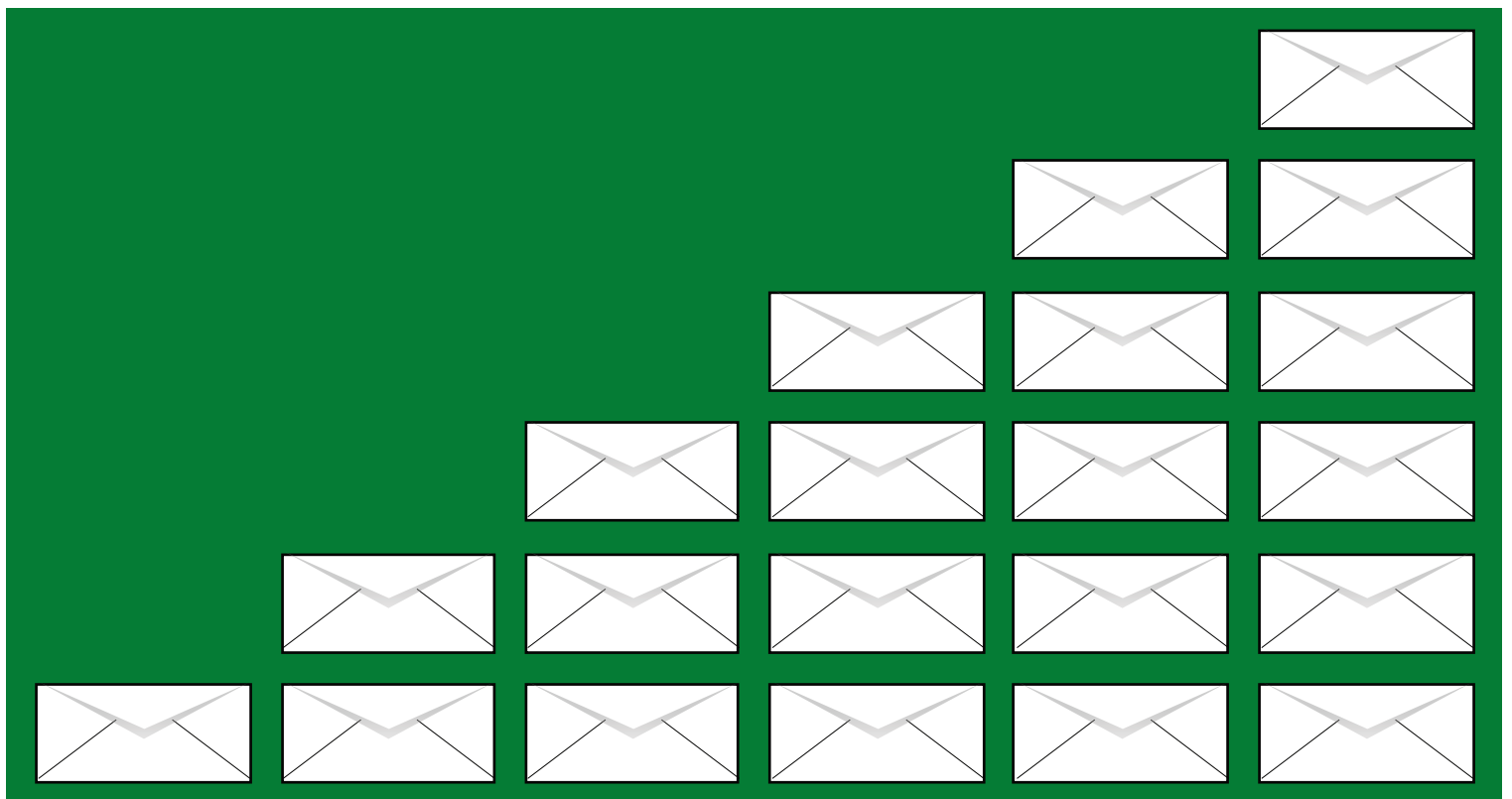


# Best Practices Enhanced

Volume 1: Content, List Management, and Testing

*2015 Revised Edition*



This guide is published by:  
Goolara, LLC  
1030 Country Club Drive, Suite D  
Moraga, CA 94556  
Telephone: (510) 522-8000  
(888) 362-4575  
Fax: (510) 522-2457

Copyright © 2015 Goolara, LLC All rights reserved.  
No part of the contents of this publication may be reproduced or transmitted in any form or by any means without the written permission of Goolara, LLC.

Goolara and the Goolara logo are registered trademarks in the United States, other countries or both. All Rights Reserved.

[www.goolara.com](http://www.goolara.com)

# TABLE OF CONTENTS

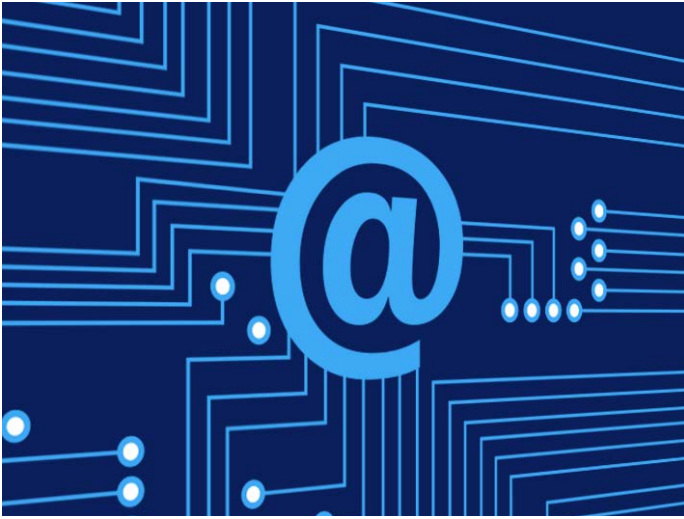
---

<b>Introduction</b>	1
<b>Email Collection</b>	3
Buying lists	3
Make registration easy	4
Consider adding demographic details in phases	6
Make your policies clear about how the email will be shared	6
Double opt-in	7
<b>More deliverability issues</b>	8
Removing unengaged recipients	8
Spam Traps	9
List appends	9
<b>“From” address</b>	11
Use your company name whenever possible	11
Use a consistent name	12
Avoid Do Not Reply addresses	12
Make it descriptive	13
<b>List Management</b>	14
<b>Email and Different Channels</b>	16
<b>Personalization</b>	18
Mail merge	18
Dynamic Content	19
Segmentation	21
<b>Test With A/B/ Splits</b>	23
Best time to send	23

- Measure and Adjust** ..... 25
  - Testing ..... 25
  - Engagement and Deliverability ..... 26
  - Send logs ..... 27
  - Comparisons ..... 28
  - Trending reports..... 28
- Send a Welcome Email.**..... 29
- Configuration**..... 30
  - Remap URLs ..... 30
  - Use authorized protocols ..... 30
  - Send to customized landing pages..... 31
- Summary** ..... 32

# INTRODUCTION

---



**B**est Practices, simply put, means everything you do to make the email as engaging for the reader as possible. This encompasses everything from the subject line, to the links, to the content. Some people think Best Practices refers to the CAN-SPAM Act, but this is wrong. CAN-SPAM dictates what is legally required by the sender in terms of address information, unsubscribe links and so forth. What is best never enters the picture. Nonetheless, as we shall see, CAN-SPAM issues can play an important factor in the process of following best practices. Best Practices can refer to several things. On one level it means

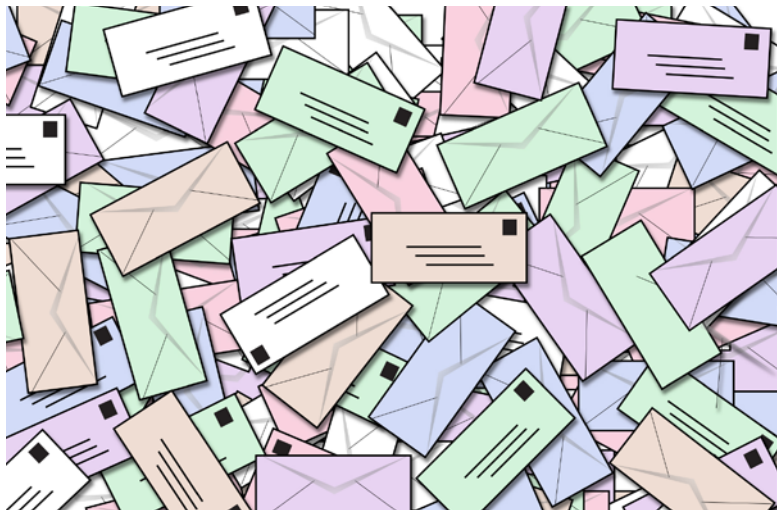
treating your email recipients with the same respect that you would want to be treated yourself, but it can also mean designing your email with multiple email clients in mind. Some of what goes into Best Practices is simply common sense (don't send offensive material), and some *should be* common sense, but is often ignored (don't over send); some things require a basic knowledge of how email works (tables vs. div tags) and email client display restrictions (using ALT tags effectively). In this guide, the first volume of a two part series on Best Practices, we will address the issues of content, lead generation, and testing techniques. In part two, we cover the aspects of Best Practices that deal with design issues. Together, these two guides will give you a complete picture of understanding of how to get the best results with your mailings.

Every email client gives recipients some easy ways to express their attitude toward an email. They can click on the links and explore further, or delete it. If they find an email disagreeable for some reason, they can tag it as spam or report it in some other fashion. Best Practices, then, are the things you *should* do to make your email engaging and *positive response-inducing*. Following Best Practices makes your email easier to read and can help encourage more opens and higher clickthrough rates. There are aspects that require some knowledge of the quirks and characteristics of email. This guide will help you identify those characteristics and use them to your advantage.

Deliverability is an important aspect of email marketing, as it doesn't matter how great your offer is or how many people it is sent to, if

those people never receive it. In some cases, the tasks for deliverability are distinctly separate from the best practices of email creation, such as configuring authentication standards like DKIM. In other cases deliverability and the best practices for email creation overlap considerably, such as the concept of text-to-image ratios. In this guide we will be mentioning deliverability issues, but we have a dedicated whitepaper on deliverability that you should read for more information on that subject. We have tried to keep the overlap of information down to a minimum, but the subjects are closely linked.

For more information on all aspects of deliverability, please see our whitepaper, *Deliverability Enhanced*, available from the resources section on our website at [goolara.com](http://goolara.com).



An email marketing program won't get far without email addresses. So where do you get email addresses? With direct mail marketing, the solution was simple—you bought a list of the names and addresses, and you sent them letters. However, postal mail is not email, and while it is normal and accepted to buy postal addresses, it is a *terrible* idea to buy email addresses.

People have a much more personal relationship with email than they do with postal mail. If I get a stack of advertisements in my postal mail, I don't feel personally offended. But when an unsolicited email is sent to my mailbox, it bothers me. Most people seem to have the same feeling. Why this is so could be a fascinating discussion of human psyche, but this is not the place. Let's just leave it that most recipients are not happy to receive unsolicited email, and governments everywhere have passed legislation codifying the people's requests to control their inboxes into law. For the U.S. this is the CAN-SPAM act, but most countries have their own versions.

## Buying lists

As many offers as you will find on the Internet to buy email lists, you would think it is a common practice. But the experience of email marketers in this business, as well as our own experience, is consistent in our recommendation that you should *not buy lists*. The CAN-SPAM act says you can only send emails to those people who have opted-in to your list, or those you have an existing business relationship with. Some companies get around this by not selling the list directly, but by first sending to it themselves. Anyone who clicks has shown interest, and they then sell



***“A purchased list can have an immediate effect on your deliverability. ...ISPs will not support sending to purchased lists, regardless of whether it is legal or not.”***

these email addresses. If you buy one of these lists, it doesn't mean you automatically have permission to send to these people, but enforcement of the CAN-SPAM act in this regard has been minimal, so some marketers risk it.

The effect of sending to a list depends on the quality of the company that collected the data, but generally it ranges from bad to terrible. A purchased list can have an immediate effect on your deliverability. You may be blocked immediately by the big ISPs, and it is unlikely you will even be able to get much of your list distributed. If the list contained “spam traps” (email addresses designed to automatically trigger blacklisting) even your email sent to valid, opted-in recipients, will be blocked, and it is extremely difficult to correct this situation. The domain that is used to send the email will be marked as bad, so other email you may want to send through a different account also will get flagged and dropped.

When deliverability experts contact the ISPs to attempt to remove these blocks, they have to explain where the emails came from. If the answer is a purchased list the conversation ends there. ISPs will not support sending to purchased lists, regardless of whether it is legal or not.

So if buying a list is not the way to start, how should an ethical email marketing profession get started? The answer, unfortunately, is to grow the list organically. This means putting a sign-up form on your website, and perhaps other places, such as an in-store list, so you can start collecting addresses from those that are interested in receiving your mailings. Even before you've gathered a single email address, you should make sure that the experience of registering to receive email from your company is as painless as possible. There are two points in the process that are the most sensitive ones: registration and receipt of the first email. Follow Best Practices here and you are well on your way to email success.

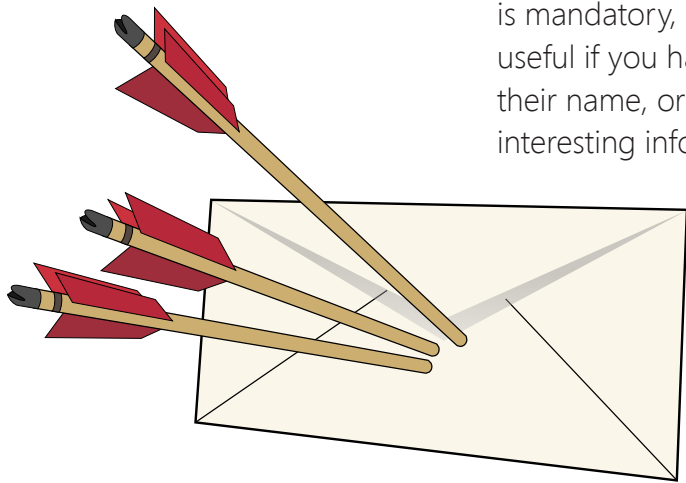
### **Make registration easy**

Keep in mind that you are asking for a person's email. For many people, this verges on asking for the key to their house. They are only one click away from rejecting you, so you better not do anything to frighten them off. This includes the following:

#### **Ask for only the information you really need**

People will put up with—and even expect—a certain number of questions when they request more information from a website. Email





is mandatory, of course, but some kind of name for the person can be useful if you have a loyalty program, want to address the person by their name, or want to make personalized coupons. Beyond that the interesting information depends on your business. While it might feel

normal to ask for things like home address, consider carefully whether the information you are gathering would really be useful to your marketing program. As an example, a physical home address could be useful for your direct mail program, but is unlikely to be particularly useful for an email marketing program. The exact address of the recipient probably won't

help make decisions on segmentation, dynamic content, or workflow. On the other hand, some level of address information (such as a zip code for U.S. residents) could be quite useful if you want to geotarget your recipients.

### **Give options for frequency**

Some people don't mind getting marketing email a few times a week, while others prefer that it only shows up on special occasions. It's best to find this out right off the bat. Recipients who are slightly interested in your content may feel overwhelmed and unsubscribe if they start receiving it too often. Rather than losing recipients entirely because of an unsubscribe or spam complaint it is better to understand what frequency they want to receive email and adjust to their preferences.

### **Give options for content**

If your content can be broken down into topics that might be interesting to some recipients but not to others, it is a good idea to offer recipients the option of selecting which topics about which they will receive email. These can be linked to unsubscribe topics, so that unsubscribing from one of the topics allows the recipient to continue to receive information about other topical areas. For example, if you provide regional news for many areas of the world, a recipient might choose to get information about Turkey and Iran, but not be interested in news from France or Spain. Each of these would be a topical area that recipient could subscribe to or unsubscribe from, as their interests changed.

### **Ask for information that would help you target the email**

It goes without saying that for an email marketing campaign to succeed, the email has to be relevant to the recipients. Sending notices about bargains on women's shoes is going to have a higher response rate among female recipients than males, just as a notice about the

*“The more information you have, the better you can personalize the email, but asking too many questions is a recipe for failure.”*

latest skateboard technology won't find many respondents among people over sixty. As mentioned, you don't want to bombard people with questions, but a few quick demographics might help establish some useful guidelines for targeting your audiences. Gender, for companies that sell separate products to men and women, might be useful. On the other hand, a company might forgo the gender question in favor of asking if the respondent uses a Mac, a PC, or something else.

### **Consider adding demographic details in phases**

The more information you have, the better you can personalize the email to reflect the recipient's individual likes and dislikes, and that means a better email experience for everyone involved. But asking too many questions is a recipe for failure. At a certain point, people will stop responding and quit the process. As a rule, five or six questions is safe, but beyond that things start getting shakier. If you feel you need more information there are good ways to go about this. One approach is to make further questions optional, but this still runs the risk of provoking the applicant into leaving your site prematurely. If you do choose to use the additional question approach, only ask three to five questions per page with the option to finish up at any time. A highly visible "I'm Finished" button will go a long ways toward preventing someone from abruptly leaving the site.

An alternative is to send occasional surveys that ask for more information. The length of the survey is in direct proportion to the reward for the respondent. Most people will gladly answer a few questions if it means receiving more relevant email. They will answer more questions if it means receiving special discounts that aren't available to the general public.

### **Make your policies clear about how the email will be shared**

Your privacy policy and how you intend to use the data should be stated on the sign-up page. People are more willing to give you good information if they know that you won't share it with others. If you are working with an affiliate program, you should vet it carefully. A badly chosen affiliate program can lead to more grief and fewer sales. If you offer options for different topics or other selections, it is best to leave these options unchecked and have the recipient explicitly pick the options they want. You want the recipient to consciously choose to receive your email and not be tricked into it.

## Double opt-in

The safest way to build a list of recipients that want your email is to use a double opt-in process. This is an automated process that first sends an email (of your design) to the recipient informing them that a request was received to add them to a list, and asking them to click on a link to confirm their interest. Those that choose to click on the link are added to the list as regular members; those that don't are not sent any further email.

This process ensures the recipient is interested, at least at the time they enrolled, but does result in fewer confirmations, so that many recipients who might be interested are not added to the list. Some people insist that all email marketing should be done to only double opt-in lists, but the reality is that most marketing people do not use double opt-in lists because it reduces their list size too much. ISPs like it when you confirm users, and it will help later if deliverability issues arise, but most marketers do not see it as worth the cost. Symphonie automates the process of the double opt-in, but Goolara does not require all marketers to use a double opt-in confirmation process for their lists.



**B**est Practices, as it pertains to deliverability is about avoiding the tactics of spammers, keeping your list clean, and not provoking your recipients into marking your mailings as spam.

### **Removing unengaged recipients**

One of the toughest fights you may face within your organization is when you want to remove unengaged recipients from your email list. Many companies will never give up, continuing to send to unengaged recipients year after year. Even though the person has had 100 messages delivered to their spam folder, the marketer

hopes that the 101st message will get into the inbox and suddenly they will have a new customer.

ISPs determine deliverability, in part, by looking at the engagement rate of your recipients. What does it mean to be engaged? It is pretty simple – open an email, enable images, and, perhaps, click on links and the ISP sees that as engagement, although the ISPs vary considerably as how many emails must be opened before the recipient is considered engaged.

Recipients that are sent email but are not engaged, who do not open or click links in the email, add negatively to your Reputation score. The email that piles up in the bulk folder is noticed by the ISPs, and they'll use that information to send email of more recipients to the bulk folder. The last thing you want to do is continue to send to recipients that are not engaged. Soon you won't be getting any email into the inbox.

The strategies for when to take action on a recipient vary considerably, and are influenced by factors such as how often you send. If your distribution is only once a month you don't have an option to cut down on the frequency, but those sending several times a week have many options.

Generally you should have logic that starts to cut down on the number of emails sent to an unengaged recipient after several months of no or

***“Hitting a spam trap really hurts your deliverability score, and hitting several in one send might stop all delivery completely.”***

low activity. If the less frequently sent emails also do not generate any engagement, you should start a re-engagement program. The basic idea of the re-engagement program is to let the person know that you are concerned they are not interested in the email, and they need to take some steps to show they are still interested. This can be done as a separate email that addresses this issue only, or as prepended content before your normal distribution.

Allow these emails to be sent a few times, with a few weeks in between, and if the recipient doesn't engage, remove them from your regular distribution list and try again later. You don't need to delete or suppress them, as they haven't asked to be unsubscribed or something similar, but to keep your Reputation score up, and make sure those that do want your email get it in their inbox, you shouldn't continue to send to unengaged recipients.

### **Spam Traps**

Related to working with unengaged recipients is the deliverability issue called a spam trap. The basic idea is that the ISPs will take a few closed email accounts and turn them into spam traps. When you try to send to a spam trap the ISP will notice it and give you a large negative hit to your Reputation score. The ISPs will generally not turn a closed address into a spam trap until they have returned the unknown user error for at least six months. As long as you occasionally send to recipients, spam traps should not be an issue.

But what if a coworker approaches you and says they found a great list of email addresses of previous customers or something that haven't been mailed too recently? While it might sound great to add to your list, especially for contacts that may have been interested in the past, the threat of spam traps should make you cautious. If the address has not been sent to by software that will mark the user as invalid for more than a few months, and certainly not more than six months, you should reject the list, as difficult as it may be. Hitting a spam trap really hurts your deliverability score, and hitting several in one send might stop all delivery completely, so it is not a casual issue.

### **List appends**

A variation on the purchased list is the appended list. This is a list of actual customers whose email addresses you obtained from an outside source. The CAN-SPAM act says that a business can communicate with a customer without requiring a separate opt-in and some businesses use this as a way to grow their lists without violating the law. The same

basic issue exists with appended lists as with purchased ones – sending email to recipients that don't want it leads to more complaints and unhappy customers.

So while it may be tempting to augment your house lists with email addresses from an outside service, you must consider the reaction of users to receiving this email. If the users decide it is unsolicited and undesired, your Reputation score and your brand image will suffer in ways that may be far more damaging than the little lift you get from some appended customers converting.

For a complete explanation of all aspects of deliverability, don't miss our whitepaper, *Deliverability Enhanced*, available from the Resources section on our website at [goolara.com](http://goolara.com).

# “FROM” ADDRESS

---



The “From” address is critical for both deliverability reasons and for user perspective reasons. In most email viewers, it is the first thing a person sees. You could lose the battle right here if you’re not careful. The “From” address will highly influence whether the recipient opens it or deletes the email immediately. A reputable company listed in the “From” line will greatly increase the chance of the email being opened, whereas an unknown or strange address will likely lead to an immediate delete of the mail. The “From” line is also very important in deliverability.

The “From” name is really two parts, the actual email address, and a “friendly” name that can be used for display. A good ESP should allow you to enter both, and the standard format would be something like this: “Linguini’s VIP Club” <[sales@linguinis.com](mailto:sales@linguinis.com)> Most email clients will show the “friendly” name, and many will show both addresses.

Here are some more points to consider:

## **Use your company name whenever possible.**

The ideal situation is to use your company name alone, with no subdomain. Your brand should mean something to the recipient, and since they explicitly subscribed to your publication, they are expecting it from that brand name. Sending from a generic name provided by your ESP or some other unrelated name, like mail.ex33.com, will likely cause the recipient to delete the email without opening it.

Sometimes it is difficult for a company to send email through an ESP when they are also sending email as that company name for other business purposes. These are technical issues that can be solved, but some companies choose to use a subdomain instead to avoid these issues. For example, Walmart.com might need to send as mail.walmart.com to avoid internal issues. Most everyone in the United States would recognize walmart.com immediately, but mail.walmart.com makes us pause for a moment to wonder if it is truly Walmart.

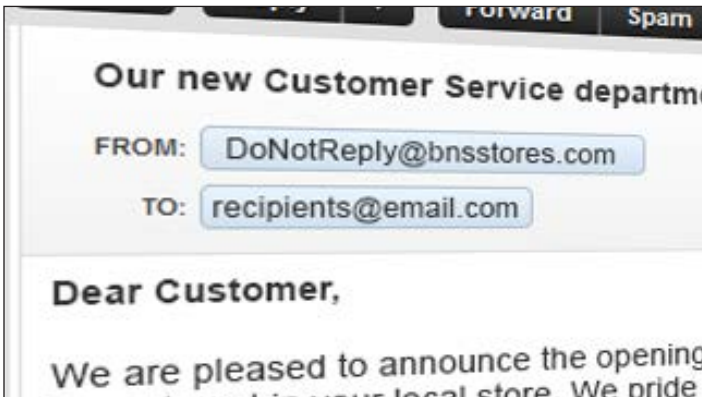


## Use a consistent name

Choose the "From" address carefully when you start your program, and don't change it unless you really need to. The name should be consistent for deliverability purposes, but it is also important to make sure that user-created whitelists will work. If you get a recipient to whitelist your address, but then you change it, that whitelist entry is no longer valid. It will also confuse recipients, who may expect an email "From" one company, but will not recognize your email from some other brand name.

Most deliverability and whitelist programs will be based on the actual email address, not the "friendly" address portion. This means you should not change the actual email address, but you can change the "friendly" name if needed. This can be an opportunity to make the email from a certain salesperson, for example. The actual email address would not change, but the "friendly" portion can be "Frank Johnson, Springfield Toyota Sales" to make the email more personalized. And if the salesperson needs to change you do not need to worry about deliverability issues since the actual "From" email address has not been changed.

## Avoid Do Not Reply addresses



You've created the perfect email. The content of the mailing talks about how much your company cares and how responsive you are to your clients. You want people to know that your company will be there for them at all times. But yet the email address is DoNotReply@, with instructions in the content telling people not to respond to the email. Nothing says "I don't care about you" like a Do Not Reply "From" or "Reply To" email address. If you are really interested in responding to your clients, then you need to make

sure that you've set up, at the very least, a way to let your clients contact you by other means. Otherwise, they'll go to court of public opinion, and you don't want that.

This can't be reiterated too strongly. In the age of the Internet, if people feel the need to complain to you about something, they *will* find a way. You'll fare far better if you are in charge of those channels. The time lost in service to this cause far outweighs the potential damage from appearing unresponsive in a public forum such as Facebook, Twitter, or YouTube. In one famous example, a musician angry at United Airlines for destroying his guitar posted a YouTube



video called “United Breaks Guitars” that went viral and was a public relations disaster for the company. **Always** give your customers a way to reach you.

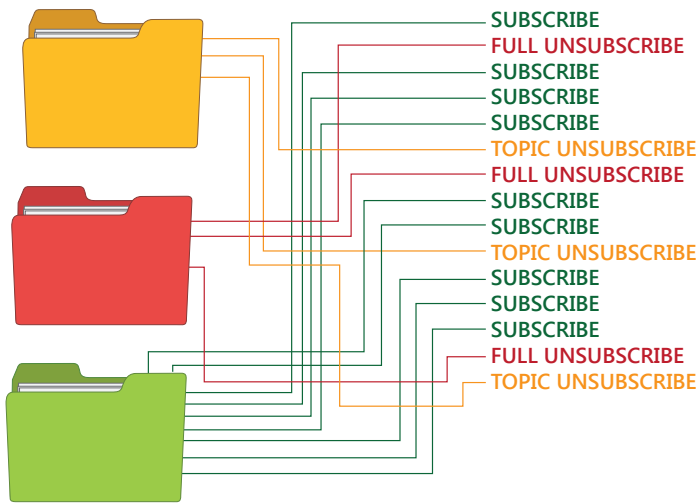
## **Make it descriptive**

The Best Practice for the From and Reply To information is to use names that are descriptive and not misleading. “Bob – Your Alameda Ford Dealer,” says it all. You know exactly who is writing and you should have a pretty good idea as to what this email is all about. For U.S.-based mail, the CAN-SPAM act says that you must provide a “From” address and a subject line that are not deceptive or misleading, so there is also a legal side to this as well.

An email from “Bob Smith” may mean something to you, especially if Bob is one of your friends, but if Bob Smith is the salesperson you met last week while browsing furniture, it is unlikely to be recognized. Recipients are likely to either delete the email unopened, or open it with great suspicion. If they think the email should be from a person, rather than a business, they may react angrily to this “From” address when they realize it is a business email, even if they might otherwise accept email that came from the company.

So a “friendly” name of “Bob” is not recommended, and “Bob Smith” is better, but still not ideal. A better choice would be “Bob Smith, Comfort Furniture”, which gets both the salesperson’s name and the company’s name into the “From.”

# LIST MANAGEMENT



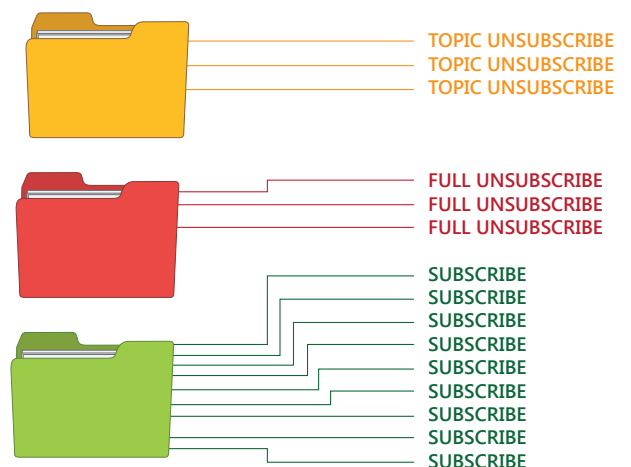
In many email marketing applications the concept of a “list” is a common one. You create a list and upload your recipients to it, then you send emails to the recipients on the list, recipients unsubscribe from the list, and you may eventually delete that list and create a new one. In some applications the list is how you perform segmentation. If you want to target a different audience, you create a new list that holds these recipients. While this concept is intuitive and commonly used, it does create some serious issues.

The main challenge of this design is to maintain and respect a recipient’s request to be unsubscribed.

Over the course of several months I may receive email willingly from a vendor, but then I get tired of it, so I unsubscribe. What I don’t know is that during this time my email address has been copied to several different lists, as the administrator created these for different purposes. For sake of example, lets say I initially subscribed to list A. Later, my address is copied to lists B, C, and D, each of which is created for segmentation purposes. When I unsubscribe, it’s to an email sent to list D. I will not receive any emails sent to list D from that point on, but what if the administrator sends to A, B, or C?

This is always an issue with email marketing systems that require the creation of separate lists for different campaigns, segmentations, etc. Email marketing vendors that use this list system often wind up with problems keeping track of unsubscribes. And it may be the reason why so many people are reluctant to use the unsubscribe link, because they know it won’t

really matter – they’ll start getting the email again. I have had personal experience with this. A reputable non-profit that I unsubscribed from several times suddenly started sending me emails



again. I don't think they were consciously ignoring my request to unsubscribe, but were using a list-based system that allowed my email to become active again from an old list.

This is less of an issue with Symphonie. We separated the concept of a list as a segmentation tool from the list as an unsubscribe mechanism. With Symphonie it is easy for administrators to target any recipient with segmentation but still honor their unsubscribe request, regardless of any future segmentation. This completely avoids the probably of multiple lists with variable unsubscribe information.

If you use a list-based system, you are responsible to make sure that recipient's unsubscribe requests are honored. Be careful about creating new lists or deleting old ones. Ask your vendor how their software can ensure that no recipient's unsubscribe request will be lost or ignored, and if they cannot answer that question to your satisfaction, you know a vendor who can!

## EMAIL AND DIFFERENT CHANNELS

---



Technology has changed rapidly over the last few years. Marketers now have more channels than ever from which to deliver their messages. Social sites like Facebook and LinkedIn, SMS-based services like Twitter, plus blogs, podcasts, videos (perhaps using YouTube or Vimeo), and more. So how can a marketing person best use all these channels?

One method we've seen recently is to try and unify all these channels with a single message. Send the same basic message via email, Facebook, and reference it in an SMS or Twitter post. While using the same basic content to be used in multiple places can save time and resources for the marketing department, it is an approach that can lead to

annoyance for anyone watching your brand across multiple channels.

One recent trend is for marketers to use one channel to advertise for another channel. An email goes out telling customers to "like" them on Facebook. Or worse, to sign up on Facebook for specials. A Facebook posting tells customers to sign up for the email distribution to get special offers. An SMS message is sent to tell users about an email or Facebook posting.

We have observed that emails sent to users telling them to sign up on Facebook have poor deliverability. They often result in more complaints and higher unsubscribe rates. Then the ISPs detect that the recipients don't like the content, and less of the mail makes it to the inbox. We've seen such significant hits on deliverability that it may take several more reasonable emails before the deliverability rates recover.

Customers that pick a channel for receiving communications are rarely happy to hear that they need to sign up for another channel to engage with you; especially if they were told initially that they would get coupons or other rewards for signing up. This sort of shell game will leave people feeling frustrated, wondering why their initial channel is not good enough.

Different users like to be communicated with in different ways. Some people love social sites and rely less on email. Some resist social sites

***"If a user gets a message via SMS or a social site, and they delete your email without opening it, the ISPs treat this as a negative point on your Reputation score."***

and prefer the one-to-one communications of email. Marketers need to communicate with people in the ways they request, and not try to get them to change channels. We have seen cases where companies send out an email telling customers to sign up for a special event on their Facebook page, and so many people complained about being *required* to use Facebook that the company had to quickly backtrack and offer another way for people to sign up. Now, suddenly, the marketing department has more work to do than they would have if they had tried this option in the first place. Now they have to do it under more severe time restraints as well.

There is also a deliverability aspect to this as well. If a user gets a message via SMS or a social site, and they delete your email without opening it, the ISPs treat this as a negative point on your Reputation score, eventually leading to more trouble getting your email delivered.

Use each channel as you feel comfortable, of course, but avoid requests via one channel to sign up for another. Why risk losing customers in an attempt to make your numbers look better in each channel? As a Best Practice, we recommend that you do not send different advertisements, or give different rewards based on the channel. This makes people feel like they need to sign up for each one, which, in turn, can lead many people to feel like they are getting too many communications from you.



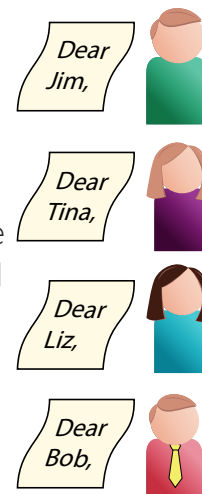
**B**lasting—that is, the sending of generic emails indiscriminately to your entire list—has never been and will never be a component of Best Practices. Back in the Introduction, we talked about the importance of relevance. Relevance requires that you take your list and either pare it down to only those people who might be interested in the topic, or tailor the content specifically to each recipient. An email blast should only be used if the message you are sending out applies to absolutely everybody. It is the least effective method of email marketing, and it can, if overdone or done badly, lead to deliverability problems. Some marketers may talk about how

regular blasts keep the names of their companies on people’s minds, and that may be true, but not in a good way. Instead of seeing your company as one that regularly sends them relevant emails, they’ll see it as one that sends them a lot of useless junk.

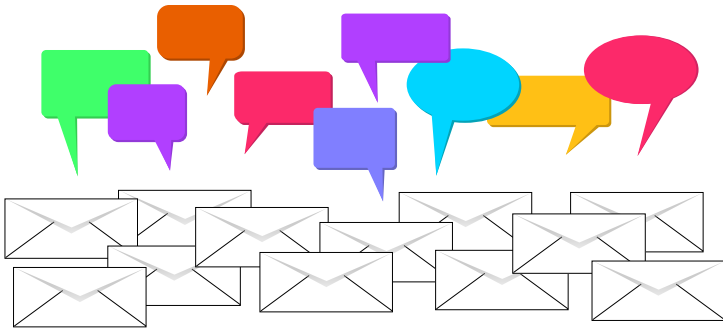
As a Best Practice, we recommend personalization whenever possible. There are three ways to personalize email messages: Mail merge, dynamic content, and segmentation. Each offers its own advantages and disadvantages.

## Mail merge

Mail merge lets you add a piece of data, such as a first name, or a city to your email. It is the simplest form of personalization, and the most abused. Everybody has received email that starts with their first name, and most of it is spam, so this particular approach should no longer be used. Nonetheless, a person’s name in the body of the text is acceptable as long as it doesn’t make the content seem more generic. Care must be take that the information is actually available for all recipients to avoid embarrassing situations where the message begins: “Dear first name.” Sometimes, mail merge is erroneously referred to as dynamic content, but mail merge does not allow you to make logical choices based on multiple variables. It is fast and easy-to-use, but is limited to simple insertions.



## Dynamic Content



Creating individual emails for each person on your list would take months, maybe years. Fortunately, you can make each email in a list completely unique to each recipient through the clever use of dynamic content. With dynamic content, it is possible to insert different text, graphics and barcodes based on the demographics you've collected for each person. This can be everything from their membership status, to their preferred

shopping hours. The clever use of dynamic content is the closest thing to having a one-on-one conversation with every single email recipient. It takes more time to set up, but the payoff is substantial. It is also possible to create ready-to-use content blocks containing dynamic content that can be inserted as needed into email and used again at a later date.

The ideal situation for creating engaging email content is to know something about your audience. If you know the person is a male, approximately 60 years old, it can tell you something important about how to market to him. That person is likely to be more interested in relaxing cruise vacations than mountain climbing adventures. But it is important, if you plan to use dynamic content, that you have the data you need. If you don't know anything about your recipients, either because you didn't ask any questions on your sign-up form, or because you haven't been collecting additional data at your points of sales, then it is more difficult to create personalized content.

It is possible to derive interests based on clickthrough behavior. Continuing our example, if we see that the links clicked by a recipient are for cruises focused on relaxation, and no links are clicked for vigorous physical activities, you can conclude something about that recipient. Good email marketing software should allow you to create segmentation and dynamic content logic based on the clickthrough behavior of recipients. Determining recipient interests based solely on clickthrough behavior is challenging, as it suffers from the classic horse-before-the-cart problem. In order to get recipients interested in your content, you need to know something about them. But if you only learn about their interests based on their clickthroughs, those that aren't interested in your unpersonalized emails won't expose their true interests, so you are left with an unengaged recipient with no clear idea how to increase their engagement.

You can learn about a user's interests from a number of sources. The sign-up form is a great start, but you can also learn from their



***" However you collect and analyze your data, the key takeaway is to have some information to help target the recipient with engaging content."***

website browsing history, their purchases, and their clickthroughs and opens. You may have additional sources, even some from paid data aggregation services, that you can leverage to form a picture of the recipient. Collecting and analyzing all this data has been given a term recently, "big data", and it can be challenging to do well. But however you collect and analyze your data, the key takeaway is to have some information to help target the recipient with engaging content.

Substituting something like the nearest store location, along with a brief map of the location, can make your email much more personalized. To do this, you need to build a library of the content for each store, with any images you want and the map image or text. This would be combined into a reusable section, called a Content Block in Symphonie, that could then be substituted based on information from the user. To maximize your value in this investment, consider before having the section designed how you could use it across multiple emails. If you pick background colors or otherwise format the content such that it wouldn't look good in some of your emails, you have lost out on some of the reusable value of this work.

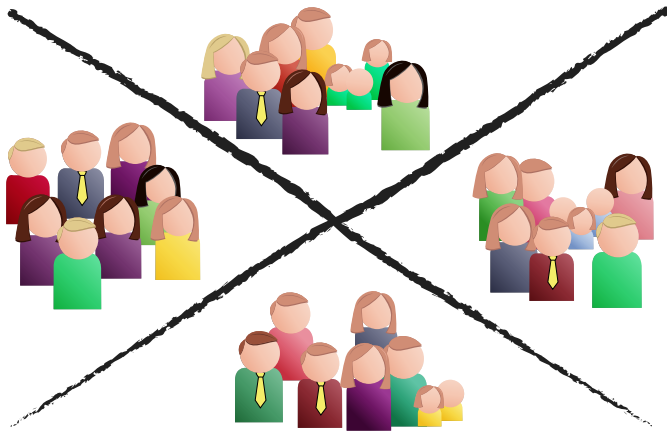
Once your content blocks are defined, it should be a simple task to indicate which content block should be substituted based on the store identifier. Let's assume your stores are numerically assigned, so you can create a demographic that indicates which store number is closest to that recipient. Then you simply use dynamic content to indicate that store number one gets dynamic content section called "Stonestown Mall, Springfield, OH". Once these rules have been defined once, you should be easily able to reuse them from a library of dynamic content rules in future emails.

While adding dynamic content to your email will help engagement (assuming its done intelligently), it does make things more difficult to ensure the content will render correctly. If you have a flexible system, such as Goolara Symphonie, where you can choose to substitute dynamic content in any location in the email, including the subject line and "from" address, you can quickly generate dozens of possible combinations. How can you ensure that each recipient will get content that looks good for them, renders properly, and has the correct information for that recipient? The answer is that it is not possible to test every recipient, assuming you have a reasonable sized list and several dynamic content points.

But you can spot check different recipients, looking for those that have different combinations of the criteria used for your dynamic content conditions, until you are satisfied that everything appears to be



working properly. Your email marketing software should make it easy to generate on-screen previews of the content, as it would appear for that recipient, and an easy way to pick recipients to test. Showing the preview on-screen means you don't need to wait for any possible delays in your email system, and no worries that your corporate filters will kick-in to start blocking emails sent from one location in quick succession. We had a customer who insisted on receiving an email version of their dynamic content versions, but their corporate email filters would start blocking the email after ten or so emails were sent in quick succession. To solve this, we wrote some custom rules to send one email every minute or so, which meant it took much longer to verify the email content was correct. Viewing the emails on-screen avoids these kind of issues.



## Segmentation

Segmentation starts by eliminating the part of the audience that either has no interest or very little interest in the subject of the email. Segmentation can be based on many different criteria. Demographics you know about the recipient, that you collected at sign-up time or later, are an obvious choice. But you should also be able to create segments based on the actions of the user, such as their opens or clicks in previous email. It should be easy to re-target recipients who received (or didn't receive)

your emails. It also should be easy to target based on other events that occurred outside the email marketing software, such as white paper downloads, purchases, webinar registrations, or shopping cart abandonments.

As an example of what not to do, a big clothing retailer sent out an email to their entire audience advertising prom dresses. The email was good looking and would have been attractive to anyone interested in prom dresses. Unfortunately, only a very small percentage of their audience was shopping for prom dresses, so the majority got an untargeted email that told them they would be sent *every* possible offer. The response for this email was poor, and subsequent emails suffered because of it. Perhaps the company didn't have any information to target only those people who might be interested in prom dresses, but it is more likely, they just didn't bother to create a segment that would narrow the field. A little bit of segmentation (such as an age or status category) could have saved them from a serious hit to the deliverability.

***"Segmentation is a way to reduce the list size to address only those people who are interested in the message. Dynamic Content is a way to change the content of the email on a case-by-case basis to address the recipient's individual interests."***

With any software that offers segmentation, you should be able to combine various criteria with "and" and "or" statements to generate a list that goes to exactly the right audience. Here are some example segments that should be easy to create:

All the recipients who clicked a link in a past email

Anyone who has a birthday in the next two weeks

All recipients who had a birthday in the last two weeks that didn't redeem your coupon

Anyone who has download your whitepaper on maintenance of the X181 hand dryer or the X5245 towel dispenser.

Recipients who live in Massachusetts, Connecticut, or Rhode Island who signed up for the webinar but didn't attend.

Segmentation should be something that you can use as needed. You can still blast everyone on your list sometimes, but begin to migrate towards sending to segments of the audience as your content allows. The main point to remember is that the more you can make sure recipients are only sent content that is interesting to them, the more likely your email program will be a success.

Segmentation should not be confused with Dynamic Content. The first is a way to reduce the list size to address only those people who are interested in the message contained in the email. The second is a way to change the content of the email on a case-by-case basis to address the recipient's interests individually. Each has its place in email marketing. In some cases you can choose between segmentation or dynamic content, picking the one that you find most comfortable to use. You can either create several emails with no dynamic content but targeted to different segments, or one email sent to everyone that changes the content on-the-fly to give the right offer to each recipient. You can use segmentation with dynamic content to further control your messages.

# TEST WITH A/B SPLITS

---



The best way to ensure maximum open and clickthrough rates is to test the email ahead of time with A/B/ Splits. Mailing without testing is like shooting craps. You roll the dice; you take your chances. Wouldn't it be nice if you could choose from different dice ahead of time and pick ones that only roll sevens? Of course, it's not quite that simple, but an A/B/ Split mailed to a random subsection of your recipients can help you find out what works with your audience, which, in turn, will improve your open and

clickthrough rates. Although it's called an "A/B Split," in fact there is no reason you can't have more than two variations. You can also vary the size of the sample. Obviously, the larger the sample, more accurate the results.

The Best Practice in A/B Split testing is to change only one or two things in the email and see which one yields better results. In subject lines, for instance, you could try a long, explanatory line tested against a short, catchy one, or a line containing special symbols (see page 23) tested against one without. In the content you might try different offers, sending a free shipping to one group and a 10% coupon to the other. After the test is sent, your report analytics should tell you which had the best response rate, and you can proceed to send that version to the rest of your recipients. As a rule, subject lines will have the greater impact on open rates, while content will affect the clickthrough rate. It is best to wait a day or two before looking at the results to give people time to respond to the email and let the email providers gather the metrics. If you don't see any meaningful variation, you can always add more splits to the testing process and measure again.

## Best Time to Send

More has been written on this subject than almost any other in the field of Email Marketing. Some maintain that the best day to send is Tuesday, while others will tell you it's Thursday. Some will say never send email on Monday because it won't get read, while others will tell you that Monday is the best day to mail because people would rather read email than get back to business. There may be some validity to the belief that weekends are a better time for mailing B2C email than B2B, but even this might not be true for your business.

***" If the sending engine tries to send an email to arrive at 9:15am, but Yahoo greylists the attempt so it must be retried later, the effort spent trying to optimize for the best time to send is wasted."***

Some vendors claim a benefit from looking at when a user last opened their email, and attempting to send to them at that same time. We have done some analysis of the data and found that the pattern of when people open their last emails is not strongly correlated with when they will open the next one. Most people are highly connected now, opening emails all through the day on their desktop or mobile device, and at home in evenings or weekends.

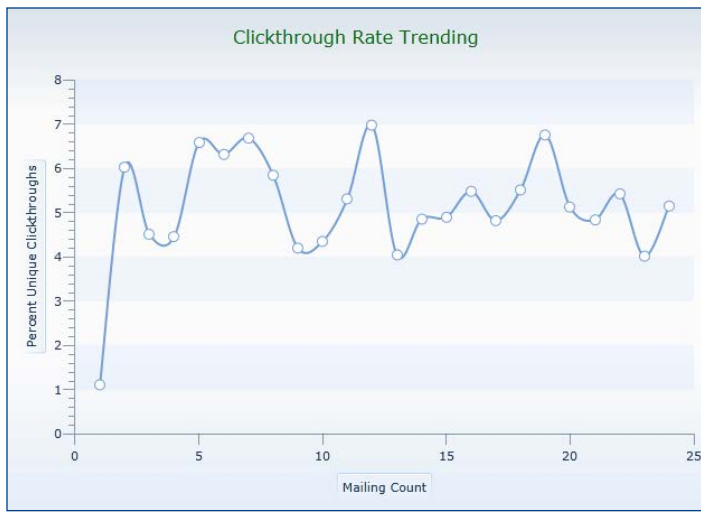
Additionally, it takes a good Reputation score to be able to deliver an email at a specific time. If the sending engine tries to send an email to arrive at 9:15am, but Yahoo greylists the attempt so it must be retried later, the effort spent trying to optimize for the best time to send is wasted.

Finally, with new email software coming around, specifically Google's priority inbox or Microsoft's Sweep, the order that the email arrived will be less important than the user's engagement with the brand. Even if the ideal situation is found and an email is delivered at exactly the right time, it would matter if the client's software puts it at the bottom of the list because the user has deprioritized the domain.

It's our recommendation that you spend any effort you might put into finding the best time to send instead into efforts to make your email more engaging to your users. This will likely have a much bigger long-term effect than any effort to pick the best time to send.

This is not to say that there are not some days that may be better for you. Certainly marketers know that timing can be critical for sales or other events. You should definitely send when you think the timing is right, and do some testing to see which days work best for your audience. We do not recommend trying to pick the best time for each recipient, as this doesn't appear to yield substantially better results.

# MEASURE AND ADJUST



It is important to analyze the results of your mailing activity on a regular basis. All the work to put together interesting content, targeted to the right audience, with a compelling subject line, will not be worth as much if you do not analyze the results to see what worked and what didn't.

It can be easy to focus on the information available to you from your email marketing application, such as open and click reports, but don't lose sight of the big picture. If your open report doesn't show as many people opening your email as you want, but the phones are ringing off the hook, and more people

are walking into your stores, then it really doesn't matter how many people "opened" the email. It is especially useful if you can measure your email marketing performance against outside metrics, such as sales increases or web site visits. Simply working to increase open or clickthrough rates is a worthy goal, but these things alone might not accomplish the bigger goals, such as driving revenue, increasing brand awareness and leads, etc.

## Testing

Testing should be a constant activity in your email marketing efforts. If you send the same basic content, using the same basic layout, over and over to your customers, then you are not performing the kind of Best Practices we are advocating in this guide. You should be constantly striving to make optimization in your email. One way to do this is to redesign your email every six months, but we don't recommend this. Instead, make smaller changes over time so you can measure the effects of the change accurately. If ten things have changed at once, it is hard to know the impact of each one.

Measuring the effect of changes can be done in several different ways. An obvious choice is the A/B split test, which makes it easy to test some change across a sample of the audience (page 23). A/B Splits can help you find out if the advertisement for shoes drives more clicks than the one for dresses, or which subject line is most effective. You can also measure response rates with dynamic content, choosing which recipients receive which offers, based on various factors.



The engagement level of your audience is important to know when planning your testing, and evaluating the results. If you regularly only get opened by 10% of your recipients, it will be difficult to tell if a change had a noticeable effect, as you are really only measuring the change of 10% of your entire distribution. In this case you may need to repeat the test across several mailings to see if the results are repeated by a broader segment of the audience.

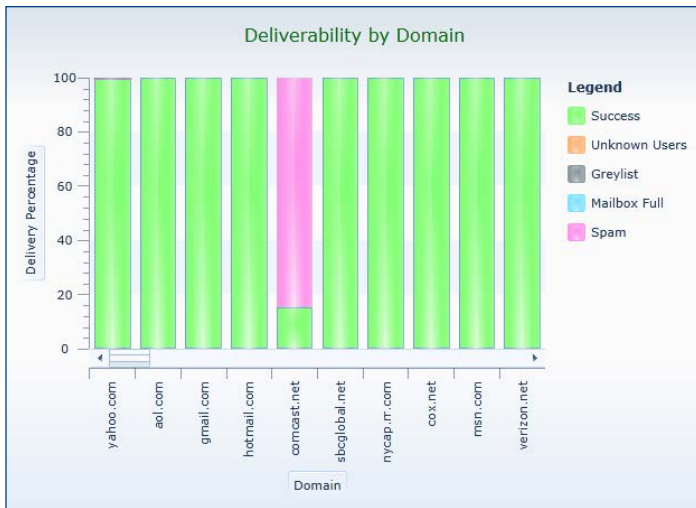
It's always nice to know which recipients have taken action based on your emails. In some cases you can measure this through clickthroughs, as every link should be recorded uniquely by your email marketing software. You should be able to download data on exactly which links were clicked by which recipients. But a clickthrough is not the only measurement that is useful, as we have suggested previously. If you send out a coupon, knowing how many people redeemed the coupon is obviously a useful metric. An even more useful metric is to know exactly which recipient redeemed the coupon.

Using customized barcodes on coupons, you can find out which recipient redeem them and which ones don't. Not all point-of-sale systems can handle barcodes with an identifier for the recipient, so this may not be an option for you, but if you can take advantage of this, you should. Your email marketing software should make it easy to add barcodes that are unique for every recipient. Barcode coupons are a great way to find out which recipients are truly engaged with your email campaign, and which recipients are using the same coupon multiple times, either for themselves or by sharing it with family and friends.

## Engagement and Deliverability

Beyond testing, you need to analyze your results to determine if there are engagement and deliverability issues. While it might seem like engagement and deliverability are two different topics, more and more they are highly correlated. The ISPs are determining a Reputation score based on the engagement of your recipients, which means that you need to have engaged recipients in order to get email delivered. As we discuss in our Deliverability whitepaper, email that sits in the inbox unread, or gets deleted without being opened, means that future email sent to that address will be more likely to go into the bulk folder, or be rejected completely.





Reports let you see at a glance where your problems lie. In this case, comcast.net is marking your email as spam, and you'll need to contact comcast.net to correct this.

Therefore, when analyzing your results, it is useful to be able to look at the breakdown of metrics based on the ISP the email was delivered to. You may think that a 94% delivery is not too bad, until you realize that one ISP that represented 5% of the audience rejected all your email. Now you suddenly have a completely different picture of the delivery. It was delivered to 99% of the recipients, except for one ISP that blocked the email.

Each of the different ISPs use similar metrics to derive a Reputation score, the actual conditions used by each one vary enough that you can have

good deliverability to all the ISPs except one, which rejects most of your email. Some look at keywords more, or have a higher weight for spam complaints or deletes without being opened, and suddenly one domain is a problem for you. Therefore, be sure your ESP has reports that will show you metrics broken down by each of the big ISPs (opens, clickthroughs, deliverability, etc.)

## Send logs

Working through deliverability issues can be quite frustrating, and it is worthwhile to use a hosted ESP that provides deliverability services, or to contract for monitoring services from Goolara or another company to help with your on-premise sending. But even if you have deliverability experts on-hand, it is important to be able to get to the raw data for sending to do the required analysis. In many cases being able to see the exact message returned by the destination mail server can answer many questions about deliverability issues. Reading the text to see that the error was due to a full mailbox, an unknown user, due to high spam-complaint numbers, or many other possibilities is extremely useful information to have. Not all ESPs will provide the details of the send logs. It does make us wonder what they have to hide, as providing the text of the failure should be made available to the client who is paying for the service.

Getting the exact message back from the mail server can also help with many deliverability and customer service requests. When a customer asks your support department why they never receive email from you even though they have signed-up, it is very frustrating for everyone involved if you can only tell them that they are signed-up for the distribution, but you have no idea why they are not receiving the email. Being able to site a specific failure code or message from the

ISP can help considerably to be able to resolve issues. If the rejection is due to the ISPs spam filters, for example, the recipient now has a specific error message to take to the ISP to ask that the filter be changed or lifted, which will help ensure this actually happens.

## Comparisons

Sometimes the easiest way to spot changes is to be able to compare mailings side-by-side. A change in open rate for an ISP, or the jump in complaints or unsubscribes might be difficult to see looking at each mailing as they occur, but when compared, the results can jump out.

It should be easy to create comparison reports that allow the arbitrary comparison of two or more mailings, showing all the key metrics (opens, clickthroughs, deliverability, etc). These reports should also be available for your transactional emails, allowing you to compare two or more different transactional email templates across time or other measurements to ensure your transactional emails are getting the attention they deserve as well.

## Trending reports

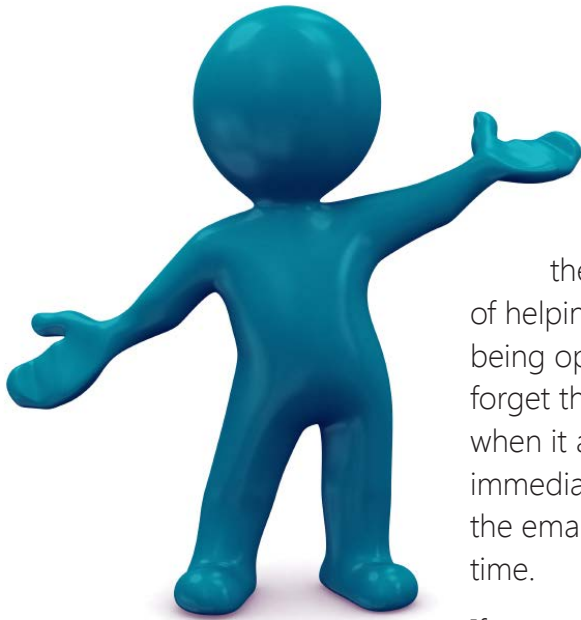
It can be useful to look at some metrics over time to see how they are trending. If your unknown user rate is going up, you need to investigate why that is happening. Were there changes made to the website gathering this information, or did you add a new mechanism to gather opt-in information? Monitoring trends in complaint rates is important to make sure you are not slowly turning off your audience. Also, longer-term metrics on engagement can show you potential issues in your email campaigns before they become real problems.

A metric we like to look at is the engagement of recipients over time, comparing their open or clickthrough rates with other recipients who have received the same number of emails at that point. So, for example, if you chart a point for the open rate of everyone's first email, then chart their open rate for their second email, and so on, you can easily see how recipients are reacting to your email over time. Often recipient open and clickthrough rates are higher rates immediately after signing up, but drop off if the recipient loses interest. A trend line chart like this is a great way to stay on top of the things and help you quickly adjust to changes in email engagement.



## SEND A WELCOME EMAIL

---



When recipients have provided their information to opt-in, it is important that you get them an email confirmation right away. This has become fairly common, so recipients will be looking in their mailbox, expecting the email shortly after the signup. ***Do not overlook this.*** If they open that email, they will have already started the process of helping establish good deliverability since the ISP sees that email being opened. If you wait a few hours or more, recipients may forget that they signed up, and will look suspiciously at the email when it arrives. It is especially important to get an email to the user immediately if you are using the double-opt-in technology to ensure the email address is valid, as the rate of response drops quickly over time.

If you must take opt-in requests via paper or other offline sources, where there is time required to data-enter the information, it is especially critical that the subject line and email content explain to the recipient why they are receiving that email. Otherwise too much of it will be rejected or marked as spam. With more and more people all over the world getting email addresses and changing these address every year or so, the complexity of the email addresses themselves is increasing. More have a strange combination of letters and numbers that can make rekeying a real challenge. Whenever possible try to have users enter their email addresses through an on-line system, using a keyboard, rather than hand writing them.

Any good ESP should make it easy to get an email sent out to new recipients when they are added, so the email can be delivered immediately.

While it is important to get that first email to the customer right away, the next critical step is what to do from that point onwards. Some marketers find it useful to create “on-boarding” programs, where the user starts a drip campaign of several messages over time that introduce them to the company and give the users key information. These can help with deliverability if the users engage with them. If they wind up being junk mail that is ignored by the users, the programs should be altered or eliminated.



Once you've created an email, there are still aspects of email preparation that are often overlooked in other Best Practices manuals. These are the configuration issues that not only make your recipients more likely to engage with your mailings, but also make them more acceptable to the ISPs, and thus less likely to end up in the junk folder. These are more technical issues than most of the ones discussed in this guide, and some of the features listed here are not available to low-end and free email marketing accounts, but they are important nonetheless.

## Remap URLs

Email recipients are more likely to click on a link if they think it goes to a company that they know and trust. Ideally, you want to have a URL that your email recipients will recognize. Most ESPs will default to some address they own as the address for the clickthrough web server. Often it is something quite cryptic, like en11.com, which doesn't give the recipient any idea where the link is going. Good ESPs will allow you to assign your own URL so that the user thinks the link is going to your website (which it may actually be, after the clickthrough is processed). Configuring this is work that must be done to work with your DNS server. It might take a little time from your IT staff, but is relatively easy to do.

## Use authentication protocols

A domain only exists on the Internet if it is in the Domain Name System (DNS), and any company that can control the DNS records for themselves should be able to indicate who is authorized to send "as" that domain. For this reason, Microsoft and Yahoo devised methods that allow email servers to determine if the email they are receiving is really being sent by an authorized representative of that domain.

Both companies submitted their designs to standards organizations, which created slightly different versions as the accepted standards. In the case of Microsoft's SPF, the standardized version is called Sender

ID, while Yahoo's DomainKeys it is called DKIM (DomainKeys Identified Mail — pronounced "dee-kim").

Both companies want to see their designs used, and mandate their use. In the case of Microsoft and their HotMail, Live.com, and now Outlook.com email domains, you must have SPF or Sender ID records published, or the message may appear something like: "Sent by xxx@example.com on behalf of xxx@yourdomain.com." This message is useful, at some level, to know that the sender may not be authorized, but it may confuse your recipients. We recommend that you always publish SPF/Sender ID records to avoid users seeing this message. In the case of Yahoo, a sender cannot get enrolled for their feedback loop program if the email being sent is not signed with DomainKeys/DKIM. [Note: For more information about authentication protocols and their effects of deliverability, see our White Paper, *Deliverability Enhanced*.]

## Send to customized landing pages

Just as it is a best practice to make the content of an email customized to the recipient, it helps keep the recipient engaged if the website you direct them to is customized with their information. Seeing information on screen about their last order, their reward points or level, or other information known about the person helps to make the recipient feel engaged with your company.

It should be easy within the ESP's software to build links that can pass information on the URL to the landing pages (using a customized landing page). The information passed should be configured based on your needs, but would typically be a unique identifier for the customer, or perhaps their email address.

Since every recipient will get a different URL, some ESPs lose the ability to track the links when they have been customized in this way. Goolara Symphonie can still track these customized links, and will be able to tell you exactly which links were clicked by which recipients, the same as any other kind of link. Check with your ESP to ensure these links will be tracked properly.

**B**est Practices means creating email that engages the recipient, making them want to open the email and click through on the links. Many factors go into what constitutes Best Practices but there are certain broad categories:

**Email address collection** – Obtaining email lists should be done by a sign up process, and not by purchasing lists. Double opt-ins offer the most engaged leads, but will often discourage potential recipients due to the process.

**From address** – Using DoNotReply, or other generic or discouraging From addresses in your email is often counterproductive. Ideally, the From name should have some meaning for the recipient. Stay consistent as possible with the From name.

**List Management** – Keeping your list clean is very important. Some email marketing software lets you create separate and redundant list that require close and careful attention. If a person indicates a global unsubscribe, their name should be removed from all lists. Failure to do so can lead to spam complaints. Goolara Symphonie avoids this problem by using a master list that is divided by topics rather than as separate lists.

**Email and different channels** – Using the same content in multiple places is to be avoided. Use the channels based on the preferences of your audience. If recipients stop reading your emails in favor of other channels, your deliverability can be affected adversely. Forcing recipients to sign up for another channel by redirecting from email or other sources is not recommended.

**Personalization** – Blasting should be avoided whenever possible. It is better to use one of the three forms of personalization—mail merge, dynamic content and segmentation. Mail merge lets you add individual demographics such as first name or state, while dynamic content lets you create highly personalized emails. Segmentation provides an easy top level method of dividing your recipient list into meaningful market segments. Each has its advantages and disadvantages.

**A/B Splits** – A/B Splits help determine what works for your market. It is best to test only one or two changes per email. A/B testing is not limited to two mailings. Although some sources suggest there are

specifically good times to send email, it is always better to test this factor for yourself.

**Measure and Adjust** – A successful email marketing campaign requires careful attention by the marketer. Variables such as open and clickthrough rates should be examined and acted upon. Doing this will improve future results.

**Send a Welcome Email** – No opt-in process is complete without a welcome email. This verifies the recipient's address. The welcome email should contain information that will allow the recipient to add the sender to his or her list of contacts, which will help prevent future deliverability issues.

**Configuration** – Links that are recognizable as coming from your URL are preferable. You can remap the URLs so that they appear to come from your servers. It is important to follow authentication protocols when doing this. We also recommend using customized landing pages.



## About Goolara

Goolara has been in the email marketing business since 2005. Symphonie, Goolara's premiere email marketing solution is available in on-premise and cloud-based, SaaS deployments. The powerful software features many advanced capabilities, such as full-featured dynamic content, transactional and triggered email, and customizable report generation features. It is easy to use and runs from a browser-based interface using Chrome, Firefox, Internet Explorer, or Safari. Goolara is headquartered in Moraga, California and can be found online at [www.goolara.com](http://www.goolara.com).

Goolara, LLC  
1030 Country Club Suite D  
Moraga, CA 94556  
Telephone: (510) 522-8000  
(888) 362-4575  
Fax: (510) 522-2457

Copyright © 2015 Goolara, LLC All rights reserved.

No part of the contents of this publication may be reproduced or transmitted in any form or by any means without the written permission of Goolara, LLC.

Goolara and the Goolara logo are registered trademarks in the United States, other countries or both. All Rights Reserved. All other company and product names may be trademarks of the respective companies with which they are associated.