



JACOBS & CLEVENGER

EMAIL MARKETING BEST PRACTICES

Need-To-Know Email Marketing Techniques

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INTRODUCTION

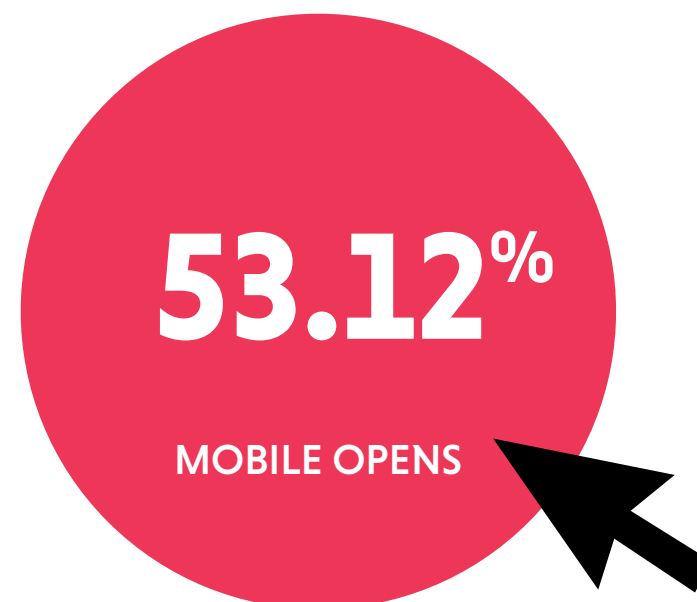
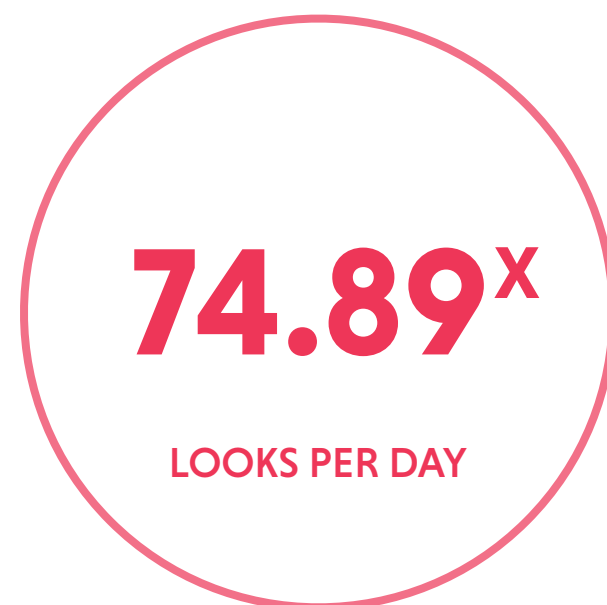
Email marketing is still a vital component of any successful businesses marketing strategy, and yet so many miss the mark with this powerful tool.

There are three main reasons email remains at the top of the playbook for many organizations:

1. Technology continues to render traditional outbound methods less and less effective
2. Those traditional outbound methods are expensive and interruptive
3. Email is the only communication channel you truly own and it provides a direct 1:1 relationship with the contact

WHY MARKETERS LOVE EMAIL

- Potential ROI of 38:1
- Average person checks their email 74x a day
- 54% of those are opened on mobile devices



HOW TO BUILD A KILLER EMAIL STRATEGY

Building a killer email strategy isn't difficult if you make sure you apply these four core principles during your strategy phase.



Mobile-First
Design



Segmentation



Personalization



Data Analysis
& Optimization

Sources: MarketingSherpa (April 30, 2013). Demand Metric (2014). Monetate, "The Business Case for Personalization" (March 2015)

THE FOUR CORE PRINCIPLES OF AN EFFECTIVE EMAIL STRATEGY

No. 1: Mobile-First Design

If you haven't already, you need to put mobile optimization at the top of your priority list. More and more people are using smartphones, and a recent survey showed that 81% of smartphone users say email is the most popular activity they use their phone for, with 48% of those respondents reporting that email clearly displaying on their mobile device was of great importance.

No. 2: Segmentation

Perhaps the most powerful weapon in your marketing tool belt is your contact database. A treasure trove of lead, prospect and customer data if used properly, your database allows you to "slice and dice" all those contacts into groups that share common traits, characteristics, pain points, activity, etc., allowing you to put as much focus on the context of your message as on the content.

THE FOUR CORE PRINCIPLES OF AN EFFECTIVE EMAIL STRATEGY

No. 3: Personalization

Now that you've segmented your contacts, you can begin to personalize the communications you send out so even if the message went to 1,000 people, it doesn't have to look like it.

No. 4: Data Analysis & Optimization

If analytics is the engine that powers the growth of your business, then the data is the oil you run through that engine so it functions optimally. Without it, the engine stops. The idea is to continually be looking for clues for ways to improve your efforts.

COMPONENTS OF A SUCCESSFUL EMAIL MARKETING STRATEGY

Before we go any further, it's important that we take a minute to talk about what are widely considered to be the three components necessary to execute a professional and successful email marketing program.

The first is buy-in and commitment from leadership to the idea that email marketing is capable of driving the growth of your business. Email, like content marketing, is a long-play and it will take time to determine the best approach.

Secondly, you'll need professional-level software capable of handling the level of sophistication your strategy requires. Some things to look for in an email service provider tool (ESP) include a seamless connection to your contact database, the ability to analyze the success of sends and the ability to automate sends based on behavior/activity; ideally, it will also have some sort of landing page and form functionality for generating new leads.

Lastly, you need to thoroughly assess your understanding of email's role in your business. Ask yourself how your business can use lead nurturing. How many emails is too many emails? What role will email play with existing versus new customers? Once you're satisfied with your responses, you'll be best positioned for success.

THE IMPORTANCE OF LIFECYCLE MARKETING

In case you're not familiar, lifecycle marketing is the term used for your communications with contacts from their first touchpoint all the way through their lifespan as paying customers, and maybe eventually promoters. There are a few simple questions you can ask yourself about your recipients that will go a long way toward ensuring you send the right message at the right time.

QUESTIONS TO ASK YOURSELF

- Are they new subscribers to your blog doing research on a problem they have?
- Are they currently comparing you to one of your competitors?
- Are they new or current customers?



Source: [Gleanster Research](#), "Measuring the Impact of Lead Nurturing" (2014).

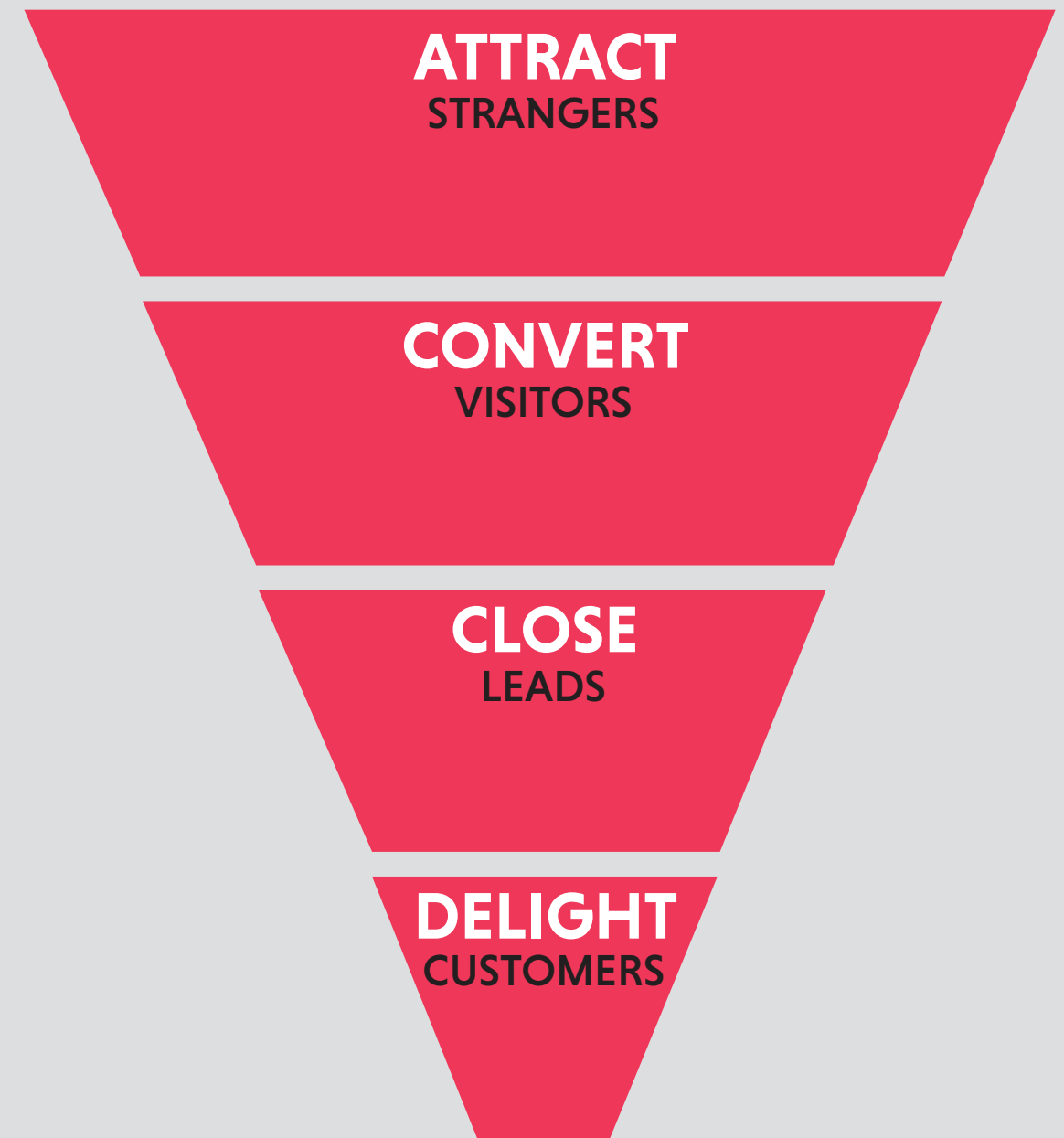
LIFECYCLE MARKETING BEST PRACTICES

- Map content in your emails to the buyer's journey
- Identify the key touchpoints in your marketing and sales process
- Be sure your forms are capturing the right data

Regardless of who you're sending an email to, be sure that your communications always provide real value. You can ensure you're always making that effort by paying attention to context and listening for cues to additional needs.

LIFECYCLE MARKETING TIPS FOR SUCCESS

- Always respond promptly (think minutes, not hours or days)
- Set the proper expectations
- Encourage people to engage further
- Display information in a clear visual hierarchy
- Instantly communicate purpose and use actionable language
- Keep it simple!



CONTACT MANAGEMENT STRATEGY

The single most important part of any email marketing strategy is a quality contact database.

Without one, your success will be marginal at best. A quality database containing a wealth of contact information will allow for better segmentation, which in turn allows for better personalization of your emails, making them more relevant and engaging to the reader. Segmentation (or *lists*) consists of the different ways marketers break up contacts into smaller segments based on their similarities. The more information you collect on your contacts, the more this information will allow you to more easily provide relevant content that has context for the reader.



CHARACTERISTICS OF A HIGH-QUALITY CONTACT DATABASE

- Shows the whole picture of every contact, including every touchpoint in their lifespan
- Better aligns marketing and sales
- Seamless integration with every other tool you use

SEGMENTATION STRATEGIES

Do You Have Permission to Email This Person?

When it comes to email marketing, there is no more important question to consider than this.

Segmentation Strategy Best Practices

- Make sure your database is accurate and up to date
- Identify the key touchpoints in your marketing and sales process
- Determine your segmentation strategy



SEGMENTATION STRATEGIES

The data you collect will vary based on your business's needs, and may include any of the following: website activity, form submissions, email engagement, conversion information, social media activity and any other integrations you use. All of these elements can then be used for advanced personalization (further defining your buyer personas) and improved list building, lead intelligence and marketing automation triggers, but all require that your database is up to date.

Your success as an email marketer hinges on your ability to successfully segment your contacts. The two best (and easiest) ways to segment are:

- Audience definition (who they are)
- Current lifecycle stage of the buyer's journey.

SUGGESTED SEGMENTATION STRATEGIES

Company-Related

- Company size
- Company type
- Industry

Role-Related

- Department
- Seniority
- Function

Behavior-Related

- Conversion events
- Email opens
- Page views

Marketing Intelligence

- Social media data
- Original source
- Web analytics



WHAT A SUCCESSFUL SEGMENTATION STRATEGY LOOKS LIKE

In order to be an effective email marketer, you'll first need to fully develop buyer personas. These personas provide a clear picture of who will be receiving your emails. The fundamental lists you'll need to create (at the very least) are subscribers, leads and customers. These lists will help ensure that you send the right message, at the right time, to the right person. After these lists are created, look into developing additional lists based on engagement (e.g., site visits in the past 90 days, visits to page X), and/or email health (e.g., unsubscribes, bounces, unopens).

Taking your list development one step further, consider business-specific information you might want to track, as every business is unique. It will be up to you to decide what questions you need to ask and what information to collect that will allow you to send more contextual and personalized emails.

TRAITS OF HIGH-PERFORMING EMAILS

Creating and sending great emails is easy when you're familiar with the best practices.

The three best practices we will examine are:

1. Determine a primary goal of the message
2. Optimize your email for opens
3. Compel the reader to take action

BEST PRACTICES FOR HIGH-PERFORMING EMAILS

1. Determine Primary Goal

You can't write a great email if you don't know why you're sending it. If you're unsure of the goal of your email, the "5 W's" are a great place to start. Ask yourself:

- Who is getting this email?
- What action do you want the reader to take after receipt?
- When is the appropriate time to send the message?
- Where will the email be read?
- Why are you sending this message?

BEST PRACTICES FOR HIGH-PERFORMING EMAILS

2. Optimize for Opens

Think of your email's subject line as a gatekeeper. A good subject line compels your readers to take action and open the message. Follow these tips to optimize your subject line for opens:

- Short and sweet is best (60 characters max)
- Front-load important words or key phrases
- Avoid sales-y language and jargon
- Keep it simple and straightforward
- Personalize when appropriate
- Mix it up

BEST PRACTICES FOR HIGH-PERFORMING EMAILS

3. Compel the Reader to Take Action

A fundamental trait of high-performing emails is a constant focus on writing great copy. Without it, your readers will struggle to find value in the communications you send. Some tips for writing effective email copy are as follows:

- Write for scannability (quick read)
- Use the right tone (buyer persona)
- Personalize when appropriate
- Make it readable on any screen
- Proofread-Proofread-Proofread

Tips for Choosing From Name and Address

- Use a company email address, never a free webmail account
- Don't send emails from no-reply
- Use an address that indicates the purpose of the send
- Let the customer's lifecycle dictate who the email comes from

BEST PRACTICES FOR HIGH-PERFORMING EMAILS

A call to action (or CTA) is another key component of high-performing emails. Its sole function is to take readers out of their inbox and further engage. When determining a CTA, ask yourself the following questions: What do I want the reader to do? Why should they do it, and how will they know how to do it? Whatever the answers are, your email should never use more than one CTA. The golden rule of attention ratios is one email equals one purpose or goal. A trick is to make each component of your email is a CTA. Specifically, link any images in your email to your offer's landing page. Hyperlink the appropriate copy in the email to that landing page as well. Ensure the images and CTAs used have appropriate alt-text and, if necessary, modify the message's preview text.

BEST PRACTICES FOR HIGH-PERFORMING EMAILS

Last but not least, we want to briefly discuss email testing. Testing gives you the peace of mind needed to send your message with confidence. If you're unfamiliar with testing best practices, here's a few tips to get you started.

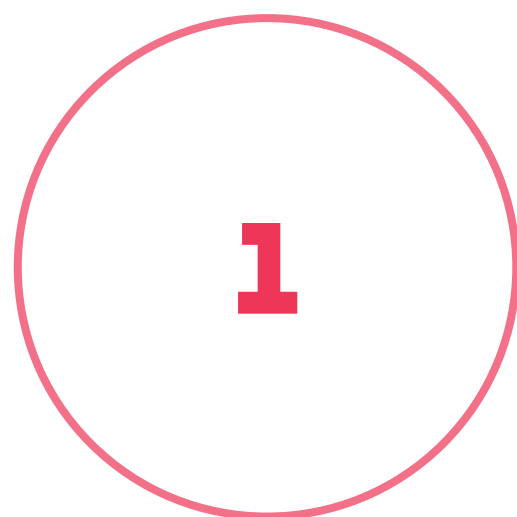
- Send a test to yourself (check on both desktop and mobile)
- Try to read your email without images
- Click on and test all links
- Make sure the unsubscribe link is functioning
- Make sure there's a plain text version of the email
- Test the message in all popular apps and programs

EMAIL DESIGN & FUNCTIONALITY

Together, design and functionality create your user experience—or UX.

It is important to produce and provide quality content, but great design is equally important and it can make a huge difference. A good email uses design to improve the content or message. Great design also creates a consistent experience for everyone who receives your emails so you can deliver your message with as little friction as possible through repetition and recognition.

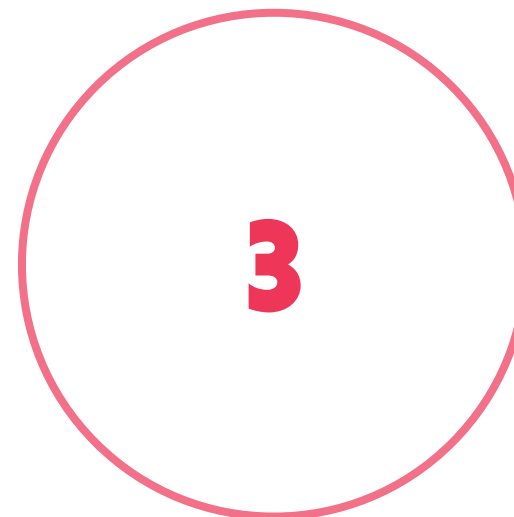
EMAIL DESIGN BEST PRACTICES



Pick a Primary Goal



Write and Design
the Copy



Create a Consistent
Experience

EMAIL DESIGN BEST PRACTICES

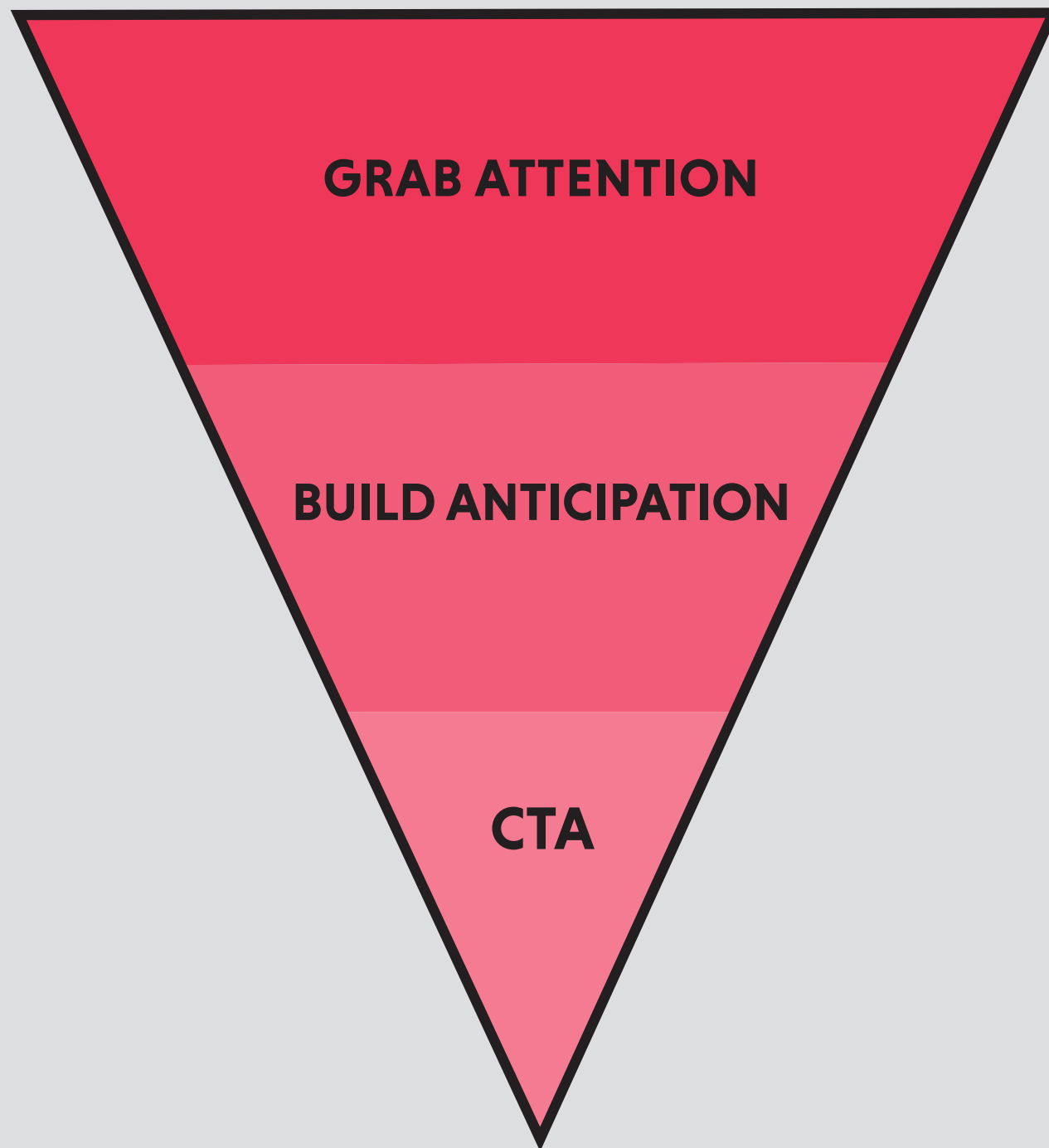
1. Primary Goal

Selecting a primary goal for your email is critical. Without one, how will you ever know if you're successful? An example of a good goal for an email would be to have the recipient complete an action like making a purchase or scheduling an appointment. Every part of your email should support that goal. Too many options presented to the reader lead to what is called "analysis paralysis," which is the state of overthinking that stops people from being capable of making a decision. Remember, deliveries, clicks and opens are metrics, not goals.

2. Write and Design the Copy

As a marketer, the actual copy you choose to use in your email is one of the few factors you have complete control over. How you structure and design your content is just as important as what you actually say. Use headers and subheads along with your brand's fonts and colors to improve readability. Use plenty of white space, reduce information density and avoid huge paragraphs of text by all means necessary. First, grab attention. Second, build anticipation. Third, compel the reader to take action.

INVERTED PYRAMID METHOD



EMAIL DESIGN BEST PRACTICES

3. Create a Consistent Experience

Email Layout Design Guidelines

- Provide a link to an online version of your email
- 600 px is the ideal width
- Avoid HTML/CSS-based positioning
- Stick to table structured positioning

Email Images & Styling Tips

- Always add alt-text to your images
- Avoid creating your email as a single image
- Avoid using background images
- Don't use externally referenced CSS
- Define the width and height of your images
- Don't use PNG files
- Less is more

Designing for Mobile

- Use mobile-friendly templates
- Move your CTA above the fold
- Put the navigation in the footer
- Font should be a minimum of 14 pt
- Avoid large blocks of text with line breaks
- CTA minimum size 44x44 px

DELIVERABILITY DOS & DON'TS

Email deliverability is the measurement and understanding of how successful a sender is at getting their marketing messages into inboxes.

When we talk about email deliverability, we're not talking about a secret key into someone's inbox. It's not a way to outsmart the good people at Google and get past the promotions tab. Nor is it some sort of secret code that bypasses spam filters. If you continue to send people email they don't want and that doesn't benefit them, you'll eventually no longer reach their inbox.

DELIVERABILITY: WHAT TO DO AFTER YOU HIT SEND

Sources

Ask yourself how valid the people are on your list. How were the addresses acquired? Were they purchased (this is a major red flag), acquired or rented? Any email marketing vendor who cares about your success (and sending reputation) expressly forbids emailing purchased lists. Email marketing is about respecting the trust someone places in you when they give you their email address.

Permissions

This one is simple. Do you actually have permission to send the email you're thinking of sending? This especially applies to marketing emails. People don't like surprises in their inbox—so be sure you're a welcome guest.

Expectations

Once you've verified that you have permission to email your contact, you then need to take great care to ensure they are expecting to hear from you. This is where you need to hold yourself and your emails to a higher standard.

DELIVERABILITY: WHAT TO DO AFTER YOU HIT SEND

Engagement Metrics

Engagement metrics will allow you to uncover the “good” that you’re doing. You’ll look at two primary metrics here: opens and clicks. Opens will help you identify trends in your deliverability, and clicks are proof positive that your email motivated the recipient to do something.

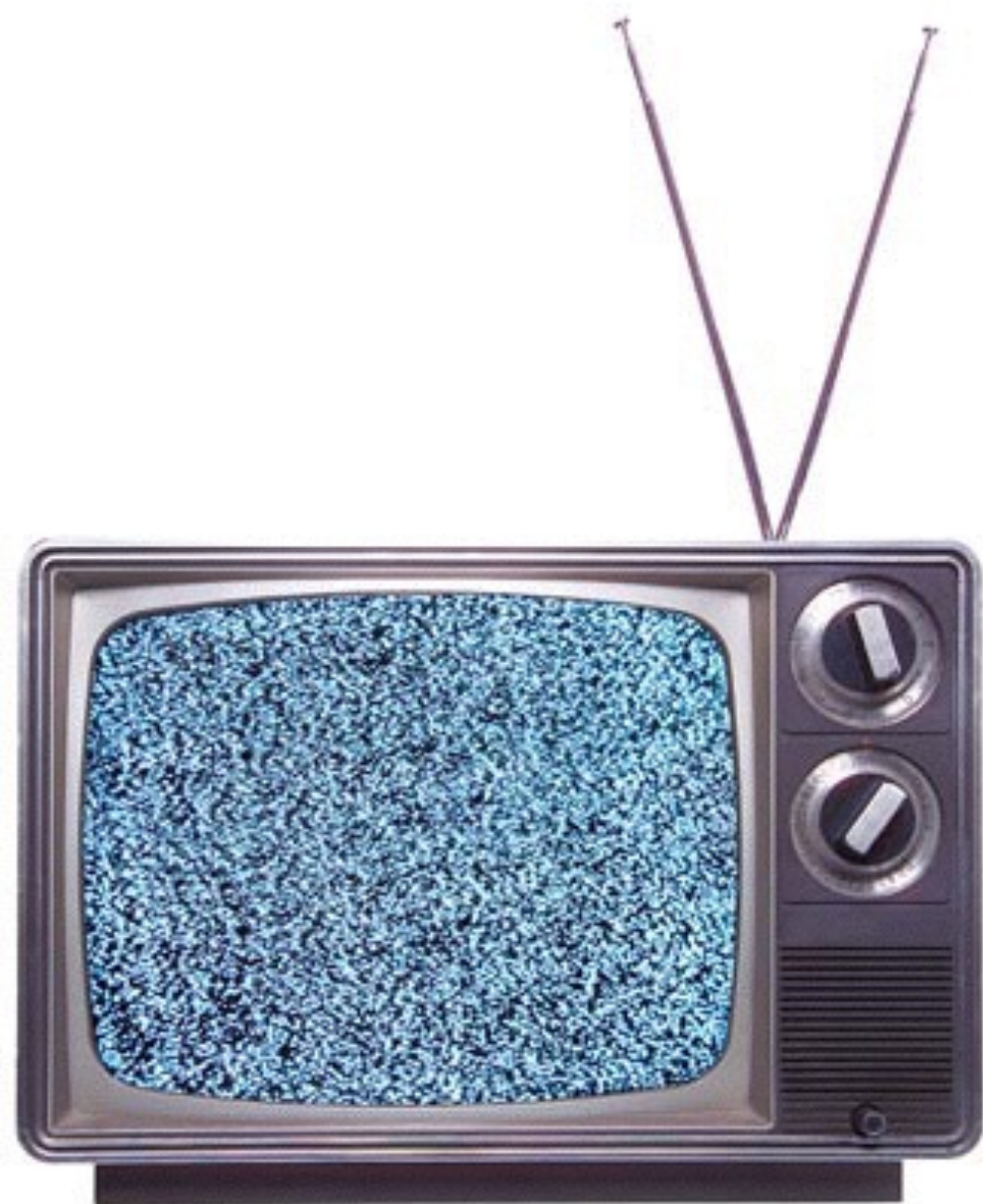
Churn Metrics

Your churn metrics can help you uncover areas of improvement. Churn refers to one of the three ways to lose contacts: opt-out/unsubscribe, bounces or mark as spam, with unsubscribe being the best means of being rejected. Bounces mean the email was rejected by the recipient’s mail server for one of a few reasons. The recipient’s server might not have liked something you linked to, you may not have had enough actual text content in the body of the email or what you did have was riddled with spelling errors, or your message may have looked like something previously marked as spam. There are hard bounces, such as a recipient bounce (code 500 or 550), a content bounce (code 571 or 554) or a reputation bounce (code 571, 554 or 471). There are also soft bounces (a three-digit code beginning with a 4), which are less severe and usually require a wait-and-see approach.

DELIVERABILITY: WHAT TO DO AFTER YOU HIT SEND

Spam Complaints

Spam complaints are going to happen—there's nothing you can do about it. You can, however, strive to make sure they're as few and far between as possible. Unfortunately, most email providers don't actually tell the sender when recipients mark their message as spam, so a good rule of thumb is to multiply the number of spam complaints you're receiving by three to get a more accurate number. The quickest way to become a better sender is to stop sending email to people who aren't picking up what you're putting down. Continuing to email unengaged contacts can be detrimental to your sender reputation.



SPECIAL NOTE: GRAYMAIL

It's worth discussing graymail for a moment. This classification of email isn't quite spam, but if you fall into this category, eventually Internet service providers will stop showing your messages to subscribers. Inquire whether or not permanent suppression is built into your email tool; if not, you'll need to monitor engagement a bit more closely.

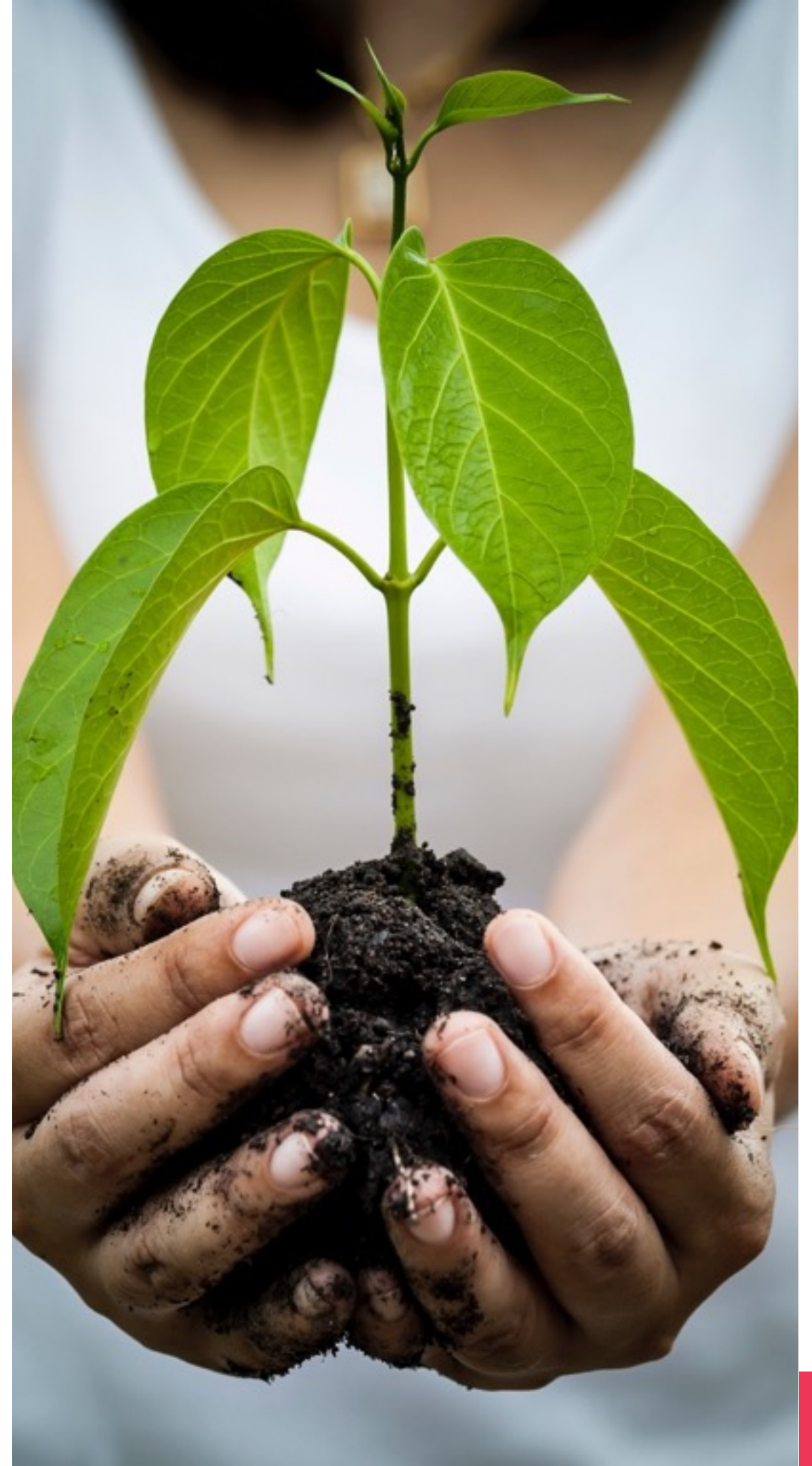
LEAD NURTURING FUNDAMENTALS

By definition, nurturing is helping someone grow.

Lead nurturing is the process of building relationships with your prospects over time, with the goal of earning their business when they're ready. In order to be successful with lead nurturing, you must be helpful and relevant, and provide value to the recipient. You accomplish this by establishing a relationship with your prospect and building trust.

LEAD NURTURING BEST PRACTICES

- Decide how your business will use lead nurturing
- Learn how to build a great individual workflow
- Communicate based on behavior



THREE APPROACHES FOR LEAD NURTURING

1. Convert—Nurture—Qualify—Pass to Sales
2. Convert—Sales Connect—Nurture—Pass Back to Sales
3. Convert—Nurture—Pause—Try Again

The approach you select will depend on what is appropriate for your business model and a number of other variables. You'll want to consider how many leads you're getting each month, and what channels are generating those leads. You'll also want to consider whether your organization has a dedicated sales force or not, and if so, how large it is and what their bandwidth is for following up with new leads, as well as how long your typical sales cycles are.

LEAD NURTURING IN ACTION

With lead nurturing, it's the actions or qualities of the lead that trigger the email send, not the marketer. In order to build great individual workflows, you'll need to:

1. Decide who you want to nurture
2. Select a goal
3. Send emails that help readers accomplish that goal

LEAD NURTURING IN ACTION

Examples of Good SMART Goals

- Attend/Register for a Webinar
- Download an eBook, Guide or Offer
- Request a Consultation
- View a Case Study
- Start a Free Trial

Examples of Lead Nurturing Email Types

- Establish Trust
- Additional Downloads
- Goal/Action
- Breakup

The single best tactic for increasing email engagement is to send triggered emails based on user behavior and actions. This philosophy is what we'd call a user-focused approach to sending email. As a marketer, every channel you employ provides a unique opportunity to listen to your users and learn more about them, and to start a timely and personal conversation.

MEASURING SUCCESS & OPTIMIZATION

Your email metrics are actually a listening device you can use to continually refine and improve your entire marketing strategy.

If you are wondering why analytics are important to the success of your email marketing program, simply ask yourself if your strategy is based on faith or data. What you want to do is use that data to tell a story, not just report numbers of opens and clicks. The natural result of all this tracking and reporting of data is accountability, which in turn leads to transparency in business operations.

TRACKING EMAIL METRICS

Individual Email Metrics

These include Sent, Delivered, Open Rate, Click-Through Rate (CTR) and Conversion Rate. Some things that can affect your open rates are From Name, From Address, Subject Line, the strength of your brand and the actual content of the email. Some things that can affect your CTR are how convincing your email copy is, how well the email is designed your call to action, and/or the quality or value of your offer.

Email Channel Metrics

These metrics are an aggregate of the results of all your email sends. Here you'll look to determine how much web traffic was driven by your email and how many conversions your email generated, as well as determining a baseline for clicks and opens.

Email Health Metrics

Here we're going back and assessing deliverability. Keeping in mind that the average contact database decays 22.5% per year, it's of the utmost importance that you weed out your contact database and remove unengaged contacts permanently to avoid becoming graymail to those individuals.

TRACKING EMAIL METRICS

You'll inevitably experience some bounces each time you send, and hopefully very few to no spam complaints. However, if you do, here are some questions to ask yourself.

- Did the content of your email add value, or ask for it?
- Did the recipient expect to receive the email?
- Are you emailing recipients the right content at the right time?
- Are you emailing recipients too much?
- Were the proper expectations set with the subscriber?

TRACKING EMAIL METRICS

Quick Email Optimization Reference List (Problem—Solution)

- Bad subject line? Short to the point, non-sales-y.
- Bad subscriber expectations? Create more options, set proper expectations.
- Unengaged contacts? Send a re-engagement offer or delete.
- Relevancy? Fix poor segmentation, re-examine personas and buyer's journey.
- Deliverability issues? You're a spammer! STOP!
- Did the recipient expect to receive the email?
- CTA isn't prominent enough? Examine heat map and adjust.
- Lack of focus in messaging—Objective of email should be crystal clear.
- Not optimized for mobile—Use responsive templates and think "mobile-first."

FINAL THOUGHTS

Mission-Critical.

It is critical, to any business's success, to implement and execute a well-thought-out email marketing strategy. We understand we covered a lot in this book and hope you found the information therein valuable. If you have any questions about implementing an email marketing strategy for your business, J&C has years of proven experience and can certainly help. We'd love to hear from you and discuss how we can help you achieve your organization's goals.

WANT TO LEARN MORE?

68% of emails are currently opened on mobile, and every year that percentage increases. Don't let emails get labeled as trash from the get-go. Use our Email Marketing Optimization Reference Guide to make sure your emails are mobile-ready.

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