



Digital
Marketing
Institute

EMAIL MARKETING STRATEGY

Study Notes

Email Marketing Strategy

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LESSON 1: DEVELOPING AN EMAIL STRATEGY

EMAIL MARKETING OVERVIEW

Definition

This is the definition for email marketing:

Email marketing is a structured, systematic process to deliver marketing messages to targeted subscribers.

You may want to print this out and put it up on a wall somewhere in your office, because it will guide the work that you're doing on a regular basis.

Data management in email marketing

Data management is very important, because we don't want to just send emails for the sake of sending emails. We want to actually collect information on our readers and use that to continue to hone and evolve our structures, and strategy, and our content. And so we've got to look at three different points.

- **Data collection:** What is it that you're gathering from your various readers, such as open rates and various sort of individual metrics that you can analyze?
- **Data segmentation:** This looks at various points along the way that may matter to you. And, again, what matters to you must connect back to your strategy. And so you're going to think about the specifics of which data points you're wanting to collect and how that's going to drive your email marketing.
- **Data management:** Who actually can see this data that's being collected? Who can access it? Who can utilize it? Who can share it? As we get more and more digital, our data management becomes more and more important.

User experience

The user experience is central, and it's almost a mantra that you should repeat on a regular basis when it comes to your email marketing. In email strategy, it must consider the user experience of individual users and the reasons why they are using the email platform.

Everybody is different but think about your user first and foremost, because that's really who matters in this context. Not you, the emailer, but the person who is receiving your message. Think about various audiences. Users email to run a business, or they maybe use email to keep in touch with their friends. People use email to email members of a club. There's a lot of different ways in which email marketing is utilized based solely on audience.

And this goes for any digital marketing endeavor. Focus on your audience first. Those are the most important people in this channel.

Growth strategy

The growth strategy in email list is incredibly important because, if you don't have people there on your list, you're not going to have readers and it's not going to be as successful as you would want.

- **Engage with your readers:** Enough people come back to you with a response or reply, so give back to them. One of the most important things of any campaign or any digital communication engagement is to respond and engage with your readers and create captivating content that engages them.
- **Inform people:** Tell people things that they don't know. If you inform people of sort of content and information that they can't get elsewhere, your email list is going to become more and more important to them. You've got to provide value to them, something that they can't get anywhere else.
- **Incentivize readers:** Once again, it kind of goes into the inform and engage aspect and combines the two, but incentivize them. Once again, what motivates them? What are the things that will get them to click on your message and read through it and engage with your content? Either click through and engage in some sort of activity like buying something that you're advertising, or promoting, maybe subscribing to another list or joining an event that you're putting on or just being a regular reader and maybe someone who then disseminates and, you know, cross-pollinates and shares your content.
- **Cross-sell:** This leads into the idea of cross-selling. Everything is connected digitally and so your audience, the people who read your emails they become your sellers. They become the people who help cross-pollinate your content. Make sure that your email lists are easily shareable. Make sure the content is segmented in such a way that your email lists are easy to cross-sell.

Example

One of my favorite examples of an e-newsletter is called NextDraft (2020). It's by a man in San Francisco whose name is Dave Pell. And it's a wonderfully written 10-point, almost news list of the day. And he has segmented out his emails, so that each sort of bit of content is easily shareable, easily linked to, in such a way that if, for example I read something in his email, I can then tweet it out, or share it on Facebook, or post it on LinkedIn, or put it somewhere else, or just email it to a friend. That ability to cross-sell his literally engaging, informative content, incentivizes me to do something with it. Look at the structure, look at the way he puts it out there, look at the way he has created something like a WordPress blog that kind of goes along with his email strategy which works really well for him.

Email branding

Let's now look at aligning email with strategy. Branding your email and making your email connect with your brand is one of the things that must be at the core of what you're doing. Because, again, if you have your brand over here and your email is over here, it's not going to connect. And as a reader I want to make sure that I'm acknowledging or familiar with the brand that you're putting out there.

And so you want to have the sort of sense of your email design that it connects with your branding strategy. And then ensure that you're communicating a consistent brand message, and experience across all your communication channels. And that will go really well for you as a company. You'll see that the best emails in terms of email marketing are the ones that connect brand with strategy, and then deliver that as an output via their emails.

OUTBOUND EMAIL MARKETING

Popular methods

A variety of companies can assist in this. If you Google outbound email marketing, there's going to be a lot of results.

Buying email lists

First thing when it comes to outbound email marketing to think about is the idea of buying email lists because it can give you a sort of quick return in a very short amount of time. This is because it can take years and years and years to actually create a really solid amazing email list. Alternatively, though, you can buy email lists, which will be targeted and curated and will provide you with emails that are active and being used as opposed to emails that have maybe been long forgotten.

Employing a freelancer

Number two, of course, is this idea of employing a freelancer to collect and help you bring in these email addresses and find relevant email addresses. Again, that idea of relevancy is very important.

Using freelancing platforms

There are platforms that will help you build your lists. You can get that jump-start on your outbound email marketing from Upwork or Freelancer, or Guru, just to name a few.

Disadvantages for purchased lists

We've got four items to think about.

Irrelevant audiences

If your content is specific to a particular geographical area or to a particular industry or sector or an age range, maybe a demographic, a cohort, for example, you want to make sure your content gets to the right person. That's extremely important to you. Your content must get to the right audience.

And if you've got an email list that has irrelevant audience members, they're not going to read it and it's going to skew your results. It's going to skew your data in terms of your open rates. And you want to make sure that you have people on your list who have a higher likelihood of clicking on your email and reading your content.

Dead email addresses

These may be email addresses of people who may be deceased and/or emails that just haven't been used for a long time. We have a long history of using email. Globally, there have been countless email providers. People have made their own email accounts and their own web servers. And then, perhaps, they change jobs. So they just stop using those messages.

Dead email addresses will give you inaccurate data. And you don't want to have those on your list. Just if you find out an email that you know is not working or no one is using it, just get rid of it. You can call some of your emails on there.

Unsolicited email addresses

These are the people who didn't really want to come to the party. They didn't want to come to your email marketing. Someone maybe added them, a friend thought they'd be interested in your content, or maybe if you're doing B2B, maybe you already added them by default. Maybe you have a database of readers of people, your CRM, your contacts.

However, people want to come to your content of their own accord. And so you want to make sure that unsolicited emails or addresses they don't get added to your list because again, those are people that might not be interested in your content and they might actually do more harm to your company and to your message and to your brand.

Potential violation of law

This can be a gray area for any of us who work within email marketing. It is vital that you learn the privacy laws and the email laws essentially of your region, and of your sector. You want to make sure that the content you're sending out, how you're sending it out, and the list that you're sending it out to are all in line with applicable laws and regulations. And don't just focus on your particular area, because email is global. And so you want to make sure that you're following the laws and privacy regulations as much as you can on a global perspective.

INBOUND EMAIL MARKETING

Attract customers to regularly subscribe

When it comes to inbound email marketing, you want to attract customers to regularly subscribe. How do you get people to keep coming in?

- **Create a free guide:** One thing you can do is create a free guide directly related to your business. It's a sort of an exchange. You say, "We'll give you this information, this PDF document, or some infographic, or some element of content related to the business, related to the sector in exchange for a few details about you." And then a little checkbox to say, "Would you like more information? Would you like to subscribe to our lists?" It's an exchange.
- **Lead capture forms:** Whenever you're creating your leads or your lists, or you're doing lead generation, you want to capture email in there. You want to capture as much detail and information as possible about potential readers.
- **Email subscription forms:** If you are trying to build a relevant list of readers, you essentially would like to put your email subscription form in as many places as possible because you want people to see this. You want people to share it to their friends and say, "Hey, I'm reading this amazing email that is relevant to our sector, relevant to our industry. You too should subscribe." And make it really easy for your readers to essentially, in a grassroots method, share the word about your email and your email list.

Advantages

So what are some advantages to inbound email marketing?

- Inbound email marketing is more effective because the **customer chooses to hear** from a business. That idea of choice is very important.

- This leads to **greater engagement levels**. “I have chosen to come in.” It’s like when you walk into a store. You’ve made that choice as a customer, as a consumer to walk in, to physically engage with this content.
- You can **build a relationship** with highly qualified leads and then form that strong brand community. If people feel like they’re part of an inside group, they’re getting content that no one else can get. I subscribe to a lot of professional people who have really taken the time to build email newsletters in this sense that give me information that I might not be able to just find on my own very easily, and they’ve done such a good job of curating this information for me that their email is something that I look forward to on a weekly basis.
- And then your **user engagement can be benchmarked** against sales revenue to measure effectiveness of email marketing strategy. One of the things that we always must challenge ourselves with when it comes to email marketing is to connect the dots. Connect user engagement to sales as well as sort out how it all leads and connects to our email marketing strategy, because, once again, we’re not just doing email for the sake of doing email. We’re doing it for revenue generation, or content sharing and creation, you know, or maybe it’s connected to an ad campaign, that type of thing. There’s a lot of reasons why we do it but it has to all be connected and then benchmarked and using our data that we collect from as I mentioned earlier something like a MailChimp, which gives you amazing analytics. Remember, it’s not just about sending out emails. It’s about collecting information that you can then utilize to connect back to your purpose and your strategy and your goals.

SUBSCRIBER LISTS

Lead generation

When it comes to subscriber lists, you’ve got **email users who have signed up** to receive your marketing emails. These are different buckets, really, in terms of your subscriber list.

Make sure you **don’t rely on a single source** for leads. Don’t just rely on your website visitors. Cast a broad net when you’re trying to create your list. Think about the variety of ways in which people connect with your content and, connect with your company. And, again, cast a broad net. Don’t just think about your website visitors. They’ll be an important way for you to get this list build up, but they won’t be the only way.

The **online environment is rapidly changing**. It is always evolving. Don’t just rely on this idea of rented space for lead generation. There’s going to be changing, moving quickly and platform evolution. It is something that’s always going to be happening.

And so think about all the variety of ways and channels that you can use to build your list, to generate your list, be it a mobile app, social media, the web, and even some old school technology may be part of this. Look at something like Snapchat or Twitter, they’re using effectively QR codes to enable a certain action with their app or their site. Think about the marketing mix as well as all the variety of ways in which we build our lists.

Key considerations

When adding to subscriber lists, there are six points to think about. And some of these are the kinds of things that are just so easy to forget about because we have a lot of things on our heads.

- **Have a submission subscription button:** We have a lot of things in our plate we’re trying to sort of gather and make meaning with. But number one is make it really easy for people to

subscribe, and have a submission subscription button. That's probably one of the things that will get you more people to add themselves to your list than anything else is having that subscription button right there front and center, make it so easy. You have probably gone to a website where the first thing that pops up is a, "Hey, would you like to join our list," little submission box. Or the kind of thing when you're leaving a website and it says, "Before you leave, would you like to enter in your email address to subscribe to future content?"

- **Ensure that email address entry is as easy as possible:** Once again, you want to just keep it simple. You want to keep it so simple that the user has no static. There's no user experience static that keeps them from entering in their information.
- **Encourage newsletter forwarding:** Even adding a sentence or two that says, "Hey, if you like this content, share it with your friends." Or, "Hey, we've made this content so easy for you to share. Just click here." The easier it is for people to share your content to their friends, their family, to their relevant business contacts, the more your list is going to get out there and populate to a greater audience.
- **Minimize the clicks to subscribe:** FeedBurner, while great, has a lot of clicks to subscribe. And one of the things that I like about WordPress.com is if you want to subscribe to new posts, to a blog on WordPress.com, it's relatively easy. There's not a lot of clicks. You don't want to take people's time. You want to make it really easy and simple for them to add themselves to your list.
- **Offer special deals to new subscribers:** This gets into that incentive idea that we mentioned earlier. Perhaps you could offer a special deal to new subscribers, something that only a new reader can get. Sometimes it's a discount on a product. Sometimes it's access to a product. Sometimes it's access to new content. But again, when people join an email list, they're joining a community. They're joining a group of people with shared affinity. And so if you offer something new in terms of a special deal to your new subscribers, that gives them sort of an incentive but also you want to make sure that your existing subscribers don't feel left out if they're not getting the new stuff necessarily.
- **Invite subscribers through social networks:** You look at Twitter, LinkedIn, and we might even add Snapchat to the mix, and Instagram, LinkedIn, Tumblr, and YouTube. We could then think about things like Sina Weibo, or QQ, or WeChat, or WhatsApp, and the ways in which we connect with people. Then let them know about our content and then possibly have that call to action be present in there is just growing and evolving. Twitter cards, for example, are a great way to directly invite people to subscribe to your content, a custom generated bit of data and a form on a particular tweet, which then can be actually targeted to a focus group of readers as opposed to just the wider world.

PERSONA DEVELOPMENT AND SEGMENTATION

Leverage email marketing metrics

Let's consider persona development. This involves the idea of tone, voice and who you are, and it gives almost more of a personalized feel to the content that you're putting out there.



Figure 1: Leveraging email marketing metrics

The first thing to think about is this idea of leveraging email marketing metrics. You use your data, your analytics, to develop your persona. What client are people using? Are they on a mobile device? Are they on a desktop? Looking at your clicks, did people click certain bits of content, certain elements? Did they ignore other pieces of content? Look at your open rates, you know, time of day. When did people open your content? Is everyone looking at it in the evening, or in the morning? Is it kind of across the board? What devices are they using, such as from iOS to Android to desktop PC to Mac? And then location, where are they located? Because, once again, it can give you a clearer picture of your audience and which will then help you just tweak and mold and create a voice that fits well with your readers. And you call it persona development. You might call it voice. You might call it tone, but use your analytics, use your data to help you create that persona.

Segmenting databases

There are a few things to think about when it comes to dividing, or segmenting, databases.

Improved targeting

Identify differences between the average persona of your existing versus target database. This is all about creating an email marketing campaign and list that reflects your goals and strategy. Does your database reflect the customers you are marketing for or marketing to? You want to make sure that everything is custom-tailored and bespoke to your audience.

Benefits

Well, it improves the effectiveness, you know, of your lead generation strategy and marketing. And, again, everything is connected to your audience, that makes effectiveness so much easier to achieve. We all have a set amount of time, a set amount of resources, and you want to avoid wasting those valuable resources. You want to make sure that everything is tailored and customized in such a way that your activities are actually leading to something that connects to outcomes and goals.

Informed growth tactics

Determine if your database growth has been successful to date. Look at it as a timeline.

Also, delete those records that don't provide value.

And so the best thing to remember about email marketing is that everything is connected, your data, your lists, your audience, your content. It's all part of this sort of holistic email marketing mix. And that is really important to remember.

Criteria-based lists

Here are some list criteria:

- **Identifying personas:** These are identifying the individuals that you're trying to reach, identifying how your own message is going out.
- **Targeting life cycle stages:** This means how you connect your content and your lists and your outreach effort to various points along the way. You've got a timeline that you've created.
- **Segmenting for personalization:** There's nothing better than getting a personalized message. Some of this could be as simple as inserting someone's first name, the surname, into a message because it makes it feel more like it's directly reaching out to them.

EMAIL TYPES

Different types of emails

There are a lot of different emails out there in terms of the messages that we send and how we send them.

Blast emails

This is an email containing a message with just a call to action, or a CTA, sent out on a list of contacts with this sort of predefined criteria. That's you blasting it out to everybody, hitting the button, and it goes out to a bunch of different people, and there's a specific call to action, and that's it. It's just a single one-off blast message.

Drip email

This is an email which is delivered on a regular basis and it sort of builds up this larger sense of communication and community. And so, you might be sending this message maybe once or twice a week. The frequency and the regularity of it is going to depend on your goals, again, your outcomes, and your audience in terms of what they're doing with your email.

Newsletter

This is probably the most popular, at least these days. They've been around forever, but their efficacy just continues to amaze people. And the newsletter, specifically, is an email containing news and updates that have to do with the industry or the company. And sometimes this is where you get into the stuff that only your subscribers can get access to, that sort of in-group-specific honed content or information that makes your newsletter, once again, worthwhile to subscribe to.

Using more than one type

Now, the thing with these three different types of emails, from blast emails, drip emails, to newsletter, you may end up using all three with a variety of components of your email list. Because, once again, if I subscribe to a newsletter, you could hit me up every once in a while with a blast email or kind of a

drip email of, “Hey, you know, we’re going to just send this out,” not a newsletter, but maybe just an update about what’s going on maybe behind the scenes. And then there’s the regular newsletter, so you may end up looking at all three. And I know that sounds like a lot of work, and it is. But therein lies the reward, right, of using email for marketing

Other types

So a little bit more on types of emails:

- **Advocacy emails** are defined as emails where you ask your contacts to take an action on your behalf.
- An event email is where you notify recipients of an event, invite them to an event, confirm they are attending an event, and follow-up with content from the event.
- A **re-engagement email** is where you try to provoke your database into taking an action in order to discover if they are still interested in your brand.
- A **welcome email** is defined as the first email a new contact will receive from you. They are useful to establish your brand and to confirm email communication opt-in.
- An **abandoned cart** email is triggered to remind potential customers that they have not completed a purchase, that they have items saved to their shopping basket, or that their payment details need to be reviewed.
- An **automated email** is sent automatically based on pre-defined behaviors (such as a welcome email when someone subscribes to the blog for the first time).
- A **one-off email** is built intentionally by the email marketer for a single purpose and sent to a unique list in the database.

It is important to label your messages, such as “Okay, hey, this week, we’re going to send out an event-oriented message,” or, “This week or this month is going to be kind of a one-off,” or, “This one is kind of a re-engagement,” a “Hello again” type of message.

Email automation

Automation plays a massive part in email marketing, and there’s a few different things to think about when it comes to automation.

Automated emails

These could include **welcome emails**, which, of course, you don’t want to have to send a welcome email every time to someone manually. You want to automate this process because, again, these are the kinds of emails that you’ll curate them. You’ll create a bespoke message that goes out and say, “Hey, welcome to our email list. Welcome to this or that. Glad you’re on board.”

Some **event emails** may be generated via automation. Some **abandoned cart** emails might say, “Hey, we noticed that you were looking at this particular item. Are you still interested? Would you like to come back? Would you like to be engaged with that product?” And abandoned cart emails, you never know what a reader’s going to think with that. When it comes to that technology, just kind of play it by ear. See what people say to you. Really listen to that feedback on abandoned cart emails.

And then **re-engagement emails** are the, “Hello, again. Glad you’re here. Haven’t heard from us for a while, or maybe we just wanted to check back in with you.” These are the things that you can automate very easily. Now, we talked about automated emails.

One-off emails

Let's talk about one-off emails. These could be **advocacy emails** saying, "Hey, we've got a campaign running about a certain event, current things that are happening," **newsletters**, and then **some event emails** yet again.

Automation can enable you to keep up with the churn and volume of your emails in such a way that you don't have to have this sort of manual process of sending it out or hitting a giant button every single time, and it can provide a lot of value to your readers and to your audience.

NOTES

LESSON 2: MANAGING EMAIL DATA

SPAM EMAIL

Definition

Spam is the receipt of unsolicited email communication and bulk communication. Essentially, it is mails that you don't want to get and that you never asked to receive, but which people are sending to you. And so you don't want your emails to go into the spam folder, or to go into the junk folder.

Legal requirements

Let's consider the legal requirements around spam.

- **Only email people who have opted in:** Permission and choice are everything with your audience. You can only message those people who have said, "Yes, I wish to receive this content from you and your organization and your business."
- **Provide an opt-out mechanism:** Let people let go. Let them say, "Okay, maybe I'm not interested now. Maybe I never was really that interested, and I just want to opt-out. I want to say goodbye. I want to unsubscribe." And what I find is a lot of companies make this really difficult to do when in fact, you don't want readers on your list who don't want to be there. You want to let people leave. Let people unsubscribe as easily as they could subscribe, because that will make your list much richer and much more legitimate than if you have a bunch of people who just weren't able to unsubscribe who are trapped on your list.
- **Make that opt-out process instant:** Perhaps you have subscribed to an email list, tried to unsubscribe, and received a message that said something akin to, "This will be processed in two weeks' time or three weeks' time." And you've wondered there is a physical process, some sort of actual lever or a cog that must be moved to make this happen. Make it easy for people to leave. Make it easy for people to unsubscribe. Make it an instant process for them.
- **State the purpose of email:** What are you all about? What are you trying to do? Just be open and honest. I think openness and honesty with email marketing is a massive part of what you're going to be doing. And there's a theme here you may have noticed around holistic aspects, transparency, authenticity. Again, state the purpose of your email.
- **Identify ads:** Just be real with people. Let them know, "Hey, these are ads. These are put here for the purposes of selling you something." Just identify it as sponsored or advertisement, and let people know so there's no confusion. This helps ensure that you don't get listed as a spammer.
- **Include a business address:** Make way for the physical. Let people know where you're located so that you don't just exist in this vastness of digital space. Let people know where your business is located in the real world. That's also important.

It's important to look at those legal requirements, as well as things that are recommended. But I would start with this list of six things to definitely include when you're operationalizing and creating your email marketing strategy.

EMAIL LEGISLATION AND REGULATIONS

Email marketing regulations

Many countries now have laws concerning what an email marketer can 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.

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.

Email marketing regulations

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 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 ten 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.
- 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.

EMAIL LISTS

Different types of email lists

It's important to recognize and understand these various lists that exist.

- **Suppression list:** A suppression list contains those individuals within your email list collection who have either self-identified or been identified in other ways as saying they don't want to receive your messages for a variety of reasons. And you call that your suppression list. These are the people who don't want to be emailed.
- **Whitelist:** This is more for you as an email marketer to say, approve, we're approved, and we can send messages. Email providers like Gmail or your Yahoo!, and so on have put you on a whitelist saying your messages will not go or put it into the spam folder or the junk mail.
- **Blacklist:** That's the place where you don't want to be if you're an email marketing person, because a blacklist is essentially where the email providers have said, "This is spam, this is junk mail. We're going to automatically put it into those places where readers won't find it." And so the blacklist is where you definitely don't want to be.

You also want to carefully monitor your suppression list, because again, you don't want people who are on a suppression list to go and get accidentally a message when they've said they don't want to be messaged. The middle of the road here, the place you want to be, of course, that whitelist, the place where messages are approved, they go right into the inbox, and they'll go straightaway to your reader, who will then see your content and see your message, and see the messages you're trying to send them.

BOUNCED EMAILS

Definition

A bounced email is an email that is returned to the sender because it cannot be delivered. And these are emails that bounce back for a variety of reasons. As a personal individual emailer, we've all received these kinds of messages where you send a message and it comes back. Maybe the email address no longer exists or it's no longer valid, or you missed a keystroke, or there's an attachment issue. But in any case, the email bounces back, and that's called a bounced email.

OPT-IN EMAIL

Definition

Your opt-in email is extremely important. The opt-in email is when an individual is given the option to receive bulk email in the form of a mailing list, newsletter, or advertising.

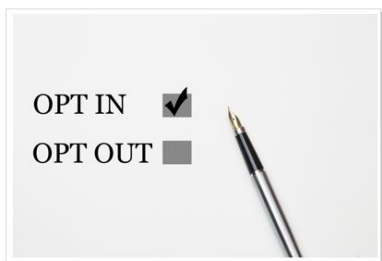


Figure 2: Email opt in or out choice

That's the permission piece. That's that option of choice, that's me as a reader saying, "I want this content, I have opted in, and I've given you my permission to send me content information emails."

Benefits of single opt-in emails

Single opt-in emails have a number of benefits.

- **Ease for subscribers:** They make it easy for subscribers so that they know exactly what they're signing up for. You want to clearly identify the purpose, the reason of your message, of your email. Why am I signing up? Give me the reason.
- **Fastest way to build a list:** A multiple list can be considered with a single opt-in, right? So you want to make it easy to say, "Hey, guess what? You want to sign up for multiple lists? Here's my single opt-in," with a few check boxes saying, "I'd like to receive information on," this, this, this, this. And you're literally as a reader opting into a variety of lists simultaneously with one opt-in form, which can be very nice if you're the email marketer.
- **Less lost email:** This again is all about saving you time, making you more efficient. If people opt in, you've got their message, you've got their email, you've got the fact that they've given you permission. And it gives you a bit more confidence in your overall list.
- **Less technology resources used:** It improves your efficiency.

You may notice the theme throughout is that we're talking about efficiency. Saving time, reducing waste, not collecting bad emails or making the process difficult for your reader, there's a lot of

themes that run through this. And again, pay attention to these things as you're learning from this slide deck from this presentation. A few more elements of the opt-in email conversation.

Benefits of double opt-in emails

Double opt-in emails have a number of benefits.

- **Higher quality list growth:** Double opt-in gives you this higher confidence in the quality of a list. If you have people double opting in saying they opt in initially on a web form or a mobile app form, and then they get an email back, and it says, "Just to confirm. We just want to confirm that this is you, and that you've actually signed on for this content."
- **Opportunity for you to communicate with your subscribers immediately:** It's almost a secret way for you to then have a chance or an opportunity to say, "Hey, we're glad you signed up, we know you're here for some good information," or some interaction, or a newsletter, or what have you, "and here's a little message from us to new subscribers."

Remember I talked about opportunities to engage with new subscribers? Your double opt-in email can be a great place for you to engage with those new subscribers, and give them something that your regular readers may not necessarily see, which is a great thing for you to do to incentivize them to say, "Hey, I'm part of this community now," and share it and let other people know that this list exists.

EMAIL DATA MANAGEMENT

Overview

Data management ensures that subscriber lists are as accurate, complete, and up to date as possible.

Now, what are some of the key components? What are some of the elements of data management?

- **Database cleaning:** You can think of it as going through and tidying up a little bit, making sure that everything that's in the database should be there. Make sure there's no empty fields or inaccurate pieces of information, or that people just didn't maybe hit your double opt-in email, and they're just sitting there, they're not necessarily fully into the system, which again might mean you have to hit them with another opt-in message, if it isn't already automated.
- **Re-engagement campaigns:** These are like "Hey, welcome back again. Hello again" kind of emails.
- **Applying segmentation consistently:** Your data management will help you segment your list so that you've got the right audience getting sent the right content. And then notification to remain on your mailing list, and this is one of those things where you just want to constantly be letting people know, "Hey, just letting you know, you're on the list. I'm glad you're here. But at the same time not a problem at all if you want to leave." If people want to leave your list, let them leave because again, you're about building your list, growing your list, but with the right people, with the right bits of data.
- **Data enrichment sources:** Consider things that you can do to look at your data differently, such as create infographics. Just enrich the ways in which you look at your data sources.

Benefits of data management

Data management brings a number of benefits:

- **Improves persona-based segmentation:** You're able to build more meaningful persona segments.
- **Avoids contacting those who will not benefit:** This is probably one of the most important things, because when you think about email, one of the reasons people don't like email is because receive too many messages, or they'll get too much spam. They get too much email and it's not really relevant to them. Your data management will help you become more effective at avoiding that spam. You want to make sure that your readers want your content. Your readers are engaged with your content.
- **Improves your email engagement rates:** That sounds a bit analytical, or maybe not necessarily as fun as for the content creation piece, but, if you have proper data management, it will assist you with your email engagement, which is what you want to have out as an outcome.

Focusing on quality

You need to focus on the quality of your data.

At every stage of the email marketing process, there's an opportunity to improve data quality. Look at your process as having these places where you can say and ask the question, "What are we doing to improve our data quality?" Don't go from A to B without any improvements. You want to continuously be improving, continuously be evolving when it comes to your data quality.

Email authentication

Understanding authentication

Email authentication is this process by which your email is verified, that it's legitimate and coming from your business. This is something that protects your reputation. It is extremely important because you don't want your emails to get blocked. You don't want your emails to get stuck in the spam folder. You want your emails to come through as legitimate to your readers.

Email service providers

Email service providers are also known as ESPs. They're going to be authenticating your email address. They're the ones who are in charge of this. And they're going to flag your emails as being trusted. They're also going to look at the sending domain and authenticate it. Your sending domain really does matter. If your sending domain is something like @wearespammers.com, it's probably going to get marked as spam. You want to have a whitelisted authenticated domain, that your email service providers have approved and will then legitimize your content.

Fraudulent attacks

Fraudulent attacks are something that all email marketers need to be aware of. Fraudulent attacks or when an email is sent from your domain is almost spoofed. It's not necessarily really coming from your email, but it looks to the reader like it's coming from your email address.

You may notice when you get a spam message when you can look at the email address. It looks like it's coming from a brand that you trust, but it's not really. That happens a lot because people obviously want you to click on those bad emails. And so, it's important as an email marketer to be working hand in hand with the email service providers to make sure that messages are authentic and legitimate and not fraudulent.

Security measures

Let's focus on email attacks and some of the security measures that can be implemented. This is about breaking it down into prevention and mitigation.

Prevention

From the prevention perspective, look at appointing someone to establish email security practices in your company. Who is your point person? Who's the person who's going to be interacting with the ESPs? Who is that individual whose job to establish some security protocols to prevent email attacks?

You don't want to let unauthenticated emails reach your recipients. That's a worst-case scenario! You want only authenticated messages to reach your readers. It's all about the quality of your email list, quality of the content, quality of the experience for your readers.

Mitigation

Now, from a mitigation perspective, if a breach does occur, ensure that there's this plan in place. A lot of times that's going to start with an acknowledgment and an apology. We acknowledge that it happened, and we apologize that it happened, and we promise not to let it ever happen again.

DATA PROTECTION

Laws and penalties

Data protection laws control the access and storage of data. By capturing and using email addresses you could breach these laws.

You don't want to breach these laws, and it's important to be aware of what you need to do to prevent these types of breaches, so you don't find yourself breaking data protection laws. It's important to be aware though that there's differing laws across geographical territories.

There are penalties which can be imposed upon a breach. And penalties may be more severe towards those marketing to consumers, because of course there's a lot of consumer protection, consumer regulation, and we want that to be the case. Therefore, it's very important for you to think about data protection from a laws and penalties perspective. Your point person around data management might be one of the people involved in your overall data protection scheme.

Common requirements

Here are some criteria for data protection:

- **Physical location:** Where's your data stored? Where is it housed? Is it in the cloud? Is your business located here but your email's coming out from over here? Think about these physical locations.
- **An unsubscribe option:** Let people leave. Once again, let them unsubscribe. It's very important to let people leave as opposed to holding them captive, you don't want that to be the case.
- **A legal disclaimer:** Depending on your country where you're operating, you may need a legal disclaimer. Your legal disclaimer says essentially, "This is our message. What we're all about." Check with legal counsel, create a legal disclaimer, and make sure that it's present in your message.
- **Confidentiality of personal details:** People are trusting you. They're trusting your company. They're giving you their information. They're giving you their details, so you want to ensure those details are handled and stored confidentially.
- **Any legal notification:** This includes anything that's required, anything that you just must put in there because that's part of the Consumer Protection policies that are in your area of operation.

NOTES

LESSON 3: GROWING AN EMAIL SUBSCRIBER DATABASE

BUILDING SUBSCRIBER LIST

A key metric

List growth is a key metric, in terms of how you're growing your list, and how it's building and emerging. List growth measures this rate at which your target personas are opting in to email marketing. It involves the people that you want reading your content, actually opting in, and this is your list growth.

List growth is everything. List growth data can be used to build the sales and marketing funnel, and email opt-in can be captured both online and in person. It is one of those metrics that you're going to look and you're going to say, "Where are we at this week, where's our list in terms of growth?" Because once again, if you have a list that is growing, and evolving, and gaining more and more readers, that's going to be a list that is going to have a higher likelihood of being successful, rather than a list that just plateaus and stays there after the initial push.

EMAIL DATA CAPTURE

Methods

There's a wide variety of ways in which you capture readers, and how you get their data, their details.

- **Website subscription boxes:** You've seen these all over the web. They provide you the option to put in a wide array of your personal details as a leader, from name, email, website, company, phone number, and so on.
- **Contact form opt-ins:** First and foremost, of course, for email marketing purposes, you want to get name and email. Some of this could come in the form of contact form opt-ins.
- **Competition entry forms:** You may have seen those on the web, where if you want to enter a contest or a competition, you can enter in your email, enter in your name, and that's a requirement and that's how people build the list of subscribers.
- **E-commerce checkouts:** That's where you're purchasing something, you're at check out and there's a little check box and it says, "Would you like to hear more about the products and services of our company?" E-commerce checkouts are a great way to build an email list because people already have an affinity typically, for whatever it is that you're selling or the products you're putting forward, because they're already there on your site. They're making a transaction already, and so the getting them to subscribe to more information, more emails from you is a little bit easier.
- **Twitter Cards:** The Twitter Card is something that marketers can use to build a tremendous email list because think about the context of Twitter. Think about the audiences that are on Twitter. It's very specific, very niche, and so if someone is following you, or if someone sees a retweet, odds are they already have an affinity towards your brand, your products, your services, your company. Now a Twitter Card enables you to build your list in a relatively short amount of time, targeting people specifically on Twitter.
- **Customer care touch points:** These are the sort of the physical in-person opportunities, where you can get people to, either with a touch pad or even writing it down on paper, their email address and their name to add themselves to your email list.

Example

For example, I'm a reader of a website called, The Next Web, they talk about new technology, and digital marketing, and social media and the other day I was on Twitter and I saw a tweet from them and it had a Twitter Card. Now, a Twitter Card looks pretty much like any other regular tweet, except it has a call to action built into it, or something special that makes it stand out from a regular tweet. And this particular one, from The Next Web, had a little link that I could click on saying, "Do you approve to send your email address?" And it didn't say this on the Twitter Card. It just said, "Click to subscribe." But when you click to subscribe, it basically sends your email address that is on your Twitter account directly to The Next Web, to populate and subscribe you to this particular newsletter that they wanted you to subscribe to. It's a great way to build an email list as a marketer, as an advertiser.

Sign-up forms

Now, what are some of the attributes of a good signup form, things that you want to think about in terms of making it easy for your audience?

- **Easy to find:** That's one of those things where you think it'd be so simple! You think everybody would do it, but not everybody does. If you want to be a successful email marketer, you want to make it easy as possible for people to find your signup forms.
- **Easy to see:** Is it something I can find relatively quickly?
- **Non-intrusive:** It's easy to overdo it, where at every point along the journey of your website there's a place where people are almost being forced to enter in their details. You don't want to make it too intrusive.
- **Requires little information:** You don't want to scare people away! It's one of those things where you want to make them feel welcome. You want to make them understand that, "Hey, we just want your name and your email and we're going to have you opt in." We don't necessarily want your life story. Sometimes, as marketers, our tendency is to ask for everything, because we know we might want those bits of information, right, those different data fields.

Make it simple, make it easy and make it non-intrusive for your reader when it comes to your data capturing methods.

Common customer touchpoints

Customer touchpoints are places where customers will interact with you. Think of them as entry places, the places where they'll come in and interact with your company and maybe buy something, or meet people, or read your content.

Sales Department

From e-commerce to an actual physical store, the Sales Department is historically the place where your customers interacted with you first and foremost. And it could be in a physical location, or it could be in a digital location. But again, these are those common touchpoints for your customers.

Marketing Department

These are the people who will be getting the word out about your company, your services, your products, and so on. And it's their job to make sure that your content, your name, your branding, your imagery, and your ads are getting out there. A lot of times, customers might come through sort of the

front door of data capturing, via marketing. And that's fine and it happens a lot. You want people to be able to come in whichever way works for them.

Conferences

There are a lot of conferences and there are a lot of events, and at events you've got people coming up to your table, coming up to your booth. Maybe there's email lists for a conference and you can ask people, "Hey, do you want to opt in to this other email list associated with our company?" Conferences are a great way, because you have an audience of readers who match up with your content. If people come to a conference, they already have a natural affinity or an interest in a particular area. And you can then align those people with your email list. It's so much better because it gives you a richer email list than just a sort of broad net that you might have cast it.

Meeting points

There are also various meeting points with customers. There is a wide array of ways in which you connect with customers. It actually doesn't really matter how you connect. What matters is the funnel in which you capture their data. You capture their details, and then you align that with their particular affinity or interest with whatever it is that you're trying to generate and do from a strategic level with your email list.

Collecting email addresses

This is all about incentivizing opt-ins, and getting people to opt in with the goal at the end of the day of getting more and more email addresses.

So how do you do this? You can **offer something of value as an exchange**. This is an effective way of collecting someone's email address. You've got to give them something in return for something. And the something that you want is their email.

Common products and services offered in exchange for an email address include the following:

- **Short and simple forms:** This could just be some information.
- **Social media logins:** This is connecting your Facebook account, connecting your Twitter, and so on.
- **Entry into a prize draw:** This is a kind of a contest. If you sign up we'll put you into a draw for something of value to you. Because you want to incentivize the opt-in.

A lot of times that's the thing that motivates people kind of beyond the fact that you may have great content, you may have great information, you may have the best newsletter, or your email might be a thing that everybody wants to read. But if they don't know about it, if they don't know why they should be reading it, you might have to incentivize them a little bit at the beginning to opt in and these are some things to think about.

Email collection software

You can use email collection software. These are companies that you can use to collect emails, that will help you in this process. They're certain software solutions and they can basically set up a specific page for a pop-up. You may have seen this when you're browsing the web, where an email, a little box pops up and it says here we're going to collect some details.

Some of the companies that are involved in this activity are:

- PadiAct
- Hello Bar
- Sleeknote

This is just a snapshot of some of the ones that are available, but you can just Google this, too. There's a lot of companies that come up that do this.

Remember, it's not necessarily how you collect that's important. It's about why you're collecting, what you're trying to accomplish, and then who's going to help you achieve your goals.

OPT-IN STRATEGIES

Opt-in methods

This is all about encouraging data sharing.

There are many opt-in methods which can basically encourage website visitors to share personal information.

- **B2C:** From a B2C perspective, or a business to consumer, you've got Facebook. Everybody knows about Facebook, there's about 1.8 billion active users on Facebook right now, and that doesn't even include China. So if you think about the worldwide footprint of Facebook, it's continuing to grow.
- **B2B:** From a B2B perspective, especially for list generation, from a more professional outlook would be LinkedIn. LinkedIn is worldwide. LinkedIn connects everybody for the sort of sole purpose of a career or jobs, which means it's a great place for you if your content is more focused on that, as opposed to Facebook, which Facebook is sort of everybody, everything and a bit broader in terms of what you can do from that opt-in method.

So for example, you could link your B2B or B2C specific social media channels in order to collect information. And that could be the kind of case where you require a login, you require a connection, to collect this information. You've seen these websites where it says, "Log in with your LinkedIn and we're going to collect some information from you," or "We're going to have you login or connect if you want this piece of content, connect via Facebook and we're going to perhaps, we're going to grab your email, we're going to add that to our list."

So there's lots of different ways to get people to opt in. This is just Facebook and LinkedIn, but there are several ways in addition to that.

Data enrichment services

It's all about enriching your database, building it up, and making it far richer and robust. And data enrichment means increasing the amount of data that you have per contact in your database. You are saying, "We don't want to just have first name, last name, and email." You want to add more context, more relevant information, you know, geography, sector of employment, gender, education level, all these things that help enrich a database, that helps you target the people to reading your content who are relevant, right, who make sense in that example. So for example, we've got Twitter, API via Zapier as a way of connecting.

If you want to learn more, we're not going to get too much into detail but just Google that, that process of using the Twitter API using Zapier to enrich your database.

Offline opt-ins

This is the verbal opt-in, getting people to say, "Yes," over the phone. It's possible to verbally capture email addresses. It still works and it should be part of your overall structure. It's possible to verbally capture email addresses either face to face or over the phone. And customers must verbally opt-in before you contact them. This is essentially you saying to your customer, "Do you opt in to receive our content? Yes or no?"

And if a customer says yes either on a physical form or over the phone, you record that interaction. You record that opt-in and so it's considered an offline opt-in. However, it's just as valuable or just as useful.

SEGMENTING SUBSCRIBERS

Identifying segments

Segmentation is all about identifying various segments. It is the process of defining and subdividing a market into clearly identifiable segments which have similar needs, wants, or characteristics.

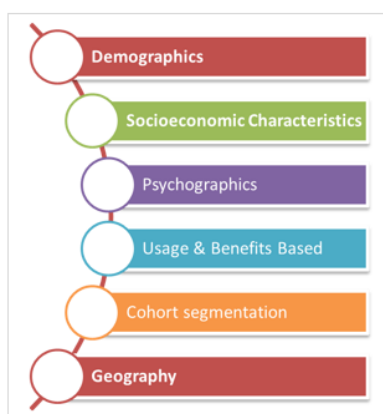


Figure 3: Email marketing segments

Segmentation is important to marketers because the more segmented you are, the more niche you are, the easier it is to reach the right audience, the right user, the right reader with your email marketing. A bit more on segmentation.

Identifying market segments

It's important that your choice of segmentation reflects your business purpose. You have to connect the dots. Why are we doing this? Who are we trying to reach? What's the goal?

Consider your CRM system. Salesforce provides you with very useful, granular segmentation information. And it doesn't have to be Salesforce. This could be LinkedIn, Salesforce, or some other CRM, but, again, that segmentation is very helpful in terms of you figuring out who to send messages to and how you're going to actually analyze, then, that data that comes back.

Social media analysis

Social media analysis can really enrich existing data and provide you with customer insights. This segmentation allows you to personalize marketing content to individual segment needs, and you can gain deeper insight and improve the effectiveness of your targeting techniques. And, now, for example, you've got Twitter, or Facebook, or LinkedIn.

For example, if you are the administrator for a Facebook page, your Facebook insights give you a tremendous amount of data that you can then use to segment. Same thing goes if you're a LinkedIn group or page administrator, or Twitter. If you look at analytics.twitter.com, you get amazing data-rich segmentation on the people who are interacting with you, and, again, it's really easy to do via social media.

Subscriber segments

This is all on reflecting your marketing and sales funnel stages, as it gets narrower, and narrower, and narrower and more targeted. And, segments can be used to reflect your different marketing and sales funnel stages.

- **Subscribers:** Subscribers come at the very beginning.
- **Leads:** These are people who, maybe they're people that you really want at the beginning of that.
- **Qualified leads:** You want the qualified ones, the ones that really are the ones that you have drilled down into.
- **Opportunities:** Consider various people who might become customers.
- **Customers:** They're already in your flow and working with you. They've been buying your services or your products.
- **Evangelists:** These are the people who have a lot of affinity for you. Those are the people who are already sort of out there saying good things about you. These are the people who really have bought into what it is that you do. Some may call them evangelists, some may call them influencers, but, again, these are the people that are going to give you that grassroots boost with your content.

Subscriber segment definitions

Here are some definitions for subscriber segments.

- **Lead subscriber segment:** This is a contact who you have verified as fitting your buyer persona criteria. They've made it through stage one. They've given data to you. You've said, "Okay. These are the people who meet the criteria." Stage one is lead subscriber.
- **Qualified lead subscriber segment:** A qualified lead is a contact that not only fits your buyer persona criteria, but they've also taken key actions to prove potential interest in your business. They're a little bit further along the way. They've proven themselves to you, and they're qualified in that sense.
- **Opportunity subscriber segment:** This is a qualified lead that has been verified, and the actions they took are out of a direct interest in your business. These are people who actually have direct interest in the business.
- **Customer subscriber segment:** This is a customer who is a contact who has completed the full buying cycle at your business, usually in some exchange of value. These are people who you definitely know. These are people who have already come through, and there's been

some sort of action or transaction. These are your customers. These are the people that you really like to have on your lists.

- **Evangelist:** This is a customer that not only successfully did business with you, but is willing to promote you personally through their own channels out of loyalty. These are the people who a lot of businesses will call influencers. These are the people who go out and they say good things about your company because they've really enjoyed your product, your service. They have good things to say about you, and they are, again, kind of your grassroots evangelist of your subscriber segments.

When you think about the technical aspects of generating these segments, you realize that it gets a lot more sophisticated than the olden days of email.

Subscriber sources

Understanding where your subscribers come from is an important way for growing your business. Where are they coming from? Give me more detail, more information, more analysis, and more metrics. I love MailChimp's subscribers' sources detail because, again, the more data you have, the more stats you have, the better you are at understanding your audience, the better you are at creating custom content for your audience, which will then resonate with your audience. So, again, look at this data. Dive into it, and really drill into the value add that you can get from something like MailChimp's subscriber data.

Dynamic segmentation

Dynamic segmentation is when data accumulated based on a subscriber's previous activity in your email campaigns can then be used to define targetable segments.

Companies that do this really well include HubSpot, Marketo, and Salesforce. Salesforce obviously comes into this equation quite a bit, because they're a huge CRM company. In the world of higher education, HubSpot comes into play quite a bit. A lot of higher education marketers are using HubSpot for dynamic segmentation purposes, and so Google them, read through their white papers and case studies.

Dynamic segmentation is this idea when data has accumulated based on a subscriber's previous activity in your email campaigns, and then the offshoot is that it can be used to then define targetable segments.

Criteria for retargeting segments

What are the criteria? By looking at data from your previous marketing campaigns, you can identify criteria which retargeting segments can be based on

There are three things to think about:

- **When the campaign opened:** Consider when it came out, or when it was released.
- **Which link the subscriber clicked:** Where do people go? Look at their activity, look where they went, and look what they found interesting.
- **How many links the subscriber clicked over a certain number of campaigns:** Are these people active? Are they going in and engaging with your content on a regular basis? These are the people that you can really count on, so retargeting is important.

Re-engaging subscribers

How do you re-engage subscribers? We had you before, you were awesome, we're really glad you engaged with us, but how do we get you to re-engage?

Dynamic segmentation, once again, can be used to create a list of subscribers who haven't necessarily been interacting with your past email marketing campaigns. Use that segmentation to sort of say, "Hey, we knew you were here before. You were engaging a lot. Welcome back," or, "Hey, we just thought we'd reach out and say hello again".

Maybe there's a reason why they're not re-engaging, and it could be they're looking for you to re-engage with them. And, after compiling this list for your re-engagement campaign, you then create a campaign. You focus in on re-engaging those subscribers. You've seen those emails that say, "Hey, where have you been? Where'd you go?" and it's just a little sort of ping to say, "We're here still. We acknowledge you, and we want you back."

NOTES

LESSON 4: DELIVERING EMAILS

BULK EMAIL

The challenges of delivering bulk email

What are the challenges of delivering bulk mail?

Internet spam filters

They can block you. They can block a lot of things that are still relevant. A lot of users have spam filters in place, and they sometimes catch things that are legitimate. They catch things that are, perhaps, your content. And it's important for you to figure out the ways in which you get whitelisted and so you make your way through and past those spam filters, past those walls.

Bulk emails are categorized as spam

You don't want your bulk emails to be categorized as spam. You might get emails like this, where it's something you want to read, it's valuable to you, and then you find it, perhaps, a day or two later, not in your inbox, but in your spam or junk folder. And, it's something you've wanted to see, but your spam filter caught it for whatever reason. So, when you're on the other end of that, as the email marketer, you want to figure out what works, what doesn't, and what's getting your email to perhaps get tagged. You know, sometimes it has to do with coding. Sometimes it has to do with rich text versus plain text. Sometimes it has to do with the number of images that are in your email. Sometimes it has to do with the number of links that are in your email. A lot of factors at play here.

Unauthenticated spam

If your email isn't authenticated by an email service provider, it's going to go right into that spam folder. You want to partner and be in constant touch and have a relationship, a business relationship, with those email service providers.

A questionable IP address

This is those numbers that are sort of every single web device or email that gets sent out in terms of where it's from and servers and whatnot. Everybody has an address on the web, and that's your IP address. And, if there's a questionable IP address, your message could look like it's spam. It could sort of make this appearance like it's going to be spam, even if it isn't. And, some of that has to do with the address where it's originating from. And so you want to make sure that your IP address is whitelisted as well.

Marked as spam rate

It's the number of times people have marked your message as spam. Now, sometimes this has to do more so with your carefully curated list than your actual message because you want your list to be the people who want to read your messages, who want to read your emails, not people who maybe haven't opted in or people that are getting irrelevant content. Those people might be the people who mark your email as spam. And, the more times your email is marked as spam, the higher chance that it's actually not going to get past those spam filters, right. It adds more and more to that spam filter, and then, again, all of a sudden you've been marked as spam too many times, and your message won't go through.

Using purchased lists

The validity and legitimacy of a purchased list is important. You don't want to purchase a list of people who didn't opt in, people who don't want to read your content, or people who are not the right audience. It's not relevant to them. It's not curated to them. They're not interested. And, again, they could mark you as spam. And, so you always want to make sure when you're working with a vendor, when you're purchasing email lists, that that content is relevant.

EMAIL SERVICE PROVIDERS

The purpose of ESPs

There's a wide array, obviously, of email service providers (ESPs), including hosted, cloud-based online email marketing systems and services. These include Gmail and Yahoo! Mail. There's a lot of them out there.

An ESP provides a platform for managing and segmenting your contacts, and your lists especially, building email templates, and sending and tracking your campaign on a larger scale than personal software allows. ESPs are the people that help you along the way. These are the companies that are like the middleman.

MailChimp, for example, will help you make the connection to a user who's on Gmail or on Yahoo!, as opposed to you just having a massive Excel spreadsheet, sending out a BCC list. And then, of course, when you do that you get blocked a lot of times. You get listed as spam. It's a lot more sophisticated. And so those ESPs will help you make that connection, make that handshake between your readers and your content.

Key functions

Here are the key functions of email service providers:

- **List management:** They provide the data. They're keeping it for you. They'll probably allow you to export it as a comma delimited CSV file, but they're the place where your list is managed, where it sits, from MailChimp, FeedBurner, Constant Contact, and so on.
- **Unsubscribe management:** They also manage the unsubscribe aspect. And, of course, when you're the email marketer, you want to make sure that that unsubscribe management function is working well.
- **Segmentation:** Your email service providers also will help you with segmentation. They will help you with your data and say, "Okay. This is our audience. This is sort of where we want to segment them or how we want to segment them out."
- **Template editor:** They'll also provide you with templates. It's really important to consider the wide array of devices and screens in which your audience will be accessing your information. The template editor makes all the difference in the world because if you have an old school, old-looking, badly designed template, it's not going to be as appealing visually. The user experience isn't going to be as good. So you want to make sure that you've got the back-end list management, subscription management, segmentation, all going well and joined up. However, the template editor also must work well because, again, it's about design and user experience.
- **Report production:** Everybody wants reports, and everybody wants to see how their email is working, how their campaign is coming along, what their readership is like. And, various companies have different reports in terms of how they structure it, how they make it look and

feel. And so, when you're evaluating an email service provider, look at their reports. Look at how they create them, and generate them, and what's available to you.

Spam watchdogs

Email service providers use spam watchdogs to monitor outgoing email. They want to make sure that it's your message, not somebody else's or that it's not spammy. And, this basically helps them to manage the reputation of their email servers. A lot of this has to do with reputation. It's on the ESP if you send information that is spammy or spam-worthy, and so they want to make sure that you're not sending out stuff that could go in the junk mail or should go in the junk mail folder.

It's their reputation on the line, as well as yours. And so you want to keep a really good relationship with your email service providers.

Key considerations

Here are some key considerations when you're thinking about your email service providers:

- **Ease of use:** You don't want to have to deal with a lot of technical issues when you're the creator and you're the email marketer. You want it to be really easy.
- **Deliverability:** Just as you want it to be easy for your reader, you want it to be easy for you to deliver content to your reader.
- **Segmentation:** You want it to be sophisticated. It's a balance. You want it to be easy and have a high level of deliverability, but, at the same time, you want it to be sophisticated enough to give you really detailed, granular segmentation.
- **Scheduling:** Is scheduling available? Can you actually time when content's going to go out? It's similar to how social media marketers will use things like Hootsuite or Buffer to send out their content on a scheduled basis. You don't want to have to manually hit go all the time on your content on your emails. You want to be able to schedule this stuff in advance and say this month, this week, this day this is going to go out at this time, and you don't have to be anywhere near your desk or your phone to make it happen.
- **Reporting functionality:** You want to have solid reporting functionality, analytics, metrics, and visuals that help you in determining whether or not you're being successful and that help you when you're talking to various partners and stakeholders to see whether this email campaign is working, this newsletter is getting a lot of readers, and they're actually clicking through, and the calls to action are working.
- **Auto-responders:** You also want to consider the auto-responders. Do they have that functionality? Does they work really well? Can you customize them? Customization's really important as well in terms of autoresponders, so you can put messages in there that are tailored to audience.
- **Email templates:** Email templates really do matter. Look at the templates used by MailChimp, Constant Contact, iContact, GetResponse, and AWeber. Look at their templates, and look at the design. Is it flexible? Can you redo it? Is there modern-day code in the design, too? Remember, code changes. It has to look good on mobile. It has to look good on a big screen.
- **Social elements:** Consider the incorporation of social media, and social media analytics, and tracking into your template. Consider when a reader looks at your content and they think, "Wow, I want to share this with my Twitter audience!" Is there a tweet button in there that you can customize maybe to say we want to tweet out just this snippet of text with a link back to a freestanding URL? Can you track that in terms of your data so that you know that someone tweeted out that particular link and content because they saw it on your email? It's all about connecting the dots, and you don't want to sort of have this thing be disparate. You

want it to be the case where your email led to a tweet, led to a call to action, led to this or that, led to an actual transaction taking place. And you can track that.

Advantages of hosted ESPs

What are the advantages to having a hosted email service provider?

- **No server hardware purchase:** There is no server, hardware, or gadgets, or IT staff. You don't have to make these massive purchases of infrastructure. Hosted ESPs, by the way, are for when you have a lot of your setup of the things I was talking about previously. It's on behalf of another company. They're running that for you. They're managing that for you.
- **No worries about blacklisting:** The ESP is handling that for you. They're handling the whitelists. They're handling suppression lists. They're handling all that for you. And so, in theory, you have no worries at all about blacklisting.
- **Low cost of entry:** Servers are expensive. Hardware is expensive. Getting people to manage these things is expensive. With that low cost of entry, you can get your email marketing campaign off the ground by way of an ESP far faster than if you try to do it all on your own.
- **High level of functionality and reporting:** You get access to reports and functionality that you haven't had to build out yourself. You haven't had to code this. You haven't had to ask the questions of whether you should do this or that. Email service providers have already done this for you. They've done the heavy lifting.

You get all these benefits if you have a hosted ESP.

LOCAL JUNK FILTERS

Complying with local junk filters

How can you comply with local junk filters? Remember, these are the gatekeepers at the end of the chain.

- An email must contain an **unsubscribe link**.
- You've got to comply with **double opt-in**. That's where people say "Yes," and they have to say "Yes" via email again to confirm that they want it.
- You must have **neat HTML coding**. You want to have modern coding, coding that fits with the coding guidelines and techniques of the day.
- You want to **authenticate your domain**. You don't want it to be from a rogue domain. You want it to be from you. You see this a lot with spam messages, where they try to spoof or fake a domain. You want to definitely authenticate your domain because you want your message to get through that last final barrier, and that's the local junk filter. It has already made its way to the email provider. It's kind of been whitelisted in a sense, but there's still that final hurdle.

Spam filter test providers

So, how can you test your messages? What are some spam filter tests? What are some of the providers you can use to test your messages to make sure they're actually going to make it through that gate?

Spam filter tests can basically be, either built into your email service provider, or they can exist as a separate service. And, it's more of a personal preference if you want to test it separately or as part of your ESP, almost as a way to just have a second opinion, really.

Spam filter test providers include Litmus, Sender Score (by Return Path), and GetResponse. And, again, those are just a snapshot of some of the spam filter tests that are out there, but take a look and run your messages through there just to get a score to see where your messages sit in terms of spam filtering.

Trigger terms

These are the words that if you use them in your email, they might automatically get stuck in a junk folder or a spam folder because they might trigger the filter. These are these trigger terms and there's local junk filter triggers and then terms that activate junk filters.

Local junk filter triggers are the things that people have made themselves and it's an "if-this-then-that" type of formula. Now, you could say if a message contains the following, automatically put it into my junk filter. Some of that stuff is going to be more challenging for you to sort of figure out because again, you're not necessarily sure what people have created in those if-this-then-that type of formulas.

But there are certain terms that activate junk filters, including swear words, epithets, and things that people wouldn't say on the news, for example. Use your common sense. You can basically intuit what the terms are, but again there are certain words that you just want to be careful of.

And I have noticed this in my work with social media that sometimes words get filtered just because they're part of lists of things even though it's relevant to a reader, and so there's a bit of experimentation. There's a bit of dialing it in when it comes to email marketing, and you just want to make sure what are the headers, what's the subject, what's the alt attribute on an image, and so on. Everything has to be filled out, everything has to be labeled. And just watch out for those trigger terms. And you'll come up upon them really quickly if you use one because you'll know right away. You'll be put into a local junk filter.

SCHEDULING EMAILS

Key considerations

Scheduling does matter when it comes to when emails go out. For example, I mentioned earlier the email newsletter from Dave Pell called NextDraft, and NextDraft, depending on where you are in the world, comes out the same time of day. And I remember when I would be in the United States the message would come out at a certain time. When I'm in the UK the message comes out later in the day, in the evening due to time zone differences. And scheduling does matter. One time you get a message at your desk and the other maybe you're just on your mobile device.

What are some key considerations for scheduling?

Test against your overall marketing goals

You align demographic and audience with marketing goals and you put that all together with how you schedule your emails to come out.

Consider the frequency and volume of email sends

If you send me an email over and over again and, maybe it's not the same email, but you're just constantly messaging me, there's going to be a higher likelihood of me to unsubscribe. You're essentially taking away the value play and you're bothering me. Some brands have a tendency and history to send an email every day, saying half off, 50% off, or 75% off coupon for this deal. Their frequency and volume are just too much. They took away the value play, and they started bothering people instead. So always think about the value that you're creating for your audience and that's where scheduling comes in.

Create with user priorities in mind

Your readers and your users are everything. Think about the people who subscribe to your content, and the people who want to read your content. This applies to email, social media, direct mail campaigns, and in fact everything you do as a marketer. Put user priority first. And you have to build up trust with your users and make sure you send them what you promised them when they opted in.

So think about time of day, think about location, think about where your readers are, think about your frequency, think about your volume, and send just the right amount right. Dial it in to where you're sending just the right amount that resonates with your very specific and bespoke audience and that's where the beauty of email marketing starts to play out.

Common user prioritization criteria

What are common user prioritization criteria?

Sender familiarity

Do I know you? Have I seen you before? Does your message align with the opt-in that I did maybe a month ago, or a week ago, or a day ago? Does your content connect to that so that I know who you are?

Here's a great example. I was at the Taste of London in Regent's Park in London. And they have all these different food booths. There's chefs and people giving you various things that you can taste and eat for the day. And I can't remember exactly how they were collecting our user details or information. We had a badge or whatnot that was somehow connected, but I started getting emails about two or three months after the event from various restaurants and hotels in London, and I had no idea where these were coming from, or why I was getting messaged. There was no sender familiarity whatsoever and it was because they hadn't connected the dots of "hey, this is from the Taste of London, this is from this particular restaurant at the Taste of London and other advertising an event that you might want to go to". But it didn't make any sense to me because I couldn't remember opting in. I just remember eating something tasty. So always remember you want to connect the dots, let the receiver of your message know who you are and why you're sending something to them.

Time of day

If you're a global email marketer, time of day can be a bit tough. However, if you have segmentation and you can specifically look at open rates and look at your data, then you could say, "Okay, this list of people here they are in this time zone, this list of people here they're in another time zone, and a list over here they're in another time zone."

Then you can then take those various lists and break them up into very specific time of day lists so that you're not emailing certain people at eight in the morning and other people at two in the morning even the next day. You think about time zones and you think about the reach of places.

Location

Location goes hand-in-hand there, but that location really does matter, and this is about prioritization.

Work and personal priorities

Think about what the work priorities involved are and what the personal priorities involved are. Do you want your readers to be connecting with your content during the workday? Do you want them to be connecting with your content after work, at the end the day? It's not necessarily connected to what they are doing during their day job but what they're doing in the evening when they're relaxing.

EMAIL OPEN RATES

Trends

What are the some of the trends with open rates? It varies during different days of the week.

Some of the common criteria for maximizing schedules are:

- Location
- Industry
- Newsjacking events
- Holiday targeting

Location

Know which location you're targeting. Where is the recipient based? What are the time zones?

Industry

I work within higher education so for me it's about industry. Am I getting those industry players to open my content? When are they doing it? What day is the most successful? I've been a professional blogger for a very long time now I've been blogging as part of my income for six years, and one of the things that you always look at as a blogger is finding out when people are looking at your content. And what you always find is the beginning of the middle the week tends to go far better than the end of the week or the weekend because people have other things on their mind towards the end of the week. So remember this when you're thinking about your open rates.

Newsjacking events

Newsjacking occurs when you play into what's happening in current events. One caveat with newsjacking. You want to connect your content into *relevant* news that isn't necessarily going to put people off. You want to be current and connected to current events, but you also don't want to be connected to current events that have a negative connotation or there's something that isn't going to get people to read your content.

Holiday targeting

It can also be holiday targeting, where you target things like Christmas, Thanksgiving, and Boxing Day. Bear in mind holidays from different countries. That's important to think about because again the work that you do might be specifically targeted to a certain geography location.

Open rates

These are some of the features which affect open rates.

'Always on' mobile

Always on mobile email will greatly impact your open rates because it's always there and it's always opening. It's always pinging and connecting.

Sender's name

Who did it come from? Did it come from a real person, did it come from a campaign, or did it come from a business?

Sender's email address

Is this an email that I recognize? Does it match up? For example, there is a large corporate entity that I subscribe to and their email from the sender's name will not be connected at all to the sender's email address. And every time I open up one of their messages, I'm not sure whether this is from them. Is this legitimate? Is this an email I want to actually open up and so connect the two?

Or if it's a newsletter or if it's something to do with your brand, it should be "brand" is the sender and brand is in the email address. It's often one of those things that people don't think about so remember.

Subject line

Your subject line should not be the length of a novel! It should just be something that clearly defines what it is. If it's a newsletter say, "Newsletter" and then maybe a few highlights from what's in it. The best subject lines tell you *why* you should open the email or they give you just a bit of a hook. For example, "Top 10 reasons why" and then you should open this email and it actually gets you to open something.

So your subject line really does matter. How does it stand out? Think about how you compose it from capitalizing or not capitalizing using just various things. You'll find that as you go along, and you can track your historical data, certain subjects worked better for your open rates than others. And you can then use that data to create subject.

Impact of sender names

Let's look at sender names and their impacts on open rates.

Gender bias

Gender bias can have an impact on email open rates. It's one of those sad but true things. People do have a bias towards male or female. So track different sender names to see what works and what doesn't. And again, some of it is going to have to do with the brand and the business that you

happen to work within. For example, certain brands maybe historically were known as female fashion brands and they're branching out into saying "Okay, we're going to be a bit more coed, we're going to have clothing items for men now." So how do you create content that fits sort of both genders in that sense?

Cultural bias

Cultural bias can have an impact on email open rates. Again, sad but true. Hopefully, this will start to decrease as we become more of a multicultural global society, but it is important to think about.

And other times though too it can be part of your winning strategy. Look at Adobe, for example. Every other version of Adobe Photoshop has listed who has been behind the creation of Adobe Photoshop. And one of the members of that creation team, his name is incredibly long, but he has this huge following of people who are fans of his work. And it's become such a successful aspect and component of Adobe's history and Adobe's culture. So again gender and culture play a big part in open rates for email, but again it also depends on the business that you're doing and the work connected to your audience.

Generic email addresses

Generic email addresses can also impact upon email open rates. Generic email addresses are boring because they have no customization or personalization. If you get an email from info@something.co.uk, it's a lot less tailored than something connected to your brand, or a special word that is connected to the campaign that you're doing with his email. Don't use a generic email and don't use an email that doesn't connect with the person who sends it. Combine those two. Nothing worse than having an email from somebody over here and this is where the "from: [the actual name]" text is different.

Facilitating replies

How do we encourage open rates? This is all about encouraging open rates and sort of facilitating replies.

Reply address is the same as the sender address

This is really important because if you've got a sender address and then I hit reply and it's not the same, make sure that the person at the other end of that reply email is actually paying attention. And definitely you have those emails where no one is actually going to pay attention to this email that you respond to.

Facilitating replies is good for email responses

You want to encourage interaction and you want to encourage replies. You want to see this as a positive thing. It's all about interaction and engagement and so you want to match the two up. You want to say here's who this email was sent from, here's who your reply is going to go to, and they're the same person or the same account. Because again if people respond to your messages good or bad they're still engaging with you, and if it's a response that's negative it enables you the chance to answer a question or clear something up. If it's positive, you can put them in a separate sort of data set to say these are people who are more likely to be our evangelists. These are people who have gotten back to us in a positive way, and they've taken some time out of their day to respond.

Attachments can cause risks related to open rates and spam blockers

If you're including attachments a lot of times, that's going to be a trigger for junk folders and filters that your message is going to get labeled as spam. It's going to go into the spam folder and it's not going to be seen by your audience. Think about the value of an attachment in relation to the value of getting someone to open your message and receive your message. If you have to link people to a PDF or link people to some sort of document, that is much more preferred than having the attachment be in the email. Remember that if the attachment is too big for the person's inbox, they won't get your message.

So there's certain things to think about you want it to be simple and sleek when it goes out to people. You don't want to get caught by those spam blockers and you want to do as much as possible to encourage open rates.

Understanding autoresponders

Autoresponders must meet the ESP criteria. Otherwise, they're going to be marked as spam. An autoresponder occurs whenever you send something and then it goes your audience, and maybe they have some sort of action, and then there's an auto email that gets kicked out. These are usually automated, hence the word *auto* in autoresponder.

Autoresponders are not the same as the more generic blast you might send out. They're *triggered* by a specific action or a change of status which makes email a bit more personal. So less of a, "Hey everybody," to more of a "Hello, how are you doing?" type of thing.

Combined with segmentation, these autoresponders can provide effective customer lifecycle marketing as email messages because they're optimized to that particular customer. However, check with your email service provider. Depending on how successful you are, you could have a lot of autoresponder content getting kicked out on a semi-regular basis more frequently than maybe your newsletters or some of your other email blasts that go out. And so again, maintaining that whitelisting, maintaining content that is customized and curated for your readers are important.

NOTES

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