

CMA Guide to E-mail Marketing

Theory, best practices and practical advice for marketers

CANADIAN
MARKETING
ASSOCIATION

CMA

About the Canadian Marketing Association (www.the-cma.org)

With more than 800 corporate members, the Canadian Marketing Association (CMA) is the largest marketing association embracing Canada's major business sectors and all marketing disciplines, channels and technologies. CMA is the marketing community's leading advocate on the key public policy issues affecting both consumer and business-to-business marketers. As well, the Association is the principal provider of knowledge, marketing intelligence and professional development opportunities for marketers; and catalyst for networking and business opportunities within the marketing community.

CMA provides an effective voice for responsible and ethical marketers and has participated in a variety of government-led task forces and working groups on issues such as privacy, e-commerce, SPAM e-mail and fraud prevention. From time to time, the Association forms internal task forces to develop self-regulatory policies on marketing best practices, ethics and privacy.

The Association's Code of Ethics and Standards of Practice is compulsory for its members. It includes marketing guidelines and the use of CMA's Do Not Contact Service, whereby consumers register, without charge, to have their names removed from marketing lists held by CMA member organizations. The Association also offers a customer complaint resolution program known as Operation Integrity.

The Association promotes industry growth, development and education through a network of eight marketing councils which provide a forum for members to exchange marketing intelligence through case studies, white papers, articles and guidelines. CMA offers a Professional Marketing Certificates program with courses in advanced marketing, advertising and media, e-marketing, direct marketing and integrated branding. Other educational initiatives include the CMA National Convention & Trade Show, conferences, seminars, in-house training, roundtables and the CMA Awards program.

CMA Guide to E-mail Marketing

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CMA Guide to E-mail Marketing

Introduction

On behalf of the Canadian Marketing Association's Digital Marketing Council, we would like to welcome you to the second edition of our **Guide to E-mail Marketing**.

Overview

Since we wrote and launched our inaugural Guide to E-mail Marketing in 2003, more than 14,000 marketers (as of December 2006) have downloaded the document. In 2003 there was a clear need for a definitive how-to guide for e-mail marketers, and that need is just as strong today. Much has changed since we first tackled the topic of e-mail, especially when it comes to privacy, permission, technology and deliverability.

This second edition is a more comprehensive publication that takes the best of the previous document and adds new and valuable content.

We think you will find this Guide to be a great blend of theory, industry best practices and practical advice from experienced e-mail marketers.

As the e-mail channel continues to evolve, so will this guide. We intend to make the *CMA Guide to E-mail Marketing* a living document with relevant additions and updates on a continual basis.

We strongly encourage you to add your own comments, links, research, experience and suggestions via the CMA Blog at <http://www.canadianmarketingblog.com>

A new approach

In this 2007 Edition, we have taken a new approach to organizing our Guide. We have created an e-mail marketing program critical path that takes you from brainstorming to deployment, all with an eye to helping you implement a legitimate and effective e-mail marketing program.

- E-mail marketing's role in the marketing mix
- Canadian attitudes towards e-mail
- Emerging technologies - considerations
- General e-mail marketing lessons learned
- Building an in-house list and renting lists
- Building effective creative
- Overcoming deliverability challenges & SPAM
- Metrics & tracking results
- Privacy, relevant Canadian & US law, obtaining consent

On behalf of the CMA's Digital Marketing Council, good luck with your e-mail marketing plans.

Acknowledgments

This Guide was first published at a time when e-mail marketing was taking mere baby steps - the year was 2003. CMA's e-Marketing Council, as it was known at the time, understood the value of the medium for marketers. The Council also understood that successful e-mail marketing is grounded on direct marketing principles. The first publication was based on drawing a strong correlation between e-mail marketing and direct marketing. Today, as marketers evaluate current and emerging factors that can impact e-mail marketing success, direct marketing principles still hold true.

Feedback from users of this Guide has been overwhelmingly positive. Marketers and academics tell us it is concise while covering all the bases. Our focus on the importance of direct marketing principles is sound.

It is with much gratitude that we acknowledge the contributions of the following CMA members and colleagues who played a key role in producing this valuable tool for marketers.

Thank-You

Special thanks to Michael Seaton and Sulemaan Ahmed for their leadership in steering the first and current edition of the Guide, respectively.

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Sharon Brown	Tara O'Doherty
Nancy Castonguay	Shelly Paolini
Flora Cheung	Michael Seaton
Laurie Dillon	Parth Shukla
Eaton Donald	Steve Slaunwhite
Scott Jamieson	Salima Valji
Geoff Linton	Shari Walczak
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SECTION ONE: UNDERSTANDING THE VALUE OF E-MAIL MARKETING

Overview

E-mail marketing is a popular marketing communications tool. Over 80% of US marketers (Forrester, 2005) and 90% of Canadian marketers (Inbox Marketer, 2005) are doing some form of e-mail marketing. But few companies are deploying high volumes; 67% of US companies only send less than 1 million messages annually (DMA, 2005). On the other hand, e-leaders typically deploy above 30 million messages annually (Forrester, 2004).

E-mail marketing has the highest ROI effectiveness rating of any direct marketing medium. Most marketers agree that e-mail has excellent cost efficiency and on a cost per response basis, e-mail marketing is ranked number one. In the table below e-mail has twice the ROI impact as direct mail (14.2 vs.7.2):

Email ROI vs. Other Marketing				
Media	Revenue Per Contact (\$)	Promo Cost Per Contact (\$)	Response Rates (%)	ROI Index (#)
E-Mail	\$1.28	\$0.09	0.99	14.20
DRTV	\$1.35	\$0.16	0.27	8.40
Inserts	\$1.31	\$0.18	1.46	7.30
Direct Mail	\$3.95	\$0.55	1.61	7.20
Dimensional Mail	\$8.99	\$1.61	3.46	5.60
Radio	\$3.77	\$0.74	0.38	5.10
Catalog	\$2.88	\$0.63	2.32	4.60
Telephone	\$6.17	\$1.45	5.73	4.20
Coupons	\$1.32	\$0.43	2.78	3.10
Newspaper	\$0.75	\$0.35	0.14	2.10
FSIs	\$0.03	\$0.06	0.09	0.60
Magazine	\$0.10	\$0.22	0.13	0.50

Source: DMA Response Rate Report, 2003

State of E-mail Marketing in Canada

E-mail is being used for a variety of purposes: acquisition, basic branding and proactive customer management. The majority of Canadian companies use e-mail to build rapport and stay top of mind.



Source: "The State of Email Marketing in Canada" Inbox Marketer Winter, 2005

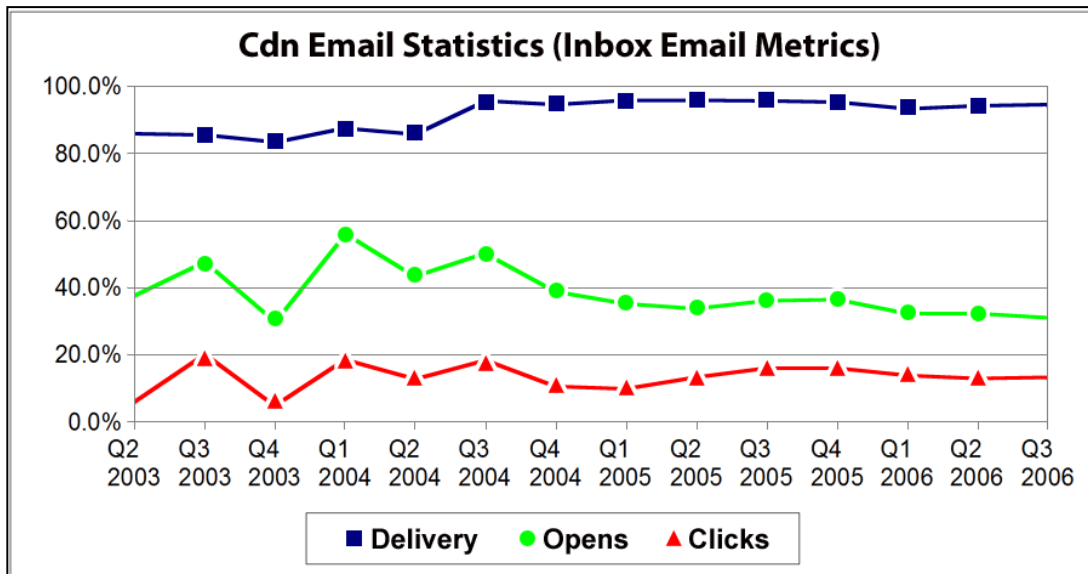
However, few companies are using e-mail for customer management (grooming, cross-sell, up-sell).

While over 90% of surveyed respondents use e-mail marketing as part of the integrated marketing communication mix (Inbox Marketer, 2005), many of the respondents are using e-mail marketing as a simple campaign blast and are not harnessing its true potential. Since e-mail is viewed as a simple, easy and efficient way to communicate with customers, its strategic advantages may sometimes be overlooked.

Overall Canadian e-mail metrics are healthy, but e-mail marketing in Canada lags behind the US market because lists are smaller and a low proportion of Canadian companies have dedicated/assigned e-mail marketing teams. With fewer resources to allocate, companies are not as vigilant in e-mail measurement.

Opt-in rates are still surprisingly low in Canada and permission lists are smaller. Large B2C companies in Canada have permission for less than 15% of their customer base. The US market ranges between 20%-30% and the penetration rates are as high as 35% - 45% for some sectors (Forrester, 2004).

Canadian e-mail metrics are better than US e-marketers. In Canada Q3 2006, the average open rate was 33%, and CTR was above 13%. Bounce rates were steady at 6% (i.e. delivery is 94%).



Source: Inbox Marketer Canadian client email results, 2006

Marketing Sherpa (E-mail Benchmark Survey 2007) reports that open rates have continued to decline most notably for the number of agencies reporting open rates of 30% or higher. There has been an increase in people reporting open rates in the lower ranges. Image blocking is often given the bulk of the accountability for open rate drops. Open rates have dropped continuously year after year since image blocking technology became more common.

There are other issues to contend with such as: deliverability and the formulas/techniques used by some ESPs to report open rates. Open rates should not be used as the primary campaign success measure, but are more appropriate for benchmarking subject line tests and success.

Marketing Sherpa reports the following list growth for B2C marketers:

- Monthly growth – Average 6%
- Monthly Attrition – Average 2.9% (approx 1% due to unsubscribe + 1.9% undeliverable/hard bounced)

B2C e-mail house lists tend to both grow and experience attrition at greater rates than B2B counterparts. There are many reasons for this such as opt-in/acquisition techniques, lack of structured nurturing processes, content that is not relevant and a lack of governance or frequency planning.

The top reasons for opting out:

- No longer interested - 51%
- E-mails too frequent - 25.8%
- No time to read - 12.4%
- Subject line not informative - 6.2%
- HTML formatting - 3.3%
- Not personalized - 1.3%

The top 3 reasons in the above list all speak to the importance of relevancy in the eyes of the e-mail recipient. With e-mail having established itself as a legitimate messaging channel, recipients are demanding more relevant information from it. Realistically, no one expects every message to be 100% relevant. However, the more frequently the message has relevancy, the more willing a recipient will be to overlook the non-relevant messages.

The early promise of e-mail marketing

The early promise of the e-mail channel was high response rates that are comparable to, or even better than direct mail, but at a much lower cost.

Has e-mail fulfilled this promise?

The reality

The early excitement around e-mail marketing was driven by a number of factors:

- The response cycle was fast, usually a matter of hours;
- There were no printing costs;
- There were no postage costs;
- The time-to-market to create and execute a campaign was relatively short.
- The ability to use metrics to determine success almost instantaneously. (*This is also 'pro' even if it's listed as a 'con' below.*)

Marketers have discovered that e-mail campaigns are executed faster and cheaper but the “better” claim is more subjective. The fact is that many consumers respond to the tangible aspects of mail and mailings are profitable. While some marketers initially looked at e-mail as a replacement for direct mail, the reality is that direct mail is still the industry “workhorse” and top direct marketers integrate e-mail as a supplement to direct mail. E-mail can certainly bridge communications gaps very cost efficiently and are excellent for relationship building.

There are other important issues to consider that are unique to e-mail.

For example, e-mail marketing requires technology to send, track, and analyze campaigns. You either have to acquire and implement this technology in-house, or purchase the services you need from an outside firm. However, the costs of these tracking tools are now quite negligible, especially when compared with campaign tracking tools in other marketing channels. And, many ASP (application service providers) / ESP (e-mail service providers) services allow you to pay for the services only when you need them.

E-mail and direct mail lists work differently. Direct mail lists are not typically permission based and they are created by response information or by compiled data. By contrast, e-mail lists are permission-based and/or "opt-in" by nature. And, SPAM (unsolicited e-mail) draws more ire from recipients than its physical "junk mail" counterpart. A DoubleClick/NFO study (Consumer E-mail Study 2002) confirms that 75% of consumers prefer permission-based e-mail marketing to other forms of marketing.

The standard in Canada is opt-out, provided the opt-out message is not hidden and the use of the information is clearly stated.

According to Tillinghast (2001), the 'gold standard' in terms of permission e-mail marketing is requiring the subscriber to confirm that they registered for an e-newsletter after they sign up (hence the term 'double-opt-in' and he explains the process as follows:

- buyer@bigagency.com wants to subscribe to my weekly newsletter from SearsTravel.ca
- He clicks on the subscribe button on the top of the column's web page.
- He enters his name and e-mail address into the form presented
- Moments later he receives an e-mail message at the same account. The e-mail asks him to respond to it to confirm the subscription.

Double opt-in prevents many online users from having their e-mail addresses being fraudulently or mistakenly being placed on e-mail lists. The criticism of double opt-in is that it could confuse the situation for subscribers. For example, when was the last time at Sears you placed the items you wanted to buy at a cash register and heard the cashier say "Are you sure you want to buy these things?" You don't make folks jump through an extra hoop for a sale that is already closed. If the communication was in error, the unsubscribe information would be sufficient. (Ahmed 2002)

The other concern about double opt-in is that some list owners have lost between 40 to 60 percent of their database using this method. That is up to 60% of those who register on a web page and agree to further communication are neglecting to reconfirm, usually because they fail to open the confirmation message, thinking they already know what's in it. (Ahmed 2002)

The state of the art

Yet, despite these challenges, e-mail has emerged as a powerful channel for building customer relationships and brand loyalty, communicating direct marketing offers, building website and retail store traffic, and reaching out to potential new customers.

Direct marketing principles at work

E-mail marketers have found that aligning their initiatives with proven direct marketing principles is the surest road to success.

What is working

E-mail marketing is evolving. Marketers are continuously discovering new and innovative ways to leverage this channel to achieve a wide range of communication objectives.

Here are just a few examples:

- **Customer relationship management.** E-mail is a fast and easy way to stay in touch with customers. Marketers use e-mail to promote special offers, announce new products and upgrades, handle service issues, and add value in numerous other ways. In addition, according to eMarketer, properly executed e-mail improves the image of the sender among customers and prospects. Lifecycle messaging and welcome programs also generate positive results.
- **Integrated campaigns.** E-mail can be a powerful component within an integrated direct marketing campaign. It can work in collaboration with direct mail, telemarketing and general advertising.
- **Catalogue, retail, e-tail.** E-mail has proven to be an effective means of promoting products, discounts, and other special offers to retail and online buyers. *Chapters.ca*, for example, utilizes e-mail marketing extensively. Traditional retailers like *The Hudson's Bay Company* also employ this type of e-mail communication.
- **Newsletters.** The newsletter has emerged as the workhorse of e-mail marketing. Many organizations publish e-mail newsletters, not only as a means of staying in touch with customers, but also as a value piece to attract new prospects.
- **Internet direct mail.** Just about any offer communicated through traditional direct mail can also be promoted through the e-mail channel. The principle difference is that an e-mail list must be permission-based.
- **Customer acquisition.** Acquiring new customers is a challenge in any direct marketing channel. E-mail is no different. However, there are many examples of highly successful acquisition campaigns utilizing e-mail across a wide range of companies including financial services, packaged goods, and the more traditional direct marketers.

State of the art

E-mail marketing is an effective means of maintaining valuable customer relationships and communicating a wide range of direct marketing offers.

E-mail vs. other marketing channels

E-mail has much in common with direct mail and even Call Centre based marketing. Like these channels, it's one-to-one communication. Yet, e-mail has unique characteristics all its own.

For example:

- Most channels, such as direct mail and telemarketing, are not strictly permission-based. E-mail is. You should obtain express consent from recipients before you send an e-mail marketing message or your efforts will be regarded as SPAM.
- There are many examples of successful acquisition campaigns using e-mail to begin a relationship. However, e-mail marketing has been used extensively to build and extend existing relationships. It can be a powerful customer relationship management tool.
- Only telemarketing rivals the response-cycle of e-mail. Typically, more than 50% of the responses to an e-mail marketing campaign will come in within just the first day of campaign deployment.
- An e-mail campaign can be created very quickly. That's because there are no delays due to printing and mailing. However, before you can execute an e-mail campaign, you must have the front-end technology in place either by using an ASP model, or by purchasing/renting e-mail marketing software to manage and launch campaigns in-house.

	Direct Mail	E-mail
Speed to Market	6 - 8 weeks	1 - 3 weeks
Response Time	2 - 6 weeks	24-72 hours

Sources: Forrester Research, Jupiter Communications, DMA

Emerging technologies

What is RSS

Although e-mail has been a key communications medium for many businesses, it could suffer from the same progress of technology that brought it forward.

Similar to how e-mail started to replace direct mail, it could be argued that other technologies could replace e-mail over time. One of those is RSS feeds. What is RSS? RSS is an acronym for Really Simple Syndication or Rich Site Summary. Essentially, an RSS feed can be used to distribute content to subscribers or other websites.

According to a Microsoft Canada report, the RSS technology varies from e-mail where it allows subscribers to ensure the content goes directly to them instead of them having to get it. Subscribers can easily subscribe and unsubscribe to RSS feeds with much less complication than unsubscribing to e-mails.

Below are a few of a many examples of icons that are displayed on websites or blogs where visitors can subscribe to an RSS feed are indicated below.



When customer subscribe to an RSS feeds, they can use an RSS Reader to read the feeds as they are updated on a regular basis without having to go back to the original website to check for updated content. This does in turn save the subscriber time.

RSS advantages

According to Microsoft Canada there are a few advantages to RSS feeds:

- To distribute press releases more efficiently
- Announce new products
- To inform users of content or product updates
- To recycle old information that has already been produced but remains current
- To announce events, campaigns or contests
- Missing person alerts, lottery numbers, weather information, job postings and any other kind of content
- With the adoption of blogs and podcasting, the adoption of RSS will increase as well
- It's a great add-on to the marketing mix in order to increase customer reach

RSS adoption

The adoption rate of RSS feeds is increasing especially when subscribers can utilize a variety of paid or free RSS readers at their disposal. The debate therefore becomes whether RSS feeds will eliminate the need, usage and adoption of e-mail.

According to a Yahoo Report (October 2005) RSS adoption is difficult to track but it is growing and becoming significant. In 2005, 12% of the US (online) population had heard of RSS feeds and 4% acknowledged they consume RSS feeds. In reality, 27% of users use RSS feeds (i.e. MyMSN, My Yahoo, etc.) but are unaware of it. It is estimated that in 2007 there will be a 500% increase in RSS adoption according to eMarketer.

The argument presented by some marketers is that RSS will indeed wipe out e-mail. The arguments presented are that younger demographic groups in society do not like e-mail as it is easily associated with SPAM and is associated as intrusive marketing. It's also argued that "RSS allows subscribers to have more control as RSS is consumer-initiated and subscription-generated." It could also be argued that RSS feeds are not subject to the same negativity that is associated with SPAM in e-mail. Lastly, it has been suggested that certain demographic groups (youth and teens) do not use e-mail and depend more heavily on tools such as instant-messaging to communicate with others. There is some truth in that statement.

RSS as a threat - or not?

It was prognosticated by some Internet marketing insiders in 2005 that RSS would ensure that in three years, marketers would see the demise of e-newsletters. It's still early and others take a different viewpoint.

According to Stefan Eyrarn (*"RSS is Not a Replacement for E-mail"* May, 2005), it's his opinion that RSS will not replace e-mail just like e-mail has not replaced direct mail in the marketing world. This is a very valid point. Eyrarn further argues that while RSS is not as affected by SPAM and SPAM filters, there are still many holes and unknowns with RSS. He also questions the viability of adding another channel (such as RSS feeds) to communicate with customers and prospects if it is not measurable. There also appears to be no conclusive data as to how many people are currently using RSS readers.

While certain experts feel that RSS spells the end of e-mail, others feel that is a premature assessment. Jennifer Evans noted a few reasons why it would be unlikely that e-mail would be completely replaced by technologies such as RSS (*"Sorry RSS, E-mail is Here to Stay"*, March 2006). Evans opines that e-mail is still beneficial for a few reasons:

- **Ease of delivery.** Most consumers were able to use e-mail before they purchased a computer. With familiarity comes a certain degree of dependency. RSS is more of embedded technology whereas e-mail is a driving technology.
- **Adoption.** E-mail adoption rates have still remained very high by consumers. Therefore marketers, advertisers and businesses will use that medium to reach those consumers until it is decided that e-mail is no longer useful.
- **Personalization.** E-mail allows a specific amount of personalization and customization unlike RSS, blogging and podcasting where one cannot effectively personalize content.

- **Timing.** E-mail allows companies to promote products or sales much more quickly on a last minute basis. Especially those in the yield-management business or dealing with distressed inventory. (Think airlines in March or retailers after Christmas.)

According to Microsoft, other disadvantages to RSS are that some RSS feeds do not work with all readers, RSS tracking is not as effective as e-mail tracking and lastly, it is much easier for subscribers to unsubscribe. While this could be noted as a benefit it also could be a drawback as RSS feeds put more pressure on the publisher to remain relevant.

Evaluating RSS

RSS feeds are indeed an emerging channel whereas e-mail is a maturing channel therefore any evaluation of success is speculative in nature. To compare one to another may be incorrect as they are at different points of adoption by world-wide consumers and Internet users. In other words, they are both enabling technologies and the types of consumers that use RSS feeds may be very different from the types of customers that use e-mail. At the end of the day, it is up to marketers to decide which medium to use but it may not be an either/or scenario.

SECTION TWO: PLANNING FOR SUCCESS

Setting realistic objectives

In the early days of e-mail marketing, creating a successful campaign was relatively easy. The medium was entirely plain text. Permission-based e-mail lists had not yet been deemed a requirement. Due to the novelty factor and that fact that there was little competition, response rates were generally high.

Today, however, that has all changed. E-mail marketing is now mainstream. Marketing professionals must work just as diligently to create a profitable campaign as they would with any other direct marketing channel, which is a good thing.

Another factor is that due to the relatively low cost of e-mail, publishers spend less time on them. Many publishers and members of senior management simply do not consider the impact of e-newsletters to the same degree as producing a print magazine where production costs are higher (Ahmed, 2002). But e-mail is a sensitive medium and care needs to be taken.

Sticking with it

Due to the early enthusiasm for e-mail marketing, there is still a tendency among some professionals, especially those new to the medium, to set unreasonably high expectations. This can lead to frustration and disappointment and may even prompt some marketers to abandon the medium altogether.

The fact is that e-mail marketing can generate a solid return on investment if you set realistic expectations. Base your expectations on your historical e-mail campaign results. In addition, if you do not have reliable e-mail results, then set a target equal to your average acquisition cost for prospecting programs. Do not include any customers that you acquired free etc. Be wary of anecdotal success stories and response figures that sound too good to be true – they probably are.

Direct marketing lessons

When planning a campaign, following the principles established in traditional direct marketing is a good place to start. This, combined with the current best practices of e-mail marketing, will often lead to successful campaign results.

Planning questions

- How will success be measured? (Clicks? Cost per click through? Cost per acquisition? Retention rate? Conversion rate? Number of leads? Number of new customers? Total order value? Web site hits? Coupon redemption? Contest entries?)
- How will e-mail augment the results of an integrated campaign?
- What is the targeted return on investment? (Is this return realistic compared to other marketing initiatives?)
- How will fulfilment be handled? Who will handle it? How quickly will this occur? What happens if demand for a campaign premium exceeds supply?
- What is the expected reaction from customers? Will it build customer loyalty, sell a product or explain a new service? How will this be measured?

- Do you have the customer service resources in place to support the campaign if customers hit “reply” or call to ask a question?

Similar to any business or marketing initiative, e-mail senders/publishers should also look at the following criteria:

- Setting the goals of the e-campaign
- Target market and list – quality and quantity
- Creative considerations: Your creative and content should reflect your target market. For example, if your target market is baby-boomers in their 50s and 60s, why are you still using Verdana size 9 font?
- Budgeting. What kind of resources can you reasonably expect to allocate to sending an e-mail or running an e-mail campaign?

In-house technology vs. outside vendors

Deciding how your e-mail will be sent is an important planning decision. Obviously, if your e-mail list is in the thousands - or even the hundreds - the enterprise system you use for everyday messaging will not be adequate.

So you have two choices: acquire the technology to send and monitor e-mail campaigns in-house; or contract with a company that provides e-mail marketing services.

In-house

The investment in software, hardware and staff required to handle e-mail campaigns can be substantial. The upside is that you gain a high degree of control and flexibility. All the systems, procedures and data you build are yours.

Amortized over the long-term, e-mail technology may make more financial sense than using an outside company. Be careful, however, not to cut corners on cost. You want to ensure that your technical capabilities will fully support your e-mail marketing initiatives — now and in the future.

The downside of owning your own system is that it is incumbent on your organization to stay current with e-mail technologies and compliance regulations. In addition, if e-mail is simply a marketing tactic or channel for your firm, then you want your scarce resources to focus on making the most of the marketing opportunities and not the technology that delivers the e-mail.

Outside vendor

Companies that offer e-mail marketing services can provide you with everything you need to send, monitor, and analyze the results of your e-mail campaigns. This allows you to focus on strategy and creative, without worrying about technical issues.

From a cost standpoint, using an outside company can be less risky than implementing new in-house technology. Instead of a large upfront capital expenditure, e-mail marketing companies offer the advantages of pay-for-use.

Many e-mail marketing companies also provide campaign strategy, writing and design, and other services in addition to technical services.

Selecting an e-mail marketing company

Not all e-mail marketing companies have equivalent capabilities. That's why it's important to ask questions regarding: message formats (i.e. plain text and HTML); capacity to handle volume and frequency requirements; personalization; database management; depth and detail of reporting; handling responses; e-mail testing practices, relationships with ISPs, etc.

Privacy and third parties

Strictly speaking, an e-mail marketing company is a third party. So consider privacy issues carefully before you transfer e-mail lists and other personal information.

What to look for in an ESP

What are the qualities you should look for in an E-mail Service Provider (ESP)? Listed below are the top responses from Jupiter E-mail Buyers Guide:

1. Overall cost - 74%
2. Providers reputation - 56%
3. Delivery capabilities - 55%
4. Features - 45%
5. Industry experience - 40%
6. Tactical capabilities - 37%
7. Strategic services - 34%

Here are some additional items we recommend considering an ESP:

- **Deliverability reputation** – this is becoming much more important and will continue to do so in 2007 as more and more ISP's switch to reputation filtering as the primary deliverability filtering criteria.
- **Advanced segmenting and personalization capabilities** – the theme for e-mail marketing is now relevancy. Without a solid foundation in these items from an ESP it will be impossible to realize the benefits of relevant communications.
- **Automation** – as more advanced techniques and data channels are available and required for lifecycle type messaging, the economies of scale are challenging if the programs cannot be built and automated.
- **Reporting** – whether built in or ability to integrate, as the e-mail and all digital channels grow into accountability, reporting functionality becomes more important.
- **Integration** – for cross channel and broad digital channel campaigns, openness to integration both with data and reporting sources as well as other business systems (Sales Force Automation, Call Center, etc.) will be critical.

Getting ready for fulfillment

Getting your product into the hands of consumers is a success factor of any direct marketing campaign. The fulfillment challenges faced by e-mail marketers are just the same as in other channels, if not greater, because of the immediate nature of the Internet.

Because e-mail marketing is relatively new, it can be difficult to predict response. For example, a direct mail campaign offering a free guide may generate a 2% response while a comparable e-mail with the same offer may pull in an 8% response. The challenge is compounded by the fact that direct mail replies come in over a period of days or weeks, while e-mail results pour in within a matter of hours.

The Internet is home to the "click-it and get-it" generation. E-mail users expect fast turnaround. If your campaign is slow to fulfill, then you risk disappointing customers, who may then be less than receptive to further e-mail offers.

Electronic fulfillment

Fortunately, many direct marketing offers can be automatically fulfilled on the Internet.

In business-to-business e-mail campaigns, for example, such information-based offers as case studies, reports and white papers can be delivered automatically as an Internet download or by e-mail (usually in PDF format).

Consumer offers can also be fulfilled over the Internet. Examples of these include printable discount coupons, vacation packages, banking services, tickets to events...the list is virtually endless.

Hard offers

Of course, not all direct marketing offers can be fulfilled electronically. If your offer is a physical item, such as a magazine subscription or other product, then planning to fulfill these offers expeditiously is important. Is your customer service department or order desk ready to handle higher than expected e-mail results, seasonal increases, and campaign peaks? Remember that no one likes to wait.

Direct marketing principles at work

A direct marketing offer is a promise. The faster you can deliver on that promise, the greater customer satisfaction will be.

E-mail best practices

Testing a smaller segment of your e-mail list can help you predict the response rate and, subsequently, plan more accurately for fulfillment.

One good idea is to establish expected response times to e-mail and advise customers of them, whether it's 24 hours, 1 business day or 5 calendar days. However, it is worth noting that, from a customer service perspective, a longer wait is always worse.

Test, test, test

Few direct marketing programs hit a home run the first time at bat. The most successful campaigns are those that evolve through a process of testing, analyzing the results, and rolling out the winners.

When it comes to testing, e-mail is a direct marketer's dream. That's because variations on an existing campaign can be created and sent out quickly, usually within a matter of days. It's not uncommon for more than 50% of the responses to arrive within hours of sending the e-mail. E-mail is ideal for split testing which can improve your results by over 50%. (Source: Inbox Marketer)

This rapid response cycle, unique to the e-mail channel, allow marketers to quickly learn what works and what does not.

Elements to test

Direct marketing principle at work

Testing is the cornerstone of a successful e-mail marketing campaign. Test bigger variables first, then move to refine the elements and drill down to smaller variable tests based on your earlier learning.

Depending on the nature of the campaign, here are some elements you may consider testing:

- Lists and segments within a list
- Offers
- Copy and design treatments, especially subject lines
- Online vs. offline offers
- Pricing levels
- Pricing presentations (for example, you can test 2-for-1 specials against 50% off)
- E-mail delivery dates and times (for example, you may discover that early morning and noon are the best e-mail delivery times for business offers, while evenings and weekends work better in consumer offers)
- Timing as to when is the best time in the day to send an e-mail. Is it morning, afternoon, evening or night? The best time to test could vary from company to company and industry to industry.
- Size matters. E-mails that are smaller in size are less likely to get intercepted by SPAM filters. The total file size (including text and graphics) should be a maximum of 30-40k and that the total size of images should be no more than 5-7k each according to Weisenfeld (2001).

- Media rich components such as video-messaging and flash should be done judiciously. Due to file and download times, rich media message should not be longer than 30 seconds in order to maximize the impact and reduce loading times. This is in spite of the increased usage of high speed and broadband internet. (Ahmed 2002)
- How certain words can trigger SPAM filters
- Frequency and placement of the call-to-action within the e-mail message
- HTML and plain text versions

Deliverability

What does it mean and why do I care?

Deliverability is one of the top issues in e-mail marketing today. ISP and corporate SPAM filters are getting more diligent. In the North American industry, approximately 4% of e-mail marketing messages end up in a bulk folder and 20% goes missing. (Source: EmailAdvisor).

Most of the e-mail metrics reported in an ESP interface are based upon "messages delivered." Messages delivered are calculated by subtracting the soft/hard bounces from the total of e-mail message sent by the e-mail engine. Canadian marketers bounce rates averaged 9.7% which could indicate a need for greater list maintenance and consistent contact. (Inbox Marketer, 2005) With good list management bounce rates should be 2%-3% per deployment.

E-mail messages need to be pre-tested, optimized and specially designed. But it is more than just message size and creative, and includes issues such as use of flash and unnecessary code.

You don't know what you don't know

If your company is using e-mail to communicate with customers or prospects, or if you are sending a personal e-mail that contains a word or phrase that a SPAM filter does not "like," such as a recipe for barbecue chicken breasts, there is 20% chance that the recipient will not receive your e-mail. The perilous path of e-mail ranges from SPAM filters at your ISP, corporate SPAM filters and personal e-mail SPAM filters, and then messages can be rerouted to a junk folder (regardless of whether you obtained permission from the intended recipient or have solid relationships with customers)

It can be surprising to find out that no matter how well you adhere to the law, or how valued your service is to its audience, there are no assurances or guarantees from Internet Service Providers that your e-mail will be delivered. The kicker is that the ISPs will not tell you if, when, or why they blocked the e-mail. On the Internet, there is no comparable service for e-mail to Canada Post's returning of undeliverable mail.

The ISPs do have a point when they say that if they did not block e-mails, the volume of SPAM would inundate our e-mail boxes, effectively killing the channel. They also have a point when they say that if they tell marketers why they blocked a message, then their ability to block true SPAM would drop, as spammers would also find out how to beat the filters.

In the ongoing war against SPAM and anything that looks remotely like it, "deliverability" remains the key issue for responsible marketers to tackle. From our perspective, the challenge is not that e-mail filters stop e-mail from reaching their targets, it is the fact that legitimate marketers have no way of knowing if e-mails made it or not, even when we are willing to pay for the information.

Based on consultations with the CMA's Digital Marketing Council and the Industry Canada Task Force on SPAM, we know that legitimate e-mail marketers are not the problem when it comes to SPAM. They are scrupulous when it comes to respecting all the permission-based e-mail best practices in Canada.

How widespread is the deliverability problem?

To our knowledge there is no single reason that dictates why your e-mail may not be delivered and there are no standards either. In fact, due to the ever changing technologies, rules and other factors, the reasons mentioned here might soon be outdated. There could be a number of factors that affect deliverability:

- **Blocked at the ISP level**
 - Consumer's ISP blocking incoming mail. Most ISPs maintain blacklists of IP & e-mail addresses that are filtered out. They compile these lists from various sources: customer complaints about e-mails from particular sources; amount of e-mails sent from a particular IP; timeframe the amount of e-mails sent from a particular address (e.g. more than 1000 in an hour from a single address - ISPs block IP ranges without any notification to anyone).
 - Your ISP blocking outgoing mail. Your ISP blocks outgoing traffic to another ISP.
- **Public lists.** Publicly accessible blacklists and whitelists, maintained by volunteers, are often used by smaller ISPs and companies without dedicated e-mail administrators. Some of the lists are: Mail, SpamCop <http://www.spamcop.net>; Spamhaus <http://www.spamhaus.org>; ORDB <http://www.ordb.org>; RSL <http://relays.visi.com>. Each organization has its own factors to determine who stays on and off their list. Furthermore, administrators select the lists or parts thereof that they feel meet their privacy/filter standards most appropriately.
- **Content filters.** ISPs and organizations often employ content filters. These filters scan for content that has over the years been noted and classified as commonly occurring in SPAM. SpamAssassin is a popular open-source content filter and a good example of how these filters operate.
- **Consumers own SPAM lists.** Almost every e-mail client provides junk mail filters. Content filtering of keywords and key phrases allow users to compile their own black and whitelists of individual and domain addresses.
- **Challenge/response systems** require senders to respond with a code or other confirmation before their messages are delivered. You might have seen this when, after sending an e-mail, you got a note asking you to click on a link or reply to a particular address with a particular subject line "in order to verify that this is coming from a real person."

What do I need to do to minimize my deliverability problem?

1. **Speak only when spoken to (permission)**

E-mails should only be sent to those users who have explicitly given your company permission to send them the particular type of information that the e-mail contains. It is wrong if the permission received was for “billing inquiries” but the customer is being sent promotional e-mails.

2. **Ensure content is validated**

Ensure that the e-mail you send is professional looking and has good content and code – poorly designed e-mail messages make you look like a spammer or a phisher to ISPs and consumers. Many e-mail filters also screen for SPAM-like keywords or formatting so make sure your content and subject/from fields are clean.

3. **Cleanliness is next to Godliness**

If your list has many outdated addresses (you have not removed all those users who asked to unsubscribe or the e-mail addresses which bounced back) you will be targeted as a “suspect” and your messages might be blocked.

4. **Authentication**

E-mail authentication seeks to ensure that you are who you claim to be. You might have heard SPF (AOL), Sender ID (MSN/Hotmail), and DomainKeys (Yahoo) and Cii - all these practices are important to incorporate into your e-mail delivery systems

5. **Bonded Sender Programs**

Accreditation programs such as Habeas or Bonded Sender examine your list, permission practices, and e-mail practices. Accredited senders can then use warranted marks and are placed on ISP-accepted whitelists, allowing your e-mail to bypass filters.

6. **Seed lists and Test, Test, Test**

After ensuring the content you want to send is clear of the usual trappings, send it out to a small list. You can create accounts for yourself with most free e-mail providers and send it to that list – see if it lands in your inbox, junk box or gets totally blocked. Then tweak and re-test and do this each with new piece of your communication before sending to the whole list.

How do I know if I have a deliverability problem?

Examine message bounces. Understand the difference between a soft vs. a hard bounce.

Content filters, blocking rules and user feedback constantly keeps changing, so keep a close eye on your open, delivery, bounce, unsubscribe, and SPAM complaint rates. Any major shift in these might be due to a deliverability issue.

Deliverability action items

1. Opt-in; the 'higher' standard

Capturing an opt-in and confirming it with a follow-up e-mail is a higher standard to ensure that you only add recipients who want your e-mail. As an additional enhancement, you may consider a true welcome program. Welcome programs do more than just issue a common confirmation. These programs allow you to set the tone for the relationship between you and the opt-in recipient.

Higher standard opt-in practices include programs such as double opt-in or confirmed opt-in.

2. Relevancy

A commonly addressed e-mail theme is relevancy. Once considered to impact only open and clickthrough rates, relevancy has considerable impacts on deliverability as well.

Once relevancy is established with the recipient, your e-mail will continually rise above the other clutter in the inbox. This level of recognition with the recipient means that your e-mails will not be forgotten about or mis-interpreted, which are common reasons for reporting them as SPAM.

3. Set expectations

Do not promise what you cannot deliver on. When a company promises e-mail weekly, and then sends it daily, the recipient will immediately feel misled. The opposite is true also. Do not promise weekly e-mails and then send something only once a month. Setting expectations is key to a successful long term e-mail relationship with your recipients. A well designed welcome program is often the perfect time/place to accomplish this.

4. Someone needs to own your deliverability

With legislation differing across countries and sometimes states, someone needs to be accountable for your deliverability.

If you outsource, use a reputable e-mail service provider (ESP). There are clear leaders in this field who will be members of leading SPAM related organizations. If e-mail is core to your marketing communications, do not use an ESP who cannot define their deliverability procedures clearly. Additionally, any reputable ESP should be offering additional services to help you tackle legacy deliverability issues.

If you do decide to work in house, ensure someone is assigned the role of accountability for deliverability processes and issue resolution. Consider having an internal person certified by the IAPP (International Association of Privacy Professionals) as a deliverability expert. These laws change rapidly and will continue to do so, so this is a good process for ensuring the internal person is up to date.

5. Use a recognizable and consistent "From Address" with clear, relevant "Subject Lines"

The first two items any recipient will see from you are the 'from' address and the 'subject line.' Your 'from' address is your clear indicator to the recipient that it is you sending this message. If this is not recognizable, you are at risk of deliverability issues. ISPs like AOL do not display the « friendly from » address, so do not limit this planning only to that item. The true 'from' A@B.com should be recognizable.

The subject line is your opportunity to create relevancy. While this is less risky in any one instance than an unrecognizable 'from' address, over time this can have the same net effect. The 'from' line is also one of the areas most commonly scanned by SPAM filtering technologies so clear and simple, showing relevancy, is best.

6. Use a Safe Listing Program

Most e-mail clients and ISP web e-mail clients now allow safe listing or add to address book functionality. You should be leveraging this with all new recipients at the early part of your relationship with them. Again, the welcome program is the perfect time to do this.

This allows the recipient the opportunity to place you on this list which will bypass deliverability filters as well as image blockers. This is your best end-recipient controlled, opportunity to ensure you reach the inbox with the message intact. Also consider having a micro-site with ISP/Client specific instructions on how a recipient can do this.

7. List hygiene

Spammers send a lot of junk to each ISP. One of the ways of characterizing this is the sheer number of bounces due to old or incorrect e-mail addresses. The established benchmark for e-mail list churn is about 30% each year (Return Path). Continuing to send to these addresses will have you acting like a spammer in the eyes of the ISPs. These hard bounces will have a great impact on whether you are given any kind of blacklist status. If you are blacklisted, then everyone on your list is affected.

Build a list hygiene process into your planning. Define monitoring and internal rules for handling both hard bounces and soft bounces. Soft bounce suppression should be driven by the frequency of your e-mailing.

8. Promptly remove unsubscribes and respond to complaints

Continuing to send e-mail after an unsubscribe request is the number one cause of deliverability concerns. Simply put, do not do this. Imagine doing all the work on the opt-in process only to find yourself blacklisted for not handling opt-outs.

Consider using a profile management process instead of single click opt-out. Commonly, if given the chance of controlling the type of interaction you have with a recipient, the recipient will define the interaction and stay opted in.

As in offline interactions, sometimes handling of complaints can be a good customer satisfaction opportunity. Handle complaints quickly and clearly so that they do not escalate into potential deliverability issues. You may also keep that recipient on your list by doing so.

You can also consider an exit survey. Done correctly this can be an effective way to gain insight into your opportunity for improvement. However, make sure it's optional.

9. ISP Testing

A deliverability « lab » is a great way to monitor your deliverability and head off potential issues. This can range from pre-launch content checking and domain checking inbox testing through to post launch inbox monitoring.

Most reputable ESPs will have a content checking built-in (i.e. Spam Assassin) and you can be responsible for creating and managing the inbox testing process yourself if you have the resources. For the most thorough measurement of all of these metrics, deliverability monitoring companies (Pivotal Veracity, Return Path, and EmailAdvisor) specialize in deliverability services.

10. Avoid “spammy” words and phrases

Currently, content filtering is still the most commonly used SPAM identification technique. There are many published lists of words and phrases to avoid although they do change rapidly. Use your content checker and/or deliverability lab to keep up the practice of checking before you send.

11. Deliverability audit

If you are unsure how to get started or prioritize, engage an ESP or consulting group who can perform a deliverability audit. This will give you the clearest snapshot of where you stand right now in all of your practices. A good deliverability audit will start from your e-mail permission methods and extend all the way through to your opt-out handling.

SECTION THREE: DATABASE AND LIST CONSIDERATIONS

In-house or rented?

In direct mail, your list is your target market. This is also true in e-mail marketing. The database you use for your e-mail campaign is the audience you must persuade to buy your products and services.

E-mail lists fall into two general categories: in-house and rented.

In-house lists

The e-mail list you build will tend to be your most successful. That is because an in-house database usually includes customers and prospects that are already familiar with your company.

Strategically, you know more about your in-house file than any list you could rent. So you can more effectively tailor communications that meet the specific needs of that audience based on unique attributes you may have on file.

Rented lists

Although a healthy in-house list is ideal, there are many excellent e-mail lists available for rent. These are databases that have been compiled by others - the sources of which can be website opt-ins, subscribers, customers of other companies, and more.

With a rented list, you won't know "the market" as intuitively as your in-house file. The people on the rented list may not know your products and services as well either. That's why rented lists tend to generate lower response rates than comparable in-house files, but can still be a quick means of reaching a wide audience.

Direct marketing principles at work

Which e-mail list is your best list? Ultimately, only testing for performance and ROI will let you know for sure.

E-mail best practices

Although it takes time to build an in-house e-mail list, the result is a valuable marketing asset. You own the list and can use it anytime. When you rent a list, however, it's strictly pay-for-use. Only those recipients who respond to your offer and opt-in can be added to your in-house file.

There are also some suggested questions to ask before using a rented list (Ahmed 2002):

- Where were the addresses collected from?
- Who else sells these addresses?
- Were they gathered through a sweepstakes or contest?
- Are they listed on the Mail Abuse Protection System (MAPS) Real-Time Blackhole list?
- How did they get permission from the subscriber?
- Can they explain their confirmation process?
- What is the unsubscribe rate?

Newsletter Sponsorship

Sponsoring newsletters can be a low cost and effective way to achieve your goals. Popular magazines and B2B websites offer sponsorships of their newsletters either in the form of a text paragraph or a display ad. The advantages of newsletters are:

- Popular newsletters have high open and read rates
- They tend to be cheaper than solo e-mail lists
- They offer incredible contextual relevance when the advertised product or service ties-in well with the newsletter's content
- Newsletters offer a strong halo effect between the newsletter publisher and the product or service marketed. The halo can be especially valuable for lesser-known brands, and
- There is virtually no risk of SPAM complaints

What is a permission-based list?

A permission-based e-mail list is simply a list of e-mail addresses, where the addressees have freely given permission to the list owner to communicate via e-mail and to receive offers from other select marketers. The key here is that the individual who gives permission is not tricked into providing their e-mail address or personal information and that the reason for offering their e-mail address is explicitly presented and not misleading.

Ideally, it should be no surprise to recipients when your marketing message lands in their inbox. That's because they have joined the list while visiting your website, responding to a mailing, or by some other means.

Specific consent required

You should never consider a passive interaction from a prospect — for example, contacting your company or clicking on a link — as implied consent to engage in e-mail marketing. Always get the specific consent of the recipient before sending e-mail marketing messages. This separates the legitimate e-mail marketers from the spammers.

The language of opt-in

This consent can take many forms. For example, if you're seeking an opt-in from your website, the wording on the reply form might be:

Do you wish to receive special offers and announcements by e-mail regarding our products and services? Yes No

If you intend to make the list available to third parties, a good strategy is to seek this permission separately. That way you don't discourage people who may want to join your list, but do not wish to receive offers from other companies.

In this instance, the phrasing might be:

We sometimes make our list available to carefully screened third parties. Do you wish to receive offers by e-mail from these companies? Yes No

Avoid using any list that is not 100% permission-based according to the most recent legislation in the jurisdiction. See *Section Seven, Privacy, Security & Permission Issues*.

Direct marketing principles at work

People who have opted-in to your list are more likely to be attentive to your e-mail messages and, consequently, more likely to reply to your offer.

E-mail best practices

When seeking permission, always explain clearly how the e-mail address will be used. This promotes trust and increases the likelihood that a person will opt-in.

Strategies for building an in-house list

An in-house list is often the best source of e-mail campaign results. So it pays to invest in building this valuable marketing asset.

How do you get customers and prospects to opt-in? Here are a few tips:

Best practices

When creating an opt-in message:

- Be conspicuous. You want your e-mail opt-in to stand out from the rest of your website rather than blending in.
 - Be distinct. Your opt-in message should not be confused with the body copy, navigation bar, or a banner ad.
 - Describe the benefits. Explain to the customer or prospect why they should opt-in. Clarify how easy it is to opt-out at anytime.
 - Reinforce your commitment to privacy and reputable e-mail marketing practices.
 - Be prominent. Place your opt-in message where it can easily be seen. The front page of your website is ideal.
-
- Ask visitors to register on your website. This can be the most effective point-of-entry to your e-mail list.
 - Partner with a popular website, sponsor an e-zine, or place a banner ad.

- Ask people to join your e-mail list in direct mailings, in-store promotions, events, and other off-line communications.
- Ask your sales staff to invite prospects and customers on the list.
- Consider providing prospects with an explicit benefit or offer a small incentive to join the list.
- When asking for an opt-in, keep the request for personal information to a minimum — ideally, only name and e-mail. You can ask for more information later, provided that you are going to do something with the information you ask for. If not, don't ask for it!
- If possible, integrate/append e-mail addresses with your current customer and prospect database to enhance personalization and targeting.
- Explain why you are asking for an e-mail address. Experiences show that customers and prospects are more willing to share this information if they know how it will be used.

How to rent lists

Sources in Canada

A good place to start is by asking around for recommendations and check with organizations like CMA for companies who are active in permission-based e-mail. Major list brokers are knowledgeable. Alternatively, do a search on one of the major search engines for permission-based e-mail in Canada. You may also try your current direct mail list broker but there are only a small number of firms in Canada that specialize in e-mail.

There are also a number of companies that specialize *exclusively* in e-mail lists. Some have popular websites and e-zines that attract opt-ins with a wide variety of interests and preferences. For example, a travel website may have an opt-in list of registered users available.

How it works

The process of renting an e-mail list differs somewhat from traditional mailing lists.

Direct marketing principles at work

Careful list selection is a key determinate to e-mail marketing success.
Personalizing your e-mail message with name and/or content will tend to boost response.

Points to consider:

- In most cases you won't actually receive the e-mail list. That's because of privacy and permission issues. The list manager or owner will either transmit the e-mail for you, or use a trusted e-mail service provider.
- Because it's important to remind recipients that they opted-in, the list manager may include an identifying logo, banner, or text. This will impact how your message looks.

- Many e-mail list managers have strict guidelines regarding content, copy length, and file size of graphics.

When vetting a potential e-mail list, always ask if it is 100% permission-based. An e-mail marketing campaign that is judged as unsolicited, or SPAM, will damage your brand.

Database management

Your e-mail database requires as much attention as your mailing list. You must continually ensure that the addresses are accurate, changes are updated promptly, and new information is appended regularly.

Direct marketing principle at work

The more accurate your list is, the more successful your campaign will be.

Studies by eMarketer and other groups suggest that up to 30% of people change their e-mail address each year. By comparison, North Americans change their postal address at an average rate of 18% annually.

Handling bounce-backs

One way to ensure that your e-mail list is accurate is to manage the "bounce backs," those e-mails that have been returned as undeliverable. There are two kinds; a *soft* bounce back — which can occur when someone is on vacation (auto-reply) or a server is temporarily down; and a *hard* bounce back — which happens when the e-mail address is no longer valid and is rejected by a server.

Unfortunately there is no sure-fire way to differentiate between soft and hard bounce backs. Some database managers wait until an e-mail address has bounced back on three separate occasions before removing it from the list. Others use sophisticated software that uses keywords and other techniques to separate the soft and hard bounces.

Making it easy to opt-out

The most obvious and effective means of keeping your e-mail file clean is to have clear instructions on how to opt-in, opt-out, and make changes to personal information. Studies have shown that most people will notify you when they change their e-mail address if you make the process simple and convenient — and they value receiving your information via e-mail.

Integration

Another e-mail list cleaning strategy is to ensure that e-mail addresses are integrated with your customer database. That way, when an e-mail address changes, you have other means of contacting the customer to make updates.

When the only information you have on hand is the e-mail address, you can build more data into the record by using survey, contests, and other techniques.

SECTION FOUR: DIRECT MARKETING WITH E-MAIL

DM techniques that work in e-mail... and a few that don't

In most respects, e-mail marketing has much in common with other direct marketing channels – especially direct mail.

That's good news because these similarities allow marketers to follow many of the tried and true direct marketing principles that have been established over the past century. These include addressing the specific needs of the target market, creating a compelling offer, communicating that offer persuasively, and having a clear call to action.

E-mail also shares another time-honoured DM principle: test, test, test. In fact, only telemarketing can rival how quickly you can test new campaign elements against the control.

Yet, despite the parallels, e-mail is unique. It follows some of the old rules. But it is also developing many of its own rules as well. Here are a few examples:

- Many of the magic words used in direct mail — especially the word FREE — do not work as effectively in e-mail. More specifically, SPAM filters will reject or block e-mails that use key words like FREE in the subject line.
- While a four-page letter may be suitable for a direct mail piece, e-mail tends to be a short copy medium. Most e-mail marketing messages are no longer than 300-400 words. As with the Johnson box in direct mail, the most important part of the message is above the fold, i.e., can be easily viewed on the first screen for users with a computer set at an 800x600 resolution.
- Internet users expect fast turnaround. That's why e-mail offers that can be immediately fulfilled electronically are so successful.
- E-mail is a permission-based marketing medium. Reputable e-mail marketers respect privacy guidelines of such organizations as the Canadian Marketing Association.
- Also, there should be at least three clickthrough links embedded in the copy, with at least two above the fold.

E-mail best practices

Copy, creative, list and offer are fundamental elements to develop e-mail as a successful direct marketing channel.

The importance of supporting the brand

There has been a lot of debate concerning the differences and potential conflicts between brand and direct marketing communications. The reality is that a powerful brand can add a degree of awareness and credibility to an e-mail marketing campaign that ultimately leads to higher response.

For example, if PRODUCT A is a highly prized and recognized brand, the customer is more likely to trust the claims made within the e-mail marketing message. Conversely, if PRODUCT B is an unknown brand, it becomes more challenging to overcome scepticism and buyer resistance.

Communicating trust

Trusted logos, colour schemes, taglines and other brand elements within an e-mail serve to reinforce the brand, which in turn can bring focused attention to your message and possibly improve response.

So it pays to support your brand communication guidelines in all your e-mail efforts, paying close attention to adapting and integrating your usual tone and manner when communicating your message.

One of the other most important aspects in supporting your brand is the “From” or “Sender” field of the e-mail. Rather than using a generic e-mail address such as sender@seq123.com use a more specific address that identifies your brand, such as Sony Canada and/or sony@e-mail.ca.

Brand vs. response

Some direct marketers worry about how adherence to brand communication guidelines will affect the results of a direct marketing campaign. The most important question to ask: *Is neglecting or damaging the brand worth a potentially higher response rate?* Marketers know that, in most cases, that answer is ‘no.’

Direct marketing principles at work

One of the underlying axioms of direct marketing is: communicate trust. That’s why it’s important that your e-mail marketing campaign speaks with your trusted “brand voice” and is consistent with your other brand communications.

Standalone vs. integrated campaigns

As with any campaign, e-mail can either work on its own or be co-ordinated with other direct marketing programs such as telemarketing and direct mail.

Standalone campaigns

As the name implies, a standalone e-mail campaign is solo. No other marketing channel is involved.

For example, let’s say you’re selling upscale travel packages. You have openings for a vacation in Banff leaving within the next two weeks. To sell the remaining spots, you can e-mail a special offer to your in-house list. Assuming that the e-mail does the job, no other marketing channel needs to be involved.

Standalone e-mail campaigns can be effective when:

- The offer is limited to a select audience;
- You need to create and communicate an offer quickly;
- You need a fast response (e-mail campaign response is often generated within hours);
- You have a tight budget; and/or
- You want to test an offer before it is rolled out into a larger, more comprehensive campaign.

The challenge of a standalone campaign is that the e-mail itself must do all the work. It does not get any help from other marketing channels.

Integrated campaigns

In an integrated campaign, the e-mail is just one component of many direct marketing initiatives all working together within a single campaign.

For example, if you're promoting a new software upgrade, you might make a special discount offer to existing users and communicate this through multiple channels such as telemarketing, direct mail, tradeshow, advertising, and retail locations, along with e-mail.

Integrated campaigns have a tendency to achieve results greater than the sum of their parts. Typically, the aggregate response is higher because potential customers are exposed to the same message repeatedly through multiple channels. This is consistent with the direct marketing principle: repetition is a key to persuasion.

E-mail best practices

Sending a "check your mail" e-mail message when a direct mail package, postcard or flyer is due to arrive can significantly improve campaign awareness and response.

Effective offers for e-mail

E-mail has been proven effective for communicating just about any kind of direct marketing offer. Even complex monetary transactions are no longer an impediment as e-commerce on the Internet has become commonplace.

Because of the nature of e-mail, the most effective offers tend to be "click-able." This allows the recipient to reply to your offer simply by clicking on a hyperlink within the e-mail message. This link typically leads to a special call-to-action URL (web page) where the transaction can be completed.

What's working

Currently, some of the more popular offers communicated by e-mail are:

- **Information premiums**, often in the form of booklets, how-to guides, special reports, articles, executive briefs, white papers, Webcasts, and case studies. These are often published electronically so that fulfilment can be automated and delivered over the Internet.

- **Contests** of just about every type.
- **Newsletters and e-zines**, which can be effective for generating leads and building an opt-in e-mail marketing list.
- **Products**. Just about any type of merchandise, subscription and even some services can be sold through the e-mail channel.
- **Printable online vouchers or coupons**. These can be effective for boosting retail store and website traffic and are often imprinted with a special number for tracking response.

Offering an incentive

In traditional direct marketing, a premium — the ubiquitous “free gift” — added to the offer will often boost response. The same also holds true in e-mail marketing. Of course, as with any direct marketing campaign, the costs of the premiums must be weighed against the revenues generated by the resultant increase in response.

Best practices

Provide multiple reply options, such as phone and fax. Not everyone will want to respond online, so let the respondent choose the most appropriate (and comfortable) way to accept your offer.

Need a signature? A PDF (Portable Document Format) is a convenient way to distribute a form over the Internet to be completed and faxed or mailed back.

Transactional e-mail: Key guidelines for integrating promotional content into transactional e-mail messages

There are several things marketers should keep in mind when integrating promotional content into transactional e-mails. These guidelines can help you achieve your marketing objectives while maintaining compliance and ensuring messages are still deemed transactional.

- **Follow the two-thirds/one-third rule:** More than two-thirds of your e-mail content, whether text-based or graphical, must be information related to the transaction. The remaining one-third may be for promotional use. If you choose to include an up-sell or cross-sell message in your transactional e-mails, keep it subtle, relevant and simple. Recipients will not react favourably if they have to weed through copious amounts of commercial content within their transactional confirmations.
- **Ensure informational content is visually dominant:** Do not place any promotional content in the subject line or above the informational content in the message body. Promotional content must be visually distinct and separate from informational content and well “below the fold.” That means no banners at the top of the e-mail. However, as long as it's carefully executed, a soft text-based or graphical promotional message in the right-hand sidebar is acceptable.

- **Maintain brand consistency:** Historically, transactional e-mail messages have been delivered as plain text, without any dynamic personalization, graphics or links. They tend to look and feel completely different from a company's other e-mails, and are typically handled by IT departments. Consider having the marketing department take ownership of the content and update the look and feel to match other communications. Many groups within your company may be deploying e-mail and ideally there should be a master contact strategy which monitors priorities, creative look and frequency.
- **Don't forget about ROI:** Transactional messages, whether they contain promotional content or not, are just as much a part of the customer experience as any other e-mail communication you send. They should be monitored for in-box delivery, and key performance indicators, such as open-rates, click-through rates and post-click activity, should be measured.

Direct marketing principle at work

As a direct marketing channel, the creative potential of e-mail is virtually limitless, but don't forget about your brand.

SECTION FIVE: ELEMENTS OF SUCCESSFUL E-MAIL CREATIVE

Plain or Fancy?

In the early days of the Internet, e-mail was exclusively text-based. Even simple formatting options like bold fonts and underscores were not yet available.

But that was then, this is now

Today, e-mail marketers can create messages as rich in text and design as any webpage. In fact, studies by such research groups as eMarketer and IDC suggest that upwards of 70% of users can display HTML and other forms of visually enhanced e-mail. For business users, that number is closer to 90%.

It's also worth noting that HTML has other benefits over text e-mail according to Brownlow (2001).

- You can track metrics such as open-rates a lot easier
- You can include color, text, effect, different fonts, graphics, animations, forms and other interactive elements
- HTML is useful for content suited for graphical presentation (tables, pictures, charts, etc.) and is preferred by advertisers because they gain more creative flexibility.

However, that doesn't mean that plain text should be abandoned. In fact, a large segment of users still prefer to receive e-mail messages in this format. And some older versions of AOL, Lotus Notes and other e-mail programs, still in wide use today, cannot display graphics.

Also, many companies now have aggressive firewalls in place, which means that HTML e-mails cannot be displayed properly. HTML e-mails are often larger in size than their text counterparts, and so can take longer to download, which is particularly difficult for recipients with slow Internet connections. HTML e-mails often also reference images stored online, so they require the reader to be online before the e-mail displays properly. Some e-mail recipients are concerned about security issues such as viruses. (Ahmed 2002)

Asking for preferences

What is the best practice? An effective strategy is to simply ask the user to indicate his or her preference: HTML or plain text? This can be done on the sign-up, registration, or subscription page, or at any other point-of-entry into the e-mail database.

Effect on response rates

Because of all its inherent design possibilities, HTML tends to generate higher response rates than its plain text cousin. However, you never know for sure until you test one version against the other.

Common e-mail formats

Plain Text – uses only ASCII (American Standard Code for Information Interchange) characters. No graphics. No active URL links.

HTML – is created with the same code used to build most web pages. You can format the text, select font types and sizes, add colours and graphics, and include active URL links.

AOL – uses a proprietary e-mail system. Only AOL 6.0 and later can display HTML messages.

Rich Media – is the latest innovation. It allows you to augment the e-mail message with audio, animation and video sequences.

Personalization

Direct marketing 101 teaches that personalizing improves response. This also holds true in e-mail, but with a few caveats.

E-mail users today are sensitive to privacy violations. If a marketer comes across as too personal too soon then a negative backlash can result. At the very least the e-mail will be ignored or deleted. It's the Big Brother syndrome.

Direct marketing principles at work

There's more to personalizing than simply inserting a name. Personalization is a strategy that develops from analyzing your target market segments, and customizing your e-mail messages for maximum relevance and impact.

E-mail best practices

Personalization can improve the response to your e-mail marketing campaigns, so long as you respect privacy and preferences.

How close should I get?

All e-mail campaigns should follow CMA's Code of Ethics and Standards of Practice.

When targeting customers, personalization is a strategic way to build relationships. It indicates to the recipient that you know who they are. In e-mail, some of the most effective areas to accomplish this is in the TO line, SUBJECT line, salutation, and landing page.

When targeting prospects and other non-customers, take a more cautious approach. Instead of personalizing by name, consider individualizing by title or segment. For example, use greetings such as "Dear IT Professional" or "Fellow Snowboarding Enthusiast."

If your opt-in list is made up of people who have subscribed or signed-up for e-mail marketing offers, be sure to mention this in your message. People sometimes forget.

As with any direct marketing campaign, the more established the relationship is the more personalized your message can be.

List restrictions

Your ability to personalize may be affected by the e-mail database. If the list is rented, the list manager may have restrictions that prevent personalization. Even your in-house database may be hampered by limited information. Personalization is most effective when you're sure that the source database is accurate.

The fields: TO, FROM, and SUBJECT

Gaining attention is key to the success of any direct marketing campaign, and is becoming even more critical in the e-mail channel.

Why? Today people are inundated with e-mail. In-boxes are cluttered. That's why your message must quickly break through and get noticed. If it doesn't, your e-mail will be ignored or deleted.

How do you ensure your e-mail gets noticed, opened and read? The first place to start is with the e-mail message fields: TO, FROM, and SUBJECT.

From who?

"Who is this from?" That's the first question a person asks when an e-mail is received. He or she wants to know: Is this from a colleague? A friend? An important vendor? A known company? A stranger?

That's why it's important to identify exactly who the e-mail is from in the FROM line. Instead of simply using the return e-mail address, consider customizing this line with your company name. This is especially effective if your company is a well-known brand.

To whom?

If possible, also customize the TO line with the recipient's own name or, at the very least their e-mail address. If you must group a list of recipients under one heading, pick one that closely represents the target market. For example: *"TO: Canadian Sports Fans."*

About what?

Your choice of SUBJECT line is a key determinate of e-mail campaign success. That's because one subject line can generate dramatically higher "open rates" than another. People often use the subject line to make a quick decision whether or not to click and open the message. So it pays to test different subject lines with the same message.

However, a SUBJECT line must do more than simply "get the envelope opened." It must also peek interest as to what's inside.

Some key points to remember regarding subject lines as noted by Eisenberg (2001):

- Don't Do It! (Never use exclamation points in an e-mail)
- Do it? (Senders should use question marks if it makes sense as they are much more engaging than statements. Don't you agree?)
- Used Car Salesman (Words like 'limited time', 'free' may turn off readers and appear as SPAM)
- Step 1 *before* Step 2 (Many subject lines fire sales talk right out at the recipient forgetting that successful selling is like a romantic encounter. Can't get to the bedroom without the first kiss and you aren't going to kiss unless you start a conversation.)

Tips for creating effective subject lines

- Keep it short. There's room for only a few words.
- Answer the recipient's number one question: "What's in it for me?"
- Keep it benefit-focused.
- Make it relevant to the target market
- Avoid trickery, clever phrases or empty promises.
- Be honest.

About the word FREE

Although powerful in direct marketing, FREE has a diminished currency in e-mail campaigns. In its place, consider using "complimentary," "no cost" or other substitute.

Key words like FREE are often used as a filter in SPAM blocking software. So if you use this word in the subject line, your message may not reach some intended recipients.

Some of the most commonly overused words are listed below:

- Work from Home
- Amazing opportunity
- This is a one-time e-mail
- Free long distance
- Earn free
- !!!
- XXX
- \$\$\$
- Barely legal
- Limited time offer

Planning and writing effective messages

There are many kinds of e-mail marketing communications. However, most can be grouped into two general categories: INFORMATION, and CALL-TO-ACTION.

Information

A newsletter (aka an e-zine) is the most popular format for delivering soft-marketing messages to prospects and customers. It's a strategy many companies use to keep in touch, build awareness, and communicate the value of the brand. Other kinds of information in the e-mail marketing channel include reports, announcements, surveys, press releases, opinion pieces, tips and discussion lists.

Call-to-action

A strong call-to-action is key to generating response. You can include a direct-response offer within a newsletter or e-zine, or as a standalone e-mail marketing piece.

Examples of offers you can make through the e-mail channel include subscriptions, credit cards, travel, merchandise, software, and memberships — a virtually endless list. In business-to-business lead generation programs, an offer of a complimentary booklet, white paper, case study, or webcast is very effective. Catalogue, e-tail and retail marketers often use e-mail to announce new products and specials and drive website and in-store traffic.

Readability is key

When writing an e-mail message — Information or Call-to-Action — keep in mind that text is more difficult to read online. Compared to print communications, effective e-mail messages are often shorter, more concise, and to-the-point. Text formatting should maximize online readability.

5 top tips for writing e-mail copy

- Gain attention with a strong opening.
- Get to the point immediately. E-mail is no place for a long-winded lead-in.
- Highlight the call-to-action at the top and bottom of your message.
- Make your offer and call-to-action easy to understand.
- Be sure the copy stays focused on the benefits.

Direct marketing principles at work

Creating a message that drives the call-to-action is a proven direct marketing strategy. Always ensure that the “how to respond” directions are crystal clear.

What to look for in good e-mail design

Here are some things to look for in effective e-mail design:

- Reading online is a strain. So make sure everything that appears in the message area is friendly on the eyes.
- When creating plain text messages, avoid using too many ALL CAPS and extraneous ASCII characters (i.e. ~~~, }}} , ***, >>>,) for emphasis. Let the words do the work.

- An underlined word will often be confused as a hyperlink. Bold text works best for emphasizing online copy. (However, bold text option is not available in plain text format.)
- Be sure the visual elements don't distract from the text. After all, if no one reads your message, no one will respond to it.
- Avoid large image files. You want your message to be quick and easy to download.
- Consider including pictures of your product, or images that represent the benefits of your product or service.
- All graphics should be clickable to the URL call-to-action. Avoid adding extraneous links to other web pages.
- Don't forget the lessons learned in direct marketing. The most effective e-mail design is compelling, yet simple with readable, well-laid text.
- E-mail marketing communications is an extension of your brand. Ensure the e-mail design supports it.

Important

Not all e-mail graphics and text layouts will display the same way to all audiences. For example, AOL account holders and OUTLOOK users may see the same e-mail message very differently. That's why it's important to test your message in as many e-mail programs as possible.

Direct marketing principles at work

There is still a learning curve with e-mail creative. However, the best applications so far have been based on elements from traditional direct marketing design.

Usability

“Sixty-nine percent of users said that they look forward to receiving at least one e-newsletter, and most users said the e-newsletter had become part of their routine.”

Jacob Nielsen, E mail Newsletter Usability (2006).

To date, limited research and documented insight has been publicly available on the influence of usability in e-mail marketing. What we do know is that each industry, whether it is automotive or consumer packaged goods, has their own nuances and best usability practices that work for their particular target audiences. That being said, there are some usability trends that have emerged across the board.

The most significant research finding released in 2006 confirmed that people are in fact emotionally attached to their e-mail boxes. We now understand that consumers view their inboxes as a place of personal and personalized communication. What this really means is that targeted/personalized e-mail and newsletters that are contextually relevant can create a stronger bond between consumers/potential consumers and a company than a website ever can.

When a consumer visits a website it is usually to complete a particular task or goal. Whereas e-mails (from companies) and e-newsletters tend to establish and maintain a relationship almost in a social fashion. The downside to this social-based personalized interaction is that consumers take any usability issues found in these executions as personal insults.

Since most companies today are utilizing HTML e-newsletters as their primary e-marketing execution, it is important for them to follow known usability guidelines to: ensure readability, reduce consumer cognitive load, and maintain & extend a strong brand relationship.

General usability rules of thumb:

- Ensure that the execution is simple (keep it short), useful (directly related to what the person signed up for), and easy to deal with (all your links work).
- Ensure that your execution conforms to the variety of prominent platforms. Test. Test. And retest.
- Promote your e-mail program offline (catalogs, point-of-purchase, call center, registration cards, collateral, invoices, etc.)
- Limit unexpected promotional messages as subscribers may think it is SPAM.
- Explore the benefits of a regular publication schedule.

When it comes to subscription we recommend:

- Ensuring that you provide a prominent link to your e-mail/e-newsletter sign up directly on:
 - Your home page
 - Resources/publication section
 - In your website footer
- Providing a short benefit explanation with any and all your subscription solicitations.
- Ensuring that users can subscribe and unsubscribe in less than two minutes. It is always helpful and in good faith to the user to provide an unsubscribe link in *every execution* that you send out.
- Leveraging a single registration page to list e-mail choices, collect information and set preferences.
- Ensuring your opt-in process takes only one click from start to finish.
- Allowing users to set their own preferences for one or more of the following: frequency, format (text vs. HTML), and content/product personalization.
- Ensuring that users receive an e-mail confirmation for all subscribe and unsubscribe activity along with any change in profile.

When it comes to the content of your execution, it is best to:

- Ensure that your execution can be easily scanned by utilizing bolding, indents, and bullets. Avoid those long paragraphs! People scan; they do not read word for word.
- Provide information of work-related news or company actions.
- Publish prices/sales when possible, along with related photos if applicable.
- Provide labels for all product images.
- Provide links within your execution that link directly to applicable pages – ideally on your website.
- Consider adding in a feedback link in your executions so that users can provide feedback on content, layout, etc. of your execution.
- Use 'alt' tags and text to support images and graphics in your HTML messages.
- Consider including multiple access points to popular areas of your website in your execution. These include back issues, subscribe/unsubscribe, search, contact us, store locator, etc.
- Label submit buttons with the actions you want readers to take ("Order now!")
- Provide a subscriber profile update link in all your executions.

When sending your communication, don't forget to:

- Ensure you include some of your content from the execution in each subject line of the e-mail.
- Include your company, newsletter or brand name in the "from/sender" line in recipients' inboxes.
- Include the following in your e-mails:
 - Forward-to-a-friend link
 - Link to printer version
 - Link to a web version of the e-mail

Landing pages that work

Most e-mail marketing messages include a call-to-action. Often, this is a URL link to a special web page called the "Landing Page."

Issues of abandonment

In direct marketing, every component of the campaign creative is important. The same holds true for e-mail marketing. However, some marketers mistakenly pay too little attention to the landing page. They feel once a customer or prospect has clicked through to that page, the job is done. Not so. Some people will click through to the landing page, but not respond. This is called the abandonment rate, and in some e-mail campaigns this can vary from as little as 1% to well into the double digits. That's why creating the most effective landing page possible is so vital.

Reinforcing the benefits

When the landing page opens, the e-mail message disappears. So it's important to remind readers why they clicked through in the first place. An effective way to do this is to reinforce the key benefits in the landing page copy.

Avoid asking for information you may already have in your database. Instead, consider personalizing the landing page with the appropriate information that may help fulfil an order conveniently for the customer/prospect.

Response instructions should be clear and landing page reply forms should be simple and easy to complete.

Singularly focused

Like any direct marketing reply device, the sole purpose of the landing page should be to respond to the offer. Avoid cluttering this page with extraneous marketing messages or links. Your customer or prospect might get distracted and surf away! Also avoid using your website home page as a landing page. That can be confusing for the respondent, and makes it more difficult to track success.

More landing page success tips

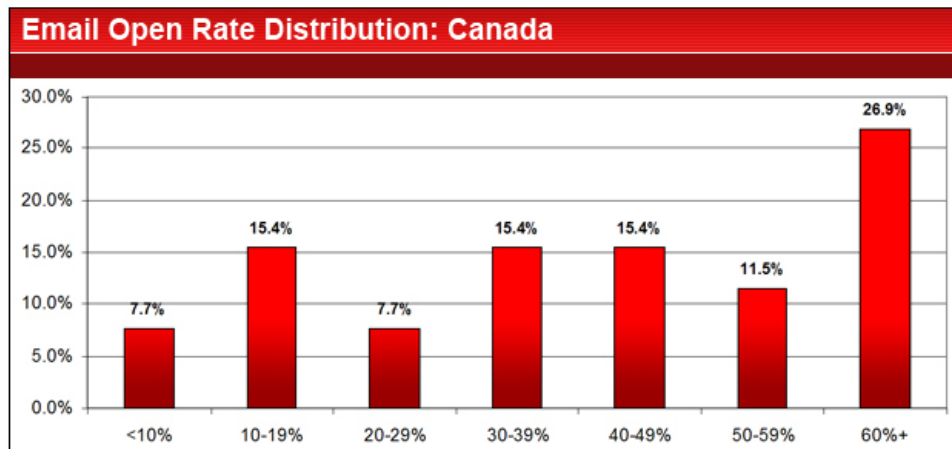
- Continuity with your e-mail campaign is critical when customers/prospects click-through to a landing page.
- Ensure you have secure methods to capture credit card information.
- Include other response options, such as a 1-800 number; fax number, and mailing address. Not everyone will want to reply online.
- Privacy is an issue on the Internet. To build credibility, consider adding a link to your privacy statement.

SECTION SIX: TRACKING RESULTS

Top-line engagement metrics

As discussed in Section 1, Canadian e-mail metrics are better than US e-marketers. In Canada Q3 2006, the average open rate was 33%, and CTR was above 13%. Bounce rates were steady at 6% (i.e., delivery is 94%).

Canadian open rates are above the US average of 28% (DoubleClick, 2005). According to Canadian marketers their open rates averaged 40% in 2004. The diagram below shows that there is a wide variance in open rates.



Source: "The State of Email Marketing in Canada" Inbox Marketer Research Study, Winter 2005

Note that there is a wide distribution in the study above. Top e-mail marketers achieve open rates above 50% while others have very low open rates below 20%. Given that the above histogram is not normally distributed, the average industry rate of 40% can be deceiving. There are clearly three groups of e-mailers: top e-marketers, "stuck in the middle" and the "mass blast" approach.

The better indicators of message engagement are the total clicks and CTR%. High CTR% indicates that the readers are engaged and want more. The average reported CTR was 21%, which seems high when compared to US sector averages (Inbox Marketer, 2005). However, CTRs of 20%-30% are common for best practices leaders (Inbox Marketer, 2003-2006).

On average in Q3 2006, CTR is 13.2%. Note that declining CTRs can be a sign of fatigue or problems with your open rates. Therefore it is important to monitor campaigns and industry trends closely.

How to track it

In direct mail, it's difficult to know with certainty how many people have opened the envelope and read the package.

The e-mail channel, by contrast, is unprecedented in its ability to accurately track virtually every element of a campaign, from who opened the e-mail to who replied to the offer to even if that person subsequently visited your website. Web analytics systems can track even deeper and calculate an attributable ROI.

Note: you cannot track the open rate of a plain text message.

Technical capability

Of course, your ability to track results is constrained by the technology used to support the campaign. Not all e-mail marketing systems, nor all e-mail marketing companies, have the same capabilities.

If you're using an in-house e-mail system, it's important to ensure you have the features in place to deliver the campaign information you need — now and in the future.

If you're using an outside e-mail marketing services company, make sure they have the sophisticated campaign reporting capabilities you require. Some companies offer an a-la-carte approach, allowing you to pick and choose which campaign reporting features you need.

In-house readiness

Of course, not all e-mail campaign tracking is dependant on technology. Keeping an eye on such factors as return on investment, conversion rates, fulfillment issues, trend analysis, and other success factors requires people resources as well. So it's important to have these in place before your campaign is launched.

Direct marketing principle at work

Tracking the success factors of an e-mail campaign is on various resources. Ask yourself and your team: *"What data is critical for measuring our success and is everything in place to access and track those elements of our campaign?"*

SECTION SEVEN: PRIVACY, SECURITY & PERMISSION ISSUES

In Canada, there are both existing laws and voluntary guidelines that govern e-marketing. CMA members are required to comply with the *Code of Ethics & Standards of Practice*. The Code requirements surrounding e-mail and other digital marketing practices are intended to compliment existing Canadian laws that govern SPAM, privacy, e-mail marketing and marketing to children. For example, the *Personal Information Protection and Electronic Documents Act* (PIPEDA) outlines the obligations of those who collect, use and disclose personal electronic-mail addresses.

Collecting E-mail addresses

Under Canada's privacy laws, marketers are required to identify to individuals, either through a dialogue box or prominent notice backed up by a more detailed privacy policy, why an e-mail address is being collected and the intended purposes for which that e-mail address will be used. This must be presented to an individual prior to or at the time that the e-mail address is collected. The e-mail address that has been collected can be used only for those purposes identified.

A "use" could include the sending of warranty or product information or marketing offers related to the original purchase or transaction.

Canadian privacy laws recognize that it may not always be possible to identify the purposes at or before collection. One example is where the information has already been collected and an organization would like to use it for a new purpose. In that case, new consent is required. For example, marketers' customer-acquisition efforts may include the collection of e-mail addresses in connection with other forms of communication, such as responding to a consumer's request for product or service information. As per the definition of *existing customer* in the CMA Code, a marketer would have implied consent to use that e-mail address to market related goods and services. Where the personal e-mail address will be used for the marketing of an *unrelated* good or service, or to extend third-party offers, at minimum an opt-out opportunity must be provided to the consumer beforehand to establish consent to use personal contact information for such secondary purposes. However, as outlined in previous sections, there are many situations in which email marketing practitioners advocate that this prior consent should be obtained by offering an opt-in opportunity, followed by a confirmation email to secure what is in effect a "double opt-in".

Consent

The CMA Code requires that marketers do not send marketing e-mail without the consent of the recipient, except where there is an existing business relationship.

Note: An existing business/consumer relationship or current customer relationship exists where a consumer has made a purchase or donation, has rented, leased or contracted for, or has otherwise participated in a organization's provision of products or services within the past 18 months, or a period consistent with that organization's normal buying cycle. An existing business/consumer relationship is also defined as continuing for six months from the date of an inquiry or application from a consumer.

In circumstances where a marketer has an existing relationship with an individual, then the marketer has implied consent to communicate further marketing offers to the individual. However, marketers must honor an individual's request to be removed from e-mail lists, including requests from existing customers.

There is an exception for sending e-mail messages outside of an existing business relationship, or to an inactive customer who no longer meets the "existing customer" qualifications. If the organization has service, warranty or product-upgrade information, or if there are health and safety issues related to a product purchase, the organization may send e-mail messages to its customers. However marketers should use discretion in doing so as customers may view the communication as SPAM if the organization uses it as an opportunity to up or cross-sell products.

Finally, marketers, list brokers and list owners should take reasonable steps to ensure that the addresses on their e-mail lists were obtained with proper consent. If a marketer, list broker or list owner knew or should have known that the proper consent was not obtained, they could be accountable. Some examples of reasonable steps that an organization can take to ensure clean lists include:

- Reviewing the privacy policy of the broker/owner of the list
- Reviewing the opt-in procedures used to obtain the e-mail addresses
- Having the broker or owner sign a contract warranting that they have complied with the requirements of applicable Canadian privacy laws and with Section J3 *Protection of Personal Privacy* of the CMA Code

Published business e-mail addresses

Privacy law requires that if a marketer finds a publicly available list of business e-mails on a website business directory, the marketer cannot send marketing e-mails to those addresses that are entirely unrelated to the intent of the employee directory. Marketers can continue to send e-mail messages to individuals listed in business and professional directories, provided the products and services are related to the business or theme of the directory.

E-mail marketing opt-out

Clickthrough opt-out opportunities that are easy to locate, understand and use are a best practice for marketers, and a requirement for CMA members. In effect, with every marketing e-mail, marketers re-establish consent to use the e-mail address for marketing purposes.

The opt-out opportunity should not be buried in the e-mail message and must, at minimum, be website and/or e-mail enabled. Language used in the opt-out may be as simple as: "If you no longer wish to receive marketing offers from this organization, please click here or e-mail: info@anycompany.com." By way of best practice, marketers should confirm by e-mail that the opt-out request has or will be implemented without requiring further action by the consumer.

It is important for marketers to actively monitor consent and "do not send e-mail" requests from all consumers and businesses, including their existing customers. When a consumer or business opts-out, marketers must promptly add the e-mail address to their internal do not contact list and cease marketing to that address.

Identity of marketer and source of e-mail

The CMA Code also requires that the identification of the sender and source of the e-mail must be clearly and obviously specified. Whenever possible it should be placed in that part of the e-mail that is visible without scrolling. Requiring that both the marketer and the source of the e-mail must be clearly identified gives consumers greater ability to control the amount of e-mail they receive. (Note that, in all cases, use of the phrase "source of the e-mail" is not meant to imply disclosure of a physical address.)

CMA Code requirements

- Where organizations are transmitting e-mail directly to a customer, the organization must be clearly identified to the e-mail recipient.
- Where an organization has contracted with a data processor or agent for its e-mail marketing communications, the identity of the data processor or agent should also be disclosed and be apparent to the e-mail recipient.

Marketing e-mail or SPAM?

"SPAM" is defined as "unsolicited commercial e-mail."

By obtaining the consent of the recipient prior to delivery, you differentiate yourself from SPAM. Apart from lack of consent, SPAM e-mail frequently does not reveal the identity of the marketer and does not provide the recipient with a means of responding to the e-mail.

SPAM – an historical perspective

Canada currently has neither federal nor provincial legislation dealing specifically with the regulation of SPAM. Since 1999, Industry Canada has undertaken three major initiatives which relate to the regulation of SPAM.

1. In 1999, Industry Canada released a policy document entitled "Internet and Bulk Unsolicited Electronic Mail (SPAM)". At that time, Industry Canada was of the view that anti-SPAM legislation was not necessary for the following reasons:
 - Individuals could look to their ISPs to curtail SPAM
 - PIPEDA would address the collection, use and disclosure of e-mail addresses for commercial purposes
 - In circumstances where SPAM was fraudulent or of an illegal nature, civil suits could be brought against spammers, or, in some cases, criminal charges could be laid
2. Industry Canada's second initiative was the release of Principles of Consumer Protection for Electronic Commerce: A Canadian Framework.

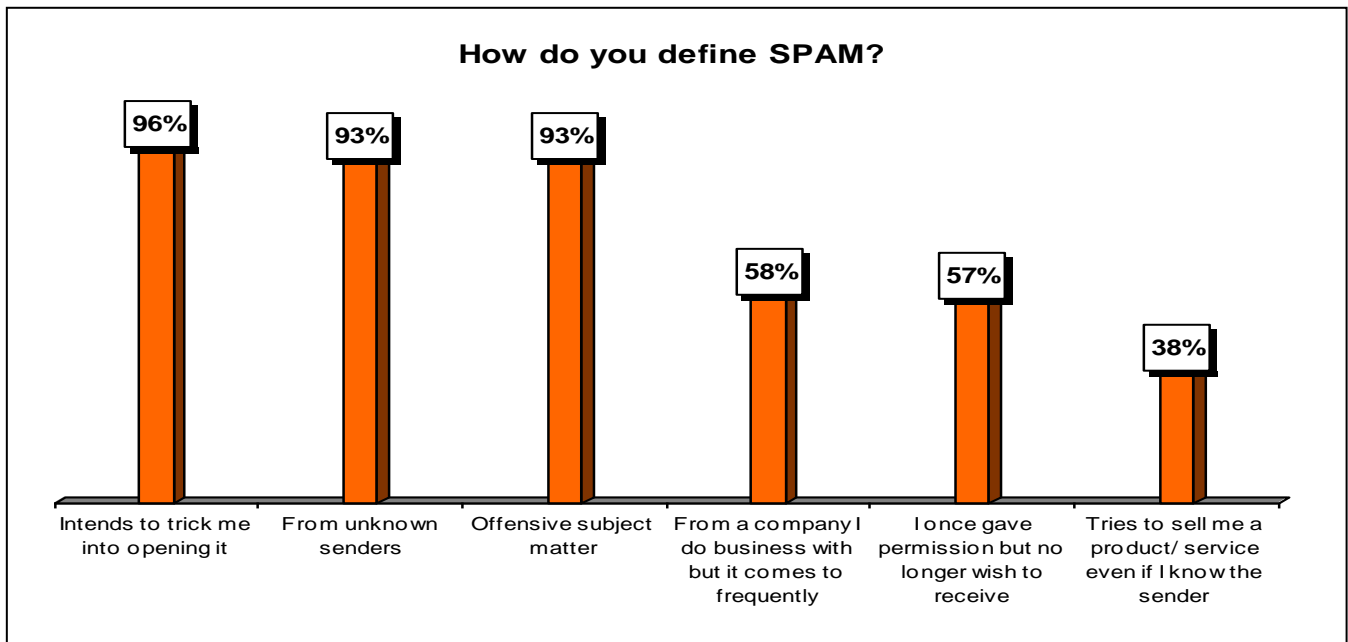
The Framework, which was developed by a multi-stakeholder group called the Working Group on Electronic Commerce and Consumers, is intended to provide good business practices for merchants conducting business with consumers online.

Principle 7 of The Framework deals specifically with unsolicited commercial e-mail, stating that "[v]endors should not transmit commercial e-mail without the consent of consumers, or unless a vendor has an existing relationship with a consumer."

3. In May 2004 the Government of Canada announced the launch of *An Anti-SPAM Action Plan for Canada* and established a government-private sector task force to oversee and coordinate its implementation. The Task Force released a paper in May 2005, "*Stopping Spam - Creating a Stronger, Safer Internet: Report of the Task Force on SPAM.*" The paper called on the federal government to "establish in law a clear set of rules to prohibit SPAM and other emerging threats of the Internet (e.g. botnets, spyware, keylogging) by enacting new legislation and amending existing legislation as required".

Quite simply, the rule of thumb for e-mail marketers is to err on the side of caution when it comes to privacy and permission-based e-mail. While there still may be some ambiguity in the current laws about e-mailing with and without permission, the court of public opinion is much more clear-cut. Consumers and the press enthusiastically publicize the names of organizations they deem to be spammers, even when they have broken no laws.

Remember, it doesn't matter if you are right or wrong. SPAM is in the eye of the beholder.



Source: DoubleClick June 2005

Because there is no Canadian legislation that explicitly covers e-mail, the first place to start when looking to follow best practices are the e-mail rules detailed in CMA's Code of Ethics, overviewed in this section.

However, if you are e-mailing consumers in the US, you should familiarize yourself with the US CAN-SPAM Act of 2003 (Controlling the Assault of Non-Solicited Pornography and Marketing Act). While the following is not legal advice, it does highlight some of the compliance issues you should know before you e-mail US customers or prospects.

- Effective January 1, 2004, CAN-SPAM is the authoritative legislation in the US that governs all e-mail whose primary purpose is advertising or promoting a commercial product or service, including content on a website. A "transactional or relationship message" – e-mail that facilitates an agreed-upon transaction or updates a customer in an existing business relationship – may not contain false or misleading routing information, but otherwise is exempt from most provisions of the CAN-SPAM Act.
- May be enforced by federal and state law enforcements and ISPs.
- Rules may apply to non US companies too – ask your lawyer.
- Fines can be horrendous (\$11K per e-mail).

US CAN-SPAM Act commercial e-mail sender requirements

- No deceptive headers, misleading content & false return addresses.
- Subject line which accurately reflects the content of the e-mail.
- "From" with the name of the advertiser.
- Clearly identify the message as an advertisement or solicitation.
- Cannot use harvested or algorithm based e-mail addresses.
- Valid return address or link to permit recipient to opt-out of future e-mail solicitations from that sender.
- Comply with opt-out requests within 10 business days of receipt & the e-mail address or web page must be functional for 30 days after the mailing.
- Include sender's physical postal address.
- Do not use e-mail addresses harvested by automated means.

For more information, visit the Business Facts: The CAN-SPAM Act: Requirements for Commercial E-mailers link on the site of the US Federal Trade Commission, the nation's consumer protection agency that is authorized to enforce the CAN-SPAM Act.

SECTION EIGHT – GLOSSARY OF TERMS

A/B split

When the list is divided into two segments, each of which is tested for different offers or creative.

Above-the-fold

The part of an e-mail or Web page that is visible without scrolling. It is generally a more desirable placement because of its visibility.

Acquisition versus retention

The presentation and content of an e-mail marketing message or campaign often depends on whether the objective is to acquire new customers or encourage loyalty and repeat purchases from existing customers. Acquisition efforts are more likely to focus on encouraging action, retention efforts on building relationships.

Alert

Is a short e-mail message that notifies subscribers of an event or special price.

ALT tag

HTML tag that provides alternative text when non-textual elements, typically images, cannot be displayed.

Application Service Provider (ASP)

A business-model a company specializes in, hosting software and/or hardware platforms/systems and then makes them available to other companies on a rental and or lease basis. An ASP arrangement allows for e-mail campaign set-up and deployment for "users" without requiring the "user" to invest in the underlying technological infrastructure.

Blacklist

Also known as "blocklist". The practice employed by Internet Service Providers of blocking an IP address or series of IP addresses to prevent the receipt of e-mail messages from a server that is suspected of transmitting SPAM.

Blocking/Filter

E-mails that are blocked are not processed through the ISP and are essentially prevented from reaching their addressed destination. This is also referred to as a "filter" to block SPAM.

Bounces

Number of e-mail messages that were unable to get past the recipient's e-mail server because of a delivery error, such as a full mailbox, or an expired or incorrect e-mail address. (see Hard and Soft bounce)

Calls to action

Words that offer the opportunity and encourage the prospect to take action. For example, "Click here to Purchase Now" or "Add this product to your wish list."

Campaign

A co-ordinated effort where the objective is to deliver a set of individual e-mail marketing messages to a specific audience containing a strategic or tactical communication. The purpose of a campaign can be to acquire, retain, cross-sell, stimulate usage, provide a customer-service message, build or reinforce a brand, etc.

Cell testing

When the list is divided into a number of discrete cells to allow for a robust test across multiple variables. To determine optimum response, conversion rate is measured for each cell, usually against a control cell to test "lift."

Click-through

When a prospect takes an action and clicks on a link.

Clickthrough Rate (CTR)

Also known in some quarters as the Clickthrough Ratio. CTR measures the rate at which links in an e-mail message are clicked on by recipients. CTRs are typically expressed in terms of the number of clicks as a percentage of the total number of messages delivered, i.e., divide the number of responses by the number of e-mails opened (multiply this number by 100 to express the result as a percentage).

Conversion rate

The key metric to evaluate the effectiveness of a conversion effort (accepting a free gift, setting an appointment), reflecting the percentage of people converted into buyers (or subscribers, or whatever action is desired) out of the total population exposed to the conversion effort. For websites, the conversion rate is the number of visitors who took the desired action divided by the total number of visitors in a given time period (typically, per month). For e-mail marketing, the conversion rate is the number of people who take an action divided by the total number of people who received the e-mail. (Multiply this number by 100 to express the result as a percentage.)

Co-registration

A negotiated arrangement in which companies collecting registration information from users (e-mail sign-up forms, shopping checkout process, etc.) include a separate box for users to check if they would also like to be added to a specific third-party opt-in.

CPA (or cost per acquisition)

A payment model in which payment is based solely on qualifying actions such as sales or registrations.

CPM (or cost per thousand)

In e-mail marketing, CPM commonly refers to the cost per 1,000 names on a given rental list. For example, a rental list priced at \$250 CPM would mean that the list owner charges \$.25 per e-mail address.

DNS

Abbreviation for Domain Name Service (or System), a network of servers that translate web site names (such as www.quotientmarketing.com) into the IP (or Internet Protocol) addresses that are used to uniquely identify any device connected to the internet.

Double Opt-In

The method for acquiring and verifying subscriptions to e-mail lists that is widely seen as a best practice according to the principles of permission-based marketing. Under this system, subscribers enter their subscription and then must respond to a confirmation message.

E-zines

Electronic newsletters or electronic versions of magazines. Some e-zines publish only in electronic format but many of the top traditional print publications also have e-zine versions.

False Positive

A legitimate message mistakenly rejected or filtered as SPAM, either by an ISP or a recipient's anti-SPAM program. The more stringent an anti-SPAM program, the higher the false-positive rate. Pivotal Veracity reports that 20% of legitimate messages from e-mail marketing are blocked.

Format (appearance)

E-mails currently can be delivered in plaintext format or HTML format. Consider the target audience to determine which is the appropriate format for any specific campaign.

Frequency

The intervals at which e-mail marketing efforts are repeated: weekly, bi-weekly, monthly, bi-monthly, etc.

Goal (objective) of e-mailing

The coherent, defined purpose, which allows targeting recipients appropriately, creating a unified and effective message and measuring the results. Each e-mail, as well as the overall campaign, should have a clear goal.

Hard bounce

A hard bounce is the failed delivery of an e-mail due to a permanent reason like a non-existent address.

Headers

The documentation that accompanies the body of an e-mail message. Headers contain information on the e-mail itself and the route its taken across the Internet. Recipients can normally see the "to" (identity of recipient), "from" (identity of sender) and "subject" (information in the subject line) headers in their inbox. You can modify these to influence their decision to open or delete an e-mail.

House list

A list that you built yourself from your current or prospective customers. Use it to market, cross-sell and up-sell and to establish a relationship with customers over time. Your house list is one of your most valuable assets. Typically these are opt-in in nature.

HTML

Hypertext Markup Language - is the standard language for publishing on the World Wide Web. Having gone through several stages of evolution, today's HTML has a wide range of features reflecting the needs of a very diverse and international community wishing to make information available on the Web.

Landing page

The page on a website where the visitor arrives (which may or may not be the home page). In terms of an e-mail campaign, one can think of the landing page as the page to which the e-mail directs the prospect via a link. A landing page must satisfy all the requirements pertaining to a home page.

Layout

The arrangement of elements in the communication, designed to optimize use of screen real estate within the prospect's e-mail client. Layout of an e-mail must take into account the fact that only a small portion of the content will appear in the visible window ("above the fold") and further reading requires the prospect to scroll down.

Links

Text links, hyperlinks, graphics or images which, when clicked or when pasted into the browser, direct the prospect to another online location. To be most effective in motivating action, links must be obvious to the visitor or recipient. When images or graphics are used as links, or when hyperlinks are used, always provide a corresponding text link as well.

List host

A service providing users with tools and facilities for distributing high volumes of e-mail and managing a list of e-mail addresses.

Load time

The length of time it takes for a page to open completely in the browser window.

Look and feel

The degree to which design, layout and functionality is appealing to prospects and fits the "image" the business is trying to portray.

MAPS RBL

Mail Abuse Protection System Realtime Blackhole List - this 'balckhole' list is the concept that describes the place where traffic coming from known spammers (IP addresses) disappears. The most common reason for an IP address to get listed in the RBL is when it is used as a *relay* for sending spam.

Mailing list

A set of e-mail addresses designated for receiving specific e-mail messages.

Messages pushed

This term refers to the total number of messages that a server attempts to deliver during a particular e-mail campaign. Because of the organic nature of e-mail lists and the fact that recipient mail servers can be down, not all of the addresses on a list may be delivered.

Multi-part message

The deployment of both a plaintext and HTML version of an e-mail message. If the recipient's e-mail client can read HTML, the HTML version is served up, if the recipient's e-mail client is unable to read HTML, the plaintext version is opened.

Navigation

The tabs, text and graphic hyperlinks that always let prospects know both where they are and where they can go. Navigation elements must always be available and obvious. Well-designed navigation will lead the prospect in the intended direction.

Open Rate

The percentage of messages delivered in an HTML format (excludes plaintext e-mails) that are confirmed as having been opened by the recipient. This is ascertained by verifying that an invisible image in the message was displayed by the e-mail recipient.

Opt-in/Opt-out

Opt-in is the action a person takes when he or she actively agrees, by e-mail or other means, to receive communications. It requires tactics and mechanisms to encourage and allow people to become recipients. Opt-out is the action a person takes when he or she chooses not to receive communications. It requires tactics and mechanisms by which people can ask to be removed reliably from an e-mail list.

Percent bounced back

The number of e-mails that were returned as undeliverable divided by the total number of e-mails sent, multiplied by 100.

Percent opened

The number of e-mails opened divided by the total number of e-mails sent, multiplied by 100.

Percent removes/opt-outs

The number of requests for opt-out or removal divided by the total number of e-mails sent, multiplied by 100.

Permission

The practice of only sending e-mail messages to those recipients who have agreed (or asked) to receive them. The definition of permission is the subject of considerable debate in the e-mail marketing community.

Plaintext

A message before encryption or after decryption, i.e. in its usual form which anyone or any system can read, as opposed to its encrypted form. The most common and readable form used for e-mail.

Personalization

The practice of writing the e-mail to make the recipient feel that it is more personal and was sent with him or her in mind. This might include using the recipient's name in the salutation or subject line, referring to previous purchases or correspondence, or offering recommendations based on previous buying patterns.

Phishing

Phishing is a type of deception designed to steal your valuable personal data, such as credit card numbers, passwords, account data, or other information. Phishing is typically carried out using e-mail (where the communication appears to come from a trusted website) or an instant message, although phone contact has been used as well.

Privacy

The quality or condition of being free from unsanctioned intrusion. Communications need to reassure the prospect through clear, accessible and enforced assurances so he/she can feel comfortable about providing personal information and transacting business. Please see CMA Code of Ethics & Standards of Practice.

Readability

The degree to which the copy is well-written as well as optimized for reading on the Web. The readability of text is affected by many factors including, but not limited to: the color of the text in relation to the background color, the font, the spacing between words and between lines of text, the length of lines of text, how blocky and dense the paragraphs appear, text justification, the complexity of the grammar and the education level of your audience.

Rental list (or acquisition list)

A third-party list of prospects or a targeted group of recipients who have opted-in to receive information about certain subjects or products. Using opt-in or permission-based rental lists, marketers can send e-mail messages to audiences targeted by interest category, profession, demographic information and more.

Rich media

E-mail messages that deliver a mix of sound, video and/or animation.

Scannable text (also called skimmable text)

Highlighted, bolded, bulleted or otherwise visually-distinguished content that allows the reader to quickly scan block text and distill the overall point and essential features of the communication. More correctly, scannable text is "skimmable" text - text the reader can easily skim through to determine the essence of the communication.

Signature file (sig file)

A tagline or short block of text at the end of an e-mail message that identifies the sender and provides additional information such as company name and contact information. Use it to convey a benefit and include a call-to-action with a link.

Soft Bounces

A type of bounceback that refers to e-mail messages that cannot be delivered during a particular campaign because the destination mailbox is not accepting mail. This usually happens when the mailbox is full, and is a common occurrence with free web-based e-mail clients.

SPAM/UCE

Unsolicited commercial e-mail. The term normally given to commercial e-mail sent without the recipient's permission. Those accused of sending UCE can run into trouble, ranging from impolite responses through loss of Internet access accounts to destruction of brands, reputations and public scorn.

Subject line

The title of the e-mail communication. This is the first (and hopefully not last) element of the communication recipients will see when they access their e-mail. It has to grab attention and be credible or the e-mail will not get opened.

Targeting

Sending the right message to the right recipient at the right time.

Timing

1. Scheduling the e-mail campaign to reach the audience at the most opportune time so it is most likely to be read. Timing might be seasonal (for example, vacation or school), dependent on holidays, etc. or mailings might go out on a standard schedule. Even the day of the week and what time of day the mailing goes out are important considerations: for example, a Friday afternoon mailing may be great for retailing customers, but bad for business-to-business customers. 2. Choosing the most appropriate interval between e-mails in a campaign, to maximize overall effectiveness.

Tracking

Collecting and evaluating the statistics from which one can measure the effectiveness of an e-mail or an e-mail campaign.

Unsubscribes

Those recipients that have asked (requested) to be removed from your mailing list.

Unique forwarders

The number of unique individuals who forwarded an e-mail.

Viral design

Elements and functions included in a communication that encourage and allow recipients to pass the offer along to others, thereby leveraging the marketing effort "tell a friend," "please forward," etc.

Viral effect

A measurable outcome of the degree to which recipients of a communication refer the offer, products, services or company to others.

Viral forwards

The number of referrals sent.

Viral responses

The number of recipients who received the referral, opened it and clicked on a link

Whitelist

An e-mail whitelist is a list of contacts that the user deems are acceptable to receive e-mail from and should not be sent to the trash folder. When a spam filter keeps a whitelist, mail from the listed e-mail addresses, domains, and/or IP address will always be allowed. Internet service providers also have whitelists that they use to filter e-mail to be delivered to their customers.

APPENDIX

Additional Resources

CAN-SPAM

ClickZ Links

- <http://www.clickz.com/showPage.html?page=3610616>
- <http://www.clickz.com/showPage.html?page=3613681>

CMA Code of Ethics:

- <http://www.the-cma.org/?WCE=C=47|K=225849>

Interpretive Guides to relevant sections of the Code (member-only accessible):
E-mail and Internet, Opt-Out Consent, Privacy

- <http://www.the-cma.org/?WCE=C=47|K=225856>

Deliverability:

ClickZ Links:

- <http://www.clickz.com/showPage.html?page=3591201>
- <http://www.clickz.com/showPage.html?page=3623025>
- <http://www.clickz.com/showPage.html?page=3623171>

Newsletters and Usability

E-mail Newsletter Usability: 165 Design Guidelines for Newsletter Subscription, Content, Account Maintenance, and RSS News Feeds (based on usability studies, Nielsen Norman Group, 2006)

- <http://www.nngroup.com/reports/newsletters>

www.the-cma.org/marketingguides

Canadian Marketing Association

1 Concorde Gate, Suite 607

Don Mills, Ontario M3C 3N6

Tel: 416 391-2362

Fax: 416 441-4062

www.the-cma.org

CANADIAN
MARKETING
ASSOCIATION

CMA