



# Email marketing guide





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## Glossary



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## Acknowledgements

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# Introduction

## Introduction

### Purpose

This best practice guide aims to give you a rapid orientation around the key elements of successful and compliant email marketing.

Its focus is on the marketing part of email marketing rather than the different technologies, services, platforms and tools that are needed to execute email marketing – which you should research yourself to keep up to date with the latest opportunities.

It is not intended as a complete in-depth handbook on email marketing, but rather as a starting point – giving you a gateway to more detailed guides and how-to information.

We encourage you to use this guide to identify what is relevant to you and then research those points in more detail using the resources suggested – including articles, whitepapers, DMA reports, case studies, expert organisations, DMA communities and discussions and DMA members who can give you specialist advice to improve your results.

Whilst no particular vendor or technology is advocated here we do recommend that you use the list of DMA members as a starting point to finding the marketing partners you need.



# Business practice



# Business practice

## Compliance

### Email marketing and the DMA Code

The DMA Code is the standard to which all DMA members, their suppliers and clients must agree to conduct their business.

This email marketing best practice guide will ensure that you satisfy the law and the DMA Code, but it is also about much more than mere compliance – rather, it is about delivering one-to-one marketing that is a true *exchange of value* between your company, looking to prosper, and your customer, looking to benefit.

Marketing in the right way – honestly and fairly, putting your customer first – will also make you a much better and more valued marketer.

Best practice in all marketing can be described, in short, as understanding your customer's expectations of your brand and ensuring that you meet them.

### Key legislation

Complying with the law is a basic requirement for all marketers.

Whilst this guide aims to give you a working understanding, you should have your own legal advisors to consult on any point of particular risk, complexity or importance.

There is a wealth of legislation of which you must be aware – all of which works towards making and keeping the medium beneficial to your customer.

The two key pieces of legislation governing email marketing are:

**The Data Protection Act 1998 (DPA)**

**The Privacy and Electronic Communications (EC Directive) Regulations 2003 (as amended) (PECR)**

### Industry codes

Mobile marketing is also subject to code requirements from the following industry bodies:

**The DMA Code**

DMA members must comply with the provisions of the DM Code.

Non-members are strongly advised to comply with the Code as it is a useful summary of the legal and best practice requirements for one-to-one marketers.

The Code is adjudicated by the Direct Marketing Commission (DMC).

**The CAP Code**

The British Code of Advertising, Sales Promotion and Direct Marketing (CAP Code), which is enforced by the Advertising Standards Authority (ASA).

### Regulatory organisation

**The Information Commissioner's Office (ICO)**

Regarding data protection and privacy issues.



# Business practice

## Penalties

Penalties for compliance failure include fines for breaches of the DPA and PECR and sanctions under the various industry codes.

To find out the latest information on penalties and sanctions, including examples of companies that have been penalised, visit:

[ico.org.uk/](http://ico.org.uk/)

## Complaints and dispute resolution

### Receiving complaints

- **Have complaints procedure in place**  
In our era of consumer power and activism, it is prudent that your brand should have practices in place to handle complaints and disputes that might arise as a result of email marketing.
- **Define escalation processes**  
Have a plan in place to map out the escalation of a complaint in case your customer is dissatisfied with your initial response.
- **Aim for speedy resolution**  
Have policies and processes in place to ensure that any complaint you receive is resolved as quickly and smoothly as possible.

Failure to do so may result in further or formal complaints being made against you – to the ICO, for example.

### Dispute resolution

- **Be prepared**  
In the event that an email marketing message has been sent with either incorrect information or an incorrect offer, you must be prepared and able to make a strong, prompt decision about how to rectify any negative consequences.
- **Record proof of consent**  
Make sure that you have stored the date, source and permission statement of your customer's opt-in or soft opt-in consent and that your customer-facing staff are able to retrieve it easily, on demand.  
  
This will enable you to respond quickly and appropriately to direct complaints, or to provide evidence in the event that a complaint is made about unsolicited email.

### Apology emails

- **Expect occasional mistakes**  
Despite all best efforts, mistakes can happen.  
  
For example, links may be incorrect, landing pages may not work or the wrong offer may be served.
- **Assess impact**  
Once a mistake has been made you need to assess the impact quickly.  
  
This is important to ensure your response is appropriate – both to those who were affected by the mistake and to those who were not.



# Business practice

For example, if you have sent out an email with an inappropriate link, you will probably only need to apologise to those customers who actually clicked the link – rather than sending an unnecessary apology to your whole list.

- **Monitor consequences**

Monitor the impact via your website visits, social media sentiment, inbound calls or by replies (if this is configured) and emails to role accounts.

- **Assess factors**

Consider elements such as:

- How many customers have been affected?
- What is your brand reputational impact?
- What is the material impact?
- Is there a legal aspect to the error?
- Is a correction needed?
- Is a material apology needed (a voucher, for example)?

- **Is an apology necessary?**

In some cases, if the mistake has minimal impact then sending an apology might be unnecessary or even a nuisance to your customer – and might merely draw unnecessary attention to the error.

- **Clarify decisions**

If you do decide to send an apology, make sure that your decision is clear and explain to internal stakeholders why you are taking this action and your expected outcome.

- **Keep your apology on-brand**

Make recommendations on tone of voice and keep your apology consistent with your brand.

- **Act speedily**

Once your decision to send an apology has been approved, you should act quickly.



# Campaign creation



# Campaign creation

## Integration within your marketing mix

### Strategy

- **Integrate with wider marketing activity**  
Whilst email is one of the marketing channels that shows the highest return on investment, it is imperative that you look at the bigger picture and integrate your email campaigns with other channels as part of your marketing mix.
- **Give your customer choice**  
Providing your customers with a choice of how to interact with your brand is crucial to giving them the best possible experience – and you will reap the best results from your marketing campaigns if you have a multi-channel, integrated approach to your strategy.
- **Treat channels as complementary**  
Think of your marketing tools as complementary channels, not competitive.
- **Treat audiences independently**  
Do not assume that your email subscribers are the same people who engage with your brand through other channels, such as social media sites.  
  
Treat your customer individually and contact them via the channel that most suits their needs and preferences.
- **Drive overall brand**  
Maintain consistency across all channels to ensure your brand messages reinforce rather than contradict each other.

### Closing the marketing loop

- **Use offline opportunities**  
Consider how you can integrate offline opportunities to strengthen your email marketing.  
  
For example, experiential and in-store activities offer fantastic sign-up opportunities and subject matter for email content.
- **Gather preferences**  
Your best way to capture information about your customer is at their point of sign up – so take this opportunity to ask your customer about their preferences.
- **Use complementary messaging**  
Use the right combination of email and mobile marketing to reflect your increasingly mobile audience and their personal preferences.

### Use of cross-channel data

- **Drive response**  
Use data gathered through other channels to profile and segment your customers and therefore send more relevant emails.  
  
For example, you might use web analytics about browsing behaviour; social media interaction to understand successful content; or information gathered during customer service calls.
- **Increase conversion**  
Use cross-channel data to understand your customer journey in detail and smooth out any obstacles.  
  
For example, you might find that email is more suited to a particular role in your customer's decision to purchase; or that your social media audience is notably different from your email one.



# Campaign creation

## Website integration

- **Integrate software**

Make sure that your email software integrates seamlessly with your web analytics tools, review software, abandon basket programme or ecommerce platform

This will enable you to follow the entire customer journey from the point at which your subscriber leaves your email, having clicked on your link or offer.

- **Drive web traffic**

Use a variety of channels – such as email, SMS, blogs, social media, QR codes – to help drive traffic to your website and drive lead generation.

- **Use emails as shortcuts**

Use emails to deliver your customer straight to the products or pages that they are most interested in.

- **Use behavioural analytics**

Track your customer's activity on your website after they click through from each email.

This will allow you to see which parts of your site they are particularly interested in – and be better able to serve them the content via email that they are most likely to appreciate and engage with.

## Social integration

- **Use social channels to drive email sign-up**

Use social channels to encourage your customer to sign up to your email newsletters, as well as driving traffic to your blogs and corporate websites – it really does work!

For example:

- Add email opt-in forms to your Facebook page
- Tweet links to your subscription page
- Use Google+ or LinkedIn requests

- **Use email to expand social reach**

Use email to direct your customer to your social networking sites to increase their engagement.

For example:

- Include social sharing buttons beside your email content to advertise your social activity
- Include 'follow us' requests on each of your email campaigns

- **Monitor metrics and measure results**

Optimise your email and social integration by tracking your key performance metrics for each channel.

## Key integration metrics

Key performance metrics for integration include:

- Percentage of customers who share email content on social channels
- Click-through rates on social buttons from your email campaigns
- Social media comments on shared email content
- Web traffic generated via email and social links
- Conversions from integrated social and email campaigns



# Campaign creation

## SMS marketing

- **Offer subscription via SMS**  
Give your customer the option to sign up to your email newsletter via SMS using a short code – a valuable extra way to increase your subscribers, especially when in-store or on the move.
- **Make your SMS time-sensitive**  
Use SMS marketing for short, time-sensitive communications – such as appointment alerts or last-minute sale reminders – rather than the richer content that you would typically send in an email campaign.

## Creative

### Essentials

You have certain obligations to your customer in every email you send.

- **Identify sender**  
Clearly identify the brand responsible for sending the email – whether it is from your brand or your client's.
- **Provide sender address and contact details**  
Make sure you include the sender organisation's contact details – typically at the bottom of your email.
- **Unsubscribe link**  
Customers have a right to be able to unsubscribe from your communications.  
  
It is also very bad for business to have unhappy consumers marking your emails as spam – or even making formal complaints to you, their ESP or an adjudicating organisation such as the ICO.
- **Honesty and responsibility**  
You have a responsibility to be honest and fair in all your marketing.  
  
Do not send any email that might be seen to mislead your customer, misrepresent the true nature of your organisation, purpose, offer or product, or to use any less-than-fair marketing tactics.

### Concepting

- **On-brand**  
Make sure your email marketing complements and benefits from the strength of your wider brand image.
- **Integrate with wider marketing activity**  
Consider how your message will complement and enhance other marketing activity.
- **Consider unique opportunities of channel**
  - **Immediacy**  
Email makes it possible to prompt an instant action, something you can take advantage of.  
  
For example, email offers a good way to drive conversions for a short time-sensitive offer or urgent fundraising campaign.
  - **Location**  
Consider where your customer might be when they read your email and how can you use this.  
  
For example, you might target an offer of a free coffee to an ABC1 customer segment early in the morning and be confident that a significant proportion will pick up your email on their phone during their morning commute – perfect timing.



# Campaign creation

- **Timing**

Brainstorm other factors that will allow you to make your email more relevant and drive response.

For example:

- What time of day?
- What mood might your subscriber be in? How busy? How tired?
- What current events might affect your message?
- Time of year (for example Christmas, summer holidays, Valentine's Day, Ramadan...)

## Email copy

### Strategy

- **Prioritise substance over style**

Emails have become more and more sophisticated as the years have gone by, but nothing is more important than the basic content.

No matter how good your emails look or how well optimised they are, it needs a meaningful message or offer or you risk wasting your time and money and losing your customer's interest.

- **Tailor and personalise copy**

It is vital that you combine compelling and personalised copy with snappy offers and tailored content – otherwise you'll miss out on the relevance and conversion rates that your email marketing should deliver.

- **Keep customer experience in mind**

It is easy to focus on setting up a correct technical email campaign and forget the most important objective: to provide your customer with a relevant, engaging experience.

- **Have a single goal**

Do not be tempted to cram in too much information.

A single-minded message, clearly delivered and with consistent CTAs leading to one landing page will create a far more powerful impact.

- **Check out your competition**

Monitor your competitors and ensure that you differentiate your brand from others.

- **Be industry-specific**

Best practices on copy length vary greatly from industry to industry and what works for one industry – retail, for example – can be entirely different to what works for another – such as financial services.

- **Define your customer's expectations**

The biggest key to successful copy is to fully understand your customer's expectations – including industry norms, the information they want to receive, the nature of your offer, the time they are prepared to spend reading and the conversion action you want them to complete.



# Campaign creation

## Test different factors

To continually improve your email success and efficiency, never stop testing different copy approaches.

- **Understand context**

Influencing factors might include:

- Unique features of your particular industry
- Point your customer is at in the buying cycle
- Whether you are targeting a B2B or B2C customer

- **Test copy variations**

Test variations of each copy element to see what works, when, and for whom, including:

- Tone of voice
- Subject line
- Pre-header
- Headline
- Salutation
- Opening line
- Calls-to-action
- Sub-headers
- Pull-out, emboldened, underlined or coloured text
- Link text
- Copy balance against imagery

- **Be creative**

Whilst writing email copy has its rules, it is definitely not an exact science – so only formulate the structure, rather than the expression of your message.

Dare to be creative – try to reward your customer for reading your email and try out different approaches to find what works for your audience.

- **Be thought-provoking**

The most moving email copy is that which is thought-provoking, human and personalised.

## General copywriting tips

- **Start strongly**

Your customer should know what your offer is immediately – from your subject line and headline.

- **Explain relevance**

By the end of your headline and introductory sentence, your customer should know why your message is relevant to them and what you are asking them to do about it.

- **Make it easy to understand**

Make it easy for your customer to understand your copy at a glance, on the move and potentially in a distracting environment.

- **Make key information unavoidable**

Ensure that all key information is above the fold (ie can be read without needing to scroll down).



# Campaign creation

- **Stay relevant**

Explain how your offer specifically relates to your individual customer, not to some general group, and fit your message to their situation.

For example, “This will help you relax because...” rather than “This can help some people relax because...”

- **Use bullet points**

Small, bitesize snippets of information will allow your customer to digest information quickly.

## Tailoring copy

- **Keep it tailored to keep it relevant**

It may be tempting and save time, but do not just take a one-size-fits-all approach unless you are writing to a very specific audience with a very focused offer.

- **Write different versions to spell out the benefit**

Consumers today are usually too distracted to take the time to work out how your offer might apply to them – so if it means writing several versions that spell it out for different audiences, then take the trouble to do so.

- **Adapt to segmentation**

If your campaign is going to multiple customer segments, use the segmentation factors – such as customer status, age, or previous purchasing behaviour – as the basis to tailor your copy accordingly.

- **Personalise your email**

Personalisation means more than just addressing your customer by name. Think about using personalised images and content blocks to appeal to their individual interests and preferences.

- **Consider your buying cycle**

Tailor your content and subject line to where your customer is in the purchase cycle.

For example, an existing customer may well need to be approached differently to a prospect.

## Subject lines

- **Be attention-grabbing**

The right subject line can dramatically increase your open rate.

- **Be concise**

You have roughly 50 characters with which to tempt your customer to open your email, so make them clear and compelling.

- **Be consistent**

Ensure that your subject line matches the content within the body of your email, otherwise you risk confusing or annoying your customer.

## Tone

- **Write in the second person**

Your tone will be warmer and your customer will respond more positively to copy that feels really relevant to them.

Use the second-person – ‘you’ – instead of general pronouns such as “people”.

For example, write ‘you will find’ instead of ‘people find’.

- **Use urgency**

Give your customer a real reason to click NOW, not later.



# Campaign creation

- **Be on-brand, but be simple**

Every brand should have its own tone and its own approach to communication – but in email form, your message still has to be instant to understand. Do not let style obscure your message.

## Calls to action (CTA)

- **Make them compelling**

Make sure your calls to action contain a real and pressing reason to act – and act NOW.

- What will your customer find out by clicking through?
- What will their reward or opportunity be?

You should have a genuine reason for emailing your customer in the first place, meaning you should be able to deliver a more intriguing promise than “Click here” or “Buy now”.

- **Make them catchy**

The wording of your CTA needs to be catchy – a good CTA should prompt your customer to click immediately, not move on.

- **Make them frequent**

Make them punchy and plentiful, so there is always a CTA handy at the point in your copy at which your customer is ready to click.

Always ensure there will be a CTA visible in your customer’s email preview pane.

- **Use repetition**

Give your customer more than one opportunity to click as it might be a later comment that triggers them to act.

Use a variety of formats, too – such as buttons, hyperlinks and image click-throughs.

## Alt tags

- **Keep them simple**

Keep the copy behind the images (alt text/tags) simple and use the space to briefly describe what the image is – do not stuff them full of keywords.

## Mobile devices

- **Keep it short**

Most mobile users only see around 100 words per screen and patience is low – so lengthy copy usually will not be seen.

- **Use short subject lines**

Consider shortening subject lines as much as possible.

For example, most iPhone users only see 30-40 characters of a subject line.

- **Put your most important point first**

Mobile users tend to read their emails whilst on the move – so give your customer your key message in the first few words or they might not get it at all.



# Campaign creation

## Email design

### Design and layout

- **Design especially for email**  
Designs for other media, such as print or web, are not necessarily directly transferable to email – it is often preferable to design specifically for email.
- **Optimise emails for mobile**  
The majority of emails are now read on mobile devices – so it vital to ensure that your emails are optimised for this.
- **Consistent template**  
Ensure your email template and layout are consistent with your company branding and your customer's expectations.
- **Vary email content**  
Keep your content, including offers and information, fresh, compelling and interesting.
- **Use dynamic content**  
Personalise your emails and tailor content to your customer's personal preferences and their browsing behaviour on your site – such as content viewed or purchases made.
- **Repeat calls-to-action**  
Include the call to action for your key objective more than once – for example, make sure to include it above the fold, in the middle (if your email is long) and at the end.
- **Test everything**  
Subtle differences to images, style, content or subject line can have a significant impact on email filters or customer responses.
- **Avoid damage to sender reputation**  
If content is not interesting or relevant, your customer is more likely to flag your email as spam, which will have a negative effect on the deliverability and success of your future campaigns.
- **Further reading**  
*DMA whitepaper on email creative* – <http://www.dma.org.uk/toolkit/email-creative>  
*Can using a pre-header make a difference?* – <http://dma.org.uk/toolkit/can-using-preheader-make-difference>

### Email design basics

- **Key considerations**  
Consider the following factors in your email design:
  - **On-brand**  
Make sure your email is clearly on-brand and recognisable at a glance – this could make all the difference between your customer skipping over it or stopping to read.  
Use design colours, images and styles which make a brand connection with your customer.
  - **Clarity**  
Regardless of all else, the main purpose of your design should be to clearly communicate your key message.
  - **Layout**  
Design your email to a specific pixel size and keep your emails fairly narrow.  
A general rule of thumb is to use 600 pixels wide for desktop design and 320 pixels for mobile first design.



# Campaign creation

- **Above-the-fold**  
Make sure that your key message and call-to-action are 'above the fold' – in other words, that your customer can see and click it without having to scroll down.
- **Include web version**  
Include a link to a web version of the email, preferably at the top of your email.
- **Use pre-header**  
Put your key marketing message in the pre-header area – a "super" subject line.
- **Plain text**  
Always make sure that you include a plain text version of your email that clearly states your key point and call-to-action.
- **Accessibility**  
See your email from your customer's point of view and make allowances for difficulties in reading, comprehension and even the setting in which they might conceivably receive your email – for example, at work in a busy office or at home with their family.
- **Format**  
Make your format decisions based on your email's function.  
  
For example, if your email is an update for commuters, you might need to format appropriately for on-the-go, patchy mobile network or low-data smartphone consumption. But if your email relates to a desktop office solution, you might expect your customer to view it on an older desktop machine and behind a strict company firewall and so opt for a plain-text approach first and foremost.
- **Email size**  
Consider the total size of your email including html and images.  
  
Email size, combined with your customer's bandwidth, will determine how long your email takes to load and could have a big impact on open rates – especially on mobile devices.
- **Colour**  
Email design needs to be practical and effective as well as on-brand – so evolve specific email design rules around colour, particularly for key elements such as headlines and calls-to-action.
- **Mood and tone**  
Make sure the mood and tone encourage your customer to want to engage before they have even read and digested the full content of your email.
- **Individual design elements**  
The effectiveness of individual elements, such as button design, can make literally millions of pounds worth of difference to the conversion rate of big brands.  
  
Do not rush over these design features – research the latest ideas thoroughly and make these elements an important variable in your testing.
- **Typography**  
Typography is important in establishing the tone of your message before your customer even reads it.  
  
Use typography – including headings, sub-headings, font size and colour – to control your customer's path through key information points and calls-to-action.  
  
Typography is also an important factor in legibility. Avoid hard-to-read fonts and stick to the core webfonts that will display consistently across all email providers.
- **Imagery**  
An image can make or break your email – so choose wisely and make sure that it is correctly sized and in an appropriate file format.  
  
Use appropriate file formats for images and keep byte size of the images as small as possible.



# Campaign creation

As a rule of thumb use jpeg format for photos or any true colour images and gif format for everything else.

Make sure the quality and style suit your brand – and match the colour palette of the image to your brand as much as the content.

- **Make it work without images**

Consider how your email looks with images turned off, the default for many email clients.

Some text should be visible when images are turned off, such as header text and alt tags, to explain the message content.

- **Background images**

Background images are unreliable and inconsistent in email clients so try and avoid using them.

- **Graphics and icons**

Graphics and icons can be brilliant tools to help your customer identify separate pieces of information – particularly if your email covers multiple topics, such as a news round-up.

But make sure that these graphics are clean and simple, do not make your email size unnecessarily large and presents correctly across all ESPs.

Simpler is very often better.

- **HTML5**

You can use HTML5 to create more elaborate and engaging emails – but be wary that mobile network limitations and ESP preview settings might heavily impact on your customer's chance to see your email in all its glory.

- **Different devices**

Design your email to fit the most common devices on which customers will view it.

This may differ drastically for different brands, or even for different customer segments within your database.

- **Cross-device testing**

Use at least one of the many free emulators available online to see how your email will display on all different devices

It is worth checking on at least two different emulators to be truly confident.

Your email marketing software may well include this tool.

## Coding

- **Use inline styles**

Always use inline styles and apply them to every element using the style parameter.

- **Use tables for layout**

Use tables and nested tables for layout rather than CSS and DIV areas.

Tables are more widely supported and will give you a more consistent email presentation across different ESPs.

- **Avoid scripting languages**

Do not use scripting languages – such as Javascript – in your email as this is deemed a security risk and likely to get your email blocked.

- **Do not embed images**

Never embed images. Instead, link them so that images only download when your email is previewed or opened.



# Campaign creation

## Email data

### Follow *Data guide*

For general data best practice, to which all one-to-one marketing must comply, see the *Data guide*.

The data guidance below relates more specifically to how you can best approach data as the foundation of your successful email marketing.

### Strategy

- **Feed email marketing with the best data possible**  
Data is the cornerstone of email marketing – so the better your data, the better your results are likely to be.
- **Calculate value**  
Know the value of an email address to your organisation so that you can justify investment in data collection.
- **Take every opportunity to collect data**  
Be imaginative and identify all opportunities to collect email addresses and profiling information – online and offline – and not just through a single sign-up page.
- **Collect data as a trade with your customer**  
Email marketing cannot succeed without good data, so it is vital that your data is accurate and that your customer knows how you intend to use it, what they will get in return and is happy with this agreement.
- **Explain benefit to your customer**  
Have clear and straightforward sign-up opportunities telling the customer why you need their data and what you are going to use it for.
- **Only use reputable data**  
Add email addresses and additional demographic details to your client database by using reputable opted-in data and sensible upfront email communications.
- **Consider third-party data**  
Third-party data or lead generation can help supplement your email marketing – as long as it is carefully strategised, sourced and sensitively used.  
  
Use bought data as an opportunity to target very relevant email marketing to particular customer segments, particularly where you do not have in-house data to cover those audiences.
- **Treat data security as business-critical**  
Data security is fundamental to protect the data assets that underpin your successful email marketing.  
  
With correct policies and practices in place you can prevent data security breaches – which can cause very significant damage to your brand.

### Collecting email addresses

- **Define your offer**  
Think about why your customer will benefit from giving their consent for you to email them and explain this clearly and honestly.  
  
Again, think of data collection as a trade – what will make your consumer want to give you their information and their permission to use it? Make sure they are getting enough in return.



# Campaign creation

- **Make sign-up easy**

Ask for the least amount of information you need, thus making it as convenient as possible for your consumer to sign up.

You can always ask for further information later.

- **Clarify usage**

Ensure you are clear about why you are collecting your customer's email address and what you are going to be using it for.

- **Gather subscriber preferences**

Give your customer options: do they want to receive marketing information from you only, from other companies within your group or from selected third parties?

- **Get explicit opt-in**

Soft opt-in is NOT best practice – all data should have positive consent.

- **Include opt-out**

Always include a clear opt-out on all communications.

- **Track collection sources**

Analyse return on investment by source and optimise to the best source.

## Retaining subscribers

- **Track response of each subscriber**

Set rules in place to automatically re-segment your customers according to their levels of engagement.

This will allow you to make the most of enthusiastic customers – whilst directing different messaging to those who need a special offer or message to re-engage them – or who would respond to a different communication strategy entirely.

- **Keep content fresh, engaging and targeted**

Any customer will tune out of your marketing if you send them the same thing every time.

Keep refreshing your messages, change the type of content you send and think about linking your message with topical events to keep them relevant and interesting.

- **Try to re-engage non-responders**

You might be able to re-engage some non-responders by sending them a targeted email before removing them from your database entirely.

For example, you might send a “We’d love to welcome you back” message, with an offer attached; or you might target them with an update about a product they have already bought in the past.

## Soft opt-in

- **Specific to email and SMS marketing**

Soft opt-in applies solely to email and SMS marketing and allows you to conduct email marketing on the basis of opt-out as long as the following criteria have been met:

- Your customer's data was collected as part of a sale process
- Your customer was told at the point of collection that you would use their email for marketing purposes
- Your customer was given a clear and easy opt-out opportunity at the point of collection
- Your marketing is from the same organisation the individual is a customer of



# Campaign creation

- Your marketing relates to similar products and services
- Your customer is given easy access to a free-of-charge unsubscribe facility on each subsequent communication
- The identity of the sender organisation is clearly shown
- **Not appropriate for third-party marketing**  
You cannot use the soft opt-in exemption for host emailing or for third-party email marketing.
- **Charities cannot use soft opt-in**  
Charities can only use soft opt-in for their trading arms – not for fundraising.
- **Aim to get explicit opt-in**  
Soft opt-in is NOT best practice – it is much better practice and more successful to gain positive consent from each consumer before marketing to them on a one-to-one basis.
- **Collect specific opt-ins**  
It is always preferable to collect specific opt-ins for each marketing channel.

## Third-party email marketing

### Host mailing

- **Use host mailing for third-party offers**  
Host mailing is the preferred method for distributing third-party email marketing.  
It means that a consumer should only receive marketing communications sent by organisations to which they have directly subscribed.  
For example:
  - A customer might sign up to receive emails from Brand A.
  - Brand B wishes to market to them.
  - Brand A obtains their customer's consent to pass on marketing messages from the named Brand B.
  - Rather than Brand A passing on their customer's email address for Brand B to use, it is better for Brand A to send their customer an email that contains an offer from Brand B.
  - This email should clearly show that the offer is from Brand B, not from Brand A.
  - In effect, this is presented as 'sponsored' content.
  - Another way to view this arrangement is to see Brand A's email as a media space – available to rent but curated by Brand A with respect towards their own relationship with their customer and sensitivity towards their customer's preferences.
- **Obtain informed consent**  
Brand A must make it clear to their customer, at point of sign-up, that they intend to send such third-party messages from Brand B – and obtain their customer's opted-in consent to do so.
- **Compliance and commercial benefit**  
As well as meeting your data compliance obligations towards your intended customer, hosted mailing has the added commercial benefit of arriving in your intended customer's inbox from by a brand that they have signed up with and have a certain degree of trust for.  
This is preferable to your intended customer receiving an email from your brand out of the blue, with no prior



# Campaign creation

relationship or trust – and potentially feeling distrustful as to how you have acquired their details.

## Indirect third-party consent

You can share your customer's email address with third-party marketers if:

- **The third-party organisation was named and separate opt-in gained**

It is only fair for Brand B to market directly to a customer of Brand A if Brand B was explicitly named to the customer at the point of sign-up – and separate consent was obtained.

For example, Brand A might have stated: "We think you might also be interested to hear relevant offers from Brand B. Please tick here to receive offers from Brand B."

- **The customer opted-in to hear from a specific type of third-party**

Brand A is also permitted to pass a customer's details to Brand B if the customer opted-in to receiving third-party marketing from a specific type of organisation such as Brand B.

For example, if Brand B is a luxury cruise operator then Brand A might have stated: "We think you might be interested to hear relevant offers from selected luxury cruise operators. Please tick here if you would like to receive offers from these companies."

## Collecting email addresses via third party sites

- **Clarify opt-ins**

If you are looking to capture customer data via third-party sites, make absolutely sure that the opt-ins are very clear and that your customer is aware that it is you, not the third party, that is collecting their information.

Ask to see all of the websites and places where this data will be collected.

- **Check sign-up process**

Go through the third-party data capture process yourself to check that it is clear to your consumer what they are signing up for and that they are not being forced to opt into receiving information from you.

- **Tailor your emails**

Monitor response from third-party subscribers. Make sure you have an email communication strategy specifically targeted to these customer so they have a clear idea of why they are receiving information and what the benefit is to them.

## How long does third-party consent remain valid for?

- **Unused indirect third-party consent does expire**

There is a time limit – primarily applied to indirect third-party consent – for consent that has not been recently used or activated.

The ICO sets a rule of thumb for the validity of indirect third-party consent at six months.

The longer the passage of time between the initial capture of indirect third-party consent and your use of it to communicate with the customer, the harder it is to view this consent as being current under PECR requirements.

- **Context is important**

The ICO does accept that there may be circumstances where indirect third-party consent will last longer – for example, for seasonal offers, such as Christmas products, or annually renewable services, such as insurance.



# Campaign creation

## Email address hygiene

- **Recognise data hygiene as a business-critical issue**  
The hygiene and cleanliness of your customer data is both a business imperative as well as a legal requirement.
- **Understand negative impact of poor data**  
The implications for not sending to accurate data may manifest as greater deliverability challenges and ultimately poor overall performance.  
*See the [Deliverability](#) and [Email performance metrics and measurement](#) sections of this guide for further guidance.*
- **Maintain trust and performance**  
Focus on improving list hygiene in order to increase performance and revenue from your email marketing and to engender customer trust in your email marketing programme.
- **Only use clean, up-to-date data**  
Only send email to a clean and up-to-date database – make sure that unknown addresses, invalid addresses and complaints have been removed.
- **Use email validation services**  
Your data hygiene practices should include the use of email validation services that can aid data collection and validation of addresses at other points in the data lifecycle.
- **Email list rental**  
This area is fraught with difficulty from an address hygiene standpoint – principally because consent of the customer is not always readily transferrable.
- **Monitor hard bounces**  
Data collected at the start of your relationship with your customer should be cleanest – but will naturally decay over time as customers change email addresses and their interests or circumstances change.  
*Monitor and measure your list hygiene through hard bounces.*
- **Check for spam traps**  
*See the [Spam traps](#) section of this guide for full details.*
- **Define 'inactive data'**  
Over time, data decays and degrades – or your customer may no longer use a particular email account.  
Define what 'active' and 'inactive' mean within your marketing, and what each looks like.  
For example, you might mark a customer as 'inactive' after five ignored emails if they have never opened one of your emails before – but if they are a regular customer, you could fairly assume that they are still likely to be interested in your communications until they have ignored several times as many emails.  
*See the [Email performance metrics and measurement](#) section for further guidance.*
- **Remove non-responders**  
Consumers tend to receive more marketing emails than they are prepared to read – even if they've signed up to each brand themselves.  
It is natural that your customer will respond more positively soon after they sign up, at the height of their interest – but can either stop paying attention to your emails as they become too familiar, or stop being engaged as their interests or circumstances change.  
Make sure that you have rules in place to preserve the quality of your lists by removing customers from frequent emails if they do not open or click through for a certain number of messages.
- **Be strict about suppression**



# Campaign creation

It is your legal requirement to suppress any unsubscribed consumers to prevent them receiving your further marketing.

Keep an in-house 'do-not-email' list of all consumers who have directly requested that your organisation either does not email them or does not market to them one-to-one at all.

See the *Email hygiene* section of this guide for further information.

## Unsubscribe requests

- **Keep your unsubscribe process simple**

Make the unsubscribe process as simple as possible – the alternative is that a frustrated consumer may just mark your email as spam, with negative consequences for your sender reputation.

- **Provide a preference centre**

Your customer may choose to alter their subscription, content, timing or frequency preferences instead of unsubscribing from your marketing completely, so make sure you offer a preference centre – especially at the points of sign-up and unsubscription.

Use your preference centre to collect useful insight into why your customer wants to alter their status or preferences.

- **Benchmark unsubscribe rates**

Measure the rate at which customers are unsubscribing and, where possible, compare this to either historical trends or published industry benchmarks.

If your unsubscribe metrics are increasing or are out of line with expectation, look to find out why.

This is where having a preference centre with a questionnaire can provide valuable feedback.

See *Email performance metrics and measurement* for further guidance.

- **Include a list unsubscribe header**

To provide your customer with a clear unsubscribe button, include a list unsubscribe header on all your emails that will work with common email providers, such as Gmail.

- **Provide role accounts**

Have a monitored email address such as *abuse@yourdomain.co.uk* or *postmaster@yourdomain.co.uk* visible in your Whois details.

Your brand is responsible for this – and it is important, because if a customer wishes to be removed after sending an email to a role account then this request must be respected.

- **Avoid sending to role accounts**

If you find other organisations' role accounts within your email database, you might have address collection issues as these should not exist as recipients.

- **Ensure hygiene consistency**

If your organisation uses multiple data systems, take care to ensure that data hygiene and changes are reflected consistently across all of these – for example, between CRM database and broadcast platform systems.

- **Monitor non-email unsubscribes**

If a customer asks via a different channel to unsubscribe from your emails, make sure this is still correctly flagged in your databases and that the change is reflected within your email sending systems.

- **Honour unsubscribe requests promptly**

Provided that you honour unsubscribe requests in a timely fashion, complaints should not be a regular occurrence.

- **Have manual unsubscribe process**

Have a process in place to manually unsubscribe a consumer who no longer wishes to receive your email marketing.



# Campaign creation

- **Maintain suppression list**

Keep a suppression list of unsubscribers to ensure that they are not re-added to your database.

## Phishing and spoofing

Phishing and spoofing messages seek to mislead your customers and potentially steal their personal information or direct them to malicious links.

Prevention is better than cure and will help to minimise penalties such as direct financial cost, remediation cost and reputational cost.

Your organisation needs to understand the full extent of email borne threats and take the following steps to minimise the risks:

- **Adopt preventative systems**

Adopt systems to understand if attacks are occurring and use authentication technologies such as SPF, DKIM and DMARC to address outbound phishing.

- **Train staff**

Use security awareness training and policy enforcement to identify and counter inbound phishing threats.

- **Educate your customers**

Education plays a crucial role in countering email fraud. Take pro-active steps to tell your customers how to differentiate between your legitimate emails and fraudulent ones, how to spot phishing and spoofing messages and what they should do if they receive a message that they are suspicious about.

- **Monitor fraudulent domains**

Be aware of the risk of fraudulent emails sent to your customers from domains that bear close resemblance to yours – for example, *email@yourdomain.com* could be phished as *email@your-domain.com* or another similar variant.

Have clear policies in place, in advance, to ensure that your organisation responds immediately and effectively to protect your customers and brand from falling victim to any attack.

- **Prepare response**

Make sure your organisation is prepared for the eventuality that your brand is spoofed or phished.

Your response should include post-attack communications to your customers and making sure your inbound call centres and staff know how to respond to questions or complaints.

Consider minimising your exposure by engaging the services of a takedown or security services provider that can remove the websites that are used to defraud your customers.

Have this in place prior to any attack as a pro-active measure.

- **Define remediation**

Have a policy in place to define remediation to your affected customers in the event of an attack.



Campaign delivery



# Campaign delivery

## Segmentation

There are many factors that determine the success of your email marketing, but DMA research indicates that good segmentation drives 50% more response than other aspects such as creative, timing, offer, and so on.

(Source: [dma.org.uk/toolkit/national-client-email-report-2014](http://dma.org.uk/toolkit/national-client-email-report-2014))

### Key points

- **Clarify your objectives**  
There are multiple segmentation strategies available for any campaign. It is important to be clear on your objectives before selecting which data fields will be used in developing your strategy.
- **Match segmentation strategy to goals**  
Make sure that you segment your customers using criteria that complement your business goals, campaign goals or customer lifecycle – such as time since they last responded to a marketing message, or type of products bought – rather than automatically dividing by the easiest criteria, such as gender or age.
- **Focus on targeting**  
The focus of every email campaign should be on getting the right message to the right customer at the right moment.  
  
Divide your customers into key segments to allow you to easily target relevant offers to each group and drive better response rates, retention and return.
- **Weigh cost versus benefit**  
While email marketing makes it relatively inexpensive to mail to very small and specific segments, it is not free.  
  
Measure each additional level of segmentation against the lift provided to ensure the returns outweigh the costs.
- **Test different data sources**  
You can develop segments using data collected directly from your customers, from behavioural data collected through your website or email program, or from a combination of the two.  
  
Run a thorough and structured testing programme to determine which will work best to meet your goals.

### Goal-setting

- **Identify key performance metrics**  
Base your segmentation strategy on your key performance metrics – such as registrations, downloads or sales.  
  
Use process metrics to help diagnose areas for improvement – such as open rates and click-through rates.
- **Order your objectives**  
Prioritise your objectives and understand the trade-offs that may have to be made between them.
- **Measure cost against performance lift**  
Take into account the costs associated with creating content variants for different segments.  
  
Compare this to the lift in your key process metric to ensure that additional segmentation is providing the necessary return.
- **Revise your objectives**  
Objective-setting is not a one-off process – revisit it frequently as your programme evolves and improves.



# Campaign delivery

## Strategy

- **Create segments organically**  
To ensure that your segmentation strategy is effective and delivers the best results, build it slowly over time.
- **Keep segments meaningful**  
Make your segments as specific as possible – but avoid the diminishing marginal returns associated with too many segments.
- **Test segmentation**  
Thoroughly test all new segmentation strategies.

## Defining segments

### Segmentation criteria

Identify the most appropriate segmentation criteria to fit your situation, audience and goals.

It might even differ from one campaign to the next – and an individual customer might be included in more than one segment, or change segments during their customer journey.

Possible criteria include:

- **Entry point**  
For example, direct mail, email, online advertising or search.
- **Customer lifecycle**  
Interact differently with new and old customers to make each feel like you are treating them personally, appropriately and with respect.
- **Browsing behaviour**  
Target specific offers relevant to the product categories or services your customer is most interested in.
- **Level of engagement**  
Different customers behave in different ways on their journey towards the same purchase. Some might buy at the first visit, whilst others take time to decide which item to buy and might need to see more testimonials or reviews to convince or reassure them.  
  
Identify your customer's level of engagement – via site browsing behaviour or engagement with your marketing and social media – to understand how best to segment and approach different groups.  
  
For example, do they regularly visit website, regularly open emails, or purchase often from you?
- **Purchase value**  
Identify your high, medium and low-value customers.
- **Subscriber profile**  
Use the profile of your customer – such as their gender, age, lifestyle, income or family size – to send only the most relevant, timely communications to them.

### Example segments

- **Starter segments**  
Two simple 'starter' segments are:
  - Welcome/thank you messages
  - Re-mailing campaigns to non-openers



# Campaign delivery

- **Follow-up segments**  
Develop follow-up segments for customers who show an interest in particular offers but drop out before completing the purchase.
- **VIP subscribers**  
Identify which customers are the most engaged and treat them as your VIPs. Give them exclusive and privileged treatment to reward their loyalty.
- **Re-engagement segments**  
Target careful re-engagement communications at customers who have stopped engaging with your marketing as positively.
- **Track address age**  
Track the age of each address in your list to understand how this interacts with engagement – and address accordingly.

## Choosing your segmentation data

- **Segment by data type**  
Segmentation can be based on explicit data collected over time from your customer – or behavioural data collected from your website and email responses.
- **Explicit versus behavioural data**  
Remember that explicit data is frequently slanted towards what your customer thinks you want to hear, whereas behavioural data tends to be more representative over time.
- **Validate explicit data**  
Use behavioural data to validate explicit data wherever possible.  
Make sure that you gather and use any behavioural data in compliance with the DPA and PECR.
- **Check data is current**  
Data has a shelf life and should be current to be included in segmentation.
- **Omit patchy data**  
Choose fields for which the percentage of null values is low.
- **Update data collection objectives**  
If you do not have the right data for your ideal segmentation strategy, develop a data collection strategy to gather this for future campaigns.



# Campaign delivery

## Personalisation and dynamic content

- **Try to personalise all communications**

Personalisation is about much more than just using your customer's name on your email – any data element stored in your database can be used to tailor your email message.

Use every opportunity to include this personalisation in the 'from name', subject line or body to add relevance to your reader and establish a connection.

- **Tailor content to segment**

Decide which segments deserve an entirely new piece of content and which only require a degree of dynamic content.

- **Tailor message to data source**

Tailor your message to where the data was collected from.

For example, you might adapt your welcome message to say "Thank you for giving us your email address on your recent store visit".

- **Use your database fully**

Select dynamic content for your recipients automatically using any data you hold – such as gender, address or other preferences.

## Triggered emails

Certain types of email can be set up to automatically send to your customer, triggered by specific actions that they take – such as visiting a particular page of your site, submitting a form or sharing a piece of your social media content.

### Goals

- **Base on business rules**

Although many emails can be automated, be selective.

Identify the key emails that will be made *more successful* by automation, in line with your business or campaign objectives.

For example, many charities send an automated follow-up email to a supporter immediately after they sign a petition or make a donation. This email works on several levels – giving the supporter the reward of a "Thank you", using positive content (such as a nice image of the beneficiary of the petition) to confirm their decision to sign and asking the supporter to share the petition with their friends, whilst it is still front-of-mind. None of these goals would be as successfully achieved by a follow-up email even so much as a few hours later, when the moment would have been missed.

- **Increase conversion**

Triggered emails give you an excellent opportunity to improve your conversion rates and to improve your customer engagement.

As in the example above, automated emails can seize the moment much more effectively than manual ones – encouraging your customer to act now to complete an aborted purchase, purchase a complementary service and to buy again in future.

- **Increase relevance**

Make sure your triggered emails are truly data driven communications, able to be knowingly relevant, timely, wanted and welcome.



# Campaign delivery

Because your email should be triggered by a specific action, you know exactly what your customer's immediate point of interest is and can set your system to automatically email them the most relevant offer or information.

For example, if you track the type of petitions an individual supporter responds to – such as about animal rights, the environment or local political campaigns – then you can target similar petitions to them with increased confidence or a positive response.

- **Automate to gain efficiency**

Triggered emails will save you considerable resource, once set up.

For example, sending “Thank you” emails to potentially hundreds of thousands of supporters who sign an online petition is clearly unviable to do manually – but is extremely easy to do automatically.

## Strategy

- **Target precisely**

Gather customer data that will allow you to automatically target your content or objective to suit them.

For example, ask your customer for their postcode so that you can automatically email them whenever a local offer or issue is raised.

- **Fit message to customer stage**

Shape your triggered email objectives and content to suit your customer's stage in the customer lifecycle.

This will help keep the objective of your email relevant to your customer and aligned to your business needs.

- **Fit timing to customer stage**

Time your campaign stages to follow the typical customer lifecycle for your product or service.

- **Automate recurring emails**

Consider automating any regular occurring email event – such as a welcome message when your customer signs up, or a weekly blog round-up.

- **Include service messages**

Identify which service messages you can automate – for example, acknowledgements of receipt for emails to your customer service team.

## Triggered emails and data

- **Only use clean data**

Data recency and accuracy is essential for the accurate targeting of triggered emails.

- **Inform customers**

If you are collecting data for use in automated emails, it is important that your customer knows this – so inform and set their expectations.

- **Check opt-in**

Remember that you still need consent to send any email marketing message.

- **Centralise data hygiene**

It is important to have centralised data control, even if the systems sending the triggered emails are different to your campaign ones.



# Campaign delivery

## Triggered emails and dynamic content and personalisation

- **Always personalise**  
Triggered emails work best with personalisation and relevant content.
- **Match content to customer**  
Carefully consider your content against your data to ensure that each email meets the needs and expectations of your customer.
- **Use behavioural data**  
Pull personalisation from data, such as:
  - Previous booking, purchase or download history
  - The browsing behaviour of your customer, products viewed, product left in basket and so on
  - Items shown to be similar to browsing history or purchase behaviour (for example, 'people who viewed that also viewed this')
- **Test all options**  
Using content based on all of the above categories, consider a series of triggered emails that will provide new relevance and variety for your customer.  
  
Start with the immediate data point (for example, 'just abandoned a basket') and move on to related products or services.
- **Avoid repetition**  
If your automated campaign might be sent to your customer a number of times – such as an email triggered by browsing a particular page of your website – consider how your content might change each time they receive it to stop it becoming repetitive, boring or ineffective.
- **Stay on-brand**  
Keep the content of your emails true to your general brand guidelines. If you have a number of brand looks throughout the year, reflect this in your automated emails.
- **Get it right upfront**  
An automated email programme can run for months (or years) without any major changes, so it is worthwhile investing time initially to get the campaign right.

## Typical triggered customer lifecycle emails

### Welcome email programme

Welcome programmes are a good way to introduce your new customer to your key brand message, build value and lead towards the first conversion.

Your welcome programme might comprise:

- Step 1: Send a 'thank you' email, acknowledging your customer's inclusion into your email programme and including products or services they have recently viewed.
- Step 2: Introduce more about your brand, including goods or services related to the goods or services your customer has recently viewed.
- Step 3: Send an exclusive customer offer, based on the content of your previous emails and any new browsing behaviour by your customer.



# Campaign delivery

## Abandon basket email

- **Use abandon basket emails for online retailing**

For many online transactional businesses, the abandoned basket email is the most effective triggered email that can be sent.

Your customer is already engaged with your brand and has got very close to making a purchase.

- **One-off emails v series of emails**

Many abandon basket emails are single one-off emails, but this does not need to be the case and follow-up emails, as above, can be added to your programme.

- **Pitch offers carefully**

You do not always need to offer discounts to encourage your customer to return to your website – very often the receipt of your email is enough to encourage their return.

Here are some examples of abandon basket email types:

- **Customer service**

'Thank you for visiting our website and starting the application process. Please let us know if we can help you complete this.'

- **Return to basket**

'We noticed you have left your basket – click here to return to your basket and complete your purchase.'

Include content based on their basket content.

## Nursery email programme

- **Define repeat business objectives**

Once your customer has made their first purchase, the objective of your communication changes and your goal becomes a second transaction.

The second transaction could be similar goods or services or an up-sell, cross-sell or both.

- **Plan nursery programme**

Nursery programmes are designed to consolidate your customer's first transaction, introduce further value and improve brand equity.

Your nursery programme might comprise:

Step 1: Send a 'thank you for your order' email, acknowledging your customer's order and introducing further up-selling or cross-selling opportunities.

Step 2: Offer your customer a discount off their second transaction, using content based on their recent browsing behaviour. Include some brand value messaging as well as surveys and competitions to help improve engagement and increase brand equity.

Step 3: Send an exclusive offer, based on your customer's previous purchasing or recent browsing activity.

## Browsing email programme

Browsing programmes are designed to react to the behaviour of your customer on your website.

- **Define triggers**

Your browsing programme can be triggered by various business rules, such as your customer viewing three or more pages in a session.



# Campaign delivery

- **Define engagement goals**

Your objective is to engage with your customer whilst they are actively searching and are exhibiting pre-purchase behaviour.

Your browser programme might comprise one or more of these options:

Option 1: Send a customer service email, using content based on their recent browsing activity – such as their most browsed or last browsed content – to inform a message such as ‘We hope you found what you needed on our website. Please come back and see us soon.’

Option 2: Send an offer email, such as ‘We think you might like these special offers’. Make sure your content includes offers on goods or services related to your customer’s recent browsing and/or recent purchase activity.

Option 3: Make a time-sensitive special offer, based on goods or services similar to your customer’s previously browsed content.

## Testing and timing triggered emails

- **Benchmark conversion times**

Timing can make a considerable difference to the performance of your automated email and it is important to understand normal timescales for conversion.

- **Use response curve analysis**

Do some response curve analysis on the conversion window between registration/purchase, visit/purchase, first purchase/second purchase, to understand your customer’s conversion time range.

- **Set timings**

To get started, estimate initial timings on your conversion time range – for example, from one to 14 days.

- **Run split testing**

Split test timings between your emails and events to find your best campaign conversion timing.

- **Test and optimise**

Develop an on-going testing plan to test your timings and creative for the best responses.

Triggered email responds very well to testing and optimisation, so your time spent doing this will pay dividends.

## Deployment and testing

Key concepts

- **Email frequency**

As a marketer, you will try to make sure your brand is everywhere.

The real difficulty is to determine whether you send campaigns too frequently or not.

Email frequency and the marketing pressure that arises from this are two critical factors that you should deal with carefully.

- **Tuning your campaign**

You must know your customer’s habits and behaviour to achieve your ROI objectives.

Managing response properly through testing is the only way to tune your email campaign, achieve a high response rate and maintain your customer’s engagement.



# Campaign delivery

- **Consider engaging an email specialist**

Engaging an email specialist will supplement your email marketing with the dedicated knowledge, experience, skills and resource to help you achieve these standards.

## Frequency of communication and marketing pressure

- **State your email frequency**

Clearly inform your customer about your intended frequency of communication at their point of sign-up.

- **Avoid 'hammering'**

Your customer will likely not accept an amount of messages far beyond what they expect.

Avoid 'hammering' and stick to the maximum email frequency you promised your customer at sign-up.

- **Fit frequency to purpose**

Your emails could remain valuable to your customer with a daily message frequency – but your campaign could be considered overbearing if it exceeds one email per month.

Set your communication frequency to be relevant to the service or message that you are delivering.

- **Consider marketing pressure**

Be sensitive about creating excessive 'marketing pressure', which is determined by campaign frequency and the 'aggressiveness' of your communication.

Aggressive offers may start to create problems even at a low frequency level.

- **Benchmark your industry norms**

Sign up to the mailing lists of the best brands in your sector and use this competitive research to inform your own email frequency.

## Testing and managing response

- **Start slow**

When testing to reach ideal marketing pressure, it is wise to start at a low level and increase email frequency by small steps.

- **Monitor performance**

Keep raising frequency as long as you witness performance and ROI improvements.

- **Identify peak performance**

When response rates go down and complaints/unsubscribes increase, reduce back to the previous best setting.

- **Use segmentation**

You cannot apply the same marketing pressure to your whole list – so segment your list and adjust your email frequency accordingly.

There will be different profiles and behaviours for different customer segments – for example, a brand fan who opens and clicks all your messages can be solicited more than a passive reader or an inactive recipient.

- **Take other marketing pressures into account**

Email response is not the only factor to consider – assess your email marketing as part of your brand's overall marketing mix.

Sales can be influenced by marketing pressures separate to email campaign performances.



# Campaign delivery

## Split testing

Split testing is the process of sending different messages or variations of messages to randomly selected customers within a test segment to learn which messages or features deliver you the best response.

### Strategy

- **Set clear objectives**  
Have a clearly defined campaign objective to test against for each variable.
- **Align metrics to goals**  
The metric you choose depends on whether you are testing your email style, substance or process – but always identify a metric that will measure each variable against your campaign objective.
  - **Testing style variables**  
For testing design variables, you might use straightforward response metrics – such as open rate or unsubscribe rate – rather than bottom-line campaign metrics such as conversion or average sale value, which depend on other variables like messaging or website effectiveness.
  - **Testing substance variables**  
For testing substance variables, such as the impact of your message or the overall branding of your email, open rate is unlikely to be your real objective – conversion rate is better, such as the number of whitepaper downloads or demo requests, or click-through rate.
- **Test carefully considered variations**  
Devise variations to test based on a reasoned hypothesis – not randomly or blindly – with the aim to identify a rationalised improvement.
- **Test imaginatively**  
Test totally different concepts as well as iterations of current concepts.
- **Test one variable at a time**  
Although there will be many variables that you want to test, only test one at a time to isolate its effect from any other factors.  
  
Concentrate your testing on improving just one or two key variables that you think will have the greatest positive impact.
- **Test thoroughly**  
Make sure that your test size is great enough to give unambiguous results, otherwise the test will be a waste of time and you risk making important decisions based on flimsy evidence.
- **Periodically re-test**  
Validate your test hypothesis by running further tests of the same hypothesis over time.
- **Think long-term**  
Think of your split testing as being as much about gaining knowledge to apply to your future campaigns as it is about getting an instant uplift on your current campaign.
- **Look to identify rules**  
Rather than looking for a one-off uplift, focus on testing that will reveal patterns and give you rules to guide your future campaigns.
- **Monitor side-effects**  
Evaluate your test based on a single metric but review other metrics for unexpected side-effects.  
  
For example, did a particular treatment result in a high unsubscribe rate? And are the unsubscribers good customers that you want to keep, or poor prospects that you are happy to lose?



# Campaign delivery

- **Benchmark and compare**

Learn from other organisations' tests but do not assume the exact same result will be true for your campaigns.

## Things to watch out for

- **Do not judge too soon**

Whilst most clicks happen within three days, purchases may happen several days later – so when evaluating success, particularly on conversion, make sure you wait long enough for a true result.

- **Use a meaningful sample size**

Do not test with sample sizes that are too small – if possible, use test cells of at least 2,000, ideally 5,000.

- **Picking the wrong metric**

Be wary when using evaluation metrics with low rates, such as conversion rate, as such metrics require much larger test cells to provide meaningful results.

- **Evaluate external influences**

External factors can impact on your test results – including bias in your data, errors in tracking and instrumentation, other marketing activity or even topical events.

- **Keep testing fresh iterations**

Although initially successful, your customer may become immune to a particular feature of your emails – so continue to re-evaluate.

For example, you might find that using your customer's name in the subject line provides an initial lift but that doing this on every email starts to lose its effectiveness.

## Split testing process

1. **Plan testing**

Plan testing into your campaigns from the start and make it a regular activity – do not just tack it onto the end as an afterthought just before sending.

2. **Set goal**

Define a single metric by which the winning version will be decided.

3. **Brainstorm hypotheses**

Brainstorm several test hypotheses as to how you think you can change your customer's behaviour to increase response.

4. **Select most promising hypothesis**

Pick the hypothesis that you expect to have the highest impact.

5. **Build test**

Create the test for each hypothesis.

6. **Run test**

Run the test and measure the results.

7. **Evaluate**

Check the uplift in results and check results are statistically significant.

8. **Compare**

Review your original hypotheses against what actually happened.

9. **Respond**

What have you learnt? What further questions does it raise?

10. **Conclude**

Record the test and results so you can easily share and refer back to them.



# Campaign delivery

## Elements commonly tested

- Email 'from name'
- Subject lines
- Calls to action
- Email frequency
- Different offers
- Different ways of positioning the offer
- Creative design and layout
- Use of personalisation
- Types of images
- Segmentation
- Cross channel integration

## Deliverability

It is obviously important to improve email delivery and minimise the proportion of your emails that end up in spam filters, junk mail folders or not delivered at all.

Should you choose to use a specialist email service provider, they should be able to help you achieve these standards.

## Strategy

- **Do what the email domains want**

B2C and web-based email domains want to deliver emails that their customers open and click – which is also the goal of good marketing – so make these goals your goals too.

The more effort you put into improving the quality of your emails and list data, the better your sender reputation and delivery rates will be.

- **Aim for high inbox placement**

Consistently high inbox placement is important for the success of your email marketing campaigns.

- **Aim for consistent inbox rates**

To enjoy consistent inbox rates:

- Reduce inactive and invalid data
- Collect and use appropriate preference and behavioural data to personalise and target campaigns
- Send emails that encourage opens and click-throughs

- **Focus on content**

B2B and corporate email domains can use sender reputation sources but also put a lot of emphasis on email content and local policy.

Deliver filter-friendly email content and ask recipients to mark you as a safe sender by adding your address to their contacts.



# Campaign delivery

## Sender reputation

- **Maintain a good sender reputation**  
Email domains should be able to trust the domains and IP addresses you use.  
Focus on improving your sender reputation by improving your bounce handling, feedback loops, domain security and email authentication.
- **Build towards long-term reputation**  
Consistently high inbox rates and low bounce rates, based on a good sender reputation, are important to the success of your individual campaigns and the long-term effectiveness of your email marketing.
- **Measure constantly**  
The following measurements would normally be provided by an ESP or one of the many delivery assurance and email filter providers:
  - Average inbox placement rate for key domains
  - Blacklist entries and spam trap hits
  - IP and domain reputation
- **Review regularly**  
A monthly or quarterly review of your delivery metrics, as well as a monthly or quarterly review of the core elements of your sender reputation, can help provide quality assurance and give you early warning of potential problems.
- **Improve sender reputation**  
Focus on increasing the key factors that determine your sender reputation:
  - **Reduce inactive data**  
Carry out thorough pre-campaign data hygiene processes and tests.
  - **Reduce hard bounces**  
Use a system that automatically suppresses any address that bounces.
  - **Reduce complaints**  
Be clear at sign-up about the nature and frequency of your emails; stick to this agreement with your customer; be sensitive in your messaging and content; and honour unsubscribe requests promptly.
  - **Increase open rates**  
Test to find subject lines that work and build up a reputation with your customer for only emailing with a valid purpose and a clear benefit.
  - **Send emails that promote click-through**  
Have your emails designed and copywritten professionally to make your presentation, message and calls-to-action compelling, appealing and optimised.

## Mailing list deliverability

- **Use your own data**  
Consumers who directly signed up to your marketing communications, rather than those on rented or bought lists, will naturally be more likely to open and engage with your messages and less likely to mark them as spam.  
This positive response will help improve your deliverability and sender reputation – to the benefit of your future campaigns as well as the immediate performance of your mailing lists.
- **Create separate campaign mailing lists**  
Create separate mailing lists for different types of campaigns.



# Campaign delivery

Not only can this improve customer retention by allowing customers to opt in and out of different types of campaigns, but can help prevent a poorly performing type of campaign from undermining other campaigns.

- **Use segmentation**  
Segment your lists intelligently to allow you to tailor relevant content to each customer segment – again, increasing your results and reputation.
- **Refresh subscriber preferences**  
Periodically prompt your customer to review and refresh their preferences, including for content and email frequency.  
This can promote continued campaign relevancy, as well as providing further customer interaction with emails.
- **Manage customer expectations**  
Make sure your customer understands from whom the emails will be sent, what the emails will look like, what content to expect and the frequency of mailings.

## Content deliverability

The key delivery issues to look out for around content are:

- **Recognisable 'from name'**  
Use 'from names' and sending addresses that your customer will recognise and that are appropriate to your specific mailing list.
- **Identify sender**  
Ensure your emails clearly identify your organisation as the sender and provide your contact details.
- **Test against spam filters**  
Test your subject lines, email style and content using a spam filter testing tool.
- **Include obvious unsubscribe**  
Make sure the unsubscribe option is clear and simple.  
If your customer does not want to receive your emails, it is better that they unsubscribe than mark them as spam.
- **Test everything**  
Subtle differences to images, style, content or subject line can have a significant impact on email filters or customer responses.

## Spam traps

- **Understand spam traps**  
Spam traps are email addresses which should not receive email and are monitored by email domains and spam filters.  
Spam traps should not appear in legitimate mailing lists, and thus provide a good way of identifying spammers.
- **Check lists for spam traps**  
Spam traps can appear in legitimate mailing lists through old data or from typos and spelling mistakes in newly collected data.  
Just one or two spam traps in a mailing list can result in blocked delivery or blacklisting.
- **Avoid collecting spam traps**  
To reduce likelihood of spam traps in mailing lists:



# Campaign delivery

- Review bounce handling rules and remove invalid addresses from lists
- Identify and remove long-term inactive data from lists
- Ensure data capture processes do not give your customer a reason to provide a false email address
- Validate email addresses at the point of data capture

## Authentication and domain configuration

- **Ensure valid configuration**  
Correctly configure and secure your email sending domain and authenticate emails by publishing valid Reverse DNS, SPF, Sender ID, DKIM and DMARC records.
- **Obtain certification**  
Consider using an email certification provider – such as Return Path Certification EQ or Surety Mail.

## Send rates

- **Adapt send rates to email domains**  
Email domains have different sending tolerances – in general, large web-based email domains can handle higher connection and send rates than personal, corporate and academic domains.
- **Research different sending limits**  
Email domains often provide information in email responses to help you understand their sending limits.  
Use this information to configure email connections and sending rates accordingly.  
Trying to send emails too quickly can result in slower permitted delivery speeds, temporary blocks and soft bounces.
- **Monitor domain responses**  
If reputation issues are affecting delivery, email domains can often provide information in email responses to help you understand these issues.  
Periodically review email queues and act on information provided accordingly.



# Campaign delivery

## Delivery metrics

- **Measure how emails are handled by ISPs**

Understanding how your email campaigns are handled by ISPs and recipient domains, as well as having visibility of list decay, should form an important element of your email campaign measurement.

Delivery and list attrition metrics commonly used include:

- Inbox placement rates
- Bounces, bounce rates and summary of bounce reasons
- Unsubscribe and spam complaint rates
- Spam trap hits

## Delivery problems and remedial action

- **Understand causes**

The majority of delivery problems result from poor sender reputation caused by:

- **Using invalid data**  
For example, spam traps, hard bounces and typos.
- **Long-term inactive data**  
For example, subscribers who have not opened anything for 12 months or more.
- **Poor recipient response rates**  
For example, too many subscribers consistently ignoring or deleting your emails.

- **List attrition**

Expect your lists to naturally deteriorate in quality over time as your customers change email addresses or start to mark marketing emails as spam to reduce the pressure on their inbox.

See the *Data hygiene* section for further guidance on keeping your data up to date, effective and high-value.

- **Rebuild sender reputation**

If delivery problems exist you can rebuild your sender reputation by focusing campaigns to your new customers and recently-active openers whilst you investigate and tackle the underlying reputation and delivery issues.

## Bounce handling

Bounces are emails that could not be delivered to your customer.

### Bounce types

There are two types of bounce, depending on the reason for non-delivery:

- **Hard bounce**

Hard bounces are when your email could not be delivered for permanent reasons – typically because the address is not valid.

Hard bounce reasons include:

- The address is not real – because it does not exist or has a typo
- The domain does not exist – perhaps because it has not been renewed or the suffix (.com, .co.uk, and so on) is wrong



# Campaign delivery

- Your customer's server has refused to accept email for another reason – such as the address having become dormant
- **Soft bounce**  
Soft bounces are when your email could not be delivered because of temporary issues.  
Soft bounce reasons include:
  - Your email is too large
  - Your email has been blocked by your customer's spam filter or firewall
  - Your customer's inbox is full

## Strategy

- **Analyse bounce codes and messages**  
Many email domains put supporting information and URLs in bounce messages to help senders understand why emails and email campaigns bounce.
- **Understand bounce reasons**  
With hard bounce rules which are not tried and tested, send to email addresses two or three times before suppressing.  
Review bounce codes and messages to understand the difference between rejections resulting from invalid recipients and those resulting from content, policy or reputation reasons.
- **Review bounced email addresses**  
If the same email addresses repeatedly bounce, review your bounce handling rules.  
If any domain has a very high bounce rate, check to see if you are blocked. Identify the most common reason for bounces and prioritise action accordingly.
- **React to hard bounces**  
With accurate and well-monitored hard bounce rules you can suppress email addresses after the first hard bounce.
- **React to soft bounces**  
With soft bounces, send to email address three to five times before suppressing.  
Review bounce codes and messages to understand the difference between invalid domains, blocks and temporary issues.
- **Use feedback loops**  
Feedback loops allow email domains to inform senders about customers who mark their emails as spam.  
Identify the primary domains in your lists, sign up to feedback loops for these domains and automatically unsubscribe customers who complain in this way.  
Failing to remove feedback loop complaints from your mailing list is a sure-fire way to get your emails blocked.  
If feedback loop complaint rates exceed 0.4% you may notice reduced inbox placement.
- **Provide a simple unsubscribe process**  
Make it easy for your customer to unsubscribe to minimise spam complaints and help protect your sender reputation.



# Campaign response



# Campaign response

## Email performance metrics and measurement

### Strategy

- **Measure all email performance**  
Measurement and metrics are the means to understanding activity, success, trends and progress.
- **Define campaign metrics**  
Performance metrics based on email responses and delivery are vital to measuring the success of your campaign.
- **Track strategic metrics**  
Moving away from individual campaigns, strategic metrics describe trends and progress and give you insight and guidance.
- **Monitor deliverability and reputation metrics**  
Track the effectiveness of your email delivery and monitor factors influencing this at both a campaign and strategic level.

### Revenue and conversions

- **Match email metrics to marketing objectives**  
Your email conversion and financial metrics should closely reflect your marketing objectives and customer journey.
- **Revenue and conversion metrics commonly used include:**
  - Campaign revenue
  - Revenue per 1000 recipients
  - Average order value
  - Counts of non-financial conversions, such as downloads or registrations

### Recipient activity

- **Measure customer activity**  
Your email subscribers can provide you with rich measurements to understand the effectiveness of individual campaigns and should highlight specific content, links or images of high value.

Recipient analyses commonly used include:

- Opens and open rates
- Link clicks, click rates and click heat-maps
- Social shares and email forwards
- Device (desktop, mobile and tablet) and browser analysis of opens and clicks
- Geographic (country and city) analysis of opens and clicks



# Campaign response

## Multi-phase campaign metrics

- **Multi-phase campaigns**

Email campaigns can span more than one send over multiple days or weeks – such as a month-long welcome campaign, a holiday campaign comprising multiple sends or the repeat targeting of individual customers.

Multi-phase email campaign measurements commonly used include:

- Campaign recipients
- Emails per recipient
- Campaign reach, showing the overall rate of recipients who opened one or more campaign emails

## Customer database and strategic metrics

- **Use rolled-up metrics**

Use rolled-up revenue, campaign and delivery metrics, trends and a monthly or quarterly review of results to show the combined impact and effectiveness of your marketing, acquisition and retention strategy.

- **Other metrics**

In addition to rolled-up versions of the above metrics, the following database metrics are commonly used:

- Number of subscribed customers
- Monthly count and percentage of new email addresses
- Monthly count and percentage of hard bounces and email addresses unsubscribed
- Mailing list engagement – showing the overall rate of customers who have opened, clicked or converted in that month or quarter

## Reporting and optimisation

- **Measure inbox placement rates**

Use a tool to measure inbox placement rates.

If any domains have low inbox rates, check to see if your emails are being blocked and check for bounce messages.

Visit the postmaster pages for those domains to identify potential problems and prioritise action accordingly.

- **Analyse customer activity**

Look at customer activity within your mailing lists and report on the active and inactive data.

Long-term inactive data can cause delivery problems, so you should put rules in place to define, identify, test and remove long-term inactive data from your lists after every sending.

Most email management services will allow you to do this very easily and automatically.

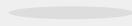
- **Strategise your sender reputation**

Understand how your actions affect your sender reputation and have a reputation-building plan in case any reputation issues arise.

- **Monitor for blacklisting**

Ensure that you know quickly if you get added to any blacklists and investigate the causes to identify wider or potentially recurrent issues.

***a-z***



Glossary

# a-z Glossary

## **A/B testing**

A simple testing method whereby two versions of a campaign are sent to a randomly split audience. Variation in results between the two segments is measured and analysed.

## **Above the fold**

The part of an email which is visible on a preview pane (or immediately after opening) before any scrolling is required. See also below the fold.

## **Alias**

Created on mail servers, aliases are used as a means of forwarding messages to a single (or range of) email addresses. They may be used in cases where the recipient list would otherwise be unwieldy, or to provide anonymity. An example might be info@example.com forwarding messages to person-a@example.com and person-b@example.com.

## **Alt tags (Alternative text)**

Specified in HTML and associated with images. It's purpose is to convey the main content of the image in instances where images are not visible, e.g. where automatic image downloads are disabled.

## **Application Programming Interface (API)**

An interface which allows one piece of software to interact with other software. In email marketing APIs are often used to integrate marketing and operational systems, e.g. for the deployment of a welcome email

## **Assets**

HTML, copy, images, links etc which are required to create an email marketing campaign.

## **Authentication**

Process of identifying the sender of emails and verifying their legitimacy. A means of combatting spam and spoofing.

## **Autoresponder**

Term used in two ways; either to describe a mechanism of responding automatically to inbound emails (for example replies to an outbound email marketing campaign). In this meaning, autoresponses may contain details of customer services or links to FAQs. Alternatively, the phrase can be used to refer to 'triggered' messages such as a welcome message sent to all new subscribers as soon as possible after a user action, e.g. signing up, unsubscribing.

## **Bayesian filter**

Method of evaluating header and content of incoming email messages to determine the probability that it is spam. Bayesian filters assign point values to items that appear frequently in spam. A message that accumulates too many points is likely to be categorised as spam or delivered to a junk-mail folder.

## **Behavioural data**

Data relating to previous interactions with the brand. For example, email opens, clicks, purchases, website browsing and purchase behaviour.

## **Below the fold**

The area of an email which typically requires scrolling in order to view. See also above the fold

## **Blacklist**

A list developed by those processing email, or relevant third-parties. The list includes domains or IP addresses suspected of sending spam. Many companies use blacklists to filter inbound email.

## **Block**

A refusal by an ISP or mail server to deliver an email message to the recipient. Many ISPs block email from IP addresses or domains that have been reported to send spam, have content that violates email policy or spam filters or that are found on blacklists.

## **Bounce**

A message that cannot be delivered. Emails can bounce for a wide range of reasons, for example, the email address may be incorrect or has been closed, the recipient's mailbox is full, the mail server is down, or the system detects spam or offensive content. See hard bounce and soft bounce.

# a-z Glossary

## **Bounce handling**

The process of dealing with email that has bounced, for example marking an address as undeliverable. Bounce handling is important for list maintenance and deliverability.

## **Bounce rate**

Number of hard or soft bounces divided by the number of emails submitted by the sender.

## **Broadcast volume**

Number of email addresses being handled in the send-out process

## **Brokering**

Usually refers to data brokers. Companies involved in collecting personal information from a single or range of sources and offering that information for sale or rental to other organisations.

## **Bulk folder (Junk folder)**

A folder many email clients use to isolate messages that appear to be from spammers or are assessed to be possible spam.

## **Call to action (CTA)**

In an email message, the link or body copy that tells the recipient what action to take. Usually the main button or clickable item.

## **CAN-SPAM**

Popular name for the U.S. law regulating commercial email (Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003)

## **Churn rate**

How many subscribers become non-mailable (e.g. bounced, unsubscribed) over a certain length of time, usually expressed as a percentage of the list.

## **Click to open rate (CTOR)**

Unique clicks divided by unique opens. It describes the proportion of people who have opened an email and subsequently clicked on at least one of the available links. It is a indicator of the quality of campaign content.

## **Clicks**

The number of clicks on hyperlinks within an email. Typically counting multiple clicks by the same person. See also clickthrough rate.

## **Clickthrough rate (CTR)**

Most commonly defined as the total number of clicks divided by the number of emails delivered. Unique click rate, is most commonly defined as the number of unique individuals clicking at least one link in an email divided by the number of emails delivered.

## **Content management system (CMS)**

Software and user interface which is used to create, manage and publish website and email content.

## **Co-registration**

Opportunity to sign up for more than one newsletter or communication type at a point of registration, for example via a website or lead generation programme.

## **Complaint rate**

Number of unique complaints relating to an email campaign compared with the total number of delivered messages of that campaign, usually expressed as a percentage.

## **Consent**

Consent is an individual's way of giving permission for the use or disclosure of their personal data, or in order to be sent electronic marketing

# a-z Glossary

## **Control**

The original version or null hypothesis against which changes are made in a test environment

## **Conversion**

Process of driving a transaction (e.g. sale, download) from a database record. See also conversion rate.

## **Conversion rate**

Number of recipients who have carried out a transaction (e.g. purchase, download or registration) in relation to the broadcasted volume of emails.

## **Cost per action (or acquisition) (CPA)**

A method of paying for advertising or assessing the cost of leads driven by a campaign. Differs from CPM or CPC as a price is paid only for completed actions, for example a registration.

## **Cost per click (CPC)**

A method of paying for advertising or assessing the cost of traffic driven by a campaign. Differs from CPA a fixed price is paid for each click regardless of a leads activity post-click.

## **Cost per thousand (CPM)**

Used, for example, by email service providers to price email delivery costs.

## **Cost per order (CPO)**

Describes the costs of email marketing per completed transaction (e.g. order of a product)

## **Customer relationship management (CRM)**

Customer Relationship Management technology and systems, often encapsulates email marketing activities.

## **Cascading style sheets (CSS)**

Style sheet language which describes the formatting of an HTML (or other markup language) document. See also inline styles.

## **Customer lifetime value (LTV)**

The value of a customer to a supplier from the first moment they purchase to the time they no longer use the company or service.

## **Data controller**

An entity who (either alone or jointly or in common with others) determines the purposes for which and the manner in which any personal data are, or are to be, processed. Individuals can be data controllers, so can organisations, companies or corporations.

## **Deduplication (Dedupe)**

The process of removing duplicate entries from mailing lists, for example using an exact match of email address.

## **Deliverability**

Deliverability is the measurement of success of email campaigns reaching the inbox. Successful deliverability depends on a combination of good sender reputation, email best practices, authentication, relevant emails and good data.

## **Delivered (email)**

The number of emails successfully sent to email recipients. Commonly defined as the number of emails sent minus the number of bounces.

## **Domain**

The portion of the email address to the right of the @ sign. For example gmail.com.

## **Domain Name System (DNS)**

How computer networks locate Internet domain names and translate them into IP addresses.

# a-z Glossary

## **Double opt-in**

A process that requires new list joiners to take an action (such as clicking on an emailed link) in order to confirm that they do want to be on the list. A common means of maintaining list hygiene.

## **Dynamic content**

Email content that changes from one recipient to the next according to a set of predetermined rules or variables, commonly according to preferences the user defines when opting in to messages from a sender. Dynamic content can also reflect past purchases, interests or where the recipient lives. See also Live Content.

## **Email appending**

A service that matches email addresses to an existing database of names and postal addresses.

## **Email client**

The software recipients use to read email, such as Outlook Express or Apple Mail.

## **Email service provider (ESP)**

Another name for an email broadcast service provider, a company that sends provides technology and/or services sending high-volume email on behalf of clients.

## **Explicit consent**

Consent provided through a positive action, which is unambiguous, freely-given, specific and informed. This is normally when someone enters an email address on a dedicated sign-up form, or ticks a box which confirms or indicates their consent. To be explicit it must be clear what the individual is consenting to.

## **Explicit data**

Data provided explicitly, for example an individual completing their date of birth at a point of registration. See also Implicit data.

## **False positive**

An email which was incorrectly classified as spam or blocked by spam filters

## **Feedback loop**

Mechanism by which ISPs provide feedback to marketers on recipients wishing not to receive further communications. May refer to spam complaints and unsubscribe requests made to the ISP.

## **Footer**

An area at the end of an email message or newsletter containing information such as contact details, the company's postal address or the email address the recipient used to subscribe to mailings.

## **Forward to a Friend (F2F)**

A common means of acquiring new registrants, providing a facility (often a web form) to send a version of an email to a friend.

## **Frequency cap**

A limit that can be set to define how many emails a contact can received over a given time period.

## **Graphical user interface (GUI)**

A user interface that allows users to interact with electronic devices using icons and visual tools rather than text commands and command-line interfaces.

## **Hard bounce**

Message sent to an invalid, closed or nonexistent email account which is permanently undeliverable and returned to sender

## **Header**

Routing and program data at the start of an email message, including the sender's name and email address, originating email server IP address, recipient IP address and any transfers in the process.

# a-z Glossary

## **Hyper Text Mark-Up Language (HTML)**

Email message language which contains formatting other than plain text. This may be as simple as programming that sets the text in a specific font. It also includes any graphic images, logos and colors. See also plain text.

## **Hyperlink**

A hyperlink is a reference to an external source (website, landing page, PDF etc) that the subscriber can directly reach when it is clicked on. May be associated with text, images or other HTML elements.

## **Hypothesis**

Proposed explanation for a set of circumstances, based usually on limited data and used as a starting point for testing.

## **Implicit data**

Data which is computed or extrapolated from explicit data, an example might be the nearest store to a customer's address. See also explicit data

## **Implied consent**

Consent implied by the situation, circumstances or expectations, rather than an explicit action. Implied consent should still be unambiguous, freely-given, specific and informed.

## **Inbox**

The collection of received email folders and tabs, not including the bulk, junk or spam folders

## **Inline styles**

Inline styles used to alter the look of the HTML tag they are contained within. See also CSS

## **Internet protocol address (IP)**

A unique number assigned to each device connected to the Internet. An IP address can be dynamic, meaning it changes each time an email message or campaign goes out, or it can be static, meaning it does not change.

## **Internet service provider (ISP)**

An organisation that provides means for connecting to or interacting with internet services, for example access or mailbox providers.

## **Landing page**

A web page designed to receive traffic from email clicks and make other content easily consumable and navigable.

## **Link tracking**

Used to measure performance of emails. Includes overall click rates and may also include further web analytics to track customer movements around websites.

## **List**

A compilation of subscribers that receive your communications.

## **List fatigue**

A description of a list having received too many mailings in too short a timeframe, resulting in diminishing returns.

## **List hygiene**

The act of maintaining a list so that recipients of broadcasts are eligible and willing to be mailed. Includes handling of bounces, unsubscribes and data entry point practices (e.g. double opt-in)

## **List rental**

The process in which a publisher or advertiser pays a list owner to send its messages to that list. Usually involves the list owner sending the message on the advertiser's behalf.

## **Live Content**

A means of manipulating the content of images and their underlying links in 'real time' at the point of email open. The content might for example reflect the recipients location, the prevailing weather, remaining time until the end of a sale and so on. See also Dynamic Content.

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## **Mailto**

HTML code to make an email address email clickable (e.g. <mailto:example@example.com>). Clicking the link opens the user's email client and inserts the email address in the 'to' field.

## **Mirror link**

Mirror links are commonly found at the top of HTML emails, inviting subscribers to click through on the link if images are being blocked or the message is not rendering properly at their ISP. The link clicks through to a version of the email hosted on a webpage, enabling the subscriber to view the email with images and links intact.

## **Mobile first design**

A reaction to the proliferation of mobile devices centred on designing for smaller mobile screen sizes first, rather than for the desktop with mobile as an afterthought.

## **Multi-channel marketing**

The use of a range of marketing channels (e.g. email, social media, SMS, advertising etc) to reach a customer

## **Multi-part**

Message format which includes both an HTML and a text version in the same message. Most email clients receiving messages in this format will automatically display the version the user's system is set to show. Systems that can't show HTML should show the text version instead.

## **Multivariate test**

A test with changes to several elements, with multiple combinations tested simultaneously.

## **Nested tables**

Tables within tables as a way of laying out components

## **Notification email**

An email to confirm an action that the user has instigated - e.g. a confirmation of a sign-up.

## **Null value**

Blank database field

## **Open rate**

The number of HTML message recipients who opened your email, usually as a percentage of the total number of emails delivered.

## **Opt-in**

A specific, pro-active, request by an individual email recipient to receive further emails.

## **Opt-in consent**

With opt-in consent nobody is assumed to have consented unless they specifically opt-in, see also opt-out consent

## **Opt-out**

A specific request to stop emails from the sender

## **Opt-out consent**

With opt-out consent everyone is assumed to have consented unless they specifically opt-out, see also opt-in consent

## **Performance metrics**

Criteria upon which the success of a campaign are measured. Often includes opens, clicks, revenue, unsubscribe rate.

## **Personalisation**

The inclusion of personalised information within an email, for example a salutation. See also dynamic content.

## **Phishing**

A form of identity theft in which a scammer uses an authentic-looking email to capture sensitive personal information, such as passwords, credit-card or bank account numbers.

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## **PII**

Any data element that is personally identifiable to an individual subscriber. Email addresses are PII.

## **Plain text**

Email message that includes no images or text formatting. See also HTML.

## **Pre-header**

A line of text included at the top of an email which is often displayed in preview panes prior to an email being opened. Works with the subject line to describe the content and drive opens.

## **Preference centre**

Facility provided to registered users, including email subscribers, where preferences can be expressed in order to facilitate more relevant communications or to alter communication frequency.

## **Preview pane**

The window in an email client that allows the user to scan message content without actually opening the message.

## **Pristine (true) spam trap**

In contrast to recycled spam traps, pristine spam traps are addresses configured from the outset as a means of identifying spammers. These addresses are never signed up to receive email but may be published to the web, which may subsequently be harvested for illegitimate marketing. Email delivered to these addresses is done so without consent, and is therefore spam. See also Recycled Spam Trap and Spam Trap.

## **Privacy policy**

A clear description of how your company uses the email addresses and other information it gathers via opt-in requests for newsletters, company information or third-party offers or other functions.

## **Process metrics**

Metrics which measure and help improve the campaign processes but aren't directly related to business objectives and KPIs

## **Re-mail**

The resending of a campaign either to the same or an alternative segment.

## **Recycled spam trap**

Used primarily to identify senders with weak data hygiene practices. Typically, an ISP will deactivate an abandoned email address and generate bounce responses for email sent to that address for a period. Subsequently, the ISP will reactivate (recycle) the address and allow email to be received. Senders of email received in this inbox are perceived as having disregarded the bounce responses, and there is an implication of weak data hygiene practice. See also Spam Trap and Pristine (True) Spam Trap.

## **Responsive design**

Responsive email design uses CSS to display content based on the screen size of the device opening it. Content can be hidden or displayed as appropriate or layout elements changed.

## **Role accounts**

Role accounts are email addresses that are not specifically associated with an individual, but rather with a department, company, position or other group of individuals. They are typically generic such as abuse@ postmaster@ sales@ or support@. See also Alias.

## **Segment**

The ability to slice a list into specific groups determined by various attributes, such as expressed preferences, demographics or email interaction history.

## **Sender policy framework (SPF)**

Email validation system which matches domains and IP ranges from an email header to a DNS record. Counters spam and spoofing.

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## **Share with your network (SWYN)**

Enables users to post content that they view on websites or in emails on to their social networking (for example Facebook or Twitter) profiles. When the content is published in this way it is then visible to that person's network of friends or followers who are able to interact with it and further share it with their own networks.

## **Simple mail transfer protocol (SMTP)**

The most common protocol for sending email messages between email servers.

## **Soft bounce**

Email sent to a temporarily undeliverable address. Often repeat delivery attempts will be made. Possible causes include a full recipient inbox. Often dealt with differently to hard bounces by senders.

## **Spam**

Irrelevant or unsolicited email messages, for the purposes of advertising, spreading malware, phishing etc.

## **Spam trap**

Spam traps are email addresses activated for the purpose of catching illegitimate email and identifying senders with poor data quality practices. IP addresses found to be sending email to spam traps are likely to be treated as suspicious by ISPs and senders hitting spam traps may find that mail is either rejected or redirected to junk folders. See also Recycled Spam Trap and Pristine (true) Spam Trap.

## **Split test**

A test whereby two groups (treatment and control) are each sent to a percentage of the total audience, and responses are analysed for variation.

## **Static content**

An email message with static content contains the same content for every subscriber; therefore every subscriber receives exactly the same message. An example of static content is message footers - they tend to contain the same standard information (e.g. links to unsubscribe, preference centres, company information etc) regardless of the content in the rest of the message.

## **Statistical significance**

A calculation that determines if a difference between observed results is due to expected randomness or identifies a real and repeatable difference

## **Subscriber**

A subscriber is a person who has opted to receive communications from an organisation

## **Suppression file**

A list of email addresses to be removed from your marketing lists, either because they have unsubscribed or otherwise expressed a desire not to be contacted further.

## **Template**

A template controls some key layout and structural elements of an email, reducing repetitive actions in the production process.

## **Test cell**

A group of people who are sent a particular treatment

## **Throttling**

The practice of regulating how many email messages a broadcaster sends to one ISP or mail server at a time. ISPs may bounce email if it receives too many messages from one IP address in a given timeframe

## **Tracking**

Collection of data that allows monitoring of performance metrics such as email opens, clicks, undeliverable addresses etc.

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## **Transactional email**

Communication to facilitate, complete, or confirm a commercial transaction that the recipient has previously agreed to enter into with the sender. Does not need to include a financial transaction, but clearly differentiated from marketing emails.

## **Treatment**

A new version of an email containing changes intended to test a hypothesis versus a control

## **Triggered email**

A triggered email is an email message that your system sends to an individual in response to a specific action. For example, sending a confirmation message after a customer makes a purchase.

## **Unsubscribe**

A request to remove a record from an email contact list.

## **User generated content (UGC)**

Content that is generated by end users. Examples of UGC include user reviews (of products, services etc), blogs, reviews and podcasts.

## **Welcome message**

Messages, often configured as triggers, sent to new registrants to an email list.

## **Whitelisting**

Used in two ways; A list of advance authorised senders that consumers can specify, usually to their ISP. The process usually involves a consumer adding the senders 'from address' to their address book. Secondly, commercial whitelists maintained by deliverability organisations to assist qualified organisations reach subscribers inboxes.

## **Whois**

A means of identifying the registered users of a domain or an IP address

