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5 steps to an ideal email campaign

By Abi Clowes

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Introduction

Welcome to Pure360's latest guide '5 steps to an ideal email marketing campaign.' When it comes to email campaigns there's lots to think about. As a marketer it can become all too easy to get stuck in a routine where the messages you are sending out are not as considered as they should or could be. It's really important to take a step back and ask yourself what you're trying to achieve and if, with the resources you have, you are doing this in the best possible and most effective way.

To help, in this guide I have outlined five areas for consideration, from the starting point; your strategy, to the all important results and what you can learn from your campaigns, as well as everything in between. I hope you find it useful moving forwards.

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Step1: The strategy

We all know the basics but usually go to the channels first - we need to do an email marketing campaign because we know it gives us great ROI and won't cost the earth. Flip that on its head. Why does our target audience want to receive an email campaign? Quick sanity check – is it the best possible way to get our required message to them and will they listen to it?

If you're an experienced Marketing Manager who's written lots of plans then you can recap and skim this section or even pass on to your Exec. If you're an Exec then these planning tips may come in handy...

So what's the plan?

- When you're planning your email marketing campaigns then don't forget to start at the beginning – why are you doing this? It may be a good channel for ROI but is it a good channel for your audience on this occasion?

- Make sure you plan in your resources – do you need a designer to produce the html? Do they know the difference between web and email html as the differences are important? Who is doing the content and have you got people available to test?

- Check your timing – does it fit in well with your other activity, are you sending too frequently/infrequently? Does it clash with a seasonal holiday or busy day/time of the week?

- Are you planning on targeting? – if you're looking to get the best response then do you have the ability to segment your lists and target based on data you hold? If you are then how many versions of the email are you planning to do and what will differentiate them?

- Where will your recipients end up? – are you taking them to a web page and if so does it have a form on it? Or perhaps you're sending them to a landing page, is this created or do you need to factor that in?

- Sanity check the desired outcome (your objectives) – if it were you receiving the email, do you think you'd end up doing the outcome that is desired? Make sure that the outcome is always at the forefront of your mind when planning.

Finally, make sure your objectives are written down somewhere clearly and are shared with everyone involved in the campaign.

Step 2: The message

There are a few key components to Step 2 – The message and they will require the most resource and investment of time. The good news is that most marketers realise the importance of the message and are happy to focus on it.

So what are the key components to the message?

Content

Content is of course vitally important when it comes to creating your email marketing message. You need to decide what the key messages are that you want to get across and try not to overcrowd the email. If you try to put too many messages into your email then you'll just dilute them and will find your recipient not actually doing anything at all! Another thing to bear in mind when writing your content is that it needs to be kept very brief and succinct. The main point of your email should be to drive traffic through to a web page, you don't need to try and reveal everything in the email – just enough to get them clicking through. Write your copy and then go through again and try to half it. Next take a look and if you see any lengthy sentences or paras, break them down because your recipient needs to be able to skim and get the key information.

Briefing your Designer



If you want to keep the design time short and not have to keep going back and forth with changes, invest time in writing a good brief. Your Designer does not know the ins and outs of the campaign like you do and they're not a marketer so don't expect them to know what you have in mind if you haven't written a detailed brief. In the brief include who the audience is and what you are trying to get them to do, if you have any ideas as to how you think the design could be styled then let them know, they will appreciate the insight. Be clear on deadlines and who is signing off, tell them whether they are uploading the html and what alt tags need to sit behind each picture. Finally set an expectation as to how long they should spend on the design – if it needs to be really creative then tell them to spend longer on ideas or if it's just an alert then let them know they just need to provide something quick and simple.

Layout & design

This is usually in the hands of your designer however you will have an input and in my experience the designer may be stronger in web design than email. Here are some tips:

- Avoid a deep header image. If a recipient has images switched off and is viewing in a smaller preview pane, you want them to see your message asap. The top left of an email is prime real estate for copy.

- Reassure with trust earning text at the top. This is very small text that goes across the top telling someone why they're receiving a message. They may have forgotten they gave you their details so this prevents you from being marked as junk.

- Don't use one large image as your email. This is done frequently and when arriving with images switched off, all the recipient sees is a large box with a cross in it. Not a great first impression. If you do have to use lots of large images in your design, make sure you have plenty of alt text so that you can still display your message.

- Don't just put your CTA at the bottom. Yes it makes sense that people read the image and then do as you tell them but most times someone will skim read and may not get that far. Drop a CTA in your copy and also at the top right to make sure it's clear.

These are just a few tips of laying out your email, there has been a separate guide done on this topic which you can check out – *one for marketers* and *one for their designers.*

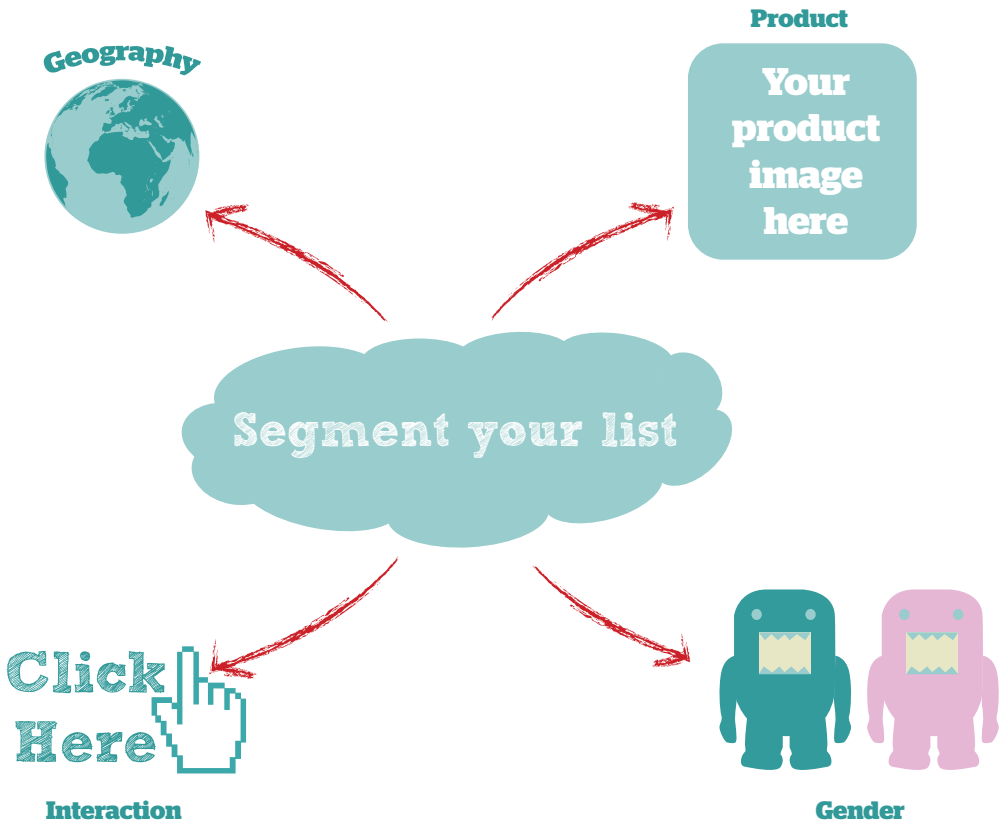
Step 3: The List

Ok so we all know the importance of personalisation when communicating with our audience, how do we transfer this into our email campaigns? There are four key ways that should be used, get these right and you'll find that your emails are read and more importantly, people will act on them.

1. Segmenting your lists

Before we even go into the message we should be looking at who we're sending it to. Are you sending a blanket message out to all of your email contacts or have you tried to segment it at all?

If you've been collecting lots of data about your recipients then this will be easy (I'll go more into this in the next section). Use the data you've got to split your list into as many as you like whether it's by geography, product interest or gender. If you've not been collecting data then you can always do this by their interaction level – look at your last send and split by who clicked, who opened and who did nothing – you can then tailor your message accordingly.



2. Using dynamic content in your message

This may sound technical but it really isn't and your email marketing provider should be able to provide the functionality within your software so ask about it. Basically this is where you can add personalisation in your copy such as [first name] or [location].

Again use whatever data you have available and be clever with it – who is their Account Manager? Why not put their name and direct dial in there? Or which industry are they in? You could personalise a testimonial from someone in their relevant industry.

3. Personalise the subject line

This one is very simple to implement and can often get missed. You can add a first name into the subject line 'We've missed you Dave – can we tempt you with an offer?'. Again you can use whatever data you have, is it their birthday or is it an offer for people in a certain location?

4. Change the picture

Within your email content you can not only change the copy but also a whole section of html with dynamic html. This is handy if you want send a relevant looking email to a range of people, without having to set up five different campaigns. You could have a campaign going to people who are in varying sized companies – each email uses a different html block to show details of different products from your range that suit their size/industry. You send one email but they all see different products, even product branding, in their inbox.

Growing your list

I get asked quite frequently how a company can grow their list and where can they buy some data from. My answer is always don't buy data; you'll get much better results from growing the list yourself. This is because the best results of email campaigns are always when the recipients feel they're receiving something relevant to them and most importantly that they have a choice about receiving it. If you buy a list and they've not heard of you before then it's a fast trip to the junk folder and that will damage your deliverability rate before you've even started.

So how can you grow your email list organically?

If you don't ask then you don't get so put a sign up form on your website. Don't hide it in the footer, make it a nice bold ad above the fold.

Tell them what they're going to get, better yet show them! A nice image of what your newsletter looks like or even a link to the last one will help them to see that you're sending quality content to them and this will encourage sign up.

Let them choose what they want to receive, give them a preference centre where they can choose your monthly newsletter, product updates or promotions. You could be really good and give them a choice of frequency as nobody likes to sign up to a monthly email and then get one every week.

How long should your form be?

This is a catch-22, you want to collect lots of nice data about your recipient but you know that lengthy forms can reduce your sign up rate. A nice way to solve this is to have a two-stage sign up form, on the first page you just collect their name and email address, you then have a second page that asks them for more information to make their experience better. If they don't bother then you still have their name and email banked and if they do then you have lots more info to play with.

Some companies aid the uptake of the second stage by offering additional content or a one off discount.

Another thing you can do is send a confirmation email to those who just filled in the first stage, with a link to the second stage and a reminder of why it would benefit them to fill it in. A nice incentive always helps...

Don't stop there

Don't just use your website as a driver for email sign ups; you've got a whole host of other channels at your disposal!

- Drop a Tweet telling people to sign up for your newsletter just after you've tweeted a nice bit of content
- Add a link to your email signature telling people to sign up
- If you've got other forms on your site then add an opt in to receive your email
- Use your Linkedin profile and Facebook page to send traffic to your sign up form
- Don't forget the smart phone, people are online all the time on their mobile now – if your sign up form is simple enough then you can capture details whilst they're on the move

Getting targeted



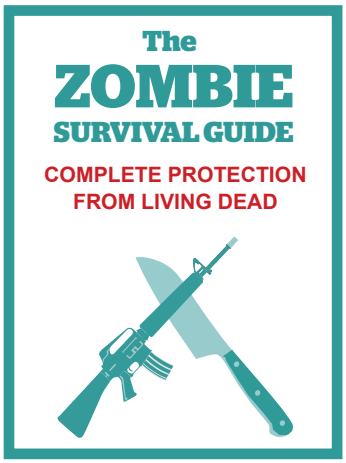
I've touched on this in the Personalisation section but here's some more detail on targeting your campaigns.

However much data you decide to collect about your recipients is up to you, of course the more you collect then the easier it is to target. You don't have to collect it all at once though, send a follow up email or run a promotion whereby they provide further details in exchange for valuable content or a prize draw.

Once you know how you want to split your campaign it's very simple to set up within your email software. You can either upload separate lists or upload one larger list and create filters on it which you can send to. If you're not using software then you can still segment your lists – good old Excel does the job, just remember to name them with which segment they contain!

Targeting doesn't stop with your list; your message will be targeted aswell. You can save time by using dynamic content that I mentioned earlier or get your designer to set you up a template (or even a few designs if they're inhouse and available) that you can tweak. You don't need to do a major overhaul for each campaign, you can just change a few words here and there and ensure that the subject line matches the message.

Spring clean your list



What do I mean by cleaning your list? It's basically removing any opt outs or hard bounces (people who no longer work there or whose email is incorrect). If you don't remove these from your list then it will have a negative effect on your deliverability as ISPs look to open and click rates to see how relevant the content you're sending out is. If they think you're not being relevant then you will find it harder to hit inboxes.

Not only that but you're cheating yourself out of measuring true results by having emails counted in your list that shouldn't be. Your 20% open rate could well be 30% once you've given your list a clean.

Your email software will most likely have a button that enables you to clean your list with a click before each send, make sure you use it.

Another way to clean your lists is to remove zombies or sleepers. These guys just sit on your list and never interact with it, dragging down your results again. Here's how you can remove them:

- Send a campaign to your database and then split it into three lists, those who did nothing, those who opened and didn't click, those who clicked
- Set up three emails with a different message to each, try to encourage the opens to click with more relevant content or a promotion and the do nothing to open with a better subject line (think Ronseal , clear call to action and some personalisation)
- Again split your lists and this time send an email to the do nothings with the subject line 'Do you still want to receive this email?' – in the email say how you've observed them not do anything with your emails and you don't want to send them something that they're not interested in so would they like to change their preferences? If they opt out then you've lost nothing, they were zombies and if they don't (having opened) then you should have sparked their interest by being upfront with them
- Those who still didn't respond either way? Take them off your list.

Step 4: The delivery

So you have your list uploaded and segmented and your message is looking great. You're ready to go...or are you?

This section is all about the send and you'd be surprised at how much is involved before your perfect campaign can go out.

Test, test and test again

Nobody wants to send out an email campaign only to have a customer point out a typo or a link that doesn't work. It happens we know but we'd rather it didn't so testing will help to cut out silly mistakes. This kind of testing can be done by sending your email to a friendly group internally who will come back to you if they spot anything, it's good to get a fresh pair of eyes on it.

I've created a delivery checklist for my team here which we use, after a while it becomes second nature but it certainly improved our campaign accuracy. You can *view it here.*

So aside from silly mistakes, here are my favourites for testing campaigns:

Subject line testing

This one can help tackle low open rates and allows you to test more than one variation on subject line before sending it out. Even changing something small like a call to action will have an impact but you may find that the smaller the change, the smaller the impact of results.

Some email providers also have a tool that will automatically select the best performing subject line for you. It will send to a small batch test and then whichever is most popular will be applied to the rest of the send. Clever stuff.

Deliverability test

This one will help your emails hit the inbox and will test your email for any nuances that ISPs don't like. For instance if you have a full web address in your content including http, it will be flagged as a spam warning or if your text to image ratio is bad. It can even tell you if any URLs that you use have been grey or black listed by ISPs (you don't want to use these URLs if you want to get into inboxes).

Check with your email marketing company what spam tools they have or you can use external websites.

Inbox previews

This test will show you what your email looks like across a range of different types of inbox, as they all show an email in a slightly different way. For example Hotmail doesn't show alt text behind an image when images are switched off, you just get a grey box.

Again you provider will have their own range of tools or you can use *http://litmus.com/.*

Timings - When is the best time to send an email?



This question gets asked a lot and the answer varies depending on the type of person and industry that you're targeting. We heard from the FA that Saturdays are great for them as obviously their football fans are engaged, there may be a match on and they want to read related information before the match. For B2B companies we've seen that early evenings work well as marketers tend to work later and catch up on their non urgent work. Across the board in the morning is generally a no no as people get their heads into work but there could be an industry that breaks the mould and you won't know unless you test.

The best way to really know the best times is to run some test campaigns of your own. Your software will be able to report when your campaign was opened after the send. Alternatively you can use features such as Intelligent Time Sending which, once switched on, will work out the time that each recipient opens their emails and will always send emails to them at that time, regardless of when the send is set up.

We have done some research into the best time of day, based on a cross section of campaigns. You can *view the results here.*

Automating your campaigns

One of the main reasons for email marketing campaigns to not go out is lack of resource. This is where automating your campaigns will really pay off. Different providers have different options but two proven ones are sending an automated message when someone fills in a form on your website or one based on a specified date.

Form-based automations

This automation is great as you can send an instant email to whoever has filled in a form with either a welcome message or a confirmation email. We know that people are most engaged when filling in a form so make sure you make sure that they stay that way by showing an immediate response to their action, it makes them feel like you're switched on and that you care about them.
A good start to any relationship.

In the B2B industry this could start a series of emails, a week after sign up 'How's the free trial going?' or 'You liked our newsletter, here's our latest guide'. Three weeks later 'Upgrade your free trial and find out how to get better results' or 'Enjoy the guide? You could benefit from a consultation with an expert'.

You can build a relationship at their pace, without giving them a hard sell unless they're ready.

In the B2C industry a good example is with retail where post purchase you can use the opportunity to get feedback and reviews, even upselling related products later on.

Date-based automations

This automation allows you to send targeted emails based on any dates that you hold against a recipient in your contact list. One example is for Birthdays or an Anniversary – you could set up an automated email using dynamic content for their name and wish them a Happy Birthday with an offer just for them. This one email could then go out to everyone on your database, on their Birthday, but you only have to set it up once.

You could set it up based on the date of their sign up for your newsletter, the date they had a consultation, the date they purchased a product, the date of a booked holiday...the list goes on.

Retargeting campaigns



This one is a favourite of mine as it doesn't involve growing your list, it just makes the most of the list you already have. A solid lead nurturing campaign could really liven up your database and is a much easier sell than to those who don't know about you yet.

Go back to the spring cleaning instructions and that is how you can retarget your database if you don't have any information on them. If you want to take it a step further then start to get personal, retarget all the people that you met at an event but who didn't sign up and talk about it in your content. What about all those people who haven't purchased from you based in London? – perhaps a special offer for Londoners to celebrate the end of a tube strike, Wimbledon, whatever related thing you can think of that's relevant to them.

You'll find it good to do a retargeting campaign every couple of months depending on the data that you hold and how engaged they are, but you will see an uplift in results by doing one and it keeps your audience engaged.

If you really don't have time to run a retargeting campaign yet and still want to maximise your sends then why not resend to non-opens with a different subject line? Some providers allow you to this as part of the campaign set up and if the person has been away or didn't find the first subject line appealing, then one a week later, even on a different day may suit them better. It's a good multi-variant test.

Step 5: The review

We're nearly there and well done for getting through this document!

In the final section we'll be looking at what to do post campaign. This is the part that really adds the most value to your current and future campaigns and let's face it, is what your Manager will be interested in!

What do results tell us?

Before you delve into the numerous reports that you can get from your email marketing platform and/or analytics software, remind yourself of what it was you wanted to achieve in the first place.
When setting out your objectives you would have put measurables in there, so this makes life easier now. If you didn't? Well there's always next time.

The usual objectives/measurables are detailed below:

Objective	Measurables
Drive traffic to a website/landing page	Number of clicks + site interaction
Increase awareness of brand/product	Number of opens + clicks + online transactions/form completion
Drive purchase	Number of online transactions
Collect data	Number of online forms completed (conversions or goals)
Inform customers/prospects of news	Number of opens + clicks + online downloads
List cleansing	Number of opens + clicks + site interaction

You'll notice that opens are rarely the core measurable, this is because measuring purely by opens and clicks will not get you the attention of your senior peers and will not show profitable results. Those are measure by transactions, whether completion of online forms or online purchases or even use of offline purchases using a voucher code that you've provided.

Always make sure that you are measuring beyond the open and click.

What does make opens and clicks useful is what they tell you about your campaign content, timing, relevancy and design. This will give you great feedback for your next campaign and how to improve it. So opens and clicks have their place and used properly will help you to drive the more important results such as purchase and data collection.

How to get reports

Now you know what you're looking for, the reports will be much quicker to look through and with your analysis head on, you can pull out some interesting data.

Reporting varies in email marketing software but there some reports that you should ask for if you don't have them:

- Opens over time
  This report will show you when your emails were actually opened. If you sent them on a Thursday morning but no-one looked at them until the evening, did you send them at the right time?

- Conversion tracking
  Taking terminology from Google Analytics, you want to see whether recipients have actually completed an action online as a result of your campaign

- Received numbers
  This shows you how many people actually received your emails in their inbox. If the number doesn't match the number of emails you sent then your deliverability may need looking at.

- Bounce rate
  This is different than in Google Analytics and shows how clean your list is. A high bounce rate means you have incorrect data in your list and this needs addressing.

- Send to a friend
  If you are using a sharing option within your email then you'll want to know how many people passed the content on. It will give you an indication of how viral your content is.

- Opt outs
  An important one that should be checked closely. If a lot of people are opting out (unsubscribing) to your email campaigns then you have bad data or your content is not relevant to them. Make sure that you're segmenting your list and not sending the same content to all. Being clear on what they can expect to receive at point of sign up will help to reduce opt outs as will adding a line of text at the top of your email to tell people why they're receiving it.

- Top links
  Always good to see what content and call to actions appealed. You can get a list of the top links by clicks and also a heatmap of where people were clicking within your email. If you're sending a newsletter and nobody is clicking on a type of article then remove it and put in more of what they do like.

- Top viewers
  Who are your top viewers of the email? These guys may be worth a call from customer services or if they're prospects then pop them into a separate campaign and push slightly harder for a sale. If they are continually the same people then they may be good to use for opinions on content and feedback on improvements.



Author of this guide, Abi Clowes is one of the many talented and experienced people who make up the team at Pure360.

Founded in 2001, Pure360 is one of Europe's top email marketing companies.

Pure360 (www.pure360emailmarketing.co.uk) provides the best email marketing and SMS services to customers such as innocent drinks, Seatwave, The FT Group, Hackett, Zoopla and LA Fitness.

Pure360 don't tie customers in with a long contracts, instead they maintain the highest customer retention rate of 98.6% by making sure marketers are getting the best possible results from their email marketing and SMS campaigns. Members of the DMA, Pure360 have recorded a 10% higher open rate for their customers than the DMA average, leading to higher clicks and conversions than competitor products.

If you'd like to talk to one of us then call 0844 586 0001 or email us at contact@pure360.co.uk

We're also on Twitter (@pure360) or sign up for our newsletter online www.pure360emailmarketing.co.uk