the constraints that GDPR enforces:

- You can only send marketing emails to users who have explicitly requested the content.
- All personal user data must be protected at minimum standards and not shared outside the business.
- Users may request all data that is stored about them at any time.
- Users may also request that all data about them be deleted.

Companies that collect data from users in the European Union need to comply with these rules. Failure to comply can lead to a fine of up to €20 million or 4% of a company's annual turnover, whichever is higher.

NOTES

LESSON 2: EMAIL MARKETING TOOLS AND STRATEGY

EMAIL STRATEGY

Key principles for building an email strategy

Let's look at the key principles for building an effective email marketing strategy. An email strategy helps you market your products and services, taking into consideration who your target customers are, what they are looking for, and when the best time is to provide that information to them.

For an email marketing strategy to be effective, you need to take the following into consideration:

- **Segmentation:** This is grouping together similar users and providing relevant information to each category of user, as opposed to sending the same email to everyone.
- **Personalization:** Tailor your message for each user by, for example, including their name and providing recommendations that are just for them, based on behaviors you have recorded them taking.
- **Timing:** Make sure your email arrives at the time that best suits the user.
- **Engagement:** Optimize your email campaigns to keep your subscribers interested.
- **Analytics:** Review past email marketing campaigns to see how they performed and use these insights to improve your future campaigns.

Segmentation

Segmentation is grouping similar users together and sending relevant content based on that criteria. By sending messages to targeted segments within your lists, your recipients will find your campaigns more relevant to them.

The more information you collect about your email recipients, the more segmentation you can do and the better tailored your campaigns will be.

For example, a car dealership could segment its email list by users who are interested in similar cars, such as all users who are interested in BMWs and send them information specifically about BMWs.

Types of segmentation

There are various types of segmentation, as you can imagine.

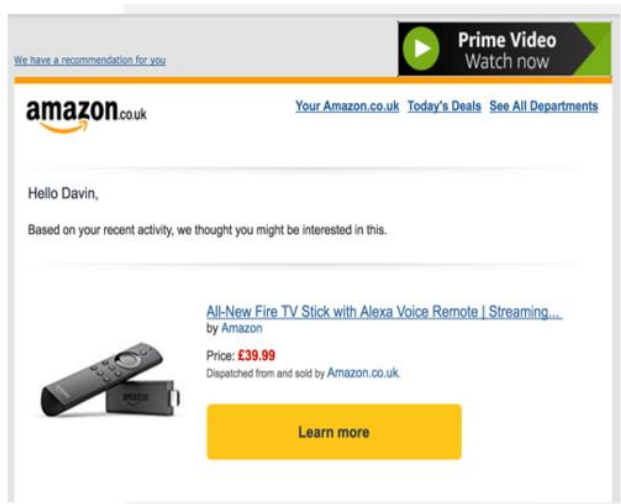
Here are a few popular ways which you can begin to segment your email recipients:

- Demographics (gender, age, geography, education)
- Job role or industry or company type
- Their purchase history
- Their web traffic
- Interest groups they're part of
- Clicks and opens within the email itself
- A change in their previous behavior to something different.

You need to understand how their behavior, their demographics and all that information results in a better email for them, not for you.

Personalization

The next principle we'll discuss is personalization and the impact that has on running an effective email strategy. By personalizing your emails, you give the user a unique experience for them, which will help drive opens, clicks, and ultimately conversions.



As you can see here, this is an example from Amazon. It has a recommendation for the customer. The email clearly states, "We have a recommendation for you," which lets the customer know that the email is tailored to them.

It addresses the customer by their name. This makes it feel more personal to them. The email then displays a product based on the customer's viewing history. Amazon has tracked and recorded this data, so it knows the person has been, or still is, interested in purchasing this item. Or perhaps it relates to an item that the customer has already bought, and this suggestion is complementary to it.

This means the customer will immediately recognize the value of why this is in their inbox.

Timing

Next, we're going to talk about timing. It is very important to be strategic about the timing of your email, and to make sure it delivers the right message at the right time in order to drive open rates, in particular, as a metric.

For the majority of email campaigns, one single send time will not suit all recipients. Do you want people to open on their mobile device or on their desktop? That can often be determined by whether they're in the workplace or commuting, or on the weekend, for example. So, here are some tips for improving the timing of your email send.

- **Test your audience:** First, you must test your audience. Utilize A/B testing, which we will discuss later, to find the optimal send time for your audience.
- **Optimal days:** From the majority of studies, Tuesday, Wednesday, and Thursday are the best days to send email campaigns, but you must test and develop information for your own unique audience.
- **Optimal times:** As a general rule of thumb, the best send times could be 6am, 10am, 2pm and 8pm to midnight. And, again, you need to consider customer time zones when you start to develop the optimal timing for your email marketing strategy.

Email engagement strategy

Building an email list is one thing. Keeping those subscribers interested and preventing them from unsubscribing through a strong email engagement strategy is another. Here are some ideas to help ensure your emails draw people in, rather than push them out.

- A good way to begin is to **welcome** all new subscribers with a welcome email.
- **Be honest.** Tell them how often you will be emailing them and what they can expect from you. This creates trust.
- Next, **set expectations** about what your emails are really focused on. What is the content going to be? Not just the timing or who it's from. Let them know the value of what they're signing up for, and allow them to set email preferences.
- **Simplify** your emails. Reduce the number of calls to action, reduce heavy text, and reduce multiple images when you're first communicating.
- Next, **create targeted segments** around individual experiences, such as the example you saw from Amazon earlier.
- Always **test your audience**. Your audience will evolve over time. You must not get complacent in terms of assuming you know what does and does not work.

Analytics

After every email campaign, it's important to perform a data-driven analysis and apply the learnings to optimize future campaigns.

Analytics is the analysis of email insights in order to inform campaign optimization and improve business growth. Even a small amount of insight derived from a few basic pieces of data can greatly improve your email channel. By applying the learnings of past campaigns, you'll come to understand what really does increase open rate, what increases a click rate, and what increases a conversion from your emails.

EMAIL SERVICE PROVIDERS

What is an ESP?

Let's talk about email service providers, or ESPs. So, what are they? To implement an efficient email strategy, you will need the help of a software program, and this is where an ESP comes in. It operates and maintains the software and hardware for delivering bulk email. This is not for one or two email sends. This is for lists of 100 to a million, or more. They provide a platform for managing and segmenting your contacts list, building email templates, and sending and tracking your campaigns on a large scale. An ESP should make the process of sending emails and managing your contacts database easier.

Gmail is one of the most popular email service providers, with over 1.2 billion users.

Features provided by ESPs

Some of the great features of an ESP include:

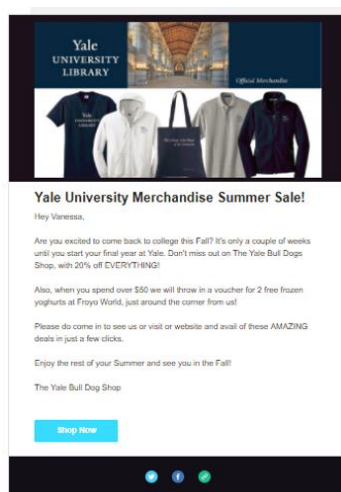
- **Contact database management**, where the list of subscribers, email addresses, and other contact information is stored, making it easy to add, edit, and remove contacts as needed.

- **Segmentation**, because the contact database stores all the information about your contacts on their personal profiles, the ESP can extract that data and use it to segment users.
- **Personalization**, again, because you have all that data residing within people's profiles, you can then use the ESP to extract that information to create a personalized experience.
- **Automation**, allowing for repetitive tasks like sending a welcome email or sending a receipt, is perfectly manageable through an ESP, and a better alternative to sending an individual email every time.
- **Tracking behavior**, providing the data and insights regarding who opened and clicked the email, so you can improve your future campaigns.
- Critically, **unsubscribe management** deals with users who want to opt out from receiving your emails. This is very important when you consider the legislation we spoke about earlier. As a business, you need to be able to prove how a person opted in and opted out of receiving your emails on your site, should it go to court.
- **Email and landing page creation**, drag-and-drop builders, or WYSIWYG (What You See Is What You Get), allow you to quickly create and edit your emails and/or your landing pages. So there are many reasons why you may want to consider an email service provider rather than your personal Gmail.

How ESPs facilitate a unique experience

Effective ESPs enable emails to be tailored toward their recipients, which facilitates a unique experience. This unique experience has three different aspects: merging, dynamic content, and accurate targeting.

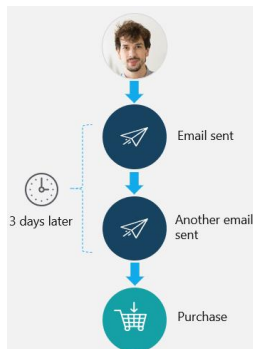
- **Merge fields:** Merge fields are placeholders such as email addresses and greetings, where information is populated from the contact database. For example, using the customer's first name to personalize an email. And as you can see in this example, this email is personalized to a student whose first name is "Vanessa."
- **Dynamic content:** This allows the content within the email to dynamically change based on data. For example, changing the currency from a euro symbol to a dollar symbol, if that is the recipient's geo-location currency. The email can pull in that personal data and populate the content so it's relevant to the recipient and makes sense.
- **Accurate targeting:** Scheduling an email campaign to be sent at the relevant time to each of your subscribers is incredibly important. This can be specifically for their time zone, or for the time of day where they're actually available to engage with an email from you.



Here, the accurate targeting can be seen in how Vanessa, a student from Yale, was targeted in the summertime before going back to college in the autumn.

Email automation

Effective ESPs can send automated emails based on user activity, personalization, and segmentation. Triggered emails and scheduled emails are also part of this. Marketing automation helps you stay connected to your customers every step of the way, reduces repetitive tasks such as abandoned cart notifications or product recommendations, and retargeting.



As you can see from this example, the user sent an email about an upcoming sale. They are then placed on a waiting period of three days.

After that three days, the ESP checks to see if the user made a purchase. If they did not, they are automatically sent another email about the sale, letting the user know that they have not made a purchase and they may want to before the sale expires. The user is now aware that the sale is about to end and has, again, the option to make that purchase.

So, as you can see, the ESP reduces the amount of manual work required to deliver effective email marketing. To carry out the same campaign without an ESP would require an absolute mountain of work, where you would have to manually check all users and every single email communication individually – and this is not a good use of a busy marketer's time.

Types of ESPs

Here are the different types of email service providers available.

Gmail	AWeber
Outlook	Constant Contact
Yahoo Mail	GetResponse
Zoho Mail	MailChimp

There is a fundamental difference between the left column and the right column. The left column, which you may be more familiar with, Gmail, Outlook, Yahoo!, and Zoho Mail, are for one-to-one and personal emailing. The right column, AWeber, Constant Contact, GetResponse, and Mailchimp are email service providers for bulk email.

So let's take a look at the ones that are more familiar to you.

Gmail

Gmail is a hugely popular and very well-constructed service with more than 1.2 billion users. People use it for both personal and business communication. Its many amazing features include contact list importing and exporting, powerful spam filters, filters based on email type – for example, promotional, personal, or social – email forwarding, and an undo send feature.

It also integrates seamlessly with the rest of the G Suite tools which you may be using: Google Calendar, Google Docs, Google Drive, and so on. But it may not offer you everything you need to create, design, deliver, automate, test, and optimize an email marketing campaign.

Microsoft Outlook

Outlook is very similar to Gmail in that it has a strong user base of more than 400 million. It offers some more advanced features than Gmail for reducing email clutter. However, it may not be the best option for creating a mass email marketing campaign as it does not offer support for sending bulk emails.

Yahoo! Mail

This is one of the earliest internet companies. Its main features include huge storage capacity (1 TB), a built-in web search tool, calendar and notepad, spam filters and SSL encryption. Similar to Outlook and Gmail, it does not offer the features an email marketer would need for sending effective email campaigns.

Zoho Mail

This email service provider has been described as a complementary email client for small businesses. Its free license allows for 25 users to register under one account, although each user is limited to 5 GB of storage. It includes antivirus protection and spam filtering and integrates with other Zoho productivity tools. An added bonus to Zoho Mail is that it does not run advertisements. As mentioned, if you are a small business already using Zoho productivity software, Zoho Mail may be perfect for you, but may not be the most suitable for creating large email campaigns.

So those are four email service providers that you can go and discover more about in terms of your personal or business communication.

But in terms of email marketing strategy and email marketing campaigns, you really do need familiarize yourself with the advanced features that an ESP can offer.

AWeber

So first, we have AWeber. AWeber is a paid ESP and a very popular one at that. It is considered intuitive, easy to get started on, and connects seamlessly to most platforms, including WordPress. Its features include ready-to-use email templates, list management, auto-responders, and email tracking. You also have the expected support services such as live chat, phone, and email.

Constant Contact

Another example is Constant Contact. Quite similar to AWeber, it allows you to also manage your email list, email templates, and provide insights, as well as giving you platform-based support on how to use it best.

GetResponse

GetResponse is slightly different in that it has a drag-and-drop feature for designing your emails, and it also integrates with third-party software like OptinMonster, Salesforce, and Zendesk, which may be important to you in your business.

Mailchimp

And finally, the most popular free version, Mailchimp. Its features include an email creator, merge field tags, auto-responders, segmentation contact lists, email testing, and simple tracking and analytics. The support is offered by email, live chat, and a knowledge base with how-to videos and tutorials. If you have up to 2,000 subscribers and a requirement to send up to 12,000 emails, the free version of Mailchimp is a good option for you. However, if your subscriber list goes beyond that, you would need to opt for a paid version or maybe consider a more robust tool. Consider the features offered by each ESP in order to decide what works best for you and your marketing needs.

Advantages of an ESP

Using an email service provider can maximize the productivity and efficiency of an email marketer. However, many marketers still use their own email clients, such as Gmail, to send marketing emails, even though these are not specifically designed for creating and executing email marketing campaigns.

So, what are the advantages of using ESPs over an in-house email system?

- **Whitelisting of Email Broadcasts:** This ensures your email will be delivered to the intended recipient's inbox.
- **ESP provisioning, domain, and IP setup:** You will want to send emails from your company's domain name, instead of a free one such as Gmail or Hotmail. To use your own domain, you must configure the IP setup with both the ESP and the domain service.
- **Deliverability reporting:** This gives you insights into how your email campaign performed – who opened or unsubscribed, for example – and a breakdown of what links were and were not clicked.
- **Enterprise mail transport agent configuration:** Free email domains like Gmail have a limit on how many emails you can actually send, which could be 100 or 150 a day. ESPs allow an almost unlimited amount to be sent and support large campaigns sent to a volume of perhaps millions of users.
- **Bounce and complaint handling:** An ESP will automatically check if an email address bounces and remove them from future campaigns, while also managing any complaints that users may have.

Limitations of an ESP

While ESPs have many advantages, as you can see, there are also some limitations.

Cost

Firstly, the cost. Most ESPs, apart from the free version of Mailchimp and a few others, cost money.

Some can be incredibly expensive, and the cost can rise depending on the number of subscribers you have and how often you email them. It may be cheaper to develop your own in-house system, or to send from a free email address.

Limits

Secondly, you've no control over rate limits and sending volumes. The ESPs control how many emails you can send per hour and per day. And while this might suit small campaigns that have just a few recipients, it can be an issue for larger campaigns that have a requirement to send to millions of users – so choose carefully.

Interface and reporting

There are restrictions on reporting and the user interface. You will have to understand the pros and cons of each ESP's interface before choosing one because you may not have the option to customize the reporting and UI as you would like to. Be sure to choose an ESP that best suits your needs.

DATA CAPTURE

Lead-generation methods

Email is a powerful channel and can be used for lead generation by capturing users at different stages of the buying cycle. It helps to establish and nurture the relationship with the potential customer, and encourage them to visit a website or a landing page for more information or to make a purchase.

Here are some of the methods that can be used to capturing leads via email.

- An email newsletter with high value relevant content
- Downloading a white paper (How about offering a coupon, or a free trial for your product or service?)
- Placing an order

Types of recipients

We can separate the recipients of these emails into three key categories: the new customer, the existing customer, and the evangelist.

- **New:** The new customer is typically a person just becoming aware of their need for a product and service, and is interested in a number of different options, including your service or your product.
- **Existing:** The existing customer has already considered their options and solutions, and decided to purchase from you.
- **Evangelist:** And finally, the evangelist, who is not just a regular existing customer. They have actually become an advocate for your product or service, in that they are telling people and recommending you.

New leads and potential customers

We'll now look at how to capture the data on each of these three types of email recipients. So, let's first look at how you capture the information and the data on the new leads, which are your potential customers. By capturing this information correctly on new leads and potential customers, you can tailor your email marketing campaigns towards them, which will help to turn these users into customers.

Blogs

Some places where you can collect that information are company blog posts. You can gauge content on your blog by requiring the user to give their email address, which you will then email what they were looking for to. The company website. If a user who is visiting your website is interested in what you offer, make it easy for the user to subscribe on almost every page.

Social media

Here, you can promote an offer for an e-book or any other free resource, as a great information or deal or discount that they may wish to have. And then, within that, you can provide a link where they can quickly subscribe. Next, we have partners or affiliates. You could run a promotional campaign on a partner's website or email, that requires registration to enter.

This gives you access to their audience, who also might be interested in what you have to offer. And finally, referrals. Provide your current subscribers a way to share your email easily, and add a refer-a-friend link to all your email marketing campaigns, if that is what you wish to do.

Existing customers

Once a user becomes a customer, you will want to keep them interested and stay connected to your brand.

By capturing data on existing customers, you can provide them with up-to-date and relevant information. This ties in very closely with the importance of personalization.

- Sources of data collection that provide information on existing customers are an **opt-in form data** upon list sign up. When a user is signing up to your email list, you can provide extra form fields to capture more information about the user, rather than repeating the same form fields, which you already have.
- **Purchase data** including location and user preferences. When a user makes a purchase, they provide a lot of information, such as location, currency, or the types of products they are interested in.
- **Social media information.** Does the user follow you on social media and do they engage with your content? You have to think about the psychological experience.

Evangelist customers

Next, brand evangelists. These are the users with whom your brand has an established relationship and they have gone on to promote your brand and your products on a consistent basis. Potential customers will often trust the opinion of an evangelist over a traditional marketing message, making it incredibly powerful.

This means it is even more important to capture the data on your evangelists.

- Again, you can capture information through **email campaign metrics**. How often do they open, click, or share your email to show how interested they are?
- Their **site visits** and log ins. How regularly do they visit your website and log into your service, if that's an option?
- **Social media engagements**, like likes, retweeting, and following. How regularly do they engage with your content on social media?
- And finally, their **purchase history**. What types of products are they interested in and how often are they buying them? These are all indicators of what makes your perfect brand evangelist.

CONTACT DATABASE

Types of email lists

Database growth is one of your goals as an email marketer. The more subscribers you have, the more potential customers you can reach. You should note that list building also gives context to the experience recipients have with a company and how this contributes to managing a solid contact database.

Opt-in and opt-out

There are a couple of different types of email lists, but the main ones you should be concerned about are opt-in and opt-out. Ideally, you should never buy or rent an email list, as these contacts did not willingly sign up to your email list. As you've seen from the legislation we described, this form of opt-in is illegal in many countries, or will be illegal in many countries down the line, and ISPs, which are internet service providers, will detect this, meaning your emails will end up in the spam folder.

So, what consists the opt-in list? The opt-in list includes users who've explicitly signed up to your email list. They need to know exactly what they're signing up for and why. The opt-out includes users who no longer wish to receive your emails, and you must remove them from future email campaigns.

Purchase list

Next, we have the purchase list, which you can do based on certain demographic or firmographic information, but you need to remember the risk that they did not sign up specifically to receive email from you.

Rented list

And finally, a rented list, which is similar to buying a list, which means you pay for a certain number of users of a demographic, but you don't get their email address. The company you rent the list from will make the email send, but because you never owned the contact list, you will not see their email address.

Building a subscriber list

So, as I mentioned, you should always be growing your subscriber list, as an email marketer, and adding new contacts. This is all due to prevent database decay.

So, here are some of the best practices for building a subscriber list.

- **Blog signups:** One of the best ways to add new subscribers is to have an active and interesting blog. When a user has visited your blog, they've shown an interest in your content through organic search, for example. Here, you can prompt them to sign up to your email list, where they can get the content delivered directly to their inbox.
- **Social media signups:** By running paid promotions on your social media pages, you can drive users to a signup form. This means they are explicitly opting in from you.
- **Offline events:** You can collect emails at trade shows or on the ground at other events, and then add them to your email list during or after the event. Be sure the first thing you do after an event is to send them a welcome email.
- **Partners:** By partnering with a complementary company's website or email newsletter, you get your content in front of a new audience who might be interested in signing up for your emails. Make sure to partner with someone that makes sense for what you're offering, rather than something that conflicts or is too far removed from what you do.
- **Opt-in media:** You can offer the user free content, such as an e-book, in exchange for their email address, which is a win-win for both parties.
- **Referrals:** Encourage your current email subscribers to share or forward the email by adding social media icons or an email to a friend link.

List segmentation

List segmentation contributes to the growth and management of a contact database by keeping information about contacts, who are your leads, subscribers, customers, partners, competitors, employees, up-to-date and accurate.

If you didn't have any list segmentation, and instead just had one email list that all users were added to, then it will be very difficult to tell who and what message to send. When segmentation is put in place, you can easily see the breakdown of your audience, and tailor each message accordingly.

Additionally, if the information isn't kept up to date, then you may be sending the wrong message to the wrong user. For example, a user who signs up to your email list as a lead and then becomes a customer, why would they still need information based on their lead stage? They are not a customer yet then, but now they are.

Different information. If you don't keep the user's information or your segments updated, you will end up sending emails that are no longer relevant, which will have a negative effect on your list growth.

Target segmentation

Combining email segmentation, which is grouping similar users together, and contact management, which is keeping contact information updated, this will lead to higher performing email campaigns with higher open rates, higher click rates, and more engagement with your content further down the funnel.

You will receive less complaints from recipients saying they're receiving unwanted or irrelevant emails. They don't want this anymore. They are looking to unsubscribe. Providing relevant and targeted information to your subscribers will keep them engaged with your content and brand, and produce a better level of trust.

NOTES

LESSON 3: EMAIL DESIGN

EMAIL COMPONENTS

Components of effective emails

There are certain components that contribute to writing and designing effective emails.

Audience

Before writing your email, you need to know who's going to receive the email. It must go to the right recipients.

Subject line

This is the metric that influences how many people actually open your email. It needs to be clear, personalized, relevant, and aligned to the email copy.

Email copy

This is the meat of your email marketing. It should offer a message that is relevant to the recipient and should provide value. The tone of your email comes into play here. And you should write it in the second person. More of "you," and less of "we". It should be engaging but brief and to-the-point. Readers of your email should be able to skim and scan through the email and still understand the general meaning of your message.

Design

Design is not just the look and feel of an email, but also how it works. It helps to decipher whether to include imagery or not, where to place the call-to-action button, and also the style and layout of your email copy. Email design has a huge impact on reader engagement, whether someone clicks on it or not.

Call to action

The call to action is a critical part of all of this. What action should the reader take within your email? It needs to meet their expectations and make sense to them. Tell them what action is expected of them.

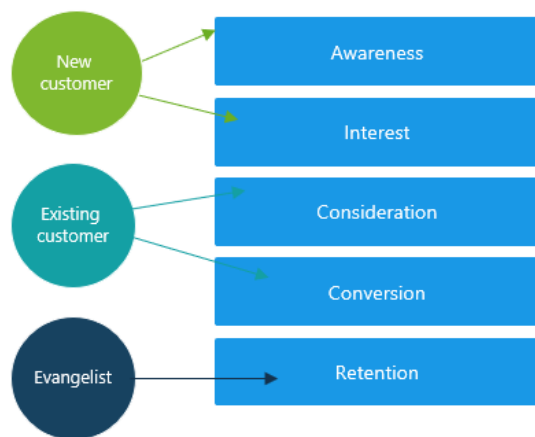
Imagery

The images in an email should be relevant to the content of the email and should not simply be there for the sake of being there. Often, the basic imagery is the company logo, but it may also be relevant to have a header and various other thumbnails. General best practice is to avoid having your email as one singular, entire image.

AUDIENCE

Using the buyer's journey

Before writing, designing, and sending an email copy, it is important to know who your audience is and ensure you're sending the right message to the right person.



You may have seen the buyer's journey in previous modules. So, let's refresh it. The buyer's journey is the research a buyer goes through before purchasing. There are multiple stages the buyer goes through before and after a purchase.

Awareness and interest

First, we have the awareness and interest stage. The buyer becomes aware of their need for a product or service and begins to look for products that would fulfill it.

Consideration

Next, is consideration stage. The buyer has researched solutions and is considering the options. They have developed a certain view on the products available on the market and are aware of their personal preferences.

Conversion

The buyer has selected the product they want and made a decision to buy.

Retention

Buyer and brand build a strong relationship. The customer receives valuable information that turn a satisfied customer into a true fan or evangelist of your brand.

The buyer's journey and email

So, what does the buyer's journey have to do with the email and your audience?

Identifying the stages your recipients are at the buyer's journey will help you align the type of email and message you want to send. Again, the right person, the right time, the right content. For a new customer at the awareness or interest stages, you may send a welcome email within the first 24 hours of subscribing and thank them for signing up and letting them know what they can expect from you.

Next, you may consider regular newsletters, event invitations, or seasonal emails in order to move them down the buyer's journey.

And finally, at the retention stage, product or content updates, downloadable content, and shareable content will help to retain and excite these into brand evangelists.

Example

As we have just seen, identifying where your recipients are in the buyer's journey can help to align your emails to the right audience. Consider an example of a 32-year-old woman named Claire. What we know about Claire is that she's a career-driven woman, has an interest in fashion, and is searching for a new outfit for work.

She has already come across your clothing website online and has selected a few outfits, entered her details to sign up before paying for the products, but has left your website before completing the purchase.

So, how do you use email to encourage Claire not just to come back to purchase, but to re-engage with your brand? And how does recognizing what stage she is at in the buyer's journey help to send her the right email?

So, first of all, if we look at where Claire is in the buyer's journey, we'll see that she is a potential new customer in the interest stage, edging on the consideration stage. You could send her a welcome email thanking her for signing up to your email list when she's entered her details, before leaving the purchase. You could then offer her an option to confirm whether she'd like to opt-in to getting regular newsletters and offers, and then, send her an email to remind her of the items she has left in the online cart.

After this, the next step would be to help Claire move from the consideration stage to the conversion stage. You want her to buy the new outfit from your company, not your competitors after all. Here, emails with product information and sale offers would perform very well with the goal of getting Clare to buy.

SUBJECT LINE

The role of the subject line

As the saying goes, you never get a second chance to make a first impression. So it is important to start off on a good note. The subject line of an email is the first thing a recipient sees and can determine if they will open your email or not. If the subject line is not compelling, the recipient will simply ignore your email. By adding a sense of urgency to the subject line, you can draw the recipient in by prompting them to open the email to find out more. Always ensure the body of the email aligns with the subject line. If it is not related, the user may no longer open your emails, or unsubscribe. Ensure the content of your email is engaging and relevant to the recipient. Know who is opening your emails and how the subject line may affect this.

Shorter subject lines are more impactful for B2C opens, while longer and more descriptive subject lines often yield higher open rates from B2B. But be sure to test your audience and find out what works best for them. Develop your own internal best practices.

Here are some statistics around email subject lines and what you can do to increase your open and click rates.

- Emails that have a personalized subject line have a 26% better open rate. Personalize your subject line, for example, by including their first name or their username.
- Segmenting emails sees an increase of 14% on opens, and up to 100% on clicks. Segment your audience by grouping similar users together and sending them the relevant message, and see what happens.
- 80% of users say spelling errors are an unacceptable mistake in email marketing. Always QA your emails before sending them. This will help to eliminate all those errors and not put off your potential customers.

Types of subject lines

The subject line will set the tone for the email and let the recipient know what to expect.

There are various themes you can apply when creating a subject line for your email.

- **Self-interest:** Self-interest speaks directly to the user and shows what benefit they will gain by opening the email. It also provides a clue to the reader about what's in the email. For example: '28 ways to increase organic social traffic'. This subject line is direct and clear. If the user wants to see how they can increase their organic social traffic, they will open to find out more.
- **Curiosity:** Without giving too much information away, you draw the recipient in to opening the email. Be careful when using this tone because if the subject line provides no information at all, the recipient might ignore the email completely. For example: 'Pokémon GO: 3 Marketing Mistakes, Millions of Users Lost!'. The use of curiosity makes the reader wonder what three mistakes were made.
- **Offer:** If you are giving something away or having a sale, mention it in the subject line. Everyone loves free stuff and it's a great way to entice the recipient to open your email. For example: '10-week live training and certification'. You let the reader know what you are providing, and if this is something they are interested in they will open the email.
- **Urgency:** This tells the reader that they must act now or they will miss something. It's a very powerful subject line tone, but should only be used when there truly is a deadline or expiration. For example: 'Are you In or Out?' Simple and direct, with a sense of urgency, the user believes they might miss something if they do not open.
- **Humanity:** By adding human appeal for attention or telling a story, you are letting the reader know there is a person behind your product or service. For example: 'Why I (kinda) HATE surveys...'. The use of 'I' here lets the reader know there is a real person behind the email.
- **News:** Providing the latest news about your company or newest features of your product always performs well and drives open rates. These subject lines often work well with the curiosity tone. For example: 'ANNOUNCING: Marketing Mastery Class'. This lets the user know this is something new and draws them in to read more about the class.
- **Social proof:** Share success stories and inform users about how many other people are using your product or service. Humans will always look at the behavior of others when making decisions. For example: '[Case Study] \$25,865/mo in recurring revenue'. The use of a case study lets the reader know how something was achieved and how they can do it.
- **Story:** Telling the recipient a story, or the beginning of one, can draw them into the email to read more. For example: 'I got Botox—& THIS is what it looked like'. This draws the reader in with the start of a story. If they want to see what happened, they will open the email.

EMAIL COPY

Essentials

Let's first take a look at the text the recipient reads. This includes the "from" name and the subject line, as well as the body copy of an email.

The copy in both the subject line and the body of the email should **grab the user's attention** and draw them in, **building anticipation** about what the email offers, and **calling them to action** by clicking through.

No matter how fancy the design of the email looks, if it is not **well written**, your subscribers will stop reading and eventually ignore your emails. Whether they're a new customer, an existing customer, or a brand evangelist, the message will differ and should **cater to their individual needs**.

Social media links are usually included at the end of an email as a way of inviting recipients to engage with your brand across different marketing channels. An **unsubscribe option** is usually placed below the social media links. As we've seen in the section on email legislation and regulations, you must offer an option for recipients to unsubscribe from your email list. You can place the word 'unsubscribe' at the bottom of the email, linking to the page where they can choose to unsubscribe from one or all your email lists.

Setting the right tone

If the user found your subject line compelling, they will open your email. And it's here, in the email copy, that you must follow up with what you promised and make it easy for the user to take action. Here are some guidelines that will help you create a good experience for your users.

It's important to try and incorporate all the guidelines into your email, as this will lead to better performing campaigns.

- **Keep it simple and strong:** The email should capture the reader's attention and keep them interested.
- **Make it scannable:** Users spend only a couple of seconds scanning your email to see if it's relevant to them or not. The main message should be clear and bullet points can be used to help get the main point across.
- **Useless 'we' and more 'you':** When you're writing your email, the message should focus on the reader's needs and how the email can help them.
- **Focus on benefits, not features:** The reader wants to know what's in it for them, not what you're trying to market to them. They need to read your email and understand how they will benefit.
- **Align with the subject line:** Quite simply, if the content of the email doesn't relate to the subject line, the user is less likely to take action.
- **Know your target market:** Recognize what your audience wants, and send them relevant content based on that. For example, for a newsletter, if a user has set their preferences to receive the emails weekly, do not send them daily or monthly.
- **Have a singular goal:** The email should have one goal or call-to-action, such as clicking through to a specific landing page. If the email contains too many links, which all go to different web pages, then the marketing strategy won't be as successful.

- **Create a sense of urgency:** By adding a sense of urgency to the email, using particular words that relate to deadlines, the user is encouraged to take action immediately, and this can help with the goal of your email campaign.

Legal requirements

Know the legal requirements

- **Mandatory:** The last step for creating an email is fulfilling the legal requirement that all emails must contain an unsubscribe link and a postal address, so that the user can opt out from receiving the emails.
- **Optional:** It is best practice to include the unsubscribe link and postal address in the footer of the email. While not mandatory, including social media links in the footer, along with a link to your company's privacy policy and some text about why the user is receiving the email, helps to provide a general better experience for the reader.

EMAIL DESIGN

Value of design

The email design is not just the look and feel of an email but how it works and flows for the reader, otherwise known as the user experience. Before jumping into how best to design your email, we need to answer the question, why is email design so important?

The following are some of the main reasons why an effective and appealing design is important to implement throughout your email campaigns.

- **User experience:** Having a good email design will add to the user's experience. If the email looks and flows well, the user is more likely to continue reading your email and click through.
- **Consistent experience:** If you send a regular newsletter, having the same design and layout in each will help the reader recognize your email and become familiar with its content, and also familiar with you and your brand. If the design regular changes, this will only confuse the reader and reduce clicks.
- **Style:** Next is that it conveys your message in style. Nobody wants to read a wall of text. By splitting your content up into bitesize chunks and clear headers, user is more likely to read your email.
- **Direct imagery and graphics:** Images are great way to showcase your product or service. In the example above, iPhone used an image of their new phone, allowing the reader to become familiar with the product.
- **Placement of CTAs:** Clicking the call to action is often the main objective of an email. Having a clear CTA at the top and bottom of an email will make it easier for the reader and help them click through to the landing page.
- **Drive conversions:** If the email is well-designed and contains relevant information, the user is more likely to take action and convert.

Identity and color

So more on email design. The first step in creating a compelling email design is to include who you are and the color of the email.

It is best practice to include your company's logo at the top of your email and also use your brand's color pallet for calls to action, headers and so on. This will allow a reader to easily recognize your emails and become more familiar with your brand. In the above example from the digital marketing institute, the head of the email includes company's logo so all readers can easily recognize the email.

And the email also makes use of the color blue which is part of the company's color pallet. The logo and color are used in all of their emails as well as their website, which leads to a consistent experience for the user.

Layout

Another key component for designing effective emails is the layout. The layout controls the flow of the email and makes it easier on the reader's eye to look at.

- **Organize for quick reading:** Bold and color the headers in your email helps the readers scan the email to find the relevant information.
- **Make room:** When designing the layout of your email, don't be afraid to use white space. It makes your content easier to read when there are multiple sections.
- **Align your content:** Use the same width, font size, and color for similar sections of the email. If one paragraph is 500 pixels wide and left-aligned, make sure all the other paragraphs are, too.
- **Define your sections:** If your email has multiple sections, such as a blog newsletter, make sure they're defined. You can use a different background color or a dividing line to show where each section begins and ends.
- **Put your call to action above the fold:** The fold, which is normally used to refer to the website page, means the part of the email that is first visible on the screen, whether it be a phone, an iPad or a desktop. Depending on the reader's device screen size, part of the email will be visible. Place your most important piece of information in that fold.
- **Choose best size:** And finally, best practice is to make email widths at 600 pixels for best rendering across multiple devices and browsers.

Fonts

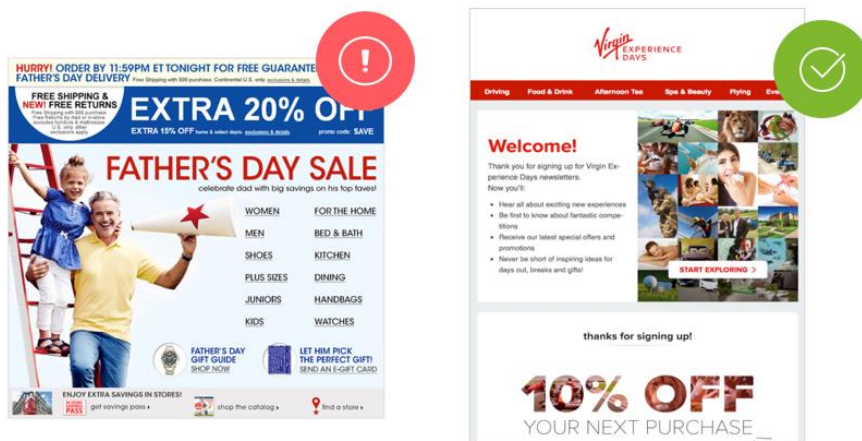
The next key component in designing emails is the fonts you use. The fonts used in your email should be consistent throughout, use the same font style, font size, and font color for all sections that are similar.

Also, don't use a very small font size as many readers will be viewing on mobile devices and this will make it impossible to read.

Your company may have a brand style guide which you must follow. In that case, you must keep that consistent in your emails as well.

Examples of good and bad

Here are two examples, one from Macey's and one from Virgin.



The one on the left is a very busy email with a lot happening. You can see that there are various fonts, font sizes, colors, imagery, and a very confused call to action.

At first, you'd think this a Father's Day sale, but then why is the first link to women's clothing? It doesn't make sense and the reader will quickly become disillusioned as to why they're reading this email. Contrast that with the virgin email, which is a very clean and simple layout with a very clear call to action, giving people quite literally 10% off their next purchase.

It is clearly a welcome email. Consider this the next time you're designing an email and understand what may seem too busy to one could do with a little cleaning up.

CTAs

Choosing CTAs

There are six very simple, but highly effective ways of making a call to action. A call to action, or CTA, is an engaging button or link that you place in your email to drive readers through to a landing page.

There are a number of CTAs that can be used depending on the campaign you are running.

- **Apply Now** is very useful in an offer email where the user must apply for something.
- **Download Now** is where you're offering access to a guide or an eBook that the reader needs to go to another page in order to access.
- **Sign Up** can be used when the user needs to register for something like a webinar or an event.
- **Book Now** is similar to Sign Up, except that it could be for reserving a space, or making time in someone's calendar.
- **Learn More** can be used for a social proof or story email, where it wouldn't make sense to have all the text in the email, and the rest of the story is on another website.
- **Buy Now** is quite clearly used where you are encouraging the user to make a purchase.

What all these calls to action have in common is an action word and a clear action to take.

Guidelines

Clicking the call-to-action is often the main objective of an email, and having a clear CTA at the top and bottom of the email will make it easier for the reader and help them to click through to the landing page.

Make it **visible**. The CTA should stand out from the rest of the content, and not be hidden, as you will want to drive as many clicks as possible to it from this email. So place your CTA in a location where it's easily visible and where it makes sense for someone to click on it. The CTA should use a **strong command verb** and have a sense of **urgency**, giving the reader a real reason to act.

It should be **obvious** and set a clear **expectation** about what will happen when it is clicked. For example, "Read More" should **bring users** to a page where they will read an extended version of what you are proposing in the email.

IMAGES

Guidelines

Next, we'll discuss images. What should you consider when designing email templates that use email images? What are the pros and cons of using email images? And what are the best practices for using images. Let's dive in and explore the hows, whys, why nots of emails and imagery.

So the first question is, should you use images? If so, how many? What's too many? And first of all, yes, you should be using images and it is really important for driving conversions and promoting your brand. You have to strike a healthy balance between using images in a way that will benefit your performance and using text.

What you don't want is to detract from conversions because of overloading it with images.

Let's see how images can be used in your emails. You can embed an image which means you attach the image or the second method is to provide a URL reference to the image located on your server, the same way you would a web page.

We'll look at the pros and cons for both to help you decide which is best for email deliverability and conversions.

Embedded images

With image embedding, essentially, you are attaching inline image to the email using HTML image tags that reference the image. The main advantage to this approach is that recipients are sure to get the image whether they download it or if it's displayed in the email.

The cons to this approach are that it increases the overall size of the email causing varying results across email clients and higher spam scores as spam filters look out for large embedded images. Another thing to be aware of when embedding images, unfortunately, image files are used to plant viruses on computers.

To combat this, most email service providers set the default setting on delivered messages to images off, meaning that a large percentage of your emails with images do not get seen unless email users turn on image viewing.

Image link

The second way to add images to your email, an image link, provides an attached URL references which comes with its advantages and disadvantages as well.

In comparison to embedded images in the email, it's less technical, requires very little effort, and it keeps the email weight light meaning you won't get caught for spamming. The downside to this approach is that the recipient will need to actively turn on image viewing in their email settings to see the image. As we've seen, both approaches come with their pros and cons.

The best way to figure out what will suit your email campaign means you need to look at the marketing emails you've seen from large scale companies, view the code. So, for example, in Gmail, you can click show original and look at their email headers, discover what's working for them, and apply it to your own.

Considerations

There are a number of factors to consider when including images.

- **Email is different from traditional marketing:** As with all digital marketing activities, the delivery differs from traditional marketing and specifically print. Your approach to email marketing needs to focus on usability as well as aesthetics. Email is not like a print brochure or a mailer as it does not have the same flexibility as print would, therefore conversions rely on your email images encouraging the recipients to click and to take action.
- **Not all ESPs will display your email images:** You must consider usability, enabling the option for images to be turned off but still be able to convey your message clearly. Your email needs to be designed to appeal to your entire subscriber base including those who did not see the images.
- **Avoid overusing images:** Another important consideration to make is that overusing images or a bad use of images in an email can result in your email being sent to the spam folder. If you do experience a deliverability issue, one of the first steps you can take is to remove some images from your email and see if performance improves.

Best practices

So, we've discussed the importance of using imagery in email, how to embed them and what the downfalls are to consider and avoid. Now we will look at the best practices and top tips for using images in your email campaigns.

- **Use brand assets:** Your brand guidelines may specify what types of photos are and are not allowed on the website. So, this should also apply to your emails because you need to have a consistent experience for the reader.
- **Include product photos:** It helps to include images of your product if it's a product email. For example, the new iPhone in Apple's emails or the product you recently viewed in Amazon's triggered emails for an unfilled basket.
- **Size your images:** An important thing to note is that your images should be sized correctly. If the image contains text, make sure it is clearly legible and not distorted.
- **Use pixel tracking images:** After you have designed your email, you will want to know how many times it was opened. When creating your email, you may need to add a tracking pixel. A tracking pixel is a one by one pixel, transparent image added to the code of your email. So when a user opens your email, the image is downloaded letting the tracking software know

that the email was actually opened. Some ESPs will also add the tracking pixel automatically so double check with your email service provider if you have to actually add it manually. Gmail will cut images that are too large, at this moment, it is 102kb in file size, and only display the top portion to the user. Therefore, you are manually adding the tracking pixel it will add towards the top of the email, so they're open to track.

- **Use the less than 25% rule:** Alternatively, you can also ensure your email isn't too big. When deciding how many images you should include, refer to the less than 25% rule. As in, no more than 25% of your entire email should be image-based. You want the 75% of the email to be readable, as in text-based without images.
- **Include alt text:** Some ESPs may default to images switched off so your email standing alone needs to be able to convey the message that the images were going to tell. This can be accomplished through the alt text.

NOTES

LESSON 4: CREATING AN EFFECTIVE EMAIL CAMPAIGN

EMAIL CAMPAIGN CREATION

Steps

Now that we've had a look at the components of an effective email and the main elements to consider in your email strategy, which are view, segmentation, personalization, timing, engagement, and analytics, we can apply these to creating an email campaign. Starting from scratch can seem a little daunting. But following a few basic steps can guide you on your way to hitting that send button and getting the results you want.

So here are a few steps for creating an email campaign.

Identify the need for an email

This comes back to, why are you sending this email? Why would the recipient find value in it? Are you running a special campaign, a special offer?

Why do they need to know about this? And also, who doesn't? Consider who will be not receiving it.

Define campaign requirements

This is the plan or the strategy for your email campaign. It should include your campaign goals, the tone, how you're going to personalize it and what segment you're sending it to.

Then you will also include the subject line, the preview text, the layout, the design and the message, including the call to action. You should also try to include how you're going to test any or all of these elements, if possible. This should then be shared with your team, so everybody understands the purpose of the campaign and what you hope to achieve from it.

Write email copy

Next, actually write the email copy and get the graphic and imagery created. Using the campaign requirements document as a guide, you can draft your email copy, calls to action and imagery based on best practices to start with. As you've just seen in the section on email design, your email should provide value and be engaging, stick to the point, be relevant, and be personalized for the recipient, and have powerful calls to actions and imagery that drive action and conversions.

Add the content to an email template

Now that you have your email drafted, you can copy your text and design into the templates available to you. You can use email service providers such as Mailchimp or the other ones we discussed and you will have access to ready-made and themed email templates.

Set up email tracking

Next you want to setup your tracking and add this to the email.

One example we went through was the pixel tracking, which is just before the closing body tag of the email, done through a slice of code or an HTML. Most email marketing ESPs will have tracking setup automatically, but you should, as we've said before, double check that this possible.

Test your email

Next you want to test your email. And this really is critical to the success of the email but it's the one least employed by email marketers.

Your email may look amazing in your own ESP that you created it in, but its delivery may not work the same in different email clients. Carry out some email testing so that you can decide what needs to be changed if necessary.

Check your email checklist

It is important to have a checklist to double check everything before it goes out.

Once sent, it cannot be undone, particularly bulk email sends. Make sure the checklist covers all of the elements outlined before, plus the call to action, and also the general branding.

Send your email

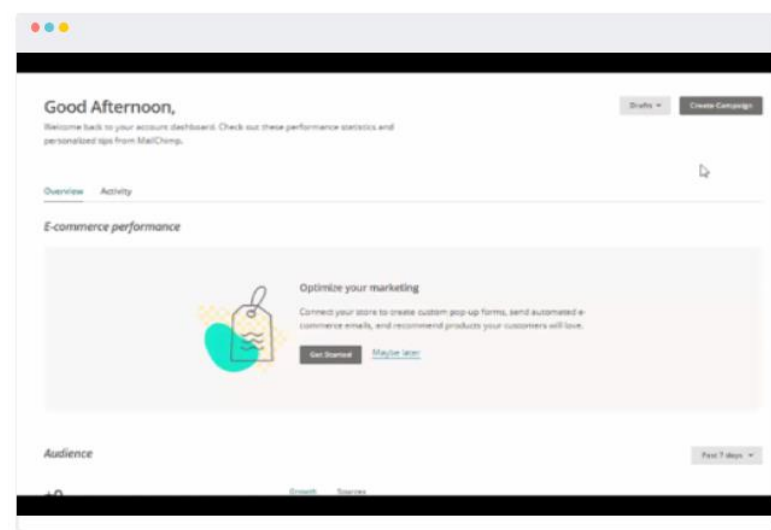
After you have created, designed, tested, revised, and double-checked everything, then you are ready to send.

Analyze your results

And afterwards, basking in the glory, analyze your results. Use your ESP's reporting features to see how it performed. Focus on the key metrics that matter to you, the ones that you can take actions on to improve it for the next time it goes out. Look at how many readers are reading it on mobile devices versus desktop.

How does that impact the success of your email campaign? Take all of this into consideration, reiterate, and try again.

Creating an email campaign in Mailchimp



Here we're in Mailchimp and we're going to create an email campaign. Click create an email and then type in the campaign name and hit begin. So, you're going to start with adding the recipients.

You can choose a list you already have made or start from scratch. Here we're going to choose one that is pre-built for new subscribers. Hit save. Next, who is this from? Type in the name you want it from and the email address you want it from. You can take the additional step of sending a verification email to make sure that it is legitimate.

Next is the subject line and the preview text. Again, follow the best practices and make sure that the subject line and preview text hook the reader in and let them know what the value in the email is. Remember to hit save. Next, we're going to design the email. You can choose from various Mailchimp layouts that already pre-built for you.

You can scroll down and choose the ones that suit best or you can also customize the design yourself. Take a look at the options you have here. You have an image block and a text block and your calls to action blocks. Let's say you want to change something in the design.

We're going to change the color of the header as an example and turn it to red. Click save, and there you go, your very own email template. Click save. Schedule your email to go out on the day and time and in the time zone you want for the best results.

Tracking in Mailchimp

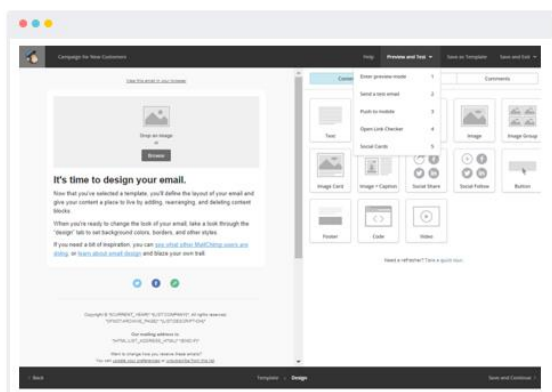
When creating your email campaign, it is important to track email engagement.

Mailchimp allows you to see if subscribers have clicked links in your campaign by clicking on track clicks in the settings & tracking selection. Your campaign report will show which subscribers clicked your links and how many times each link was clicked. Enabling the setting for track opens will allow you to see who opened your emails.

Mailchimp embeds an invisible graphic at the bottom of the HTML in the email and is unique to each campaign you send. When a recipient's email client has view images setting enabled and opens your email, the graphic is downloaded from Mailchimp's server and is counted as an open in your campaign reports.

Testing in Mailchimp

We will explore email testing in more detail in the next section. But for now, here is a quick look at the testing features available within Mailchimp. You can preview and test your email in the design section of the campaign builder to give you an idea of how your campaign will look in your subscribers' inboxes.



As you can see from the preview and test dropdown menu on the screenshot, you can preview the email and send a test email.

Push the email to mobile, open the link checker and customize social cards as well if you wish. Mailchimp automatically includes both an HTML version and a plain text alternative version for each of your subscribers. This ensures your subscribers view your content as expected regardless of the email client or the program they use.

Mailchimp works best with HTML and plain text. For example, Flash and JavaScript aren't supported.

DELIVERABILITY FACTORS

Email deliverability

Let's say you have crafted the perfect email copy and design, and you've tailored it towards the appropriate segmented list, but it doesn't make it into the recipient's email client. This means there was a deliverability issue and the user will never receive this email. Getting your email into your subscriber's inbox is the only way to get recognized, and to get opens and conversions.

Deliverability is often confused with inbox placement. 'Delivered' describes emails that were completely transferred to the intended recipient's mailbox provider. This does not mean that the email actually got into the recipient's primary inbox. For example, it could have been delivered to a promotions or junk folder. 'Inbox placement' refers to where the email ended up once it was accepted. The 'deliverability rate' refers to the percentage of your emails sent that are actually delivered to your subscribers. But it also includes those that were delivered into spam or into the bulk folder.

Email folders

If an email makes it through all the servers and past the ISP filters, doesn't bounce, and finally reaches the subscriber's email account, it is considered delivered. But remember, 'delivered' does not specify where it exactly was delivered to in the subscriber's inbox.

When an email is delivered, it can end up in any of the following of folders:

- Primary
- Social
- Promotions
- Junk

➤ Spam

Factors affecting deliverability

The following factors can affect your email actually being delivered:

- Custom authentication
- Single opt-in
- Domain
- Subject lines
- Images
- URL shorteners

Sending an email without custom authentication

By putting in place verified Sender Policy Framework, or SPF, and Domain Keys Identified Mail (DKIM) settings, receiving mailboxes have verifiable information to cross-reference with your email campaigns and determine if your email is a real or fraudulent email.

Gmail cites authentication as one of their top recommendations for getting your email delivered. So how can you actually accomplish this? Internet service providers use DKIM and SPF authentication to scan emails for fake senders. If the email fails to authenticate, it could arrive in the user's spam or junk folder.

For example, when an email is sent from @digitalmarketinginsitute.com, the receiving email server will ask to see the SPF record of the allowed IP address and then scan for the DMI domain. If the IP the email came from is different to the IP in the SPF record, the email will be blocked.

DKIM is an additional way to sign your emails that allows the recipient server to check if the sender is really you or not. This is to prevent malicious senders from using other company domains and their names to send emails. You can ask your IT team and ESP to help you set up this authentication.

Using single opt-in

Using a single opt-in rather than a double opt-in can affect deliverability, which is a huge factor to consider when choosing which to use. Single opt-in is when an email address is added to your mailing list without requiring the owner of the email address to confirm that they willingly opted in. Double opt-in involves asking a user to confirm that they did in fact sign up to your email list. They need to actively engage with it and say, "Yes, I do want to receive emails from you." In the example here, the recipient is in the process of signing up for Spotify. This is the confirmation email that they received asking them to confirm their email address before their account is activated.

Benefits of double opt-in

Double opt-in is very valuable in many ways.

- It **protects against incorrect sign-ups**, giving the user a chance to opt-out by not confirming.
- It **reduces spambots** because spambots cannot verify thousands of email addresses individually.

- It **builds your sending reputation** by ensuring your recipients are only users who are likely to engage with your content.

Sending emails from a free domain email address

Using a free domain email address like Yahoo! or Gmail, or a 'from' address that is from a domain other than your own, should be avoided.

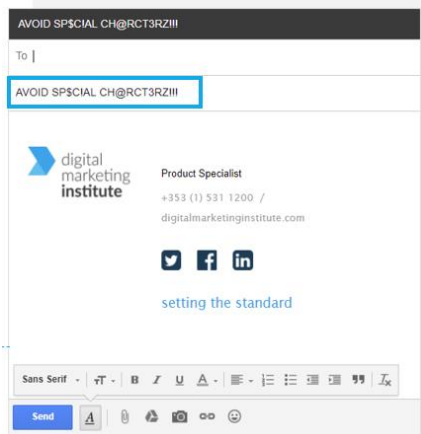
There are many benefits of using authenticated domains and sub-domains.

- **Prevents ISP filters from blocking your emails:** Be sure to use address domains or authenticated sub-domains that your recipients expect to hear from. This will help prevent ISP filters from blocking your emails.
- **Is instantly recognizable to your recipients:** It will make you instantly recognizable to your recipients and, of course, help build the sending reputation from your domain.
- **Builds your sending reputation:** If you use different domain names for every email campaign, then the mail servers won't recognize you and you risk your email being blocked.

Using unclear or spam-flagging subject lines

Another factor that can cause deliverability issues is having unclear or spam-flagging subject lines. If your subject line makes your email look like spam, then your recipients and the spam filter will probably recognize them as spam. The following practices should be avoided when writing subject lines as they can cause your emails to be flagged as spam:

- **Avoid all caps.** Use it sparingly.
- **Avoid excessive and unnecessary use of punctuation,** like lots of exclamation marks.
- **Use special characters sparingly,** and only when relevant. This also applies to use of emojis.



The subject line in the image here is an example of a spam-flagging subject line. It has all three issues and there is a very strong chance that an ISP will think it is spam and never deliver it to the recipient.

Sending emails with too many images

Sending emails with too many images can affect the deliverability of an email.

A historic spam technique was to send emails that contained just one image, or many images and very little text, in HTML emails. This was done to bypass spam filters that were based primarily on recognizing spam keywords, since the images could not be scanned as text.



While the email in this example is a legitimate one from worldwide clothing brand Gap, a spam filter could not actually read the text because it is within an image. So therefore, if your email is purely image-based or almost completely image-based, there's no way for your ISP to know this is a legitimate email and there is a high risk that your email will be recognized as spam.

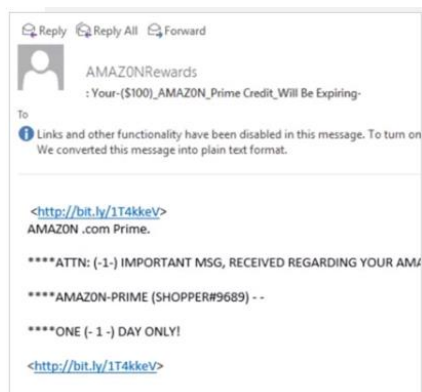
This is why you need to have a ratio of image-to-text. In general, we recommend 3:2 or, a minimum of 60% text and a maximum of 40% image in your emails.

Using URL shorteners

The last factor that can affect email deliverability is the use of a URL shortener. A URL shortener is a service that takes a long URL, which may look messy, and converts it into a much shorter link. A very well-known service for this is Bitly. You can see an example here of a Bitly link where a long URL has been converted into a short, randomized character selection.

Unfortunately, and notoriously, spammers have used URL shorteners to hide the true nature of the URL that they are trying to entice you to click on. This means that ISPs have started identifying URLs that are shortened as potential spam techniques.

As a result, it is better to avoid using URL shorteners, especially free public ones. Instead of inserting the full URL link as text, create a hyperlink with the appropriate text and make sure your links all go to legitimate domains.



The example here shows a malicious email pretending to be Amazon. They have obscured the name, cleverly using a zero instead of an 'o' in the firm name. This is to hide where the links really go, and to avoid the email being picked up by spam filters. So be very aware that techniques you may be applying, thinking they are clever workarounds, may in fact trigger a deliverability issue.

CAMPAIGN DELIVERY CHALLENGES

Main challenges

Let's look at some of the challenges that can affect your inbox placement. Once your email makes it through the servers and past the ISP filters, it will be delivered – but where is it actually going to be delivered to? Is it the primary inbox, the spam folder, or the promotions folder?

The main challenges when delivering marketing emails to your audience include:

- Bounces
- Spam complaints
- Spam traps
- Sending volumes
- Engagement

Bounces

There are two types of bounces: the soft bounce and the hard bounce.

- **Soft bounce:** The soft bounce is something that you can work on to prevent it happening again. It is a temporary failure. Reasons for a soft bounce include: the recipient's mailbox was simply full; the receiving server was down; or the message was too large. You can action these items by sending the email again when the mailbox may have some space; waiting for some time to pass until the server is likely up and running again; and finally, reducing the size of your message.
- **Hard bounce:** A hard bounce is more difficult. It is a permanent delivery failure. It occurs when the message has been permanently rejected either because there was a typo in the email address, or the email address is no longer valid. Retries will not be successful with a hard bounce.

Spam complaints

A spam complaint is when the email recipient clicks the 'Spam' or 'Junk' button on your email in their email client. Most ESPs have the 'Spam' button and it only appears when the email is in the inbox.

A user might report the email as spam because:

- They're confused about who you are.
- They're unsure about why you're emailing them.
- They can't find the unsubscribe link.

If it's easier for them to mark your email as spam rather than unsubscribe, this could cause more damage to your reputation. So, make sure that your unsubscribe link is easy to find.

Spam traps

Spam traps are real email addresses that don't bounce and are monitored by ISPs and blacklists.

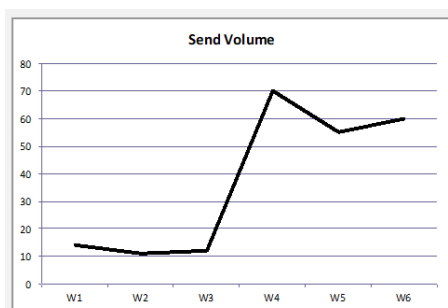
Often, ISPs will take over abandoned email addresses and turn them into spam traps.

There are three different types of spam traps:

- **Typo:** The typo is an email address with the ISP domain misspelled – for example, Homtail instead of Hotmail.
- **Recycled:** A recycled spam trap is an email address that existed, was then abandoned, and later reactivated by the ISP.
- **Pristine:** This is the email address that never opted-in to any email communication. Spam trap addresses can't opt in to receive email. The only way a spam trap address can end up on your list is if you're not maintaining healthy lists or if you're not abiding by the rules of permission-based email marketing.

Sending volumes

A further challenge you'll need to take into consideration is sending volume. ISPs want to see an established sending history and sending pattern in order to help determine inbox placement. Spikes in email volumes will often trigger email filters due to inconsistency with an existing pattern.



Let's say you send a regular weekly newsletter to about 10,000 recipients. Suddenly, you begin emailing more than 70,000 people per week. This could trigger an ISP's spam filter because it doesn't align with your sending history. You must keep a regular sending pattern that doesn't have large fluctuations with volume.

Engagement

The final challenge in getting your email into a recipient's inbox is engagement. Some ISPs look at recipient engagement to determine inbox versus junk folder delivery.

Types of recipient engagement include opens, clicks, saves, replies, forwards, moves, and so on. The more engaged a recipient is, the greater the chance of the email landing in their inbox. An email with a 35% unique open rate and a 10% unique click-through rate is a strong performing email. This lets ISPs know that users are engaging with the email and it is more likely to be a legitimate email rather than spam.

CAMPAIGN DELIVERY MANAGEMENT

Before the send: Testing

In this section, we will look at what you can do before you send your email, and after the email has been sent, in order to improve your email deliverability.

So first, let's look at what you want to check before sending your email. There are multiple places where you can test and optimize for deliverability, including:

- Subject line
- From name
- Time of day
- Day of the week

If more recipients are going to open your email at certain times of the day, why not send it at that time to increase those opens and clicks? Again, increasing those opens and clicks loops back into better deliverability stats for ISPs to monitor. Let's talk a little bit about a software called Litmus.

Litmus includes a from name and subject line checker, which can help to optimize your email before sent. It lets you know if the subject line is simply too long or too short, in terms of character length, includes spam characters or is too vague. The from name checker checks both the domain the email was sent from and what the reply to address is.

It is strongly suggested that you use a real email address instead of a no-reply address. Using tools like Litmus really helps you to spot things that a marketer in a hurry might otherwise miss. It is well worth your time to make sure that if you don't have a human being able to spot all of these issues, that you simply automate it with the tool.

Before the send: Reviewing

Another check to perform before sending your email is to review previous campaign performance. This will help you to highlight any issues you've had previously, to ensure that you've at least implemented some of the fixes before sending the next one. I would advise beginning with any issues relating to the top of the email funnel, the deliverability level, before then applying fixes to subject and copy and so on and so forth.

Always review previous campaign reporting in your ESP, to identify any possible deliverability problems first. Reports should be reviewed 24 hours after they send. Measure your opens and clicks

and bounces and so on. If your ESP provides bounce details on each bounce, review those to identify any trends and take the corrective action.

Before the send: Checking for blacklists

The very last thing to check before send is checking for blacklists. Again, this is another quick tool that you can use in order to check that this is happening. Multiple sites exist that can check and monitor an IP and domain blacklists. So simply go to mailtester.com and get your email sent so that you can check if you're on a blacklist, if your domain is not authenticated, if the email contains any general errors, and if there are any broken links.

All crucial parts to a successful email campaign.

After the send: Engagement metrics

After the email has been sent, roughly 24 hours later, check the engagement of the email for the good metrics, such as the opens, the clicks, the conversions, the trends. Your ESP should also be providing you with all of the metrics that will then help you improve for the next, such as the opt-outs, the unsubscribes, the bounces, and the spam.

If you notice, for example, that one of your emails has nearly a zero click rate or a high bounce rate, this will indicate to you that something is wrong. You should definitely investigate before continuing with your campaigns, as the same issue will just continue to crop up.

After the send: Understand, manage, and remove

The last thing to review and manage after the email send, is bounce management. In most email campaigns, there will always be at least a few hard bounces. It is important to note these are permanent failures and email will never be sent to them again, so it's best to just remove them from your email list in the first place.

You should:

- Monitor your email delivery.
- Manage good list hygiene.
- Use double opt-in.

And by maintaining this healthy email list, it means you will always have a better chance of getting your emails delivered to those who need it or those who want it.

NOTES

LESSON 5: TESTING AND OPTIMIZING AN EMAIL CAMPAIGN

EMAIL TESTING

The importance of testing

It is vital to test your emails before launch to resolve any potential issues. The types of testing that you can carry out include seed testing, rendering testing, and load testing. These are all vital steps to ensure a really good email campaign. Ensuring your email renders correctly in all email clients and devices, and loads quickly for users across all browsers, will help drive those opens, clicks, and conversions.

Types of email testing

Utilizing various email testing techniques will help to optimize your email marketing campaigns. Testing subject lines, 'from'-names, content, images, sending times, and other variable factors, will help you better understand the behavior of your email audience, and what does and does not work for them.

- **Seed testing:** Compile a list composed of co-workers, friends, or family that will help you to test out your email before you launch it. Include at least five contacts and try to find people that use different email clients and mobile devices, so that you can try it on a variety of different ones to see the results.
- **Rendering testing:** Tools such as Litmus allow you to send your email to a test address, and preview it in various email clients and devices, so that you can observe where you may need to make changes. This is great for showing any rendering issues that only happen in certain clients.
- **Load testing:** This involves testing the load times of the images and text as they become visible. When a user opens your email, all the images in the email will be downloaded. If your email contains multiple images, or the images are very large, then the email may be slow to load for the user, particularly on mobile devices or if a person has slow internet.

Email testing tools

Litmus is one of the most common email testing tools available. It allows you to send your email to a test email address, and from there it will show your email in more than 70 apps and devices. It will validate the links, images, and tracking, and test the load time. You can also build an email within the editor, and access the analytics. This ensures that your email is of a good standard.

Email on Acid allows you to test your email to ensure deliverability and preview across mobile devices. It has an editor where you can build, edit, preview, optimize, and review your emails, and an analytics feature you can use to examine email engagement and track email campaigns.

Return Path is another tool which focuses on inbox placement, certification, reputation monitoring, and email validation.

And finally, **2500k** is a platform which provides senders with real-time insights on issues such as deliverability, reputation, user-level inbox engagement, domain-based message authentication, reporting, and conformance. It can also be integrated with other testing programs.

There are many tools out there and it is worthwhile spending some time researching them based on the needs that you have.

Components to test

When you test your emails, it is important to think about the metrics that you are trying to improve upon, and to look at the various components of your emails.

Testing metrics to pay attention to before launch:

- Subject line
- From-name
- Pre-header
- Footer
- Calls to action
- Social media icons and links
- Unsubscribe link and address
- HTML vs text email
- Personalization

You'll need to identify the metric that most impacts the goal that you are trying to achieve. For example, if the open rate is the key factor for you, then you would need to test the subject line, the 'from' name, and the preview or the pre-header.

An ideal way to do this would be to carry out an A/B test, which is a variation of the primary element versus an alternative. You cannot test more than one element at a time, because you would not be able to determine which one of them improved on the metric.

The 'from' name can be important to test in terms of recipients reacting differently to an authoritative name versus the standard, for example. If the click rate is the metric that you need to focus on, then it would be beneficial to A/B test the call-to-action, the social media icons and links, and even the unsubscribe link and address at the bottom of your email. Look at the email from your subscriber's point of view and think about the alternatives you could present to encourage them to take the next step.

Other items that you can test are HTML versus plain text. Sometimes a plain version will outperform an image-rich, color, and designed email. Always use data to prove that you're creating emails that people will want to receive rather than making assumptions about what the recipient would like to see.

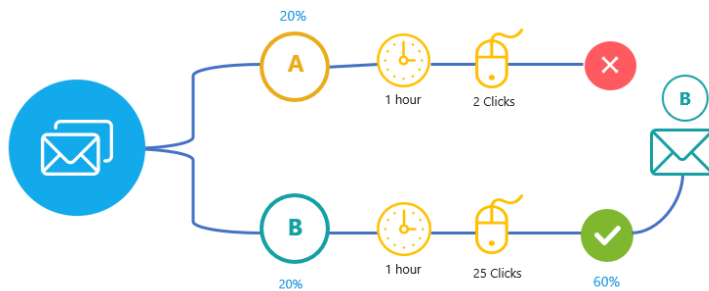
And finally, personalization. Personalization presents many testing opportunities. Does using the person's first name, surname, company name, or location make a difference? How should that inform your best practices going forward? Again, get to know your audience and start to really focus on testing the metrics that will most impact the goal that you are trying to achieve.

A/B TESTING

What is A/B testing?

A/B testing, also known as split testing, it's a method of comparing two versions of an email against each other to determine which one performs better. A/B testing is an experiment where two or more variants of an email are shown to users at random. An analysis is then used to determine which variation performed better for a given goal, such as opens or clicks.

So, you can have multiple variations, but you test the same element. If you have five versions of an email, everything remains the same except the one element that you are trying to improve upon.



Take a look at this graphic here to get an idea of how it works. There are two variations, and the metric being focused on is the click.

So, again, A/B testing can be used to test almost any element of an email, but only perform one test at a time to get accurate results. In this scenario, we are testing two emails which are the exact same, but have two different calls to actions to see which one gets more clicks. We send 20% of our overall audience to each email, wait one hour to view the results, and then whichever one has gotten the more clicks, the rest of the subscriber list will receive it.

The test group that got the underperforming email is an unfortunate side effect of your A/B test. However, in your next send with the improved version, you'll know that it will go to everyone, and perform better. This is also why it's extremely important to have a continuously growing database. Without a healthy size database, you will never have a large enough list to actually be able to do your testing.

Best practices

A/B testing best practices are very important to know:

- Only test one variable at a time.
- Split your groups equally and randomly.
- Test early and test often for the best results.
- Test as large a sample as you can for more accurate results.
- Trust the data collected, not your gut instinct.

If you're wondering about sample size, I would advise you to go to the blog of conversional to understand in more depth what sample audience size can and should look like, where it's too small, and all those other questions you may have.

Advantages

A/B testing is one of the most common testing methods in email marketing, as it is, at the end of the day, quite quick and easy to implement, and there's so many advantages.

- You **better understand each of your segments**. You can begin to see why this group is different from that group, and why they should be treated as such.
- You **determine the best subject lines** so you get to know the language that works for them. This will impact all of your marketing, not just your email.

- You have **improved content**. You will start to filter out the fluff that does not matter to your subscribers, and focus on what really delivers value to them.
- It **increases conversion rates** because you're sending the right thing, genuinely, at the right time.
- This all results in **more sales**. Who can say no to that?

CAMPAIGN PERFORMANCE

Calculations

Here, we've got some campaign performance calculations for you to observe.

Click-through rate	
What is it?	Percentage of recipients who clicked on one or more links
How to calculate	$(\text{Total OR unique clicks/delivered emails}) \times 100$
Example	$(500 \text{ clicks}/10,000 \text{ delivered}) \times 100 = 5\% \text{ CTR}$

Conversion rate	
What is it?	Percentage of recipients who clicked a link and completed desired action (purchase)
How to calculate	$(\text{Number who completed desired action/delivered emails}) \times 100$
Example	$(400 \text{ completed action}/10,000 \text{ delivered}) \times 100 = 4\% \text{ CTR}$

This is something you can use yourself as a template to calculate your clickthrough rate and conversion rate so that you can be better informed for your next email campaign. Here, we break down what a click-through rate actually is, how to calculate it, and a simple example, and the same with a conversion rate.

With conversion rates, just be careful to know what a conversion means to you, as conversion rate often can mean different things to different marketers.

Bounce Rate	
What is it?	Percentage of emails sent that couldn't be delivered
How to calculate	$(\text{Bounced email/emails sent}) \times 100$
Example	$(75 \text{ bounced emails}/10,000 \text{ sent}) \times 100 = 0.75\% \text{ bounce rate}$

Share/Forwarding Rate	
What is it?	Percentage of recipients who clicked 'Share this' button to post to social media
How to calculate	$(\text{clicks on share button/delivered emails}) \times 100$
Example	$(100 \text{ clicks on button}/10,000 \text{ delivered}) \times 100 = 1\% \text{ share rate}$

Here are two more metrics which you should pay attention to and calculate after each email campaign. Again, we have a simple breakdown of the bounce rate and the share and forwarding rate.

You can use this template to help understand your email marketing better yourself, and, again, identify drop off points where you can then implement best practices going forward. And here are two final metrics you should keep an eye on for your email marketing campaigns.

List Growth	
What is it?	The growth of your subscriber list
How to calculate	Add the number of new subscribers per week/month
Example	10 new subscribers a day = 70 per week

Overall ROI	
What is it?	Overall return on investment for the email campaign
How to calculate	$(\$ \text{ in additional sales made minus } \$ \text{ invested in campaign} / \$ \text{ invested in campaign}) * 100$
Example	$(\$1,000 \text{ in additional sales} - \$100 \text{ invested in the campaign} / \$100 \text{ invested in the campaign}) * 100 = \text{a } 900\% \text{ return on investment for the campaign}$

List growth and overall return on investment. I mentioned previously that your list growth is quite critical to your testing abilities, and also, you will have database decay which is basically people who drop off from your database list.

You must constantly be refreshing the ones that have disappeared, plus growing it in order to grow your business and impact your bottom line. That's why it's important to, again, use this template to calculate your list growth and also, to link your email marketing activities to your overall return on investment.

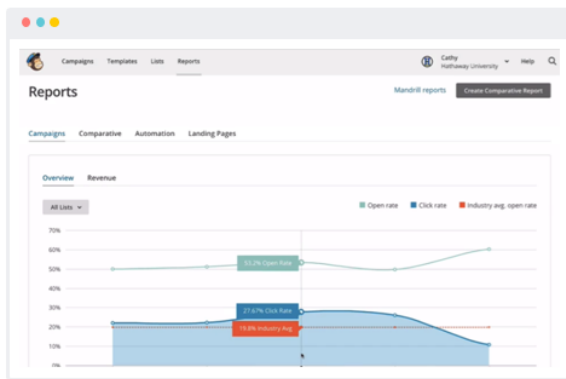
Non-email engagements

The metrics we just covered all relate directly to email, but they're not the only metrics you should be monitoring. We also monitor non-email engagements such as web logins, ad traffic, and store purchases. This is because all of this is linked together in the cross-channel marketing universe.

The recipient may not have clicked on your email, but that does not mean that they're not engaging with your brand elsewhere. Email, like all other marketing activities, should not be viewed in a tunnel. It is part of a larger universe of your marketing activities. They can definitely contribute to one another, even if that is not the area that you, at this moment, are focusing on.

Analyzing a campaign result in Mailchimp

As we saw the section on campaign delivery, the last step in an email campaign is analyzing your results after you've sent out the campaign and collected the data. The Mailchimp reporting feature contains campaign data on clicks, opens, and total revenue from the campaign, should you have a B2C business.



So here, we can see recipients, delivered, open rate, click rate, and a per industry open and click rate, which is very useful to understand.

OPTIMIZING

Optimizing open rates

Optimizing is the process of continually improving certain elements of your email campaigns that you have determined will have an impact on your critical matrix. The more people that open your email, the more people will click through and make a purchase.

You can improve your open rate by using:

- A **well-targeted subscriber list**, targeting subscribers you know will definitely be interested in the content of your emails
- A **familiar sender name**, using your company's name or a name the recipient is likely to recognize
- **Effective subject lines** with personalization, targeted to an individual.

Optimizing click rates

Click rate is important because the more people that click on your email, the more opportunity there is for a purchase to be made. This example shows an email from Aer Lingus, an international airline.

Let's break it down into components that you can optimize.

- Simple, explicit **calls to action**
- **Multiple links** for the same action so that if the reader makes the decision at a later stage, they still have the option to take the action easily available to them
- Offering **deals** for a limited time, creating that sense of urgency for the reader to take action
- Testing in different **colors** to determine the most appealing colors

Optimizing email for mobiles

Mobile devices are used by both consumers and professionals and should form a fundamental part of your email marketing.

- People now spend an average of 69% of their media time on smartphones.
- 50% of smartphone users check their smartphone as soon as they wake up.

- It is important to recognize that a high percentage, 81% of people, use their phones primarily for email.




If you don't lead with a 'mobile first' email strategy, the audience you are trying to reach will be less engaged with your messages.

The following considerations should be taken into account when optimizing email for mobile:

- You need to **keep the flow of mobile** all the way down to the landing page.
- You need to focus on **making images lightweight** for mobile devices.
- You have **a lot to convey and a smaller space** to convey it in. Make sure to have someone on your team to code specifically for phone, tablet, and desktop
- You need to use **reports** to specifically identify behavior on mobile devices.

Send time and recipient information

Nowadays, recipients check their emails regularly throughout the day.

 Jane 32 years old Works 9am-5pm Monday to Friday Takes the train to work Is not subscribed	 John 21 years old Musician Works evenings and weekends Likes travel Is subscribed	 James 40 years old Doctor Works shifts Is a product evangelist
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Here are examples of three different email recipients: Jane, John, and James. They are three very distinct individuals who may be having the exact same email experience – which doesn't make sense for all of them.

Jane works Monday to Friday, nine to five, and gets a train to work. You might think sending her an email while she's on her commute to work is the ideal time. Well, it would be if she was subscribed to the mailing list, but unfortunately she is not. As mentioned previously, there are laws in place to prevent unwanted email, so we can't send her any marketing emails. If she was subscribed, 7am to 9am would be a prime time to email Jane.

John works evenings and weekends. Therefore, sending an email later in the day, and at weekends, is optimal. Also, travel-related marketing material would resonate well, based on his profile.

And finally, there's **James**, who's a product evangelist, will respond well to product recommendations, coupons, and 'refer a friend' emails. He works shifts so it would be more difficult to identify an optimal time to email him, but you can test to determine this.

As you can see, people can have very different optimal times when you would get the best engagement from them in an email marketing campaign

MINIMIZING BOUNCES AND UNSUBSCRIBES

Relevant content

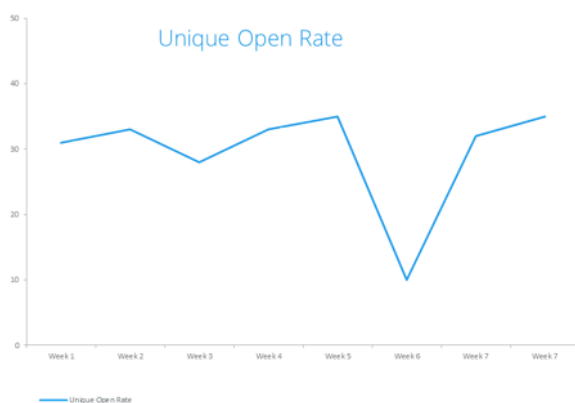
In this section, we're going to talk about minimizing bounces and unsubscribes through relevant content. We've spoken about this briefly before, but it's worth reiterating again.

- **The content of your email:** Is it aligned to the persona you have in mind? The previous examples talked about the right time of day to send to your **various** different people. Now, we're talking about, what about what is within what you're sending them? Is the content aligned with their needs, and is it aligned with what they signed up for?
- **Subject line and content:** Your subject line should very closely mirror the content in the email. You can see from this example a marketing blog round up then follows on immediately with, here are the blog posts. He's what you signed up for, here it is. No confusion, no mistrust.
- **Subscriber expectations:** Does your email cadence and frequency match out with recipient expect and signed up for. Again, if they signed up to receive a weekly email, and you don't send it to them weekly, this develops mistrust and also reduces the effectiveness of your brand. Give them exactly what they've asked for, and if you need to change that in the future, communicate that with them.

Monitoring for bounces and unsubscribes

Next, we'll talk about monitoring for bounces and unsubscribes. After every email campaign, it's important to monitor the metrics and how the email actually performed, your clicks, your opens, your complaints, and your conversions.

The good metrics and the bad metrics as we've spoken of before. Compare the result to previous campaigns as this may show if there was a problem. Review campaign open and click dips and understand what actually impacts the campaign conversion. It's also helpful instead of looking at one single email send compared to the next email send, to look at it over a time period.

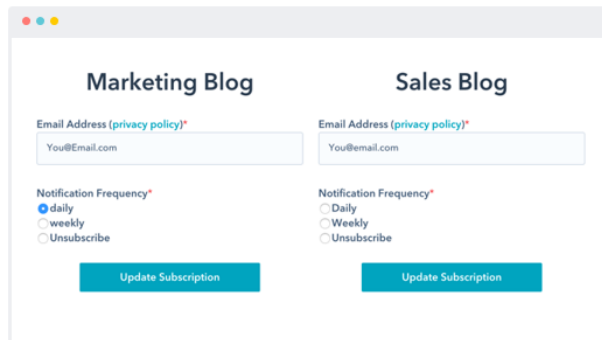


What happened in this three months of blog emails compared to this three months of blog emails? You may identify the larger trends that are really affecting conversions. So, as well as that, if the content of your email wasn't relevant, it may have caused users to unsubscribe. Make sure this is the fact.

Go in, read that email, compare the subject line to preview text to the content. Did you, either accidentally or deliberately mislead? And then finally, monitor for deliverability issues, including bounces.

Preference center

A preference center is a more advanced unsubscribe page. When a user clicks unsubscribe, instead of instantly removing them from all of your email lists, you can provide a way for them to change the types of emails they receive and how often.



The image shows a web form for managing email preferences, divided into two columns: "Marketing Blog" and "Sales Blog". Each column contains an "Email Address (privacy policy)*" field with the placeholder "You@email.com". Below the email field is a "Notification Frequency*" section with three radio button options: "daily" (selected), "weekly", and "Unsubscribe". At the bottom of each column is a teal "Update Subscription" button.

Here's an example from HubSpot. When you click unsubscribe, you are brought to this page where you select or deselect the type of emails you want to receive and also the frequency at which you would like to receive them. It does require a little more effort to maintain, but it is great to have more nuanced options for people not to have just an all or nothing opt-in from you.

NOTES

LESSON 6: MARKETING AUTOMATION OVERVIEW

MARKETING AUTOMATION

What is it?

Marketing automation refers to a set of software tools that automate marketing actions related to email, social media, landing pages, and other web activities. This technology makes it easier to perform daily tasks and automate a lot of the repetitive tasks that marketers perform, as well as allowing for more fully integrated analytics.

Benefits

Marketing automation helps execute your marketing tasks in a more streamlined and efficient way.

Marketing automation provides many benefits, including:

- Saving time
- Improving marketing results
- Having a positive impact on marketing teams as a whole
- Data synchronization
- Improving the personalized experience

Marketing automation helps you to execute your marketing tasks in a more streamlined and efficient way.

Key players

The top five established players in the marketing automation space are:

- HubSpot
- Marketo
- Salesforce's Pardot
- Eloqua
- Act-On

There are many marketing automation tools available and it is up to you to decide which one best suits your needs and your budget, taking many factors into consideration. The ROI of this kind of software takes at least six months to one year to prove. This is a long-term commitment, and you may need to get buy-in from more than just the marketing team in your company to get going.

Take a look at customer reviews, and find similar companies to you own who you can reach out to; ask why they would or would not recommend certain software.

MARKETING AUTOMATION PROCESS

Key building blocks

Action, decision, and timing are key building blocks in any marketing automation process. So think about it in terms of what your contact actually did, where that action led them, and then what happened to them as a result.

- **Action:** What did your contact do? This is any action the user performed, such as clicked an email, downloaded an e-book, or registered for an event.
- **Decision:** Where do they go? After they performed the action, something should happen. For example, after they register for an event they should be redirected to a 'Thank You' page, and also sent a thank you email.
- **Timing:** When should the response function happen? Timing is a key component. For example, if the user is registered for an upcoming event, email them to remind them a few days beforehand; or if they downloaded an e-book, a sales rep should reach out to them in one to two days.

Action

What was the trigger that caused the contact to act? Was it a form submission? Was it a page visit, a reply to an email, or a link click? In this example, the user is completing a registration form for an event, and the trigger happens when the user fills out the form and clicks the call-to-action, which is a 'submit' button.

Decision

The next step is the decision. What should happen after the action is performed? Where should the contact go?

Conditions

You can set up a workflow with the conditions 'if, else'. So if the user submits the form by clicking the 'submit' button, this happens. If they go to the form but they don't click 'submit', this happens.

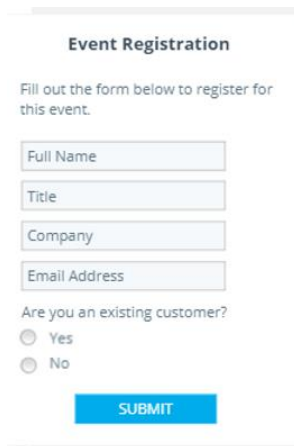
Tags and footprints

Tags can be used as part of lead scoring and help you identify highly engaged users. For example, if a user downloads an e-book, they can then be tagged in your contact database as interested in the topic of that e-book.

Sequence

And then a stop and start sequence. If a user unsubscribes, the result is to stop all future emails going to them – a very critical marketing automation process.

In this example, the user has submitted the form, so the decision is to first redirect the user to a 'Thank You' page after submitting, and then send them a thank you email and a reminder email about the event. If the person does not click submit on the form in this instance, nothing happens.



Event Registration

Fill out the form below to register for this event.

Full Name

Title

Company

Email Address

Are you an existing customer?

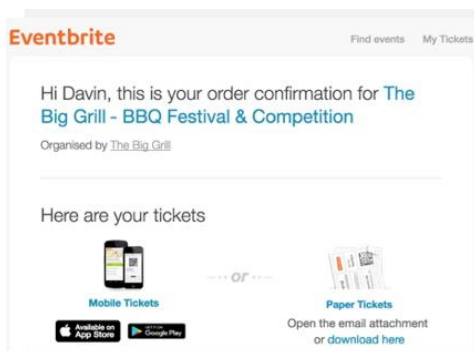
☐ Yes

☐ No

SUBMIT

Timing

After the user has performed the action and made the decision, what should occur next? When should the response happen, and should there be a waiting time?



In this example, we have a time-sensitive issue. There is a big grill, a barbecue, happening at 5pm on a Thursday. This gives you plenty of information to trigger actions based on the event details. You can send the person a reminder email the day before, or the hour before, or any time that is appropriate to remind people to attend the event.

This will be based on your knowledge of what works best for the contacts in your segmented lists. After the event – which you know is after Thursday at 5pm – say, the following day, or whenever you deem it appropriate, you can send a thank you email saying you hope they enjoyed the event.

Process

Marketing automation process consists of the following steps:

- **Web form submission:** The action that triggers the automation flow
- **Information tagging:** Assigning a tag to the user helps identify them and it can be used in segmentation
- **Delay or wait period:** A period of time the user waits before proceeding to the next step
- **Send email:** Send the specified email to all users who enter this step

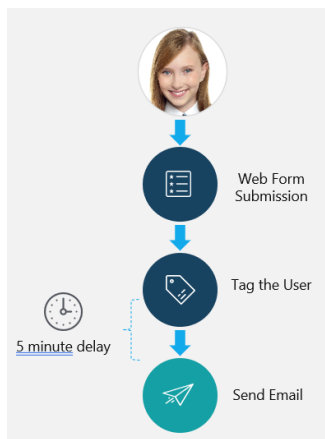
The reason for the delay or wait period is that in many marketing automation systems, which are often linked to sales automation systems such as Salesforce, it takes some time for all of the pieces of data to be tagged to the profile of a contact in your database.

For example, if you were to send the email before the tag of let's say 'France' was attached, you would not have the opportunity to send a French version of your email. It may be that the default in another language such as English would go out, therefore reducing the quality of experience this person expects.

So a delay is something important to consider in your marketing automation processes. Get to know your automation tools well, and how long information takes to synchronize from one to the other.

Example

Here is an example of a marketing automation process.



1. A new user visits your website.
2. They fill out a form to find out more about your products.
3. You tag the user as a subscriber, and with the topic they have specified they are interested in.
4. A five-minute delay is added to tempt users with special offers and promotions before they leave the website.
5. After the wait period expires, you send the user an email with more information about your products.

Without automation, each step here would have to be done manually, drastically increasing the effort and time for setting up a simple campaign.

NOTES

