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HANDBOOK

Email Marketing Second Edition

Research-based strategies
for accelerating email
marketing performance

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Email Marketing Handbook: Second Edition

Research-based strategies for accelerating email marketing performance

Lead Author

W. Jeffrey Rice, Senior Research Analyst

Contributing Authors

Sergio Balegno, Director of Research
Daniel Burstein, Director of Editorial Content
Jen Doyle, Senior Research Manager
Adam Sutton, Senior Reporter
David Kirkpatrick, Reporter
Jeri Dube, Freelance Reporter

Production Editors

Brad Bortone, Senior Copy Editor
Selena Blue, Junior Copy Editor
Sean Kinberger, Graphic Designer



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service@sherpastore.com.

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FROM THE AUTHOR

Email is an evolving communication channel, moving from its direct mail origins, to a digital tether tying together diverse marketing tactics. Email has matured in stride with Web and search marketing tactics to track user behavior and corroborate its contribution in revenue generation. The media's ability to measure its influence on conversion has helped raise marketing's leadership role in organizations. The data collected has enabled brands to create robust customer profiles and in conjunction with marketing automation, deliver more targeted and well-received content to their customers and prospects.

Nonetheless, this may be more of a survival tactic, than an enlightened transformation. Today's buyers are cynical of marketing messages, especially when pushed upon in the form of "chest-thumping" commercials, dinner-interrupting robo-calls, or junk email that clutters their inboxes. Technology has empowered consumers to bypass broadcast media, dictate their preferred communication channel, tailor their inboxes to their personal definition of junk mail and share their experiences with countless like-minded shoppers.

The trend towards "servant" marketing focuses on creating opportunities to invite customer engagement, rather than tearing the door down. This strategy uses the both user-submitted and behavior data, to provide meaningful guidance in a manner that reveals a brands humility, transparency and desire to improve the lives of its community members. As this strategy matures, the attention shifts from individual tactic metrics, to overall engagement metrics uncovering the total time spent actively participating with the brand.

My discussions with email marketers during Summits, surveys and workshops have given me the chance to witness their passion and drive for developing stronger subscriber relationships. It has been a privilege to discover and share best practices with this group of email marketers. If you are choosing to read this, you most likely to share in their traits of innate creativity, curiosity and ingenuity required to be successful in an industry that thrives on continuous improvement.

The second edition of this handbook is written to encourage calculated iteration within your email marketing program. Whether you are new to email marketing or a seasoned veteran looking to add a wrinkle in your lifecycle campaigns, our process breaks down the actionable steps to improve the accuracy and effectiveness of your email communications. It starts with identifying how to aid the subscriber at each funnel stage, and finishes with the safe arrival in their inbox. Actually, in the spirit of innovation the process is never quite complete, as the journey ends and begins with testing and optimizing your email campaigns.

We understand how quickly things change in the marketing community. As you experiment and make new discoveries, please feel free to share your findings on [MarketingSherpa's LinkedIn](#) group. There, we can continue this conversation and share both our challenges and successes.

Sincerely,



W. Jeffrey Rice
Senior Research Analyst, MarketingSherpa
MECLABS Primary Research

INTRODUCTION

Today, marketers are under more pressure to amplify brand awareness, deliver qualified leads, and increase online transactions, even as the numbers of communication channels exponentially expand and marketing budgets tighten. Complicating matters further, marketing strategies have shifted from command and control methods to more open and inclusive tactics.

In this network model, a brand is no longer separated from the conversation; rather it is expected to participate. These discussions are not scripted, rather organic and free flowing. Many marketing mavens find it difficult to communicate concisely in a world of multitasking and always-on-the-move consumers whose attention spans perpetually shrink. Nevertheless, the old adage, "Tell me and I forget; show me and I remember; *involve* me and I understand," still rings true today.

As marketing practitioners adapt to this changing landscape, many of their traditional tactics will need modifying to flourish. The task to build a healthy ecosystem in which community members spontaneously interact and share valuable information requires that all the communication points are linked, transparent and not easily manipulated. Fortunately, email marketing is well-suited to integrate with a multitude of existing and emerging communication channels to deliver precise value in this ever-evolving environment.

To accelerate email and their overall marketing performance, marketers must overcome obstacles to work synergistically with a variety of communication channels and data centers to assist the customer along the path to purchase. This is reflected in the recently published *2012 Email Marketing Benchmark Report*. Marketers from Fortune 500 companies to small "mom-and-pop" stores told us the email marketing processes in most need of improvement were:

1. Using email for funnel optimization
2. Integrating email data with other data systems
3. Achieving or increasing measurable ROI
4. Integrating email with other marketing tactics
5. Growing and retaining subscribers

ACCELERATING THE SPEED AND ACCURACY OF EMAIL MESSAGES

To help you survive and thrive in this marketing ecosystem, we have uncovered the best practices to give your organization the sustenance to increase the speed and accuracy of its email communications. Inside MarketingSherpa's *Email Marketing Handbook: Second Edition*, you will find the latest research, charts and case studies for elevating email marketing effectiveness. The chapters are arranged to quicken your email marketing programs iteration development.

The worksheets and exercises included are designed to help you prioritize and fine-tune your message when adding lifecycle communications or promoting the latest mobile app. Our goal is to have this handbook become your trusted resource for executing meaningful email communications.

The content of this handbook is based on eight years of research from surveying more than 10,000 marketers and numerous interviews with practitioners to document their successes (and, at times, failures) for our case studies and how-to articles. Additionally, the frank conversations with attendees at Summits, workshops and various online media platforms have provided insight into the latest email marketing

Handbooks

MarketingSherpa handbooks provide research-supported best practices for improving the performance of marketing programs, and to provide a curriculum for self-instructed and professional career advancement training programs. Handbooks include case studies, processes, best practices, worksheets and data to support recommended practices.

challenges. Students' candor has directed our research into mobile design, social integration and the endlessly evolving ISP strategies for user-friendly and spam-free mailboxes.

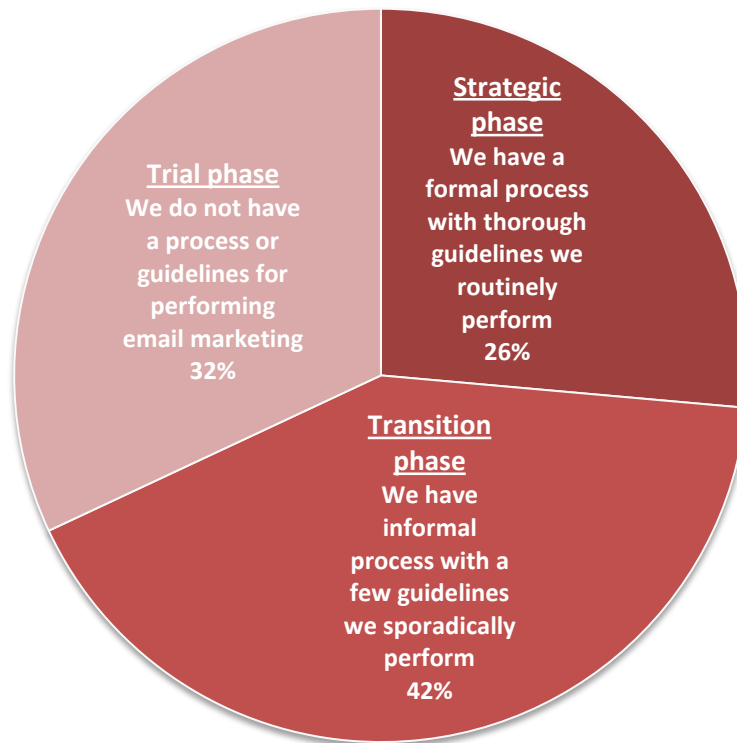
EMAIL MARKETING MATURITY

At the core of our research is the documentation and examination of proven processes of successful marketing departments. Best practices and sales and marketing intuition are not enough to build strong relationships with customers. Rather, it takes a measurable and repeatable methodology by which people, process and technology are aligned to effectively engage customers from introduction to conversion.

MarketingSherpa segments its email marketing benchmark data into three maturity phases: *Trial*, *Transition* and *Strategic*. This practice enables researchers to examine the differences in email marketing performance by organizations in each phase of maturity, and demonstrate the benefits of improving email processes.

Each phase characterizes how systematic an organization is in its approach to email marketing. The process it uses to plan, execute, measure and report on email marketing programs determines an organization's maturity phase. Instituting formal and repeatable email processes has been a priority for marketers for some time. While many firms have made progress, the following chart shows there is more work to do.

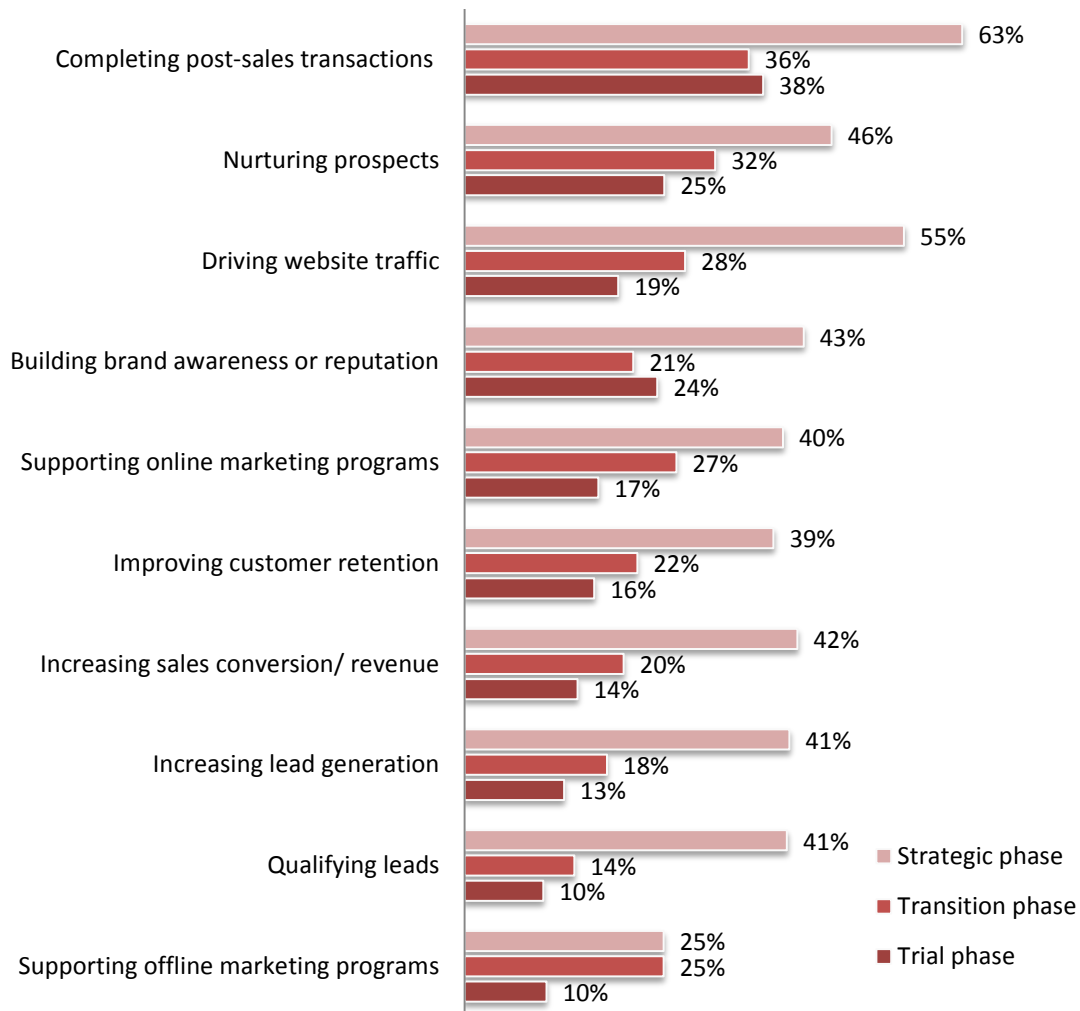
CHART: OVERALL EMAIL MARKETING MATURITY ASSESSMENT REVEALS OPPORTUNITY FOR IMPROVEMENT



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

MarketingSherpa’s 2012 *Email Marketing Benchmark Report* made a clear correlation between the phase of an organization’s email marketing maturity and the effectiveness of its email programs. The following chart demonstrates organizations in the Strategic phase are twice as likely to find email effective in driving website traffic, increasing lead generation, qualifying leads, improving customer retention, and *most importantly*, increasing sales revenue in comparison to their Trial phase foes.

CHART: CMO VIEW OF EMAIL EFFECTIVENESS ON BUSINESS OBJECTIVES BY ROI MATURITY PHASE
 Q. How EFFECTIVE is email marketing at achieving the following business objectives for your organization?



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
 Methodology: Fielded July 2011, N=2,735

Effectiveness is a key difference between organizations in each phase of email marketing maturity. Email is clearly more effective at achieving the objectives of organizations in the Strategic phase than it is for organizations in less mature phases. This disparity creates a sound business case for investing in the necessary marketing education and training to advance from your current phase of email marketing maturity to the next.

EMAIL MARKETING MATURITY ASSESSMENT

Before we begin to discuss refining email marketing processes, it may be helpful to conduct a quick assessment to determine your current processes. This will enable you to identify the current strengths and weaknesses in your execution.

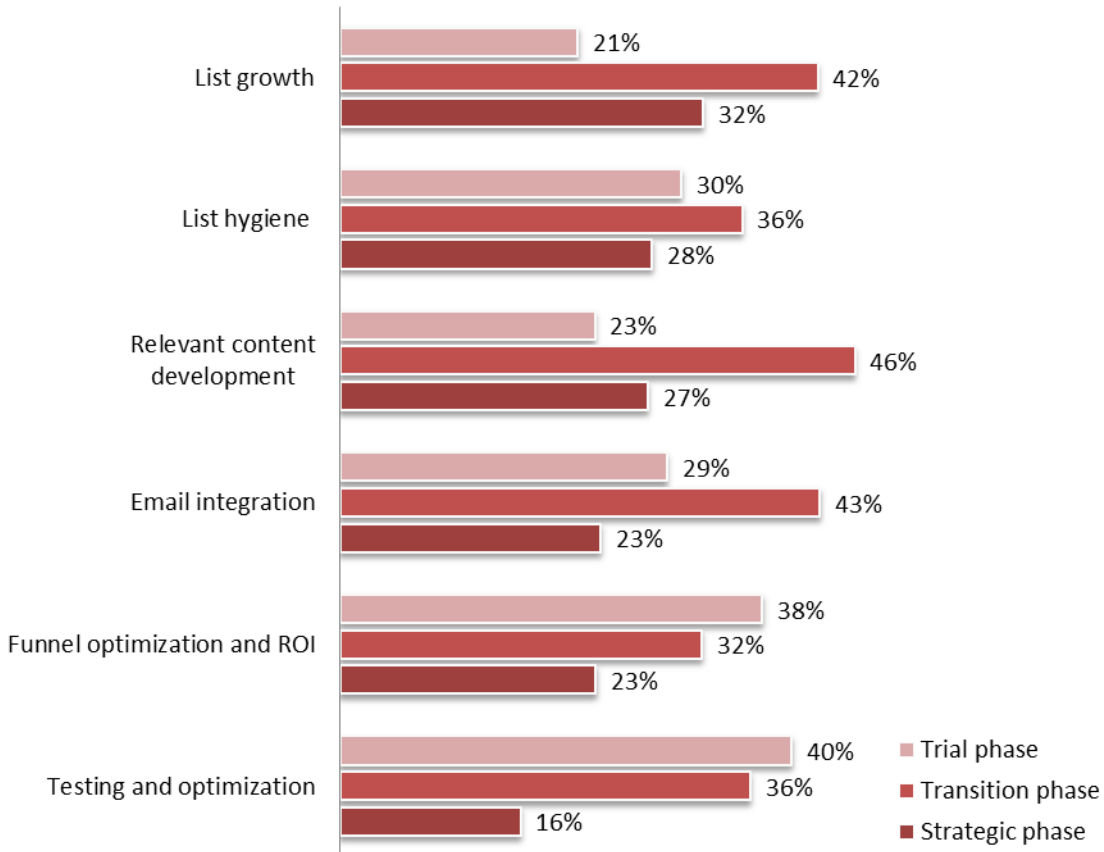
To complete the worksheet, circle one number in each row that corresponds with the column heading that *best describes* the process you use for each tactic. For example, circle 5 in the first row if your organization has a formal, documented process with thorough guidelines that is routinely performed for overall execution of list generation campaigns. If your organization has not begun to formulate a process for this tactic, circle 1. After circling one number in each row, subtotal each column and combine columns for your total score. Matching this score to the phase shown in the bottom row will determine where your organization is now in the email marketing maturity lifecycle.

Email Marketing Maturity Process Benchmark	Organization does not have a process or guidelines for performing email marketing.	Organization has an informal process with a few guidelines it sporadically performs.	Organization has a formal process with thorough guidelines it routinely performs.
Tracking email's impact on the Marketing-Sales funnel and ROI	1	3	5
Integrating email with other marketing tactics	1	3	5
Creating relevant messages (content, segmentation, timing)	1	3	5
Building a list of subscribers	1	3	5
Maintaining list hygiene and monitoring deliverability statistics	1	3	5
Testing, analyzing and optimizing email communications	1	3	5
Subtotals			
Total			
Email Marketing Maturity	Trial Phase: 6–10	Transition Phase: 12–18	Strategic Phase: 20–30

To delve deeper into the statistics, we separated these six protocols found in most email marketing processes. How does your organization compare to this benchmark chart?

CHART: LIST GROWTH FOUND TO BE MOST ADVANCED EMAIL MARKETING PROCESS

Q. Please select the statement that best describes the process your organization uses to plan, execute and measure the performance of the following activities.



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
 Methodology: Fielded July 2011, N=2,735

The chart above reveals marketers are most likely to have strategic processes in place for list building and list hygiene maintenance. The intuitive philosophy of “the money is in the list” may drive more organizational processes to ensure a healthy list of quality and active subscribers.

The complexity of reaching a target audience with meaningful messages is moving firms to find more repeatable processes to create relevant content and join conversations across multiple communication channels. These two areas are most prominent in the Transition phase.

Marketers in the Trial phase of testing and funnel optimization have a tremendous opportunity for growth. Implementing testing procedures can quickly enhance the effectiveness and efficiency of an email program. While optimizing email to have a greater impact on the Marketing-Sales pipeline will enable email marketers to justify the channels value to an organization.

The analysis of mature email marketing programs allowed us to uncover barriers preventing subscriber engagement and identify keys to successful communications. We will share the email best practices throughout this handbook. Keep in mind, the steps identified are interrelated, so even small improvements in one area will positively influence the others. For instance, the steps taken to build a quality subscriber list will pay dividends in your ability to create engaging content and ensure reliable delivery.

PERFORMANCE PATH

As we mentioned earlier, adhering to best practices is only a starting point. Your subscribers are constantly interrupted by advertising messages and may even be experiencing email fatigue. It will be a combination of your insights, innovation and systematic dedication to continuous improvement that will determine the email strategies implemented to best engage customers on their terms.

YOUR INSIGHTS

Every customer is an individual with unique preferences. Each of the marketing tactics in your arsenal has distinct qualities, and it is your job as a marketer to tailor them to your audience. Again, best practices are a good place to start, but do not discount the breadth of knowledge you already possess from your customers, your products and the competition. Your company's core values and brand voice will also guide you in manufacturing meaningful communications.

INNOVATION AND RISK TAKING

Email marketing is a mature and trusted tactic, as reflected in MarketingSherpa's *2012 Email Benchmark Report*, which notes that 73% of companies recognize that email either currently produces or will produce ROI, and are increasing their email budgets in 2012.

As marketers, we strive for alignment with our sales team. On some days, we will need to evangelize the latest marketing tactics to meet a customer's preference. At other times, we will defend the current e-marketing strategy, urging colleagues not to add one more link, picture or offer in communications by explaining there is a high price to pay for clutter.

These are the moment-to-moment judgments of knowing when to innovate and when to be risk-averse. Only you know what is best for your company. Investigating different approaches to try to outperform your current marketing initiatives is essential. When we actively seek out key performance indicators and which areas need improvement, upholding our strategy will be easier.

CONTINUOUS IMPROVEMENT

The idea is that you will continuously experiment in small increments, moving from best practices, to customization and testing, and then repeat the process. The goal is not perfection, but rather ongoing improvement — giving you the freedom to try new tactics while meeting your ship dates.

As this email process is formalized and repeated, a culture of testing and optimization will cultivate to enable you to go beyond best practices, and truly understand what works best for your community, organization and customers.

Again, the course structure encourages the expansion and iteration of your email marketing campaigns. Our process starts with identifying how to aid the subscriber at each step in the path to purchase and is never quite complete as the journey ends with testing and optimizing the message. Please find a quick summary of the six stages to accelerate your email marketing performance below.

MARKETING SHERPA'S SIX STEPS TO ACCELERATING EMAIL MARKETING PERFORMANCE

Identify impact and purpose

Email provides instant feedback on campaigns success from open rates, and clickthroughs that marketers crave. The movement of the customer towards conversion in the Marketing-Sales pipeline is the true measurement of success. In this section, learn steps to assess and prioritize placement in the path to purchase where email can have the most impact on your bottom line. You will better able to demonstrate the value of your email marketing programs to C-Suite and senior leadership.

Email marketing integration

Combining email with other tactics in your marketing toolkit can create positive synergy and tangible benefits to your entire program. The two most frequently discussed marketing topics are social media and the fast adoption rates of smartphones and tablets. Learn the evolving best practices to leverage the power of social media for sharing content and generating list growth. Develop email messaging strategies to meet the new requirements on smaller screens and for mobile lifestyles.

Content creation

In this section, learn the three keys to relevancy; contagious content, segmentation and real-time communications. First, align your internal resources to churn out content consistently and recognize opportunities to streamline processes. Next, combine available data found in your CRM, social CRM and accounting software with your email database to identify opportunities to help customers. Finally, establish processes that allow communications to be sent at their peak of pertinence.

Quality list growth

In this section, learn how to develop a strategy to build a quality list of brand evangelists for your company based on your resources and target audience. Examine your current subscribers. Discover if they are engaged and receiving email *they* determine relevant. Design a robust preference page including opt-down options, and even ask recipients to unsubscribe. Then turn your attention to adding new subscribers with a mix of offline and online tactics right for your brand. We'll teach the latest methods to systematically grow a core group of fervent fans.

List hygiene and monitoring deliverability statistics

All of a marketer's effort will be for not, if their messages do not reach the recipient's inbox. Understanding your relationship with ISPs and how your reputation affects your deliverability success is the first step. Next, take strategic action on your methods for handling complaints, list hygiene, relevant content and sending permanence to protect your reputation. Maintain best practices from diligent lead capture to legal compliance. Implementing repeatable deliverability processes will give you an edge in the ever-changing email landscape. As new regulations roll out and Web mail providers enhance their filters to prioritize emails in their customers' inboxes your team will keep pace.

Testing and optimization

Well-intentioned marketers read business books, watch webinars and attend seminars to keep up to date on the latest marketing trends and best practices. While this can generate new ideas or reinforce old convictions, the only way to truly understand what works for *your* organization and *your* customers is to continuously test and optimize your email messages. In this chapter we will outline the process, including testing methodologies and preparation practices. In addition, discover which email messaging elements are most popular and effective to trial.

About MarketingSherpa LLC

MarketingSherpa is a primary research facility, wholly-owned by MECLABS, dedicated to determining **what works in marketing** via exclusive case studies, surveys, and results data analysis. Then we publish what we learn so our community of marketers and weekly readers can improve their results and train their teams.

Praised by *The Economist*, Harvard Business School's Working Knowledge Site and Entrepreneur.com, MarketingSherpa is distinguished by offering **practical, results-based marketing** information researched and written by a staff of in-house reporters.

MarketingSherpa features:

- **Best Practices:** 1,000+ brand-side marketer case studies and 3,500+ Creative Samples
- **Research:** 2,000+ marketing and research abstracts
- **Instruction:** 800+ how-to articles
- **Newsletters:** 230,000+ marketers read weekly case studies on topics such as email, search, social, lead generation, lead nurturing, optimization and content marketing
- **Training:** 100+ live, hands-on training sessions providing practical and proven solutions
- **Summits:** 3 annual vendor-neutral, research-based marketing events

About MECLABS

MECLABS is a science lab that uses real-world research and training to **help business leaders get better use out of sales and marketing technology and resources**, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

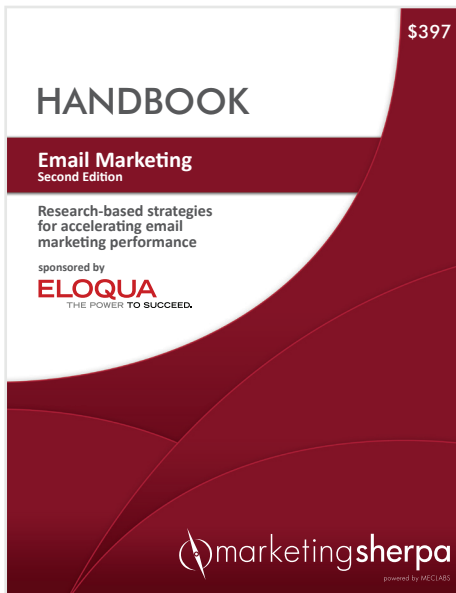
MECLABS deploys a rigorous methodology to conduct research. This research is compiled from:

- More than **10 years** of research partnership with our clients
- **1,300** experiments
- Over **1 billion** emails
- **10,000** landing pages tested
- **5 million** telephone call
- **500,000** decision maker conversations

MECLABS has consulted with companies like Cisco, Johnson & Johnson, *The New York Times*, 1-800-Flowers, and NetSuite to optimize sales and marketing processes and achieve triple-digit ROI gains.

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