



DMA Email Council Guide





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Introduction



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

Its focus is on the marketing part of email marketing rather than an in-depth review of the 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



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 marketeer.

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. From the 25th of May 2018, direct marketing will need to comply with the General Data Protection Regulation, which will demand far higher data protection standards than the current legislation.

The two key pieces of current legislation governing email marketing are:

The Data Protection Act 1998 (DPA)

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

And from the 25th May 2018:

The General Data Protection Regulation

Industry codes

Email 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.

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/

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. The same process can apply if you receive a complaint from a subscriber.

- **Record proof of consent**

Make sure that you have stored the date, source, permission statement and privacy policy 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.



Campaign creation



Strategy

The importance of an email marketing strategy

A strategy – simply put - is a plan to achieving your goals and objectives. Your strategy will define what email marketing to send, who to send it to and when to send it. Marketing research, industry insights and performance analysis of your own marketing campaigns all contribute towards your overarching email strategy.

The difference between strategy and tactics

'Tactics without strategy is the noise before defeat' Sun Tzu (The Art of War, 512 BC).

Email has the history of being the quick tactical channel to communicate a message. But to fully utilise the email strategy and for it to achieve your business objectives devising a strategy is crucial.

- **Strategy defines the what, why and where.**
- **Tactics are how you will execute the strategy.**

Defining your email marketing strategy and your objectives should be the first step when devising your email activity. If tactics are created first, then it will be difficult to determine the target audience, objectives and main goals of that email activity. A strategy also won't be successful without defining tactics. Another famous quote from Sun Tzu, The Art of War book: 'Strategy without tactics is the slowest route to victory' which sums up that strategy can only work if the tactics are defined to execute the plan.

Creating an email strategy

Creating a strategy doesn't have to be a long process. Here are our tips on where to start:

- Identify what you are wanting to achieve by determining your objectives
- For example growing revenue, or minimising churn
- Align your email specific objectives with your marketing and business objectives
- Do some competitor analysis - what are your competitors doing or not doing with their email program? Conduct competitor insight, assess your industry and what works well by conducting market research in the industry that you operate in
- Analyse your customers and how they behave - this will help to determine your tactics. Data insight analysis into your customers
- If you've sent email marketing previously, analyse the performance of those campaigns to uncover what has worked and didn't work.
- Set yourself KPIs – Key performance indicators that will determine what success looks like for your email strategy. That could be an increase in sales, an increase in website traffic, calls to a dedicated telephone number etc.

The important thing to always remember is that 'A strategy is choosing what not to do': Michael Porter (1979). Maintain focus in your email strategy so that it is focused towards achieving the main goals and objectives.



Three key areas to focus your email strategy:

1. First of all, it's all about the customer with customer-centricity. Place them at the heart of your email marketing.
2. Understand the customer journey. It's difficult to create relevant email marketing if you don't know the customer's journey and the stages and goals that they are at/heading towards. Make sure to focus on this.
3. Tailor individual journeys with data. Use data (that you have consent for) and using this to tailor individual journeys. Don't have access to any customer data? Don't worry our content section highlights other ways you can personalise your email marketing.

Defining customer journeys

Look at the key stages of a customer's engagement with your company and draw out what the most typical journey looks like.

1. **How do they first find out about you**
2. **How they purchase your products or services**
3. **What happens after they purchase**
4. **What's the process for repurchasing**
5. **How could a customer lapse and when**
6. **What happens if they re-engage with you**

It's worth looking at this with all of your audience types as the journey's may differ. Also different products or services may need different journeys.

These journeys will help you to define the communications you need to send them.

Integration within the marketing mix

- **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 multichannel, 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.



Campaign creation



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. Be sure that your strategy allows you to adhere your recipient's preferences, if they say they only want to hear from you once a month you should stick to this. You can also capture additional data on your customers at any point throughout their lifetime with your brand.
- **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 better understand not only your customer but also the full 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. Understanding the data across all channels can also help you to inform other parts of your business such as what products to offer in different regions.



Creative



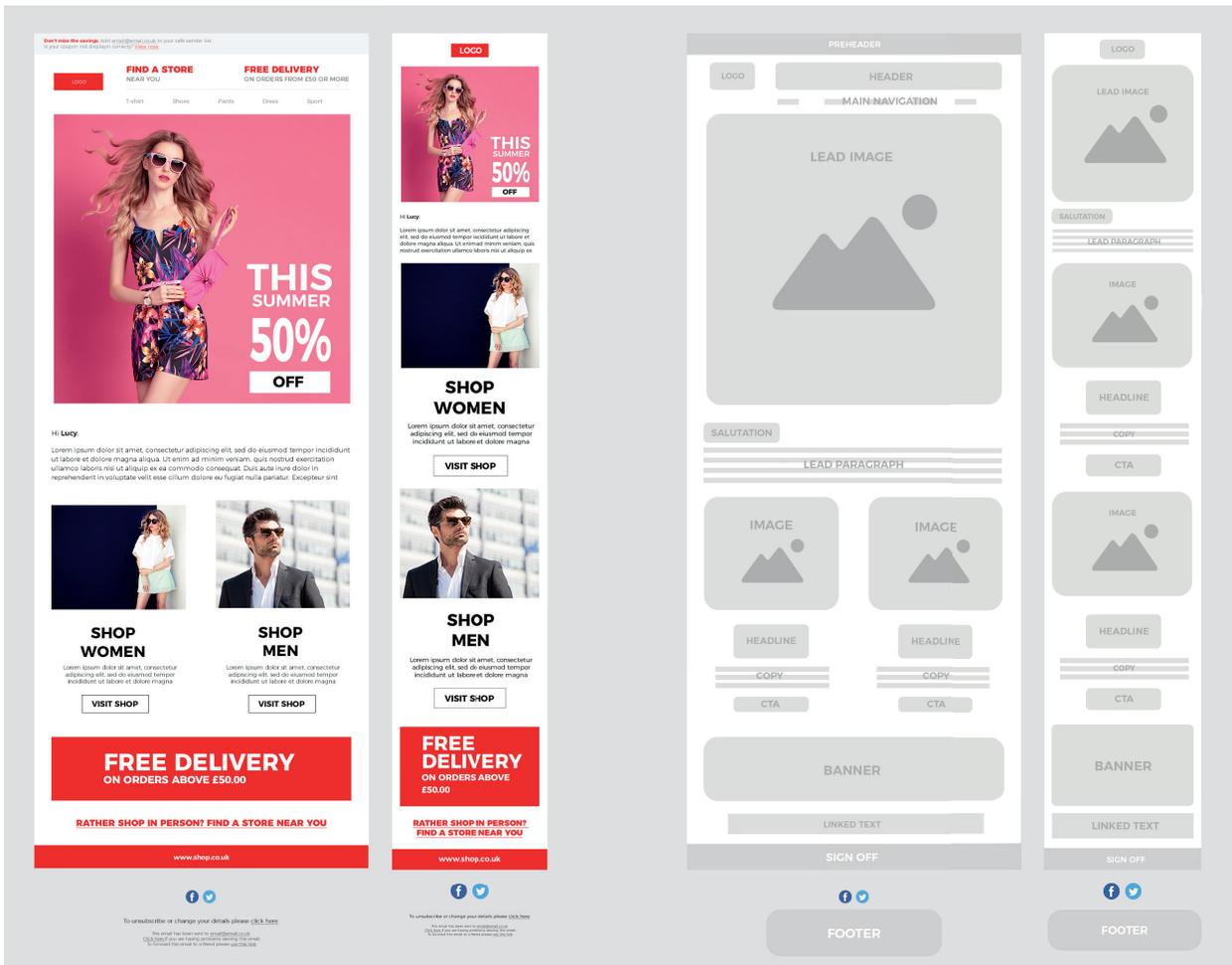
Creative

The below has been written to enable the email marketer to check all key parts of the layout of their email to ensure each section conforms to best practice.

Email carries similar properties of both web and print, however it should be treated as a completely different medium. You will find that it carries some of the UX standards of web, but not all are essential or as effective within the email environment. It also carries some of the layout characteristics of print, however not all of these work within the constraints of the email application.

These days, not only do we have the various desktop email software and webmail client to consider but dozens of popular smartphones and mail apps too. Your website may have lots of drop shadows, gradient backgrounds and round corners, but ask yourself does your email need this? Your email may need to carry through from the print creative, it will need to reflect the website or landing page. Reflections don't always need to be exact; people will associate as long as they include the main features. Try to slim down the design down as much as possible without losing the main essence of the brand.

Email Headers





From Name (often called the 'Friendly From Name')

This should ideally be From <Company Name>, <Name at Company Name> or a <Known Named Person at Company>.

The 'From Name' is as, if not more, important than the subject line in terms of whether the recipient trusts your brand, as according to Return Path's research, the main influences for opening an email are as follows:

- Know and trust the sender – 59.1%
- Subject Line – 41.1%
- Have previously opened an email and found it valuable – 30.1%

From Physical Address

This is the actual email address that the message is sent from. If you're using an Email Service Provider (ESP), as per our Deliverability section, you will want to look at delegating a subdomain so that you send from (something@something.companyname.com). [Ideally you should Authenticate your main domain for the ESP so you can use something@youdomain.com] It's a good idea to run your ideas for the local part of the email address by your ESP or email deliverability company. Choosing words such as 'sales@...' or 'marketing@...' can often result in a higher chance of being filtered into spam folders.

Avoid 'noreply@' as a prefix for 3 reasons:

1. Replies from people asking to unsubscribe should be monitored (plus replies from people enquiring further about your service should be actioned!)
2. ISPs see replies as positive engagement which can aid in longer term inbox placement. Discouraging replies will mean you won't benefit from this.
3. Email marketing enables you to create a relationship with a new subscriber, stating 'no reply' doesn't encourage this and demonstrates the email has been automated (without a human touch) and isn't particularly friendly.

Subject line

Ensure your subject line states a clear reason to open the email. Shorter can be better but it does depend on your audience, so ensure you test subject lines with most if not all sends.

The subject line should link seamlessly to your main headline and then to the lead copy and into the body of the email.

Ensure that the subject line is relevant to the content and sets expectation – the aim is not to trick the recipient into opening! It has been said that only looking at open rates is 'vanity', while click through rates are 'sanity'.

It can also be good to test using personalisation within the subject line. This could, for example, include the recipient's name, or listing an individual's local town. Many ESP's will allow you to set up dynamic content rules for subject lines so you can use a personalised subject line for someone who you do have that data for, and a more generic non personalised subject line for records where that piece of data is missing.

Or for B2B consider using the company name. For example: Does [your company] have the Right Social Media Strategy?"



Some different types of subject lines can fall into the following categories:

- **Teaser:**
Create intrigue. Often it will say 'read me' or similar and can be combined with a question
- **Questioning:**
Alludes to benefits. Often working on a need or a problem the recipient may have Eg. Time based/ Financial
- **Loss aversion:**
Avoiding loss is often preferential to making gain, so changing phrasing can have a dramatic effect in perception. For example, Free shipping this week can become Save on shipping costs before Friday. Creating a sense of urgency (timelines do have to be true) can often increase open rates
- **Contextual by event:**
Consider annual holidays or company events. Think about being contextual around various calendar dates
- **Personalised:**
Think about using <firstname> or <companyname> in the subject line. This can often give uplift if not overused. If the email content is genuinely individualised this can be reflected in the subject line to create a less "commercial" tone of voice eg Maurice, here's your latest local, racing stories.
- **Live Content:**
If the email contains live content eg images that change based on time of open through the day, this can be engaging to highlight eg Maurice, get your live betting odds here now
- **Direct approach:**
Clearly stating the opportunity or benefits without intrigue

Email Introduction (above the fold)

Users spend majority of their time looking at information above-the-fold so make sure you place the call to action within this area. The preview window within an inbox or the initial opening on a mobile device is where it can be easily seen and acted upon without having to trudge through the remaining content. It's basically the newspaper folded in half on the newspaper stand, the main headline and image is going to cause the required action.

This your 'prime real-estate' the only area that the majority of recipients will see and sometimes even smaller than you think. Take a floating window on a 13" macbook for instance, some of the above the fold content may be cut off on the right hand side. To take advantage of this area you should always try to keep it clutter free with important call to action or messaging aligned left or centre. Does the logo really need to be that big, the recipient should already know who the email has been sent from due to the sender name within the inbox.

Are those social icons a distraction or an aid. Does it contain both HTML text and image?

The above fold area should encompass your 'hero section' also, this can contain your primary marketing message or reveal a list of content within the newsletter. By keeping your header reduced you will reveal that import call to action, image or message.

Try trimming down the depth of your content where you can to ensure most is revealed. The above-the-fold area can of course vary from email client to client and user to user so a recommend depth of 400-600px for desktop and 300-400px for mobile.



Link to webversion

With advances in both email and mobile technology, whilst less important than a few years back when many devices could struggle to render HTML, it's still good practice to include a link to view a hosted online version.

Generally considered better somewhere near the top, users naturally gravitate towards this area. Email clients change and update all the time, the latest changes to Gmail on iPhone tractates the structure but loses the 'reveal more' button in the process. Best not to leave it to chance.

This functionality is native to the majority (if not all) Email Service Providers (ESPs).

Add to Safe Senders

Encourage your recipients to add your sending email address to their address books.

This will help towards ensuring future emails do not go to their junk folder, and in many webmail clients it ensures that images always display, even if automatic image download settings are off as default.

It's worth considering a prompt for this on the 'thank you for signing up' return page as people sign-up to your communications. Those that do will have 'whitelisted' you from the get-go.

Preheader

The Preheader references the area before the main content, and whilst this can include the 'link to web version' or 'add to safe senders', we're looking at it specifically to use as some 'free' extra screen real-estate, since this often has prominence in the inbox, it can be used for promotional purposes. It can include both words and a link. Some companies find that they get the most clicks on links within their preheader.

A pre-header gives some useful email real-estate between the Subject Line and the Lead Copy often referred to as the Super Subject Line. This content appears underneath the subject line on mobile devices, and can often be seen at the end of the subject line in some email systems, so is a visible means of reinforcing the subject line. The advice for the subject line applies to the super subject line. It's important to optimise this area of your email otherwise you'll end up greeting subscribers with 'view online' or 'unsubscribe' as this will be the first content that is pulled through underneath your subject line.

A pre-header is also visible in Outlook, either in the inbox view or as the new email delivery notification appears.

It is possible to have your preheader coded so the font colour matches the background colour and therefore it does not show when the email is opened in the browser, but does show next to the subject line in the inbox.

Note the below consumer examples:

Don't miss the savings. Add email@email.co.uk to your safe sender list.
Is your coupon not displayin correctly? [View now.](#)



FIND A STORE
NEAR YOU

FREE DELIVERY
ON ORDERS FROM £50 OR MORE



If you are feeling really brave you can also include an unsubscribe link in your preheader (as well as your footer). This may feel counter intuitive but if you're struggling with high SPAM complaints it can be an easy and quick way for them to opt out instead of 'marking as spam'.

Salutation

On occasion, look to dynamically insert a salutation into the subject line if your technology has the means (all ESPs do).

The ability to personalise all comes down to data integrity, however most ESPs offer the ability to add a generic salutation if the data is incomplete across records.

Personalisation is important for 2 reasons:

- Trusting the sender; if it's personalised by name, it's more likely to be safe
- "It's all about me!" – we're all human; if we have a relationship, why wouldn't I address you by your name?

If you are going to insert Salutation into your emails consider if you'll use FIRSTNAME or TITLE AND SURNAME. Use the format that best suits your company's tone and the content of the email, for example Is it a serious email or a chatty promotional email.

Technology publisher Gartner quoted in June 2015 "There's perhaps nothing more alienating than treating your best customers like strangers on the subway"

Banner/ Logo

The banner or logo should be fit for the Preview Pane. This means not too wide and not too high. Recommended email widths are anywhere between 400-800px max, this is due to some desktop and webmail preview panes on the smaller monitors (or low resolutions). Ideally with standard branding on the left side. Ensure that you include an appropriate alt tag - such as your brand name. behind your banner or logo, just in case images are not shown/downloaded.

This banner should always be clickable as an easy route straight to the website or landing page, where it's more valuable to have a recipient as opposed to reading an email due to better tracking capabilities (eg. GA) and therefore it's easier to guide the reader through the journey you want them to take.

It's therefore also easier to push them through the funnel with remarketing activities - for example recipients who've gone to the website for an event booking (i.e. clicked) but not booked can be easily segmented and sent a further booking push (provided you have marketing permissions to do so).

Headline

The headline should link seamlessly from the subject line and lead into the main body copy.

This should be text based so that it is visible if images are turned off by default when viewed. It's important to only use websafe / OS safe fonts for your headline (and other text) even if your brand font is different. Many email systems can't understand bespoke fonts and may therefore choose themselves which font to display - leaving your template style at risk of being off brand.

The headline is really important as it's the first thing visible upon open, and should jump out and grab attention. Additionally, if images are blocked and your banner isn't visible, it is important for the headline to be in a large font size.

It's important that it follows on from the subject line, not repeats it. Think about how a user interacts:

"I've read the subject line, I've opened your email, now give me an immediate reason to continue reading..."



Lead Copy

This should flow from the headline, link seamlessly to the first CTA, with the first sentence encouraging the reader to continue the first paragraph? Does the first paragraph encourage the reader to continue with the rest of the email?

Following on from the headline, this is important. In longer informational emails or newsletters with multiple topics, consider a contents list with anchor links to enable the recipient to jump to the content of most interest. It's perfectly fine to have a mix of CTA's in the lead copy text as well as the same links behind CTA buttons (see more below).

We've mentioned Salutation, and the lead copy is really the follow on from this, as a bit of a personalised message to the reader to get them to read further/ take action. Consider as well making use of this with a CTA button or hyperlink if there's a single major outcome you're looking for (e.g. booking onto an event).

Call to Action (CTA)

The CTA is the main way of getting the reader to do what you want. Primary CTA's should be easily visible and clear – always sitting 'above the fold'.

As an email marketer, we want people to visit our website. We can track them better and we can get them to convert; whether 'converting' is consuming more content, or booking a delegate seat. They can't do either of these in the email alone, and we can't measure them.

Therefore we need to always be thinking about the following from a reader's perspective:

- What's in it for me?
- What should I do next?
- How do I do it?

So as an email marketer, we need to:

- Encourage the reader to take action by explaining benefit
- Create urgency
- Make it very clear what they need to do next
- Make it as easy as possible to do so

To do this, ensure the following:

- Visual aids work better than purely text links for important CTA's, so consider buttons where possible – particularly on emails such as event bookings
- Where hyperlinks are used, look to bold them to help them stand out – particularly the primary CTA
- Enable offline contact if you have resource (e.g. Customer Service dept.). In CIE's examples, we felt that in many cases offline options weren't given or made clear. Assuming that there are staff who can answer questions over the phone, or reply to emails it would be sensible to include an easy offline way to contact them.

A call to action within the shape of a button is a recognized and established symbol of the web. It is essentially telling the recipient that you wish for them to interact and be taken somewhere. The user knows that this will take them to the mentioned destination and will look for it if they definitely wish to proceed. However not all call to actions need to be buttons. Placing the button both above and below the fold will allow the user easy access without additional scrolling. Be sure to not overpopulate your campaign with too many buttons of the same weight and hierarchy.



Some users will steer clear of these but quite happily click on a word within the copy. Text links within email work pretty much the same as you would find on a website. The user interaction with the link will depend on where and how you have displayed it. Links can be added as a call to action or prompt underneath an article instead of a button. Links within copy must be placed far apart to ensure no accidental clicks.

The same link can be added to all areas, however they should always be tracked separately to ensure learning's are taken. Set up a testing plan to learn from you recipient and how they prefer to respond. If they often click on a link within the bottom of a campaign then you know that they don't mind reading or scrolling through.

Visually emphasizing the CTA

Your CTA needs to stand out. Whilst this sounds fairly obvious, there are a few ways to help ensure it does.

Whilst CTA's can be text based hyperlinks, if they are the chosen method, then it's recommend to bold them as well in order to enhance stand-out.

Preference for CTA's in promotional emails would be to have action buttons with directive wording to help create urgency – e.g:

- Book Now
- Find out More
- Download your Copy Now
- Don't miss out on your place

Where buttons are used, ensure that the button isn't just an image, but it is text over image. This means that the button's wording is still visible with images off. This is often called a 'bulletproof' button.

Bringing gentle animation to CTA images can help catch busy reader's eye in complex emails but don't over use and check if compatible with the devices & email clients your consumers most often use.

Primary and Secondary CTA

We should consider both a primary and secondary CTA – whilst we ideally want to funnel recipients into the primary, we should give an alternative option for continued engagement. This is preferable of course to the recipient doing nothing.

Often with newsletters, both primary and secondary offers will be the same – to read and engage with different articles, however for more promotional led communications it's important to have a primary and a secondary option:

- Drive action. This may be to Book Now, Download a Brochure, engage with further content (eg. Product videos or reviews), or simply Find out More
- Give another opportunity to engage for those who are not quite ready to convert. This maybe to learn more; either on the website, or perhaps by speaking with someone on the phone (useful in a B2B environment where you have a customer service line).
- Integration with other channels e.g. social media is relevant to consider at this stage i.e. if they haven't responded to the main CTA do I want to consider directing the consumer to somewhere they might still get engaged with my brand. Of course it depends on objectives and preferences of your audience.



Main body copy

The main body copy should highlight the features/ benefits and briefly give instructions of what to do next i.e. why should the recipient follow your CTA?

Brevity is key here, together with 'what do I do next' – this should lead to the main CTA.

Bullet pointing and chunking out so content is easy to read is important – remember that readers often scan read, so making it clear and easily digestible should be the focus.

Avoid long paragraph text and anything that is too 'wordy' – be to the point! If you find writing short copy tricky, try writing it and then cutting it down by a third. Then come back and cut it down by a third again.

Where emails are copy heavy – for example newsletters, break out the topics into sections and consider anchor links to enable the reader to jump to the relevant sections.

It's also worth considering the 'Read More' option in editorial, by giving the reader a teaser or snippet of an article and pushing them into the website in order to consume the full content.

If many of your audience are using mobile devices such as tablets you might get higher engagement if you test a more "magazine style" or "Pinterest" style approach/style/layout. Of course it depends on your objectives, audience and resources.

Less is often more - this is true of lots of things, but none more so than when we talk about the length of an email. The Gmail webmail client will truncate the email structure within the preview pane if it's too long, it chops away the bottom structure in turn causing a break down in the code itself. Outlook is built on the Word rendering engine and will try to break the template in to different pages. When this happens you will have large gaps appearing in your template, on occasion you may experience a lack of visible evidence however other things like links may be effected. Make sure to test all links.

Email Close

A strong close is important in order to encourage immediate response. At this point, the CTA should be repeated.

It's important to think about how an email finishes off before the signoff. This is the final chance to confirm urgency and should re-iterate the main CTA from the body copy:

- What's happens if I don't respond?
- When is the deadline for booking?
- Will I miss out?

Signoff

In many emails this is appropriate – particularly B2B, but it can be suitable for B2C too.

With B2B or B2E, often there's a named person who can be added to the email as the signoff. For newsletters often the editor should be used, and for academia perhaps the head of faculty/ department would be a good named person.

A signoff can help make the communications feel more personal to the reader. If you are using a named person in your sign off consider using this name as the From Name on the email as well.



Footers

The footer contains legal, functional and best practice information around data protection and privacy.

This is important to get right, not just from a legal perspective, but by including the right information it will mean that recipients are more likely to trust your brand; know why they are being sent certain communications, be able to update their details, or contact you in the event of a complaint.

Overall this can also help with email deliverability as it reduces SPAM complaints. Spam complaints (mark as spam button in many ISPs email clients) adversely affects reputation, which can lead to deliverability challenges. For further info see Deliverability Section?

Statement of origin

This is explaining why the recipient is receiving the email in the first place – where did you, as the email marketer get their signup from?

It's important for recipients to understand WHY they are receiving certain communications, and where you got their email address from.

This could simply be a statement: You are receiving this email to name@emailaddress.com as you signed up to our updates.

Think about the permissions you have – was it from an event? Did they sign-up on the website? Are they a client? Etc.

If you have an 'update your details' form, it could give the recipient the opportunity to opt-in or opt-out of different communications if you have more than one type of email communication.

Unsubscribe link

There needs to be a visible, usable and easy to action unsubscribe link at the foot of every commercial email.

Obviously a legal requirement and important for it to be clear, and immediately actioned.

One area a number of B2B companies slip up in is not monitoring replies to the emails they send out – often people will reply with an unsubscribe request which sits in an unmonitored inbox.

So it's worth ensuring that any email replies are filtered to a customer service address to action. This is usually automatic through most good ESPs.

To avoid your consumers unsubscribing or spam reporting because they can't see relevant content or have forgotten what emails they've signed up for, it can be useful to take them through to a preference centre where they are:

1. Assured that their opt out will be actioned and
2. Their interest in your other content, that prompted their sign up, can be reclarified.



Company details

The Companies Act was updated in 2006 with the EC Directive which states the need for all registered companies to provide address details in the footer of their email communications.

If your business is a private or public limited company or a Limited Liability Partnership, the Companies Act 2006 requires all of your business emails (and your letterhead and order forms) to include the following details in legible characters:

- Your company's registered name (e.g. XYZ Ltd)
- Your company registration number;
- Your place of registration (e.g. Scotland or England & Wales); and
- Your registered office address

Privacy Statement

Best practice denotes that it is good to link to a privacy statement. We live in a world now where people have become immensely sensitive in terms of what happens with their personal data. Giving them reassurance will increase the likelihood of them becoming (or staying) a customer.

The privacy statement details how you will look after recipient data – You as an email marketer are the data controller. It's important that those who wish to know what you'll do with this data are able to easily find out.

It's interesting, but in the UK the average reading proficiency is that of a 9 year old child (See-a-voice.org, 2017) so we must start to consider rewriting our T&Cs for such an audience, unless we have data that our consumers are significantly different. Obviously, if your audience is actually the younger generation, then this is even more important.

Writing Style

Copywriting

Email copy should, in general be conversational, friendly – and often, fun. Consider this in terms of your tone, however ensure you balance with any brand tone of voice.

The real key is BREVITY.

Long emails can often get curtailed or clipped in some email systems such as Gmail which means that the full email does not show. Instead a portion is shown along with a link to 'view entire message'. See example below.



[Message clipped] [View entire message](#)



People read by scanning – they don't read every word of your email, so ensure that it's easy to scan. This means:

- Paragraphs should be 'chunked' out. Using one or two sentences maximum
- Keep words relevant. There isn't time to use lots of filler words
- Think about if the recipient can scan-read. Usually the start of the paragraph and anything highlighted in bold will be picked out easily.
- Keep wording brief. Write the copy, reduce the word count, then look to reduce it again.
- Ensure it still makes sense!

Bullet points work well for emails where you need to include significant text copy; and for long B2B 'Newsletter' style communications, consider the use of Anchor Links at the top to enable the recipient to navigate to the sections that they're interested in.

Image Use

Images can enhance email effectiveness enormously. Consider the following when adding imagery to email campaigns:

- **Image file size**
particularly if your target audience read your emails on the go or using a mobile phone
- **Image quality**
are they easy to see on a small screen?
- **Optimise the alt tags behind the images for when they are unable to display or cannot be downloaded**
- **Hyperlink your images so that they are clickable.**

Mobile

The explosion in the adoption of mobile devices over the past years has been a game changer for email marketers. With many recipients now 'always on', the opportunity to engage with your target audience at any time has created fantastic opportunities to further leverage email in the marketing mix.

However this is not without challenges, and there are a number of considerations for the email marketer. The first is the realisation that your recipient now has an expectation of a seamless experience with your brand, regardless of device. Therefore simply 'making an email work on mobile' is not really going far enough in many cases.

In many industries, mobile reads and interactions are between 50-75% of all emails - and dependent upon the makeup of your customer base, this could be even higher. Most good ESP's will offer you an open and/or clicks by device report so take a look at your own emails and see what percentage is through mobile compared to desktop etc.

So there needs to be a shift in approach where at the very least you should be considering a 'mobile-first' mentality, and in some cases you may even be thinking about 'mobile-only' philosophy.

A correct responsive structure and optimised design will see the fonts remain as the desktop size, pick a size that works well for both. Double columns will stack and blocks of text will wrap due to the reduced width, so for example instead of three lines of text you may have five. On average 13px text size and 46x46px touch areas are recommended by smartphone manufacturers.



Use @media queries to structure a responsive email where possible. Some email clients or devices just won't render your CSS, so it's always best to design it with all mobile display in mind. Scale your email down to 50% the original screen size, then ask yourself 'is the image text still readable when scaled, are the call to action buttons still easily accessed?'

The majority of users don't like scrolling horizontally. Cater for those who like it lean by providing a narrower optimized version of your email. It may become a little longer so try to keep the vertical scrolling to a minimum. Use media queries to increase text sizes on small screens and provide thumb and finger friendly touch areas for links if not already optimised.

A standard email is 600px wide for desktop preview window, an iPhone 4 in portrait is 320px, so using one and two columns is a good basis to work from. If using responsive structure, three column blocks will need to stack on top of each other but due to the normal $\frac{1}{4}$ widths on standard 600px framework, four column blocks could potentially stack two and two.

Try not to use old newsletter side bars when creating a responsive email, when columns start to stack where do these go? In most cases the columns will stack from left to right and row to row so ensure you plan for this. Don't put your call to action buttons on a completely different row just so you can line them up, keep them in the same cell as the article; otherwise you will end up with four articles stacked on top of each other and then four buttons.

The best way to aid correct rendering on any device is the single column where possible. In some cases such as the news and article based campaigns, double columns are required to condense length of email. Use grid-based layers and avoid complicated elements that break up on entry into the inbox. Gmail will display the desktop version for some, but also try to change it into a responsive view for others. This is due to complex algorithms built into the application. It is known that multiple column structure on Androids do not always render correctly and in the same way.

There are a number of considerations in order for this strategy to be effective:

Fully Responsive Experience

All email templates need to be created to be 'mobile responsive'. This means that content will scale dependent upon the screen-size it's being viewed on.

This does require investment; either in resource or financially – if you don't have the skills in-house to code this way, then your agency or your ESP would be worth discussing options with.

If you use a good ESP, it's likely that templates built in their Editing function, should enable mobile optimised HTML in their output but ensure you test thoroughly across devices.

Length of email copy also needs to be considered. Realising that content will be pulled 'narrow and long' in order to fit the smaller screen sizes, you want to avoid having to make the user scroll...and scroll, and ensure that calls to action are clearly visible and as near to the top as possible

Landing Pages

It's not enough just to make the email itself Mobile Responsive - we encourage you to think about the mobile customer journey and experience after the click.

All too often we see examples of a disjointed experience where a marketer has spent great effort in building a nicely functioning mobile responsive email template, only for the reader to be dumped post-click onto a non-mobile optimised landing page - or worse, rather than connecting to the product or service advertised in the email, they're directed to the home page of a stripped-down mobile version of the site.



Obviously this isn't a great user experience, and more importantly it negatively affects engagement, conversions and ultimately success!

CTAs and Link Usage

In designing for mobile you need to think away from the traditional input devices of mouse and trackpad and consider that interaction is all about 'fingers and thumbs'.

So rather than traditional hyperlinks, consider the idea of 'tappable target areas' that are easy to locate and touch. Use of clickable images will aid in this, and particularly using clear, well spaced out CTA buttons.

If you have to go down the route of text hyperlinks, ensure they are positioned with good whitespace around them and clearly differentiated in colour so they stand out and are easy to action.

As content will likely be longer on a smaller screen size, you need to put extra thought into the location of the primary CTA, ensuring it's clearly visible without the reader having the need to scroll.

Fonts

Fonts can be problematic when it comes to desktop email clients. It's recommend that you try to stick to basic OS friendly fonts such as Arial, Verdana, Georgia, Tahoma and Times New Roman etc; and always include a fallback font family just in-case.

Technically any font can be used in email, but if your subscribers don't have that particular font installed on their device then it will not appear for them in all email clients. A fall back font set within the code will therefore be shown to the subscriber and may compromise the look of the design, particularly if the substitute font has different character width or spacing.

Even system safe fonts can vary in kern, spacing, width or line height; depending on things like operating system or device. So please keep with this in mind and allow your html text to breath within its space, adding extra area for the font within a cell. In future this will aid breaks of table structure due to increase in font.

If you would like to use custom fonts in headings or hero banners, we would advise to use them as an image in the email with alt text applied. The downfall of this is that subscribers will need to download more images to view your beautiful email and emails that contain a higher proportion of images to the amount of text can be flagged up as spam. The alternative method is to add the font face via the CSS, however once again this may not appear in all email clients. To use the CSS versions please place this within the head of the document using the @fontface tag.

Multichannel

These days email campaigns can be continued (through data matching) through a myriad of other marketing channels especially online ads. Therefore unless your consumer is totally irrelevant for this, assume that the email is just one step in a multichannel journey, only some of which the brand can influence.

Live Content & Real Time Individualisation

According to research up to 80% of consumers in the UK and USA desire more relevant content in the marketing campaigns they see. One extra way of doing this, when resources and objectives allow, is via so called live email content and real time personalisation.



Live Email Content & Real Time Individualisation is when some of the email content (often images) changes at the moment of opening depending on contextual data (time, location, local weather etc) or single customer view data (used to predict offers most likely to deliver profitable CLTV growth.) This can require very high speed data analysis and real time image rendering, especially if a big library of product sku's is involved. There are several specialist suppliers in this space who work closely with ESPs and eCRM marketing clouds or technology stacks to provide easy integration with brand email plans.

Essentially this is achieved via a refresh of the email cache on open, or automatically via the email client itself. All image personalisation happens in a bespoke web widget and is dependant on the data being feed in. The newly created Gif featuring someone's name, image based on location, or an animated timer etc is then feed through to the image source within the email code.

VIDEO IN EMAIL

Images, animation & video

Email is a tricky business for a marketer or creative, this is mainly due to the vast array of email clients for web, desktop and mobile. Not only do we have the hurdles of many email clients on multiple devices, but we also need to factor in their potential connection speeds. The average user will engage within the first 8 - 11 seconds of opening your email, so it is important they receive the information that will engage them with a click or content.

Various email clients will have images turned off as native or potentially user set. Email images will be initially blocked by some email clients or various images may simply fail to load due to poor connection. Create and plan your email with this in mind from the outset, Good use of background colour to define areas and Alt text is key where applicable (remember that Alt text is not shown all email clients).

This leads us onto emails created as one large image. Whilst this kind of email can look great, they perform poorly in an images-off scenario. If you plan to create as one big image, slicing the large image into coloured sections would be the best; but try to double up with HTML text where you can.

It's best to replace imagery with HTML where possible but without scarifying the overall brand look and feel in the process. Plan this in from the start where possible, choosing imagery that merges into a coloured background or holds up when forwarded on to a friend. Use a colour picker to find the right HEX colour to use.

In general Png, Jpg & Gifs are all fine to use in email but each with their own uses and support. Png's are great for alpha transparency but make sure to use a flattened 32bit and not a layered Fireworks file. Jpg's are good for photographic imagery or graphics, compress where possible without losing too much visual quality. Gif's tend to work best for animation but it is not supported by all email clients.

Some email clients are not able to show an animated Gif image, revealing only the first or last slide. Essentially you will need to ensure your imagery looks good in both animated or static form where possible. If you have information appearing throughout your slides ensure you place the most important information at the start and end points. For image slide rotation you must choose the imagery you wish to show in static form. Fadeout effects will need to be placed near the middle as per the example later in this guide.

Animation in email can come in many different forms, we can use it to enhance or draw the eye to an area of information. We can use to influence additional clicks on call to actions. Introduce more information about a particular product or service. Create a fun engaging environment for the reader. Or we can include animation in email to simply inspire a recipient to engage. If creating animations you must reduce your frames where possible to keep file weights low. Instead of using 10 frames to show motion why not blur the image in overlapping frames, you may be surprised of how much you can fool the mind with trickery and sleight of hand.



Creative



Video can be a great feature for email when supported, even our trusted iOS recently removed support, re-adding it back in at a latter stage. It can be achieved through fall back imagery and a selection of players dependant on device. Most email service providers will have a video unit already included within the tool.

With video in email you also have to assess why it is required. If the main purpose of the email is to drive people to the website, it's best to also host the video on a landing page just in case they get the static version. A well placed video play icon will drive clicks, which is great. However be careful if your main aim from the newsletter is to allow the recipient to read and digest the email from top to bottom. In this case you may wish to display the video within the email itself, so that the recipient is not taken away from the other articles in order to watch the video. Instead of adding a link to a video landing page, why not add a line of text advising them to view on a particular email client or even a link to the web browser version.

Test your creative

Once you have coded your glorious work, test, test, learn from it and then test again. You will need to test in as many email clients and devices as possible; so set yourself up with email accounts across the various services. Litmus and Email on Acid offer testing services, you will also be able to access these direct or via an 'email service provider'.

Create a simple checklist to go through, ticking off as you go. It doesn't matter what level of designer, marketer or coder you are, it's always best to get a second pair of eyes to glance over your work.



Campaign delivery



Deliverability

Definition of Deliverability

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

The four things which determine your deliverability

Your sender reputation

Your sender reputation is effectively your ranking as an email sender and is used by mailbox providers and email domains to help them decide whether to accept your emails, how quickly they allow you to send and helps them determine whether to send your emails to the inbox or junk folders.

List hygiene

Sending emails to email addresses which are no longer in use, invalid, poorly-authenticated or collected without valid consent is a guaranteed way to be temporarily blocked or blacklisted

The email content

Email headers, subject lines, text, images and even the HTML are assessed by email systems to identify spam, phishing attempts and other malicious email

Your email infrastructure

To prove that your emails really are genuine you need to maintain a secure email and website infrastructure and authenticate your emails

Sender Reputation

Mailbox providers and email domains monitor your recipients' responses to your emails and use this information to generate your Sender Reputation. You can improve your Sender Reputation by focusing on getting more people opening, reading and clicking-through from your emails, and by reducing unsubscribes and emails being marked as junk or spam.

Goal: increased response rates for every email campaign and high email engagement

Consistently high response rates across your email marketing programme as a whole will improve your sender reputation. This will help with the success of your individual campaigns and the long-term effectiveness of your email marketing.

What to Monitor and Measure

- Positive responses, such as opens, clicks and conversions
- Negative responses, such as unsubscribes and complaints
- At a database or list level, look at how much of the list is responding to email; but equally important is to see how much of the list is not responding to your emails

These should be reviewed monthly or quarterly to provide quality assurance and give you early warning of potential problems.



Campaign delivery



Planning

- **Improve email opens, clicks**

links to how to docs for testing, targeting, dynamic content, etc

- **Reduce unsubscribes and complaints**

Links to how to do this (setting expectations, preferences, customer lifecycle, etc)

- **Improve overall engagement of mailing lists**

Look at the combined effect of all of your individual email marketing campaigns. Identify what is working well and where improvements can be made. The overall aim is to get a larger number of people opening, clicking and converting AND also to reduce the number of “inactive” people who never open, click or respond to email

Links to re-engagement, preference management, email “holidays” and how to manage inactive data

List Quality

Sending an email campaign to a list which contains old, inactive or non-permissioned email addresses can get your email delivery deferred or blocked and can get you blacklisted.

Goal:

Have a valid, active, permission-based mailing list

What to Monitor and Measure

- Bounce rates
- Blacklist entries
- Spamtrap hits

Planning

- **Improve data collection information and choices**

Setting the right expectations and provide relevant choices to ensure that the emails you send are relevant and of interest or value. Do not force or coerce email collection or marketing signup as this can result in people providing temporary, invalid or even malicious email addresses

Links to signup form best practice docs

Links to privacy notice docs?

- **Improve data validation**

Email syntax validation isn't straightforward, with the userpart (the part before the @), the domain (the part after the @ and the TLD (the part after the final ".")) are all subject to slightly different validation standards.

Even getting an email address syntactically correct is only part of picture – a mistyped email address could easily belong to another person. Confirmed opt-in (or double-opt-in) doesn't just validate the email address syntactically, but confirms the ownership of the email address and is the gold-standard for email validation.

List validation after data collection helps reduce problems, but will only result in an invalid email address being removed from the list. Real-time validation at the point of sign-up will allow the person to correct the typo there and then.

Links to RFCs and validation rules? (The RFCs are subject to change and I personally wouldn't like to be responsible for keeping an eye on these)

Links to validation service providers?



Campaign delivery



- **Ongoing data management**

Sending to old data can reduce open and click rates, and can increase unsubscribe and complaint rates. But sending top old data can also result in email service providers and domains blocking your campaign because of inactive data. Old data can also contain spam traps which can result in you getting blacklisted.

Monitor email engagement and incorporate a re-engagement strategy into your email programme

Remove long-term inactive email addresses from your email lists

Use other channels and contact points to flag where contact details need confirming or updating.

link to detailed doc?

Email Infrastructure

You can't build a great email program or have great deliverability on a weak foundation. You must have a solid foundation (or "infrastructure") comprised of authentication, bounce management, and feedback loop processing if you're going to build a world-class email program.

Goal:

Validate and establish yourself as a trusted sender by ISPs

What to Monitor and Measure

- Abuse complaint suppressions[CT2] [SH3]
- Domain authentication results
- Bounce logs – if available
- Bounce rates

Planning

Authenticate your email

Email authentication is all about validating the identity of an email sender in a means to combat fraud. It has become a vital piece to security of a brand reducing the effect of spoofing and phishing.

- **Reverse DNS**
a lookup to see if the sending IP points to a domain. Many email systems are configured to reject, or mark as suspect, any incoming emails from an IP address which doesn't have a reverse DNS. Whether that IP is authorised by the domain to send emails is tested by SPF.
- **SPF**
The Sender Policy Framework is an open standard to prevent sender address forgery. It enables the verification of a sender's IP address by cross-checking the domain in the "Mail From" line of an email against the published record a sender has registered in the Domain Name System (DNS).
- **DKIM**
(Domain Keys Identified Mail) provides a method for validating a domain name that is associated with a message through cryptographic authentication. It requires senders' computers to generate "public/private key pairs" and then publish the public keys into their Domain Name System (DNS) records.



Campaign delivery



- **DMARC**

(Domain-based Message Authentication, Reporting and Conformance) standardizes how email receivers perform email authentication using both of the well-known SPF and DKIM mechanisms. This means that senders will experience consistent authentication results for their messages at AOL, Gmail, Hotmail, Yahoo! and any other email receiver implementing DMARC.

Adapt send rates to email domain

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.

Encrypt you mail

TLS (and its predecessor, SSL) is an email security protocol keeping the email connection secure by encrypting the connection used to send the email. It does not encrypt the email itself, which can still be read by anyone with access to the recipients' email systems and devices.

Because the email itself isn't encrypted, TLS is not a full email security solution, but does help prevent unauthorised access to email communications.

Engagement

Mailbox providers monitor a variety of metrics to determine placement of your mailings, How 'recipients' interact with play a pivotal role in determining if mail should remain in inbox or if that privilege should be revoked on future mailings. Metrics within a mailing campaign report provide marketers insight into their program, allowing optimisation to maintain but ultimately improve recipient interactions and overall conversations.

Goal:

Right message, right time, right recipients

What to Monitor and Measure

- Delivery rates
- Hard bounces
- Open rate
- Click rate
- Complaint rate
- Replies



Campaign delivery



Measurements ISP take into account (but are not visible to marketers)

- Deleted without reading
- Filing (i.e. saving to another folder)
- Replying/forwarding
- Adding to the address book
- Retrieving emails from the junk folder
- Moving emails to the junk folder

Replying:

Where two-way traffic is seen between sender and recipient, this represents dialogue and implies a genuine relationship between the two parties. This suggests senders should not broadcast from an unattended address (i.e. noreply@) and that they should monitor inbound email traffic for genuine responses. They can also consider techniques to increase this behaviour (e.g. run a competition where replies need to go to this address).



Campaign response



- **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 historical trends and progress and give you insight and guidance. This can also help with forecasting in months/years to come.

- **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
- Unsubscribe rates and bounce rates

It can be helpful to show email engagement in the form of a funnel showing volumes sent, delivered, opened, clicked, quoted, sales etc. along with conversion rates at each stage.



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 (how many people 'left' the database)
- 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 IP or domain has a blacklisting against it. It's also worth checking the bounce replies. 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 engagement activity**

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

Long-term inactive data can cause delivery problems. It's important to build re-engagement programs to try and re-engage with and winback inactive contacts. If they continue not to engage you should remove or suppress 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.



Campaign response



- **Strategise your sender reputation**

Understand how your actions affect your sender reputation and have a reputation-building plan in case any reputation issues arise. Consider if you need a dedicated IP address to send from or if you want to send from a shared IP pool instead.

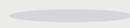
- **Monitor for blacklisting**

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

Benchmark performance

Review your email marketing performance against your industry with the [DMA Benchmarking report](#).

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.

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.

Canadian Anti-Spam Legislation (CASL)

Canadian anti-spam legislation which came into enforcement in July 2017, covers all electronic messages, including email, sent in relation to a commercial activity.

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 an 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

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

Control

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

Conversion

Process of driving a transaction of some sort (e.g. purchase, download, entry) from a database record. See also conversion rate.

Conversion rate

Number of recipients who have carried out a transaction (e.g. purchase, download, entry) 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 @ symbol. For example; gmail.com.

Domain Name System (DNS)

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

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 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.

False positive

In email marketing, most commonly 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 means of acquiring new registrants, by either asking a customer to forward on an email from you to a friend or 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.

General Data Protection Regulation (GDPR)

European Union legislation which will be implemented into UK law by the Data Protection Bill currently passing through Parliament. It will apply to the processing of data from 25 May 2018.. The regulation aims to harmonise data privacy law across the EU and centers around six key principles.

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.

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.

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 recipient's location, the prevailing weather, remaining time until the end of a sale and so on. See also Dynamic Content.

**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.

Media queries

A media query uses a condition to determine whether something should be displayed or not. If the condition is true, then the block will display. It's known as an @media rule. It is commonly used to control what is displayed on various devices, uses the display size as the condition for any @media rules in the CSS.

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

Where the recipient has agreed to receive email marketing in the future by ticking a box or providing their email address.

Opt-out

A specific request to stop emails from the sender

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.

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.

Rendering

Describes the way in which email clients display the message content sent to them.

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.

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 by an ESP. 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 during a test.

**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.

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 sender's '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.

