

Advanced Email Marketing: Tactics to Build Robust Email Programs

Digital Summit Workbook

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INTRODUCTION

Welcome to the Digital Summit #DSatHome!

Good news! You're about to spend the four hours discussing email marketing. Yay!!!

Now, email isn't the most sexy marketing topic, nor is it the most fun, but if done well it can lead to the best ROI of any channel in your B2B marketing mix. Regardless of industry, and even though there is more noise in the inbox and more apps for consumers to juggle, email continues to prove itself as the best one-to-one communication channel for brands — and most preferred by our customers.

Today's workshop will provide you with the best and most practical ways to improve your email campaigns, challenges your email conceptions, and shows you just why this channel continues to be vitally important for marketers. You'll walk away with a renewed zest for email marketing as well as 65+ tactics that you can use on your campaigns from the moment you walk back into your office. Plus, you get this handy-dandy workbook.

Along with providing you with examples of many of the tactics we will discuss over the course of the day, you'll find a variety of guides, checklists, and audits sourced from many of the world's best and brightest email minds and brands. All work has been credited, and you will find a robust credits and footnotes section that provides URLs or sources of the information provided.

If you have any follow-up questions, don't hesitate to reach out to me at @michaeljbarber on Instagram, Twitter, Facebook, and LinkedIn, or via email at michael@godfrey.com.

Happy emailing,

Michael J. Barber
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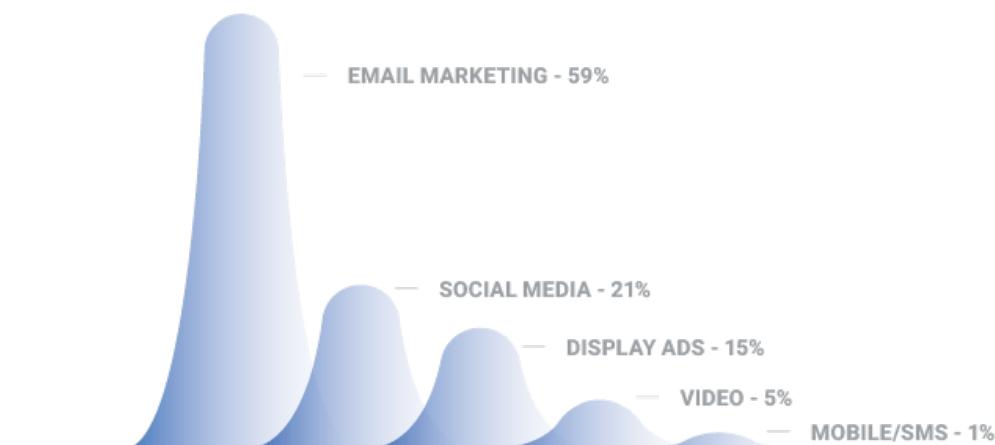
WHY EMAIL?

Did you know that there are 3x more email accounts than Facebook and Twitter accounts combined? That's 3.7¹ billion email accounts sending 270 billion emails per day.² Or that you are 6x more likely to get a click-through from email than Twitter?

As a marketer, you've probably seen the reports that show email has the highest ROI of any marketing channel available and you're probably keen to start using it to drive sales and revenue for your business.

No matter how many channels try to challenge the throne, they all come up short. The majority of respondents said they spend a quarter or less of their time on email, yet 59% said it continues to generate the most ROI for their organization. That places email far ahead of any other digital channel—long may it reign.

WHICH DIGITAL MARKETING CHANNEL GENERATES THE MOST ROI FOR YOUR ORGANIZATION?



Source: Campaign Monitor Email Marketing Industry Report

Our love for the inbox remains, but our preference for engagement on other channels has increased. That's one of the findings in our fourth annual consumer

¹ Statista, 2018

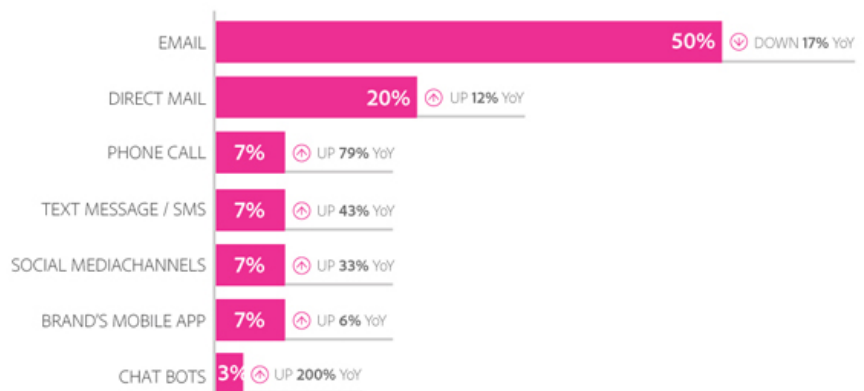
² Radicati Group, 2017

email survey of over 1,000 white-collar workers in the U.S. According to the survey, which looked at how consumers are communicating across email and other channels, time spent checking personal email is up to an impressive 17 percent year-over-year (YoY). Consumers are checking personal email an average of 2.5 hours on a typical weekday. On top of that, they're spending an average of 3.1 hours checking work email.³

Email still matters, a lot, for brands. Adobe's recent survey also suggests that consumers are happy interacting with brands through email, with half of our respondents preferring to communicate with brands by email. And it makes sense that email is the most preferred channel, beating out channels like direct mail (20%) and social media (7%).

"Email is still the number one most effective one-to-one communication channel for marketers to help determine the right email message and when to deliver it."

-Kristin Naragon



Source: Adobe Email Survey 2018 US

Consumers are comfortable opting into email relationships with brands—it's a familiar sort of a handshake. They know they can make choices, such as how often they receive messages. And if brands slip up, consumers know it's easy to unsubscribe.

That said, it's time to get personal with subscribers. Forget the dreaded batch-and-blast: Email works best when it's used to serve up the kind of relevant content and offers consumers have come to expect from brands. However, many marketers aren't

³ <https://theblog.adobe.com/love-email-but-spreading-the-love-other-channels/>

there yet. Studies suggest anywhere from 39-50% of marketers never personalize their emails, while 21-30% never use segmentation.

Additionally, marketers need to begin using tools for testing and automation. 53% of marketers never A/B test their emails (subject lines, CTAs, or send times), and an overwhelming 51% haven't started automating, even for a welcome email. The reason we keep talking about these strategies is because for the most part, people still aren't using them.⁴



AVERAGE NUMBER OF HOURS
SPENT CHECKING PERSONAL
EMAIL EACH WEEKDAY: **2.5 HOURS**

⁴ <https://www.campaignmonitor.com/resources/guides/2018-email-marketing-industry-report/>

ESTABLISH YOUR GOALS

It can be tempting to simply sign up for an email marketing tool like Campaign Monitor, MailChimp, Salesforce, or the like and start sending your first campaign.

But before jumping in head first, it's worth taking a minute to think about your goals and what you really want to achieve with email as that will dictate the type of campaigns you send, who you target, the content you include, and how you measure success.

Email should be an important component of every digital marketing plan because of its effectiveness in driving conversions and building brand loyalty.

The key to establishing the correct goals for your email marketing initiative is to align them with your company's wider marketing goals & KPIs. Is the goal to drive new signups for your product? New leads for your sales team? More attendees for your event? More donations for your cause?

Email marketing is the single most powerful channel to reach your audience, and it can be used to achieve a number of different objectives, so it's worth spending some time thinking about what you want to achieve with it before jumping in.

To help you identify what your goals should be, here are some examples of how different brands use email marketing:

- **JLG Inc.** - As the world's leading designer and manufacturer of access equipment (aerial work platforms and telehandlers), JLG products and personnel can be found all over the world, going above and beyond to support customers. The organization generates revenue from sales of new and used access equipment, along with aftermarket sales related to parts and service. The goals of their marketing are to support their story, traffic generation across its digital channels, and nurture leads into its sales team. JLG sends monthly newsletters that contain links to stories detailing how they are moving the access industry toward a more

safe future and as-needed promotional campaigns targeting customers seeking new and used equipment, and sales and service deals.

- **BuzzFeed** – The popular news and entertainment website earns revenue by selling advertisements on their site, so the key objective of their marketing team is to drive more traffic. With that in mind, BuzzFeed sends regular email newsletters containing links to stories on their website with the goal of increasing the number of visits they get each month and increasing the amount of revenue they generate.
- **Rip Curl** – The global surfing brand generates revenue through the sale of wetsuits, t-shirts, boardshorts and other surfing goods. The goal of their marketing team is to increase sales, so they use email to promote new products they're launching to try to drive people to their online or physical stores to purchase those products.
- **UNICEF** – The global charity organization provides humanitarian aid and assistance to mothers and children in developing nations around the world. Success to their digital marketing team is donations, so they use email marketing to reach out to their donor base, educate them on aid projects UNICEF is undertaking, and ask for donations.
- **SXSW, Inc.** – This lean organization organizes some of the most well-known events in the world, including the SXSW film, music, and interactive festivals held every year in Austin, Texas. The goal of their marketing team is to increase ticket sales and attendees at these events, so they use email marketing to keep subscribers up-to-date as new artists and speakers join the lineup.
- **Soho House** – This prestigious members-only club is a regular hangout for celebrities and media moguls around the world. The goal of their marketing team is to keep their member base engaged in the club and regularly using the facilities, so they use email marketing to keep their members up-to-date on events and functions they can attend.

As you can see from these examples, planning what you want to achieve with email before you start sending makes it much easier to identify what to send and who to send it to, and helps you create focused, high-performing email campaigns that will achieve your marketing goals.⁵

⁵ Via the Campaign Monitor Complete Email Marketing Guide for Beginners

AUTHENTICATE YOUR DOMAINS

Email authentication allows ISPs to properly identify the sender of the email so it can make smarter decisions about the delivery of your mail. Authentication has become a best practice for email senders since spammers have gotten really smart about disguising malicious email under the veil of a trusted brand.

By pretending to send email from your domain, a practice known as phishing, spammers are tricking your customers into giving out their passwords, account information and other personally identifiable information for their own financial gain.

In today's world, email authentication is a "must do" for legitimate organizations in order to secure their online reputation and maintain customer trust in their brand. While authentication can be tricky, it's imperative that any web application that sends email makes sure they add this to the top of their best practice list.

Here's a guide to the following key email authentication standards:

- **DKIM**
- **SPF**
- **DMARC**

DKIM

DKIM (DomainKeys Identified Mail) is an open, DNS-based email authentication standard that uses public key encryption to authenticate email messages. DKIM is used to ensure that the message has not been altered in transmission.

Message originators generate a hash of the email message, encrypt that hash using a private key, and include the encrypted hash (the cryptographic signature) in the message header. That signature is also associated with a DNS domain (included in the mail header with the signature).

The public key corresponding to the private key is published under a specific subdomain of the DNS domain used in the signature. Because only the domain owner (or someone they authorize) should be able to publish a DNS record for the subdomain, this associates the public key with the domain owner.

When a mail server receives a DKIM-signed message, it sees the public key in DNS. The mail server uses the public key to decrypt the signature included in the message header. The mail server then computes a hash of the incoming message using the same algorithm as the message originator. If the computed hash matches the decrypted signature, then the message is authenticated. Otherwise, DKIM authentication fails.

What is a DKIM selector?

To support many DKIM records for the same domain, the DKIM standard introduced the DKIM selector. A selector is simply a sequence of one or more DNS domain labels. The selector is included as a field in the DKIM message header.

A receiving mail server uses the selector and the domain included in the DKIM header to determine the exact domain to retrieve the DNS record containing the public key from.

The DKIM record domain is formed as follows:

`<selector>._domainkey.<header domain>.`

For example, if a DKIM signature has a selector `abc.xyz` and a domain of `test.com` then the corresponding DKIM record domain would be `abc.xyz._domainkey.test.com`.

Is it necessary to change the DKIM keys?

There is no rule for how frequently the sender needs to change the DKIM keys used to sign email messages.

But a frequent rotation of DKIM keys is the most effective measure you can take to increase the security of DKIM authentication. So updating the DKIM keys once a year is strongly recommended.

You should be aware that changing a DKIM key record can cause messages that may be in transit and that were signed with the original DKIM key to fail DKIM authentication. This can happen if the DNS record with the public key is changed.

The standard solution to this problem is to use multiple selectors for your DKIM signatures, and only change one at a time. This allows you to rotate DKIM keys without breaking any in-transit messages that may not have been processed by the receiving servers yet.

For example, you could set up two DKIM key DNS records in your domain with selectors "s1" and "s2." You sign the messages with both "s1" and "s2" keys, generating two signatures on the message.

When updating the "s1" DKIM key, that signature will fail to verify in some circumstances, but the "s2" DKIM signature will continue to verify, authenticating the message.

At a later time, when updating the "s2" DKIM key, the "s1" DKIM key will be constant, and a similar process will occur.

What DKIM key size is recommended?

At a minimum, 1024 bit keys should be used. The Google's server and some other receivers consider keys smaller than 1024 bits insecure, and will not use them for authentication.

Many cryptographers feel that a key size of 1024 bits will likely become insecure in the next few years. So, you may want to consider a larger key size (e.g. 2048), which is likely to be secure against cryptographic attacks for the foreseeable future.

SPF

SPF (Sender Policy Framework) is an open, DNS-based email authentication system that allows sending domains to define which IP addresses are allowed to deliver email messages on behalf of the domain.

Here are the important things email marketers should know about the SPF authentication:

1. SPF is tested for the domain used in the "Envelope-From" addresses (aka MAIL FROM and Return-Path). In order SPF can be used to authenticate the message sender, the "Envelope-From" domain must match the "From" header field domain up to the second level. The use of the incorrect addresses for the "Envelope-From" is one of the most common errors of the SMTP server configuration which leads to the SPF authentication failure.
2. Some email messages (NDR, DSN) have a blank "Envelope-From" field. For such emails, SPF authentication is performed by the domain that the sending SMTP server uses in the HELO/EHLO command. Invalid names in the HELO command is another common problem. You need to make sure that the domain name in the HELO is correct and set the appropriate SPF policy for it, for example, mailserver.example.org. TXT "v = spf1 a -all". You also need to check that the domain is not used in the delivery failure messages. Or if the domain is used, make sure it matches the domain in the HELO command up to the second level.
3. It is important to understand that the domain in the human readable "From" address will not be used for SPF record lookup unless it matches the "Envelope-From" or HELO/EHLO domain.
4. SPF is not applicable to subdomains. It is necessary to implement it for each subdomain or use wildcards DNS.

What is the DNS lookup limit?

When checking whether or not an email message passes SPF authentication, a receiving mail server may have to make one or more DNS lookups.

Typical situations where such a lookup might be required include:

- When evaluating an "include" directive to pull in the SPF rule defined on another domain.
- When checking an IP address against an "a", "mx", or "ptr" directive which require an A, MX, or PTR DNS lookup respectively to evaluate.

To protect receiving mail servers from denial of service attacks the SPF standard includes a hard limit on the number of domain lookups such a server is permitted to make. That limit is 10 lookups.

Most email service providers publish an SPF record in DNS for use by their customers. These customer-focused SPF records frequently include other domains or have additional directives that require domain lookups, so that their total contribution to the lookup count may be much larger than 1.

Customers are then asked to ensure that the SPF record published on their own domain has an "include" directive referencing the domain on which the email service provider published their SPF record.

Unfortunately, this makes it very easy for domain owners to exceed the SPF domain lookup limit. It's also not necessarily obvious when the SPF domain lookup limit has been exceeded. SPF records consist of a set of rules, each one evaluated sequentially. So if a message is validated by one of the rules defined early in the SPF record, the message will authenticate even though the SPF record as a whole is broken.

Messages which are intended to be authenticated by rules that appear later in the SPF record will fail, because the receiver will stop evaluating the record before it reaches those rules.

Domain owners should attempt to limit the number of "includes" in the SPF records for their domains, to help ensure that they don't exceed this limit. And email service providers should not recommend or require that domain owners add an "include" directive unless it is absolutely necessary.

What SPF policy is better?

Most commonly used policies are a neutral policy SPF (neutral,?) or a soft block (soft reject, ~). When SPF is used with DMARC it does not matter what kind of default SPF policy (neutral, soft reject ~ or reject -?) is used.

It is not recommended to use the "reject" policy (-) with the exception of the most secure domains, since this can negatively affect the delivery of legitimate emails sent to mailing lists.

Here's an example of a simple SPF record authenticating a single service:

```
v=spf1 include:_spf.google.com -all
```

Here's an example of a more complex record, with additional services and some dedicated IP addresses:

```
v=spf1 include:spf.protection.outlook.com ip6:2001:db8::/32 ip4:203.0.113.6 -all
```

How do I authenticate messages sent with SPF in a DMARC-compatible way?

It depends on how you are handling bounce messages. Let's consider three scenarios:

#1. You don't need to intercept bounce messages.

In this case, just use the message's "From" address for the "Return-Path" address. Publish an SPF record with your mail servers that your customers can include in their domain's SPF record.

#2. You need to intercept bounce messages, and you can use a customer's subdomain in the "Return-Path" address.

In this case, your customer has delegated a subdomain of their domain to you, using either a CNAME or NS record. Use this subdomain in the "Return-Path" address for messages you send on their behalf.

Publish an SPF record on the domain that includes the IP addresses of the mail servers sending email on the customer's behalf.

#3. You need to intercept bounce messages, but you can't use a customer's subdomain in the "Return-Path" address.

In this case, SPF cannot be used to authenticate messages in a DMARC-compatible way. Instead, you should use DKIM to authenticate your messages.

How does SPF differ from Sender-ID?

Sender-ID is now an outdated alternative email authentication standard. It is similar to SPF but has a few differences.

The most significant difference between SPF and Sender-ID is how the two standards determine which domain(s) to use to determine the SPF rule to apply to the message. Because the lookup process is different between the two standards, messages that authenticate with SPF may not authenticate with Sender-ID and vice versa, even though all of the DNS records are the same.

As we described above, SPF uses the domain from the "Return-Path" address to determine the DNS record containing the relevant SPF record. Sender-ID may use this address (called the mfrom in Sender-ID parlance), the human-readable "From" address (called the pra in Sender-ID parlance), or both to determine whether a given message is properly authenticated.

Sender-ID records are DNS TXT records starting with v=spf2.0. These should not be confused with SPF records, which start with v=spf1.

As Sender-ID is now an obsolete standard, there is no longer any need to configure Sender-ID DNS records. If you have any Sender-ID records currently set in DNS, you may want to remove them.

DMARC

DMARC (Domain-Based Message Authentication, Reporting, and Conformance) is an open email authentication standard that sending domains use to block fraudulent emails.

DMARC is built on top of two earlier standards — SPF and DKIM — and adds additional features like reporting, policy definition, and the notion of identity alignment.

When configured correctly, DMARC can completely stop phishing attacks in which the attacker sends an email with a "From" address that appears to originate from a protected domain. As this is the primary form of phishing attack, DMARC is a very effective tool to defend customers, employees, partners, and others from phishing.

Large mailbox providers email receivers, such as Google, Microsoft, and Yahoo!, require email messages to be properly authenticated in a DMARC-compliant way. So adding a DMARC record for a domain, in conjunction with properly configured SPF and/or DKIM records, will help ensure deliverability.

Furthermore, the proper use of DMARC ensures that messages sent by spammers using a sender's domain will not negatively impact the domain's overall reputation. Such spam emails will be blocked and the sender's brand will be protected.

What are organizational domains?

To support flexible domain matching, DMARC introduced the concept of an organizational domain. Typically, this is the top-level domain (TLD) plus one more label.

For some countries, that use second-level domains to categorize organizations, the organizational domain is this second-level domain plus one more label.

Examples of organizational domains are:

nytimes.com

bbc.co.uk

wikipedia.org

And the following domains share the same organizational domain (bbc.co.uk):

mail123.bbc.co.uk

abc.def.x-y.bbc.co.uk

bbc.co.uk

How does DMARC help SPF and DKIM?

DMARC contributes three major elements to the SPF and DKIM email authentication standards:

1. **Reporting.** DMARC-participating receivers agree to provide email authentication reports to sending domains. This allows the owners of these sending domains to understand the current state of email authentication for their domain, see legitimate services that may not be properly authenticating, and identify sources of domain abuse.
2. **Policy.** With DMARC, sending domains can recommend how a receiver should treat an email that fails authentication, rather than leaving it to the discretion of the receiver. This allows sending domains to authenticate all sources of legitimate email over time, rather than requiring domain owners to fix all authentication

issues immediately. A report-only policy of "p=none" can be useful during this investigation phase, but domain owners should strive to reach an enforcement level of "p=quarantine" or "p=reject".

3. **Identity alignment.** Among multiple sources of identity in an email message (including the "From" address, DKIM signature identity, and "Return-Path" address), DMARC prioritizes the human-readable "From" address as a source of identity, and only considers authentication results for identities that are aligned with this "From" address.

SPF and DKIM use different sources of identity, and so the authentication they provide will only prevent fraud if their source of identity matches the human-readable "From" address in some way. In this situation, the identities are considered "aligned."

In cases where SPF or DKIM authenticates with an identity whose domain doesn't match the domain in the human-readable "From" address, the non-matching authentication result is simply discarded. DMARC does not cause any change in the underlying SPF or DKIM behavior and the corresponding identities against which they authenticate.

Therefore, passing SPF or DKIM isn't enough to ensure that a message passes DMARC. Often messages pass SPF and/or DKIM but fail DMARC because of identity misalignment.

How to configure DMARC for a domain?

DMARC is configured through the use of DNS TXT records. A domain owner adds a special DNS TXT record on the "_dmarc" subdomain of the domain for which they'd like to configure DMARC. This DNS TXT record defines the policy for the domain.

The DMARC standard defines a lookup rule for DNS records, which explains how the relevant DMARC policy DNS record is determined. The rule is as follows:

- Extract the email domain from the human-readable "From" address;

- Look up a DMARC record on the "_dmarc" subdomain of the email domain;
- If no record is found, and the email domain is not an organizational domain, then look up the "_dmarc" subdomain of the corresponding organizational domain. If a record is found on this subdomain, use that record to determine the DMARC policy.
- If no record is found, then the process terminates and DMARC is not enforced for the message.

A key takeaway from this process is that it is generally sufficient to define a single DMARC record on the organizational domain. Even if an email service provider or domain owner is using a subdomain to send email, they don't need to create separate DMARC records for each subdomain.

What does a DMARC DNS record look like?

In most DMARC DNS records, there are only four attributes:

v — "DMARC1" for the current DMARC revision. This attribute must appear the first.

p — specifies the enforcement level requested by the sender. Allowed values are "none", "quarantine", and "reject". This attribute is required and must be the second attribute in the record.

none: receivers are instructed to not change how they deliver email based on email authentication failures. The "none" policy is typically used when a domain owner is in the initial process of authenticating their email services; moving beyond this level is key to enable DMARC to stop fraud.

quarantine: receivers are asked to mark messages failing authentication as spam.

reject: receivers are requested to block messages failing authentication entirely, and not deliver them to their intended recipients.

In all cases, the policy is enforced by the system receiving the email, and the receiving system may choose to handle the email differently than prescribed by the DMARC policy. For example, Microsoft Office 365 treats "quarantine" and "reject" identically.

rua — a comma-separated list of URLs for aggregate report delivery. These are typically "mailto" URLs. This attribute is optional.

ruf — a comma-separated list of URLs for forensic/failure report delivery. These are typically "mailto" URLs. By default, forensic reports are sent only in case of DMARC violations. You can use the "fo" option to regulate it. At present, a relatively small number of receivers send forensic reports. This attribute is optional.

So a sample DMARC record for example.com might be:

**v=DMARC1; p=quarantine; rua=mailto:dmarc_agg@example.com;
ruf=mailto:dmarc-reports@example.com**

Below are some other optional attributes of a DMARC record and recommendations for their usage:

sp (sp=quarantine) – policy for subdomains that do not publish their own policy. If a subdomain has its own DMARC policy, the "sp" is not applied. If there is no "sp" field in a DMARC record for subdomains that do not have their own policy, then the policy in the "p" field is applied.

pct (pct=20) – percentage of emails the policy is applied to. For example, the "reject pct = 20" policy means that the "reject" policy will be applied to a received message with the probability of 20% and the "quarantine" policy – with the probability of 80%.

fo (fo=1) – regulates sending of forensic reports. "fo=0" (default behavior) sends the reports only when both SPF and DKIM authentications failed. "fo=1" sends reports when any of the authentications fails even if an alternative method passes. "fo=s" sends forensic reports when there are problems with the SPF authentication, and "fo=d" sends reports when there are problems with DKIM.

adkim (adkim=r) – verification of the correspondence of the DKIM domain. By default, the r (relaxed) mode is used which means that only the organizational domain must match. The strict (s) mode requires the full match of the domain in the sender address with the domain of the DKIM-signature. It makes sense to use the strict mode if a part of your subdomains is delegated to untrusted parties.

aspf (aspf=r) – verification of the "Envelope-From" domain, which is checked for SPF and From. When "aspf=s" is set, these domains must match in order the message passes the SPF authentication.

ri (ri=86400) – desired interval (in seconds) of receiving aggregated reports. By default, reports are sent once a day, but some receivers (not all, because the support of this option by the server is not mandatory) support shorter intervals. At the stage of the implementation of the DMARC policy, you can try using a shorter interval, "ri=3600" for example.⁶

BUILD YOUR LIST

Now that you have established your goals, along with authenticated your domain, it's time to build your email list so you can start sending campaigns that achieve your goals.

There are a couple of different ways you can build your email list, but the right method for each campaign really depends on the goals you establish.

Import a list of known contacts

If you plan to use email to keep in touch with existing customers, then your email list can be built largely by importing your existing customers' details into your chosen email marketing tool.

⁶ GlockApps - <https://glockapps.com/blog/email-authentication/>

For most email service providers (ESP), you can either manually upload an existing list (from an Excel file for instance) or you can connect your ESP account to the tool where your customer data lives (such as your CRM, accounting, eCommerce tool, and hundreds of others) and automatically sync your customer information into your ESP.

Before you import any contacts though, ensure you have adequate permission to email these subscribers. If you're not sure, check out our Permissions guide or contact our support team as they'll be happy to chat with you about permissions and uploading your list.

Build a new list from scratch

If you plan to use email to communicate with an audience whose email address you might not have yet, then you'll need to start capturing email addresses and building your list from scratch.

Fortunately for you, there is a 2-part formula for building your email list that is followed by many of the most successful email marketers around. The formula is:

**A valuable incentive + simple subscribe opportunities =
large email list**

While it is a little bit of a simplification, it's also just logic. Regardless of how many subscribe opportunities you present to a visitor, it's unlikely they'll act without a valuable incentive. And no matter how good your incentive is, you still need to make it simple for people to subscribe if you want to get them to join your list.

The real question is, what makes for an amazing incentive? And how can you make subscribing to your list really simple and easy?

Here are some incentives you could use to entice people to join your email list:

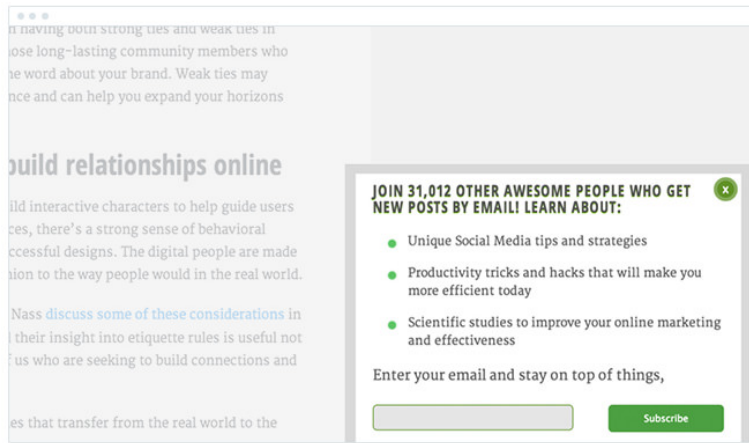
- **Compelling content** – If you have a blog or produce content on your website, then offering to send your best content to subscribers via email is a powerful incentive for them to join your list.
- **First order discounts** – If you sell goods through an online store, then offering people a discount off their first order if they subscribe to your email list is an amazing incentive. Not only does it encourage people to subscribe, but gives them an incentive to purchase as well.
- **Free or express shipping upgrade** – Offering free or upgraded shipping on your customer's purchase is a great incentive to join your list. Not only is this offer highly relevant – particularly when offered during the checkout process – but being able to get a desirable item into their hands quicker is a powerful motivator for people to subscribe.

Furthermore, the other part of the equation is offering numerous, simple subscribe opportunities as this makes it easy for people to opt-in. While the type of subscribe form you use will depend on the incentive you are offering, here are a few ideas:

Header Bar

The Header Bar sits at the very top of your website and contains a call to action encouraging people to join, as well as a form to input your email address.





Slider

A slider is a small box that 'slides in' to the bottom corner of your website and contains a call to action encouraging people to subscribe along with a field for visitors to enter their email address.

An excellent tool for setting this up on your own website is Scroll Box (part of the SumoMe suite of tools). This simple tool makes it easy for you to customize and insert a Slider into your website and integrates directly with your ESP to feed any email addresses you capture into your list.

Top of sidebar

If your site uses a sidebar, typically used in blogs and article segments, this is an ideal place to embed an opt-in for your subscriber list. Ideally, you want the opt-in to be above the fold in the uppermost space of the sidebar for maximum visibility, ensuring it's seen first.

This is most effective with a right-aligned sidebar as it takes advantage of users who scan content in an 'F' pattern, putting your opt-in CTA front and center as soon as they land on your site or blog/article.

End of Post

When a visitor reads your content all the way to the end it's fair to assume they enjoyed the read. So, why not ask them to sign-up to ensure they never miss out on upcoming content?

End-of-post opt-ins are a great place to grab subscribers in a space where brands otherwise rarely include a call-to-action other than telling readers to comment and share. Instead, include a visual call to action with your newsletter opt-in.

You'll definitely see an improvement in conversions if you have a content upgrade offered in context (on topic) with the post in question.

Lightboxes

While pop-ups may be seen by some as intrusive and annoying, [countless studies and tests](#) have shown they can be effective. There are a few things you need to get right to create an effective pop-up opt-in that doesn't run off your audience:

- The right value offer
- A strong call to action
- Timing

Timing is one to pay attention to. A pop-up opt-in that shows as a reader finishes an article, or around 3/4 of the page scrolled, is far more likely to convert than one that triggers on every page of the site as soon as a visitor arrives.

Some sites only show lightbox opt-ins that trigger when a user shows exit-intent (moving the mouse cursor outside the browser area). New York Times best-selling author, Neil Patel, tested opt-ins with exit-intent and was able to [increase conversions by 46%](#).

Experiment with the message and timing of lightbox opt-ins to find what brings the highest conversion of new subscribers.⁷

⁷ <https://www.campaignmonitor.com/resources/guides/getting-started-with-email-marketing/#three>

EMAIL DESIGN

In this section, we'll cover email design best practices for all the different elements of your email campaigns and have a bonus checklist for you at the end. Most of the content comes via Campaign Monitor, Phrasee, and a ton of best practices we've learned along the way. So let's get to it.

Subject Line

While not a traditional "design element" your subject line is considered one of the most important factors in getting your email opened so your subscribers can see your sweet design, so make it engaging, personal, and relevant. Remember that overuse of CAPS and unnecessary punctuation, as well as certain words, can trigger spam filters so respect your subscribers and don't go there.

For many of your subscribers, your email subject lines will more than likely be the only part of your emails they ever see.

This is why (combined with your sender name and the relationship you have developed with your subscribers) the subject line is your best chance to convince each subscriber to open your email and read your marketing message. You may have crafted the world's best marketing email filled with intriguing and highly relevant content, but all that work will be wasted if the subject line can't get the recipient to open.

Think of it as a headline or blog post title, but with a touch more personalization and the added threat that it could be deleted instantly or (worse yet) sent straight to the spam folder.

How to split test subject lines

There are two different ways to split test the effectiveness of subject lines – A/B testing and multivariate testing.

Split testing can reveal how small changes in a subject line affect the open rates it generates. If a marketer wants to A/B split test their subject line, they'll create two email campaigns that are exactly the same except for having different subject lines, then send the two different lines to different segments of their mailing list to see which one performs better. This helps them discern what types of subject lines, wordings, and sentiments their audience responds best to.

Multivariate testing is even better. It's a split test that tests more than one variable at a time. Unfortunately, it generally requires a more substantial mailing list than A/B testing does.

In the case of email subject lines, different combinations of words, symbols (like emojis), and punctuation can affect the resulting sentiment contained within the subject line's message, and thus how that subject line is perceived by its recipients.

Because of the large numbers of variables involved in any message (especially in English!), it is generally best practice to test for as many variations of a subject line as possible. The more variations tested the better!

Conveying the right sentiment

Language is more than just the words we use. It's all about the meaning those words convey. The same holds true for subject lines. When we read a sentence, we don't really read word by word and figure out the meaning as we go along. Instead, we read the entire sentence, then subconsciously process it and its meaning or sentiment.

Stay on brand

You've invested a lot of time and money building your brand and its unique voice. Are you going to throw that all away trying to get an email opened? You shouldn't. Your brand's voice matters and this simple fact does not change once you start writing an email subject line. Make sure that your subject lines are on brand, or brand damage becomes a very real possibility.

Be clear and concise

Subject lines are not the time to wax poetic about your product's many attributes. They should be clever but clear enough that your recipient doesn't have to guess what the body of the email contains. Let people know as clearly as possible what they're getting when they click open.

Personalize

When you're sending out multiple campaigns to thousands of subscribers, it's easy to fall into the mindset of viewing your audience as a group and not as individuals. Targeting specific segments of your mailing list is key to personalization. It's also a smart idea to write your copy with a single, key target in mind. How would you speak to a potential customer in real life? Use that voice!

Stand out

If your subject line follows the tips above, it's sure to start standing out from the mass of other emails flooding people's inboxes, but there are still more ways to play around. Testing the waters with emojis, humor, or pop-culture references is also an option, so long as it fits with your brand voice.

Optimize on the fly

In the digital age, things change quickly. A subject line which performs beautifully today could be completely ignored tomorrow. That's why it is so important to keep on testing. Track your performance data as often as possible and make adjustments when things aren't working.

Do not copy what your competitors are doing

Standing out in a crowded inbox can't be accomplished by copying the competition. Only unique, interesting subject lines will get you the opens you crave. Be original!

Do not make false promises

Making a false promise in your subject line – saying one thing but actually have the bulk of the email be about another – is poor practice and will quickly get your readers to click ‘unsubscribe’. This can also be called “openbait”. Similar to clickbait (you know the article titles we’re talking about), open bait is an enticing subject line that effectively gets readers to open your email just to find out your message has nothing to do with the subject.

While using these tactics may work in the short run to increase open rates, they’ll soon annoy your audience and threaten their trust, ending up resulting in fewer opens and conversions.

Preheader

Your preheader can be visible in the inbox preview and in the body of your email, or just in the preview pane if you want to save email real estate. Preheaders add valuable context to your subject line and can help your open rate. Keep it short (between 40-70 characters) and to-the-point. Use this space to help your customer know why the email is useful to them. Your subject line and preheader text should work together.

Email Layout

Your email layout should help the viewer know what they should check out first, and where they can go from there. They should be able to scan the email quickly using a logical hierarchy with large headlines and images focusing the attention. Use layout to break up space and help create chunks of content.

Inverted Pyramid

Campaign Monitor is a big fan of the inverted pyramid model. It’s essentially a framework for structuring the elements of your email campaigns (headers, imagery,

buttons, etc) so they work together to draw people in, deliver the key messages of your campaign, and get them to click-through.

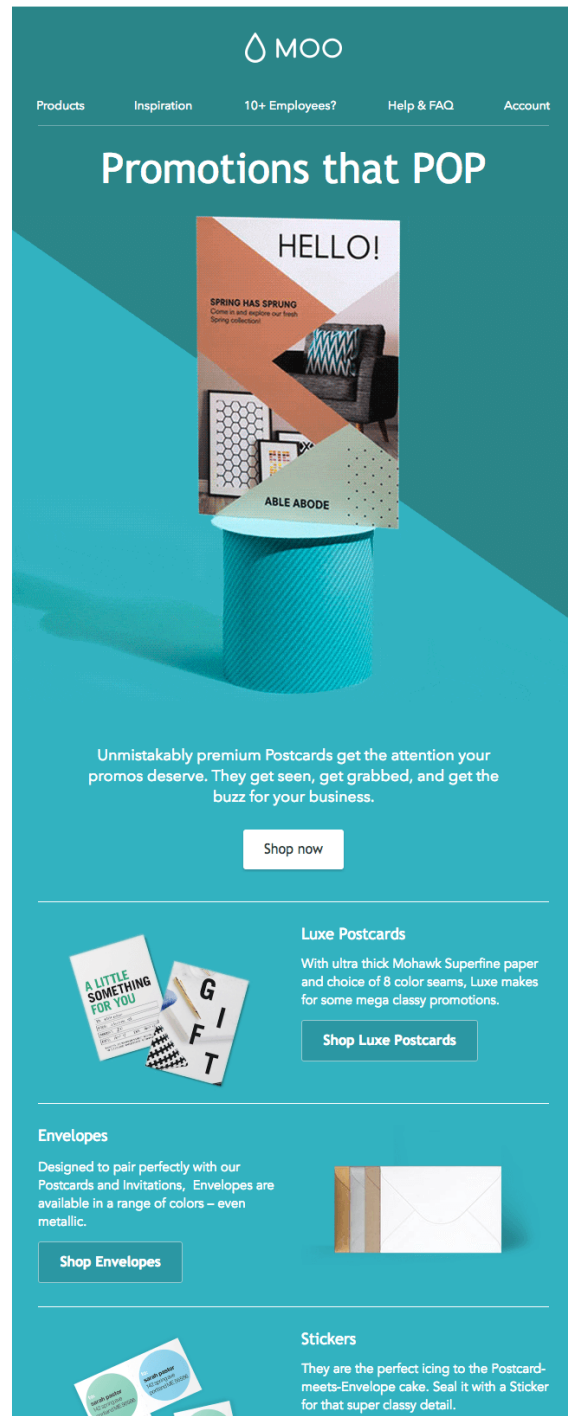
By guiding a subscriber's eye down the page to your CTA, you'll encourage them to click through to explore more of what you have to offer, resulting in better brand awareness, more web traffic, and ultimately more sales.

Zig-Zag

Another effective design grid is an angular one with a zig-zag layout.

According to the graphic designer, Mary Stribley, an "angular layout is both enticing to look at as well as functional to order lots of information and imagery."

You can create these angles through using imagery or color blocking in order to guide the reader through each step of the email. This not only creates a visually pleasing layout, it also helps to simplify each section of the email so that it is easy to read.



One Column, Skinny Layouts

One column emails work great on desktop and mobile. These mobile first emails usually adapt to desktop and scale images. It helps consumers navigate the email without overwhelming them. The one column design makes it obvious what information is important and what you want a consumer to do next.

Email Width

To ensure that your email renders well in every email client, we can push the envelope on our email widths to at least 640 pixels. At widths wider than 640px, Gmail doesn't show any background color that would appear in the margins at most reasonable browser sizes (you can see them if you stretch your browser to wider than 1200px). For our designs, 600px is usually the sweet spot.

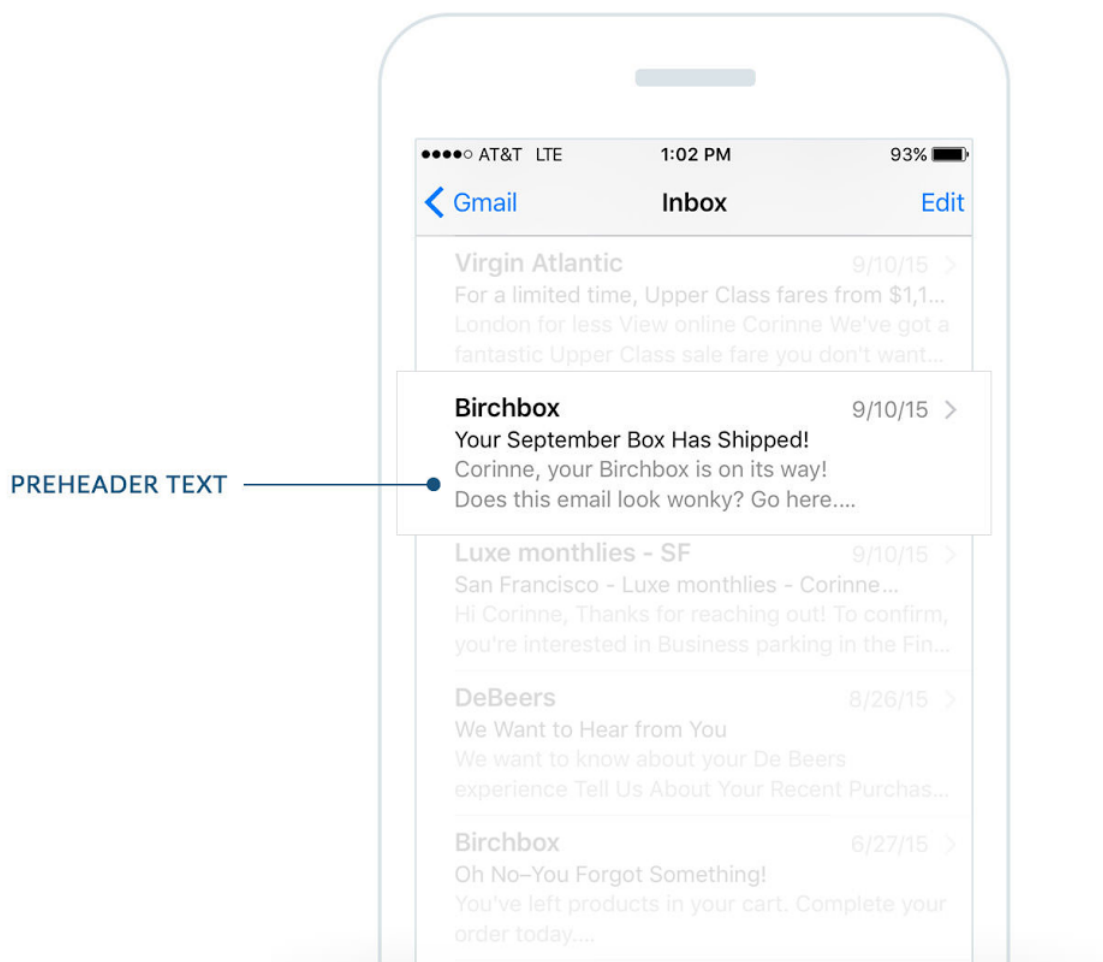
Plus, email clients don't use the full width of your screen to display an email message. Some show ads or have navigation or a menu so there are limitations to the real estate on a screen.

Images

When using images in your emails, it's important to keep the following in mind:

- **Dimension** – most emails are 600-640px wide. However, to keep your image crisp on high-resolution displays, you need to make your image 2x the size (ie. 1200px) and use the image attributes and CSS to keep the image at the width you want.
- **File Size** – It's easy to forget about file size in an email, but you want to make sure your images are optimized, especially since more than 50% of emails are opened on mobile devices. The bigger the email, the longer it'll take for mobile subscribers to view and thus create a negative experience with your email. Using a service like [TinyPng.com](https://tinypng.com) is a great last step to images to help optimize.

- **Alt Text** – If your image doesn't load or breaks somewhere along the sending process, Alt Text is the text that will display in its place. This is another area that



many email marketers overlook. Add in helpful Alt Text that adds to your message in case your image doesn't load. If your image has text on it, I usually write the overlaying text as the alt text. This way if the image doesn't load, the text will still be read. Including ALT text also makes your email more accessible.

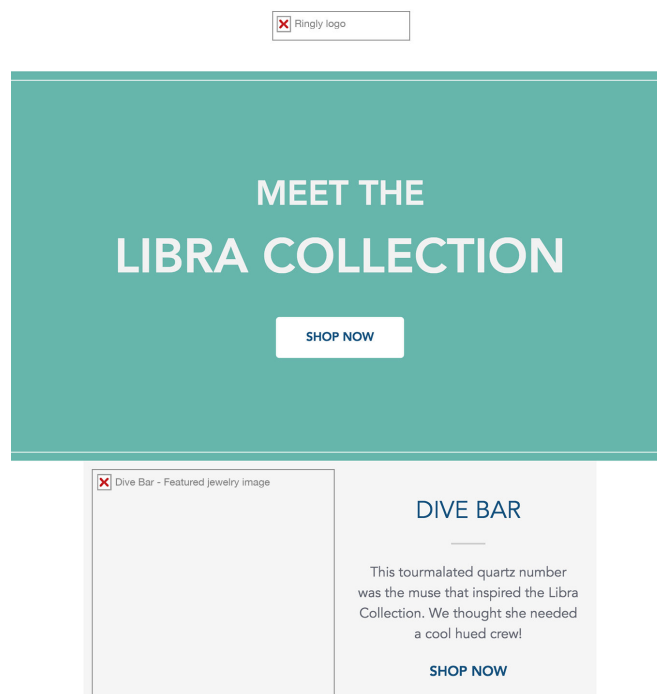
- **Use images that complement the email** – Your email should not be a bunch of images placed together. An [image should add to the email and messaging](#)—not be the messaging. A simple way to test this is to view your email with images turned off. Does the email still make sense? Is the message still clear? Our friends at Email Monks offer some solid advice on [the optimal text to image ratio](#).

- **Stock Images** – Stock imagery can sometimes take your audience out of the messaging. Keep your images on brand and genuine. Take the time if you have the opportunity to create specific imagery for your email campaign! If not, use imagery from paid sites like [stocksy.com](https://www.stocksy.com) or free sites like deathtothestockphoto.com. Here are [a few more](#) to check out.

Images and Alt Text

Alt text is simply the alternative text displayed with an image. Think of it as the backup text that provides some context about what your image is, for those that have images blocked or turned off by default. Many marketers learn about alt text the hard way by forgetting to use it and suffering the consequences. Don't be that person.

As you can see from the example below, when images are blocked, subscribers see what looks like a broken image, or a red "X". In this case, alt text indicates that there is an image and provided a little context about the image to encourage subscribers to "turn on or enable" images in the email.



For more on alt text in email, check out this [guide from our friends at Litmus](#).

Web Fonts + Fallbacks

When it comes to email marketing, it's best practice to use web fonts wherever you can. However, it's important to keep in mind, that not all email clients offer universal support for web fonts.

Example: Uses @import + @fontface to bring in Clobber, Gotham Book, Gotham Medium, and Montserrat fonts.

Google Fonts is a great resource to add web fonts to your emails. We suggest using live text when possible for better legibility across devices and consistent brand experience from email to website to add web fonts to your emails.

@import

@import url <http://fonts.googleapis.com/css?family=Open+Sans>

Currently, the @import method is not supported in AOL using IE11 and Android 2.3.

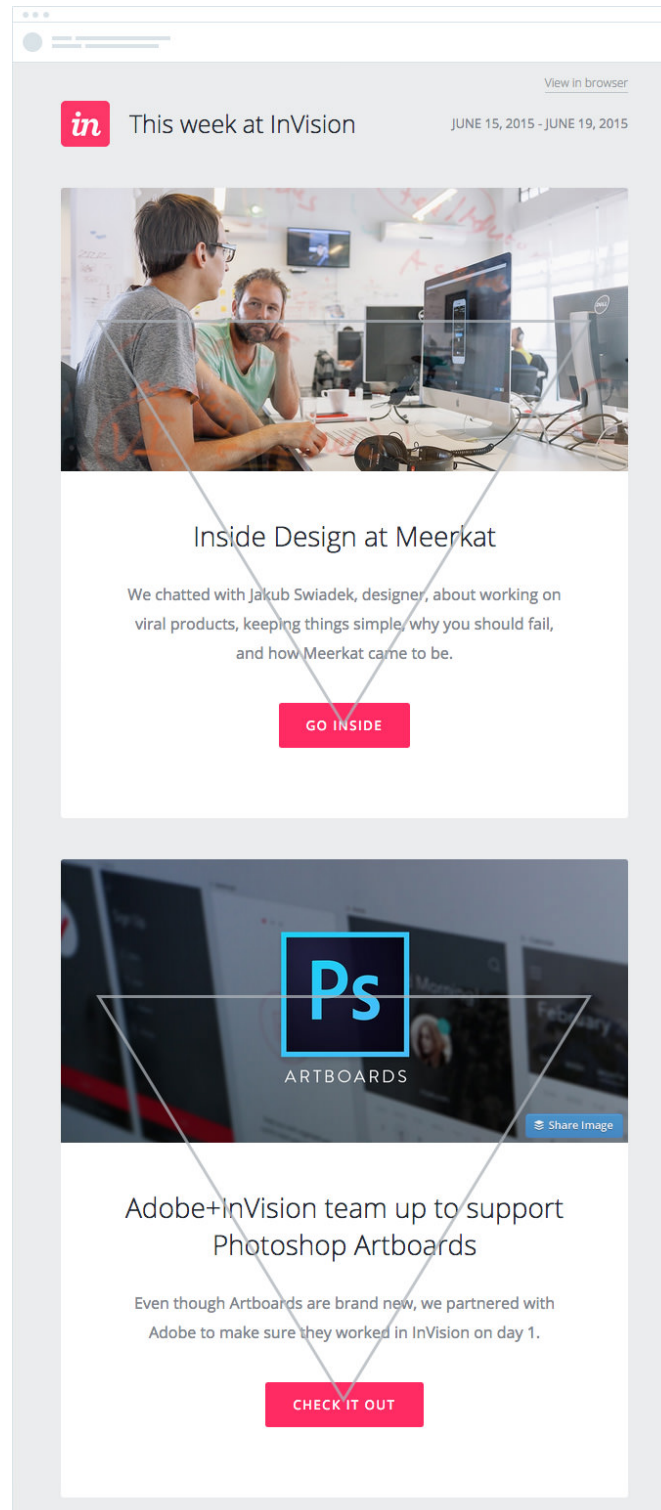
<link>

```
<link href="http://fonts.googleapis.com/css?family=Open+Sans" rel="stylesheet" type="text/css">
```

The <link> method is fully supported among the email clients listed above. Web font services will provide you with the href value to use for your web font of choice. If you're hosting your own web-font, you'll have to change the href value to where you've hosted your web font.

@font-face


```
<style type="text/css">
@media screen {
  @font-face{
    font-family:'Open Sans';
```



```
font-style:normal;
font-weight:400;
src:local('Open Sans'), local('OpenSans'), url('http://fonts.gstatic.com/s/opensans/
v10/cjZKeOuBrn4kERxqtaUH3bO3LdcAZYWl9Si6vwL-qU.woff') format('woff');
}
}
</style>
```

Think of the @font-face method as a direct-to-the-source sort of method of importing your web fonts. It can be more reliable to import the web font directly from the source as you can choose which format of web font you want to import—especially if you’re given a choice, which some web font suppliers do have.

If web fonts are not supported, there are fallback fonts that will be seen instead. When setting fallbacks, remember to use a “web safe font”. System fonts like Calibri are not always supported across all clients.

Each email client also has a preferred or default font which users would see instead of your chosen web font. The three most popular desktop email clients have the following defaults:

Apple Mail = Helvetica

Gmail = Arial

Microsoft Outlook = Times New Roman

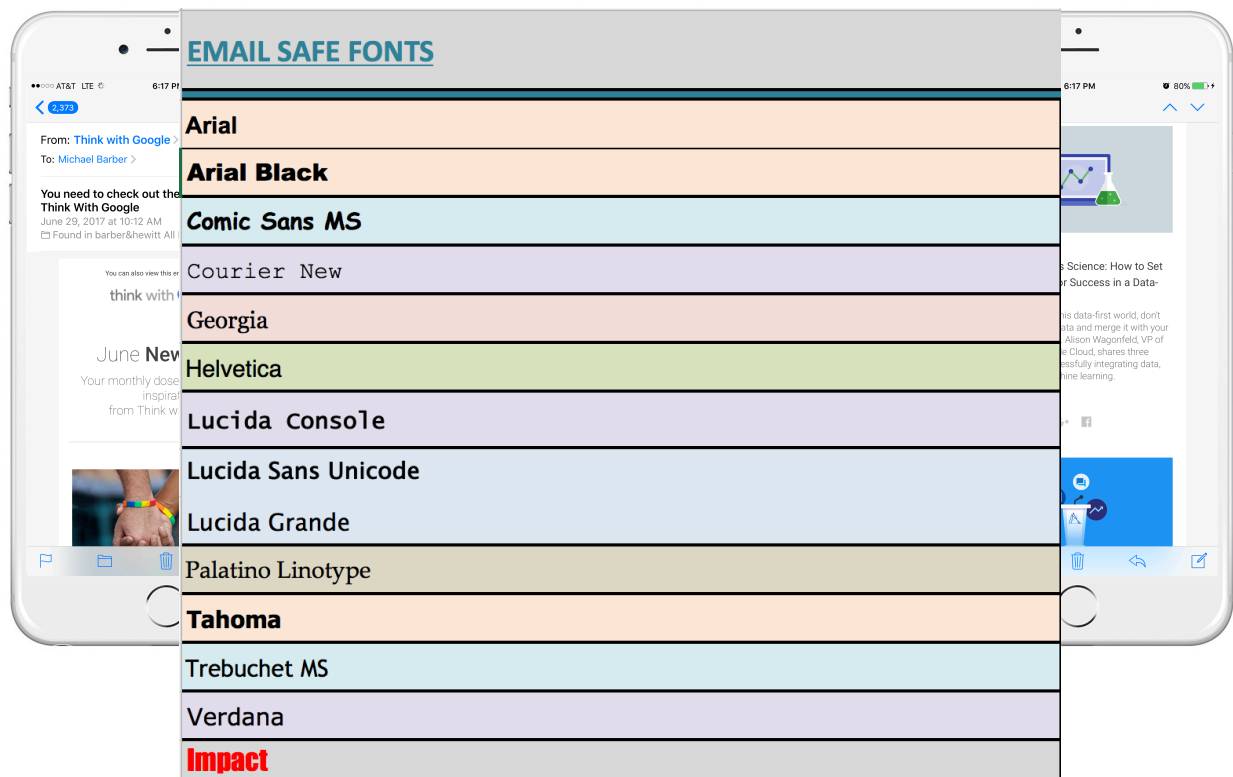
Outlook is a special case. If a webfont fails in Outlook, it ignores the fallback fonts and just decides to render everything in Times New Roman. If this happens, add this CSS to your email and you should be good to go.

```
<!--[if mso]>
<style type="text/css">
body, table, td, p, li, a {font-family: Arial, Helvetica, sans-serif !important;}
```

</style>
<![endif]-->

Add other elements like p, li, a, etc. if you need to fix Outlook rendering Times New Roman on those elements too.

For more help implementing web fonts in your emails, check out [Campaign Monitor's guide here](#).



White Space

White space is the blank area around your paragraphs, images, and call-to-action buttons.

Adding ample white space around the elements in your email encourages click-throughs by separating them visually from other elements in your email and helping

focus the reader's attention on them at the right time. It can also increase the legibility of your email and improves the eyes' ability to follow the content. Use your best judgment to ensure your copy and CTA button are separated enough to stand out, but close to enough that your readers know they're connected.

CTAs + Bulletproof Buttons

An ideal CTA button has three main aspects that work together to create an effective conversion point for the reader:

- **Copy** – be specific and focus on the benefit
- **Design** – stands out, appropriately sized, has white space around it
- **Placement** – the ideal placement of the CTA button is relative to the complexity of the offer. If the offer is more complex, you may need more explanation copy before the CTA.

It's always good to have a couple different button types for different priorities in your email. For example, having an orange button with white text for your main CTAs and light gray buttons with dark text for secondary elements. However, it's important to keep the number of CTAs to a minimum in your email. Focus on where you want people to go and remove any unneeded noise. Here are some things you should consider when crafting your button:

- **Size** – Keep your buttons big enough that people can tap on them on their phone. Typically that means around 50 pixels tall.
- **Color** – Most brands match the color of their button to their brand's colors, contrasting against the background color and the space around it. Hover effects (changing color when one scrolls over) are supported by most email clients and is being used more often.

- **Frequency** – The number of buttons you have in an email is determined by how many actions are possible to take. For retailers, that may be multiple products with each have their own button. For others, that may be just one to focus on the most important message.
- **Language** – The button is there for viewers to take action, so an active verb is typically used to help them take that action.

Because many email clients will block image loading by default, designing your buttons as images can have a negative effect. Using a “[bulletproof button](#)” (a small snippet of HTML and in-line CSS) will ensure that your button is rendered when images are turned off. You can use [this tool](#) to create one.

Links

Check every link in your email on mobile and desktop. Things to look for include: Does it go to where you want it to? Does it have UTM tracking? Is it clear in the email that it's a clickable link? Are any email browsers changing the color of your links?

Also, keep an eye on dates in your email. Even though you don't link them, Gmail and Apple like to “help” by turning them into blue clickable links. You can use CSS to override the link style to look like regular body text.

How to stop Apple from making links blue:

```
a[x-apple-data-detectors] {  
  color: inherit !important;  
  text-decoration: none !important;  
  font-size: inherit !important;  
  font-family: inherit !important;  
  font-weight: inherit !important;  
  line-height: inherit !important;  
}
```

Video

It's common to think that when you use video in email, that the video will simply play right inside the email. That would be a magical thing, much like a rainbow unicorn, but many email clients like Gmail, Outlook, Thunderbird, and others don't support the technical requirements needed to play video inside the email.

But over half of email clients support HTML5, so you can definitely embed video in your email or many ESPs enable you to have a static image with a play button that links to the hosted version of the video. You can also use an animated GIF instead.

Pro Tip: Use a video thumbnail with a play button or GIF teaser of the video to get more clicks.

GIFs

Animated GIFs are a great alternative to using video if you want to add moving content to your emails.

Animated GIF files can get rather large the more animation, frames, and colors there are in the image. To keep them as small as possible, only animate what you need to animate, keep it short, and don't use every color in the book.

It's a good idea to keep your GIF file size as close to 1MB as possible. Under is perfect. A little over is still okay, too.

Copy/Tone

Understand your audience to know what kind of language will work best. Some subscriber lists are more formal whereas other are casual and okay with the odd profanity inclusion (tread lightly here unless you are one hundred percent sure your audience can handle it.) Writing a high-performing email campaign isn't hard if you stay true to your brand and optimize the key parts of your email.

Here is an incredible guide from our friends at Campaign Monitor on Writing a High-Performing Email.

Spelling/Grammar

Always send a test of your email to at least two other people who can check your email top to bottom with fresh eyes and look for typos, grammatical errors, and other mishaps. You can use this preflight email checklist to avoid common errors before you push send.

Footer

Legal

Your email will need at least the address of the company which is sending it and an unsubscribe link to be compliant with government regulations around the world. Your legal team will probably want to add in some other information such as terms and conditions, too, if it applies to your messaging. It is always good to get a sign-off from a manager or counsel to make sure that you have everything necessary to protect your rights.

Social Links

Even though it will be a small percentage of clicks from your email, it is always a best practice to show your audience where else they can follow your company. Each social media platform has its own purpose, which your email may not be satisfying. Select the ones that your company uses the most (there's no need to show every single social profile your company has). Social icons that match your branding or the rest of the email is a nice touch.

Be sure to show the difference of social share vs. social page icons.

App

Consider including a link to download your app if you have one.

Referral

Want to spread the word about your product or service? Include a referral link section of your brand has an incentive program set up. It's a good module to include in transactional emails.

Support

Contact us or support links. Ask for feedback about the email. If your email is a noreply@, which we don't recommend, then give your customers a clear way they should reach out to you. Shows brand has a customer support focus and gives customers the opportunity to speak up about their experiences.

MOBILE OPTIMIZATION

Email opens on mobile devices just keep increasing year after year. The latest stats are that over 51% of email opens occur on mobile. Making your emails mobile-friendly is easier than ever by:

- Using a mobile-friendly layout
- Keeping your subject line short
- Using preheader text
- Using minimal body copy
- Using a clear and easy-to-click CTA button (according to a recent MIT study, the average size of an adult index finger is between 1.6cm and 2 cm, which translates to between 45 x 45px and 57 x 57px on a mobile device)
- Increasing the size of body copy if it's small on desktop emails (16px is a good size for mobile)
- Making sure your images aren't too small or hard to see when on mobile

Coding Mobile Emails

If you are coding your emails, there are two approaches to mobile emails: responsive and hybrid.

Responsive

Responsive uses media queries and CSS to override the existing styles when the email is viewed on a small display.

```
@media screen and (max-width: 480px) {  
.responsive-table {
```

```
display: block;
width: 100% !important;
}

.responsive-image {
height: auto;
max-width: 100% !important;
}
}
```

Hybrid

Hybrid gets a little more complex but relies on using a fluid layout that will shrink and grow with the size of the display. Plus, it doesn't rely on media queries which can be a big bonus if you're targeting email clients that don't support media queries.

Plain-Text Email⁸

No, we aren't going to revive the Great Text-Versus-HTML Debate of the early 2000s. But plain-text email still plays a significant role in your email strategy, especially with the growth of smartwatches, screen readers, and home assistants, none of which render HTML.

These tips will help you create a compelling plain-text email, whether it's a stand-alone message or the text version of a multi-part MIME message:

- **Write short but clear headlines.** Use at least one line of white space to differentiate each headline from the copy block below it. Set it off with typographical devices like dashes or equal signs.
- **Break up long copy blocks.** Use more but shorter copy blocks to avoid the dreaded and unreadable gray river of copy.

⁸ <https://litmus.com/blog/nofailmail-the-5-most-common-email-design-fails-and-how-to-avoid-them>

- **Create information hierarchy with lists.** All the type in a plain-text email is the same font and point size. So, you have to work harder to guide your reader to your key points. Use lists to highlight information in a series. Set each item off with a text-friendly designation, such as a dash (–) or asterisk (*). (Bullets don't work in plain text.)
- **Use white space liberally.** White space organizes related information for easy scanning. Use wide margins and extra line breaks between copy blocks, calls to action, and headers or administrative footers.
- **Define CTAs.** What did people do before they had CTA buttons? They used attention-getters like white space to separate them from other copy and with typographical devices like arrows (>> and <<) to set them off. Avoid long lists of CTAs and surround them with white space to make them click- or finger-friendly.

This email illustrates all these best practices for plain-text emails:

Golfsmith ☺ to: researchlmtus@gmail.com
from: golf.store@golfsmith.com

Don't Forget... 15% Off + Free Shipping Ends Today!

=====

ONLINE ONLY SALE ENDS TODAY

=====

Take an Extra 15% Off + Free Shipping on Orders of \$125 or More!
Hurry, offer ends tomorrow! Online only. Use promo code EPS441SAL to redeem.

>> Shop Now
<http://links.mkt063.com/cftt?kn=33&ms=NzE3Nig2MQS2&r=MzIxMTc0MjUwNjQs1&b=2&j=NTQwMzMyNTM1S0&mt=1&rt=0>

=====

*PROMOTION EXCLUSIONS: Due to manufacturer restrictions, some items do not qualify for discount. Select items from the following brands are excluded: Callaway, TaylorMade, Nike, Srixon, Ogio, ECCO, Bridgestone, adidas, Puma, and Adams. All items from the following brands are excluded: Bushnell, Sky Golf, Sun Mountain, Garmin, PING, Titleist, Leupold, Golf Buddy, Scotty Cameron, FootJoy, Mizuno, Clifgear, Oakley, Accusport, Zelosity, Under Armour, Bat-Caddy, Cart-Tek, Doorworks, Foresight, iClub, Pinnacle, Power Balance, Spitzer, Tiger Shark, Super Stroke, and Golf Pride. Not valid on previous purchases, exchanges, special orders or gift cards. Additional exclusions may apply. See the exclusions list for a complete list of manufacturer restrictions. Discounts cannot be combined with other Golfsmith offers or discounts unless specified. Offer ends 10-05-14.

FREE SHIPPING EXCLUSIONS: Applies to ground orders in the contiguous U.S. that qualify. Some manufacturer and category restrictions apply. Not valid on previous purchases, exchanges, special orders or gift cards. No substitutions or backorders. Offer ends 09-15-2014. Use promotion code EPS438SAL to redeem.

To ensure you keep receiving Golfsmith emails, add golf.store@golfsmith.com to your contacts or safe list.

If you would like to manage your email preferences or unsubscribe, click here. <http://links.mkt063.com/cftt?kn=28&ms=NzE3Nig2MQS2&r=MzIxMTc0MjUwNjQs1&b=2&j=NTQwMzMyNTM1S0&mt=1&rt=0>

This email was sent to the following email address: researchlmtus@gmail.com

Questions? Contact our Customer Service department. Please do not "reply" to this email.
Golfsmith International, Inc. - 11000 North IH-35 - Austin, TX 78753
<http://links.mkt063.com/cftt?kn=6&ms=NzE3Nig2MQS2&r=MzIxMTc0MjUwNjQs1&b=2&j=NTQwMzMyNTM1S0&mt=1&rt=0>

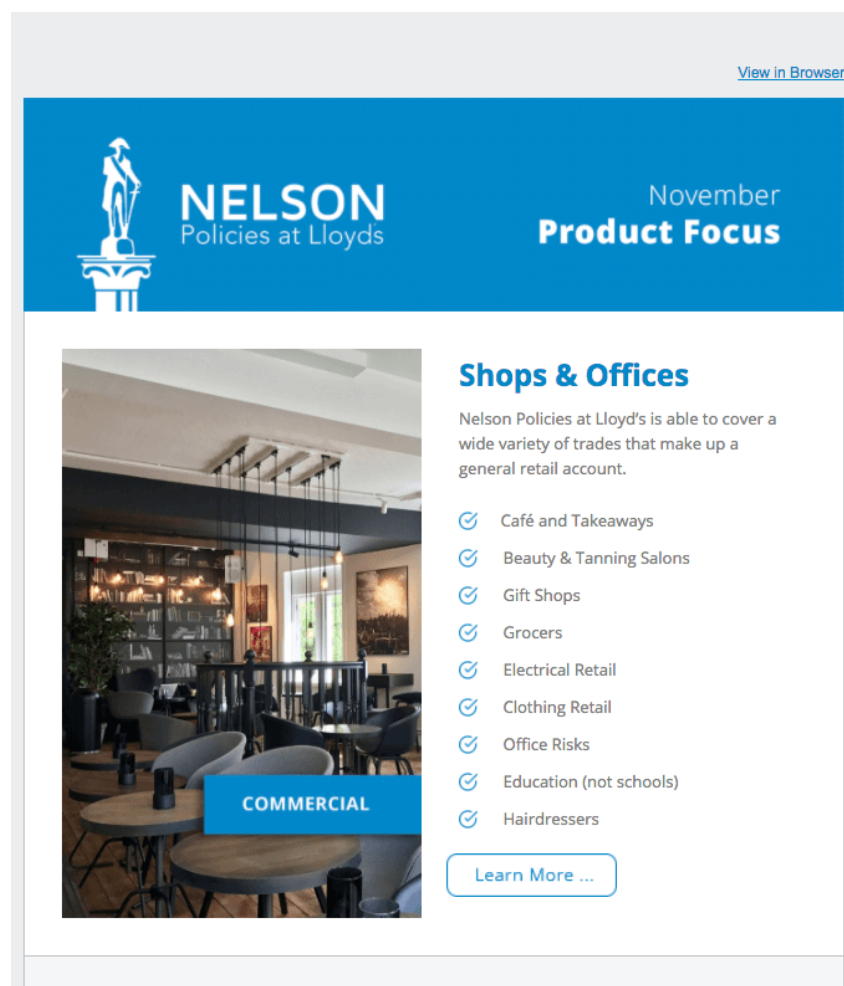
TYPES OF CAMPAIGNS

There are a number of different types of email campaigns marketers like you can send to subscribers, and the type you choose really depends on the goals you establish.

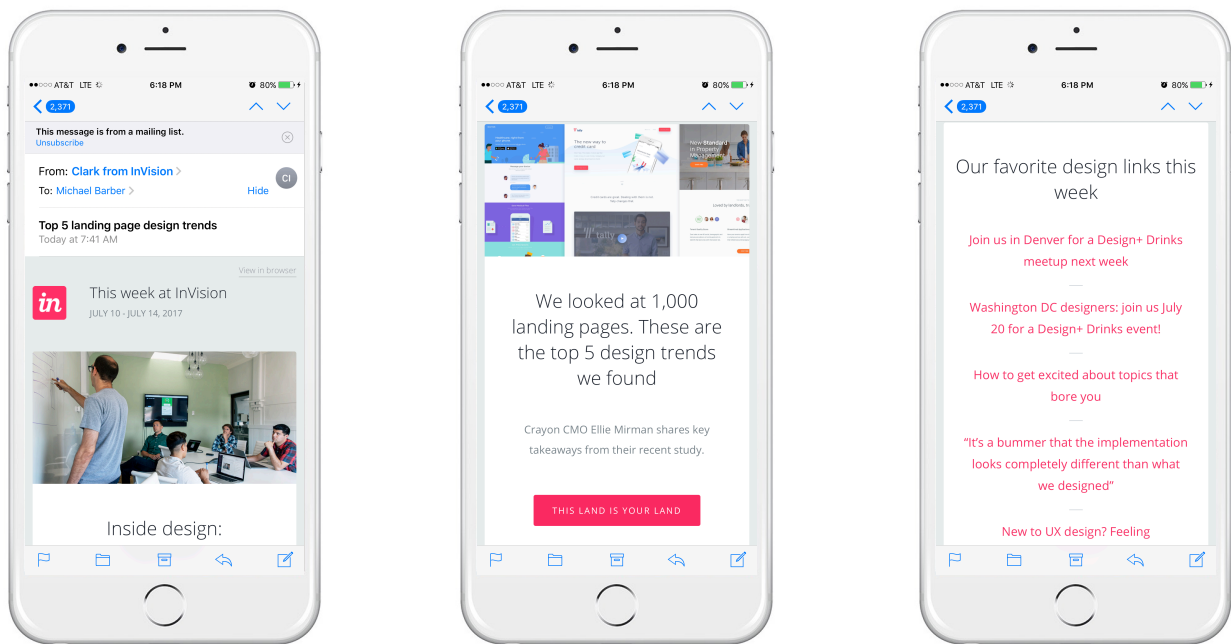
Let's take a look at the different types of campaigns and how they can help you achieve your email marketing goals.⁹

Newsletter

An email newsletter is a regularly distributed email campaign that is generally about one main topic of interest.



⁹ <https://www.campaignmonitor.com/resources/guides/getting-started-with-email-marketing/#four>



As you can see, these campaigns are sent monthly or weekly and contain content around a particular theme: tips & stories.

If your goal is to keep in touch with a list of people you already know (i.e. existing customers), then a newsletter is the perfect type of campaign to send. It will keep your business and your products top of mind and drive people back to your website.

For a deeper look at the key elements to include in your email newsletters, check out this blog post on the [anatomy of a perfect email newsletter](#).

Marketing offers

A marketing offer email is essentially any campaign you send with the goal of driving a direct response.

This can take a number of different forms, including:

- A campaign showcasing some of the latest stock and encouraging people to purchase
- A campaign offering a discount or special promotion on your products or services



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The campaigns present one of their products at a special, promotional price and include a direct call to action to purchase.

The marketing offer email is effective if your goal with email is to directly drive sales. It presents a product or discount offer and includes a direct call to action for people to click-through to your website and make a purchase.

Announcement

An announcement campaign is an email sent to your subscribers announcing a new product, feature, or service.

Google My Business
Squared Eye

A new way customers can connect with you

When customers find your business on Google, they can call to get in touch. **Now, they can also message you directly from your Google My Business listing.**

Enable this feature by adding a phone number that can receive texts in your Google My Business account. This number will not be revealed to customers, and you can turn off this feature any time.

[Enable messaging now](#)

Get started in 2 easy steps:

- 1 Sign into Google My Business
- 2 Add the number you'd like to use to message your customers

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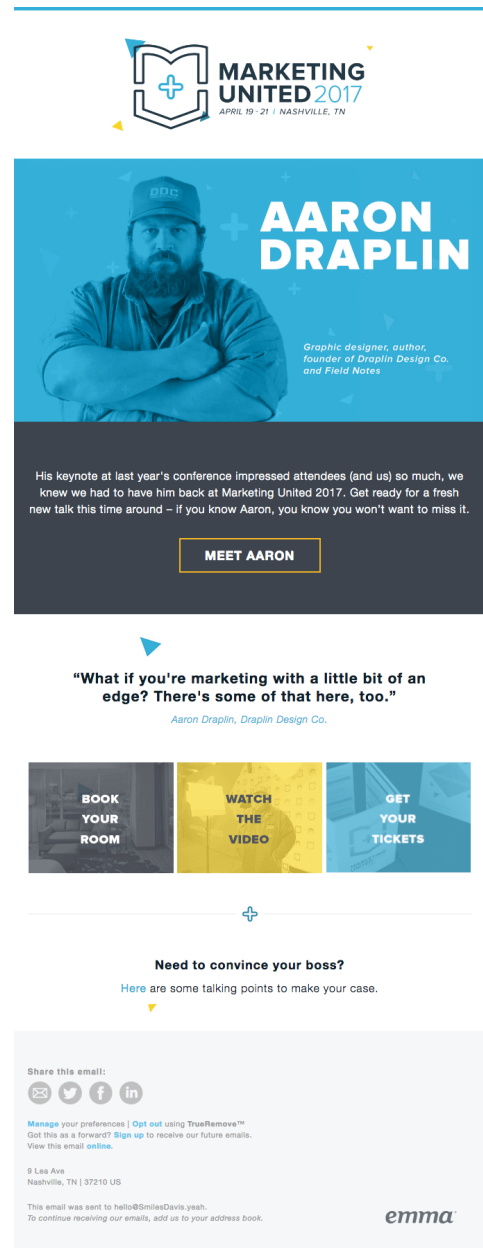
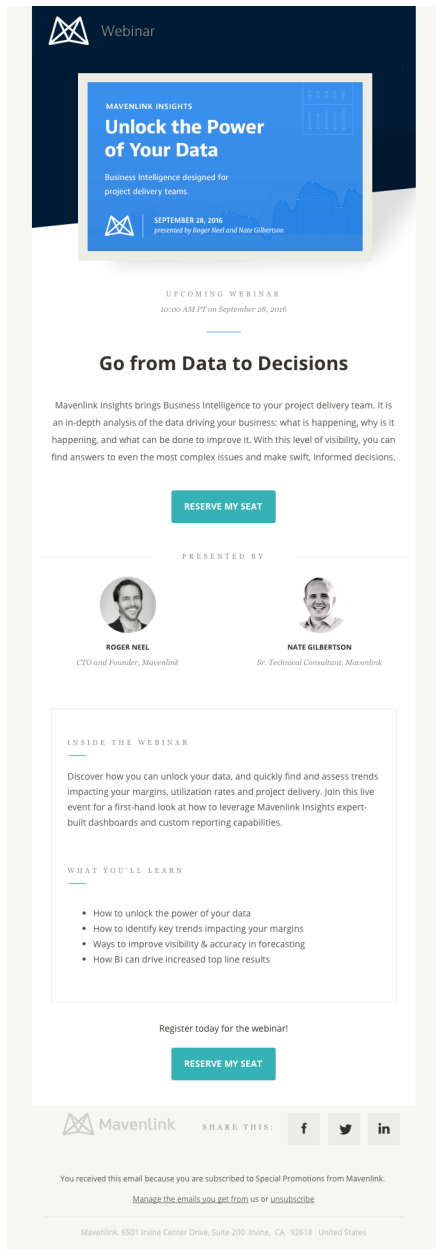
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Event Invitation

An event invitation email is a campaign designed to increase awareness of your event and encourage people to attend.



SEGMENTATION

There is a fierce competition for attention in your subscribers' inbox. Now is the perfect time to make your emails effectively deliver more value.

Segmentation is a seemingly simple but extremely powerful mechanism. Many are already segmenting to some extent, but how about taking advantage of more advanced email segmentation?

Email marketing segmentation: The art of thinking in groups

Email marketing segmentation is the art of thinking in groups. You have to realize that your email list consists of different kind of people, with different behavior, profiles, and interests. But if your subscribers are so different, why treat them all the same? The solution is splitting your email list into groups that are alike (let's call them segments).

Now we can approach each email segment in a way that is right for them. An insurance company, for instance, would have very different emails already only based on age, family composition, and car ownership. Each group deserves a different email stream, with proper content and offers. No need to talk about car insurance if you don't own a car. That is what basic segmentation allows you to do, as long as you have the groups identified.

So far, so good; email marketing segmentation is emailing to groups.

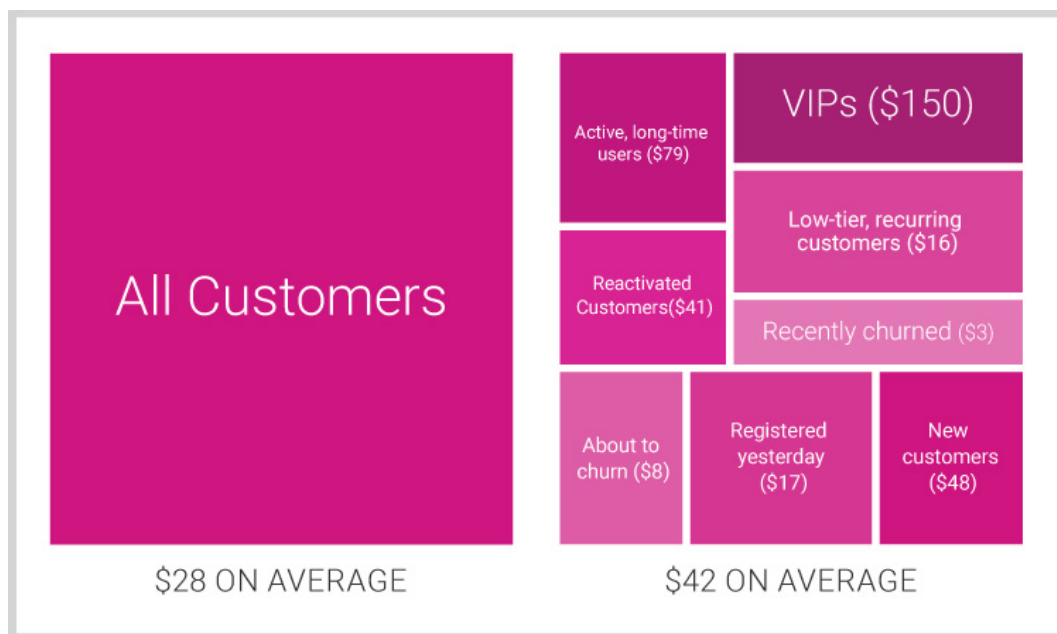
Better email marketing segmentation means that you look beyond what you think is obvious. For example, instead of making the emails fit with the current place of your subscriber in the customer lifecycle and what they are currently buying, it can also be made to appeal to their future or aspirational self; the person they want to be seen as – a tactic that has shown big success for many Luxury brands. Another example is using negative data, a preference in Brand or topic X that indicates a disinterest in Y.

The main business drivers behind segmentation

So what are the main drivers to start with smarter segmentation? Of course, subscribers appreciate getting better targeted and tailored emails. If an email is relevant, it makes for a better customer experience. But we also want to see business goals being met. More profit!

Segmented campaigns perform better. According to DMA, marketers have found a 760% increase in email revenue from segmented campaigns. This makes perfect sense: The more relevant the message, the more likely your subscriber is to act on it.

So, segmented and targeted email campaigns generate a much higher uplift compared to the results of a blanket, spray-and-pray email campaigns. This image from a research by Optimove shows how that works. Imagine segmenting and targeting all customers and then calculating the average customer value.



The segmented group had an average of \$42 per customer, compared to \$28 when unsegmented. What you see in this overview of (RFM) segmented groups is that the group VIPs is the most profitable with \$150, very different than the “recently churned” group with \$3. Not all groups are created equal. By naming the groups, you understand that it is pretty silly to send everyone the same campaigns.

Because of email marketing segmentation, the average value per customer goes up. This results in a far more successful email marketing program. The research from Optimove found that the smaller the target group, the larger the uplift. For example, targeted campaign to groups with up to 150 customers had at least a \$1.90 uplift per customer, while target groups of 1,500+ had an uplift of at most \$0.50 (almost a 4:1 ratio). This could make me eager to Shrink my Segments, the ultimate goal of the elusive “segment of one”.

Look beyond segmentation for increased results

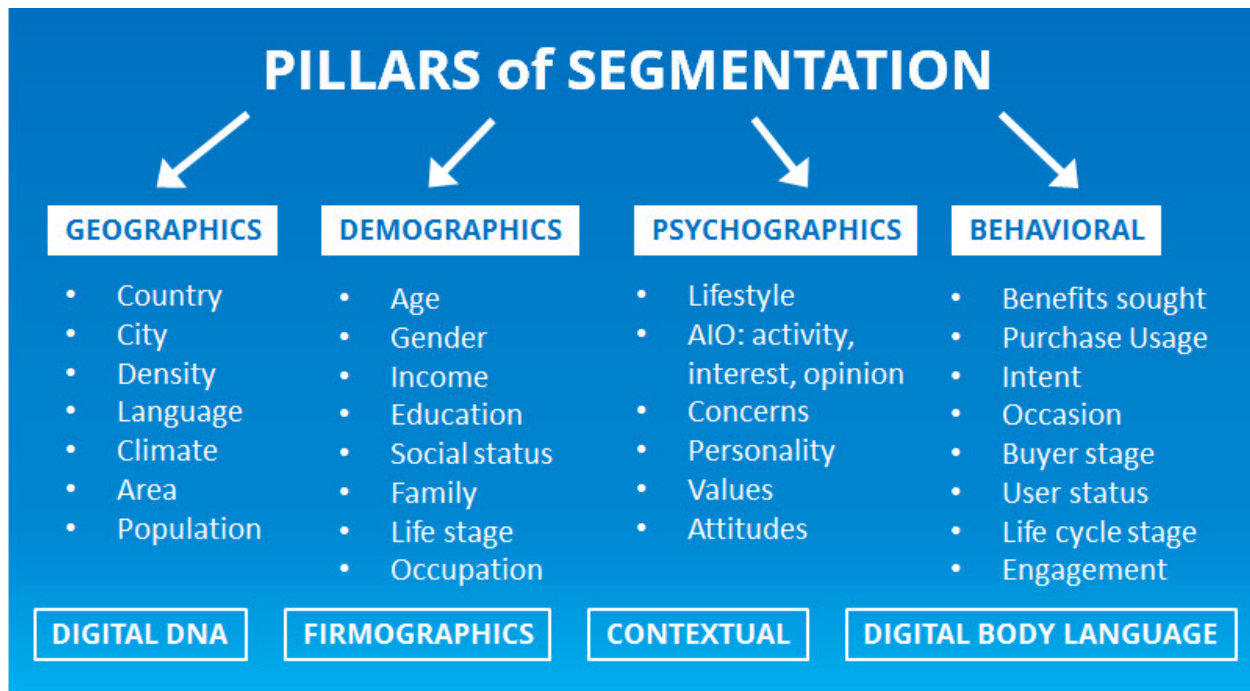
There are an overwhelming number of ways you can segment your list. Still, it is not only the segmentation that is going make the impact. If your marketing messages are highly segmented but badly executed, they will end up being highly segmented highly targeted lousy emails.

Segmentation Model x Execution = Combined Impact

Making your email segmentation more sophisticated is one of the ways to make a better match between your email campaigns and your subscribers. Crafting a sharper email or better use of the segmentation data (for instance more creatively) can be another. The end goal is to bring a plus to the bottom line while retaining ROI. So the segmentation model needs to have enough impact and represent viable groups of sufficient size.

Pillars of Segmentation: Layered email marketing Segmentation Models

Email marketing segmentation doesn't stop at selecting group A or B. Once you start layering segmentation criteria, the possibilities are almost endless. It is only limited by the available data. That is why we create segmentation models. All the data in your database – or even combined, derived or external data – can be used to create these segmentation models. There are what I like to call the Pillars of Segmentation – these describe the types of Data and Segmentation that can be used and then combined to create your models.



Jordie van Rijn - Emailmonday

Segmentation can be based on all types of data, including:

- **Geographic** (Location and related data)
- **Demographics and Profile** (age, gender, social status)
- **Psychographics** (lifestyle and AIO, meaning Attitudes, Interests, and Opinions)
- **Behavioral** (Purchases, opens, clicks, website browsing, etc)

Attention all email marketers: If you have behavioral data available, it is extremely important not to let this go to waste. It might be a bit harder to get that data prepped for marketing purposes, but once it is set-up it can be a great indicator for future interests and behavior. By sorting past orders and purchases by category, price range, etc., a whole new plethora of segmentation options opens up.

7000% increase in email marketing revenues

An example of huge increases in revenue by segmentation comes from Totes Isotoner Corp. They noticed that a lot of online shoppers repeatedly visited just a single product category: umbrellas, gloves, or boots. They decided to pitch these consumers with segmented email marketing campaigns focussed on the categories that were visited. The email offers brought many of the “lookers” actively clicking and buying.

Data can be combined or layered to achieve the level of targeting needed. For instance, sending an invitation for a pop concert, we select the people that live close to the location and have indicated that they like that type of music. We add a focused on one of the artists that are performing at the concert if they bought a song or browsed the artist’s page recently. Of course, we send a very different promotion to the group that is more interested in a very different type of music.

Advanced email segmentation

More advanced email segmentation campaigns make use of combined or derived data to go a step further. For instance, segmentation on Customer Lifetime Value, crafting Buyer Personas, or propensity modeling.

Segmenting on Customer Lifetime Value

The customer lifetime value can be one of the segmentation criteria. It takes multiple pieces of purchase, costs and profile data to make such a calculation. But after you have calculated customer lifetime value it is possible to target your best customers, exclude your worst customers or craft specific campaigns for the part of the email list with the highest potential for growth.

Buyer personas and customer behavior

There are different types of clients. Sometimes these buyer types are typecast as personas, but it can depend on a different (more practical) level too. By selecting the people that were high spenders and have seen a decline in spending who last

months, you are looking to spending patterns. Looking back at previous behavior, it is possible to identify and craft your messages to fit this group.

Predicting future behavior with propensity models

A group of statistical methods and scorecards that are used to predict future behavior of customers. This behavior includes the likeliness to respond to different types of offers, risk of churn, cross and up-sell possibilities, etc. Now you might be thinking: how advanced and sophisticated should I make my segmentation? This differs from case to case. Let me give you an example.

An example of email marketing segmentation

An online fashion retailer, for instance, can get great results segmenting on gender—showing the men's items to men and women's items to women. But if they combine it with size and style preferences, they can level up to even better results—offering the right sizes on the landing pages and excluding sizes not in stock. Offering casual, business, and other styles, the recipient is most likely to buy.

Adding the amount someone is likely to spend can furthermore increase results. Send sales emails to coupon clippers and VIP invites to exclusive high-end shoppers.

Excluding the ones that just recently purchased and offering them an alternative makes those email more effective for that group.

Choose your segmentation model based on impact

Now which of those (or combination) has the highest impact per recipient affected? And which has the biggest impact on bottom line total revenue? Yes, some segmentations can be very costly to realize. If you are playing around with segmentation models, try creating a grid of segmentation options, costs versus their impact to find the “quick win” and “build upon” segmentation models. Then test and improve upon it before making it your base and you're running further segmented campaigns.

Segmentation as a part of the email marketing plan

Every time you select a group from your email database, it's email marketing segmentation. This is a seemingly simple but extremely powerful mechanism. An email marketer can slice and dice his list and craft messages that fit the segments, ultimately lifting results. Segmentation should, therefore, be a part of every healthy B2B email marketing strategy.¹⁰

¹⁰ <https://www.emailmonday.com/smart-email-marketing-segmentation-the-art-of/>

EMAIL METRICS & ANALYTICS

Via Chad S. White at Litmus

Email analytics are powerful... and also dangerous. When used correctly, analytics can inform both wise strategic decisions and smart tactical improvements. When used incorrectly, analytics give you complete confidence to make bad decisions.

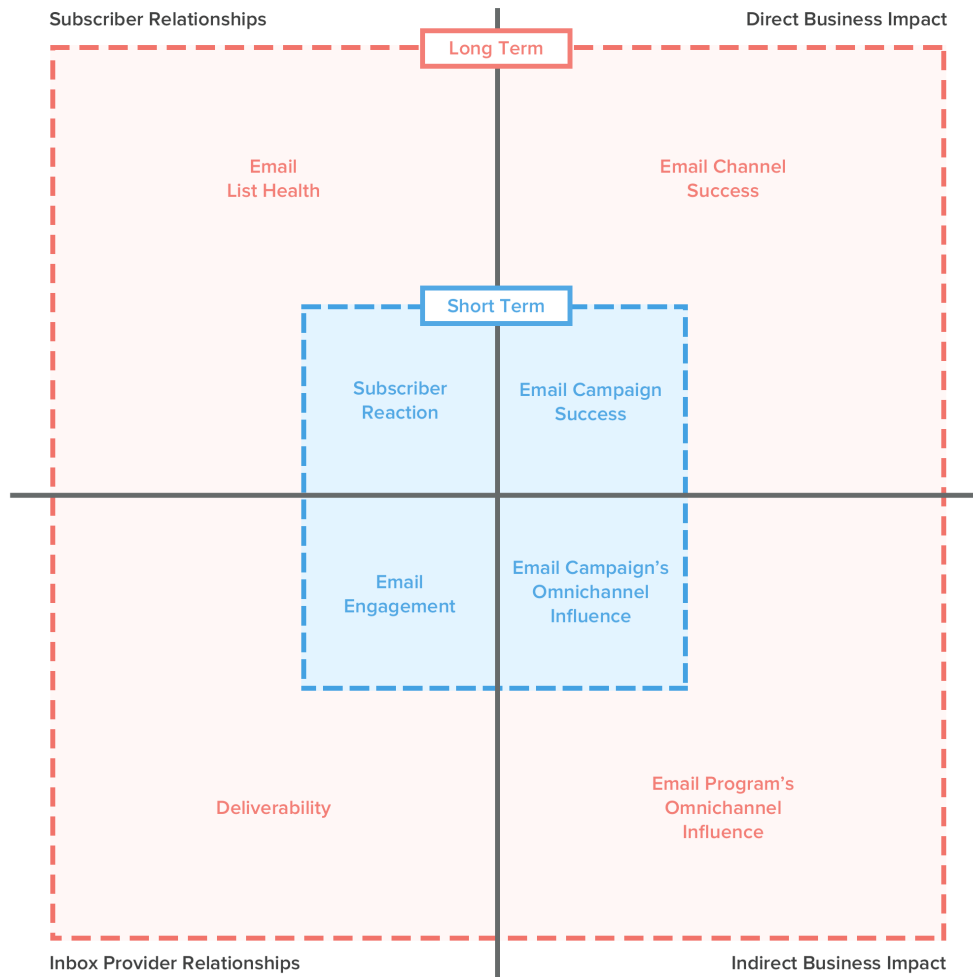
Unfortunately, there are lots of ways to reach the wrong conclusions with analytics, including:

- Not reaching statistical significance and making other mistakes with your A/B tests
- Using the wrong metric to measure success, like unwisely using open rates to determine a winning subject line
- Not recognizing the limitations of your ability to accurately measure a particular metric, especially complex ones like email marketing ROI, which only about 35% of marketers can measure very well
- Being overly focused on campaign metrics like opens and clicks, and failing to look at performance over time
- Not recognizing the influence of your email marketing efforts on the performance of other channels like direct mail and social media
- Focusing too much on company-centric metrics like email marketing revenue and not enough on metrics that indicate how subscribers and inbox providers feel about your emails

Those last three are symptoms of not seeing the big picture when it comes to email marketing metrics. Litmus' Holistic Email Metrics Matrix provides that perspective.

Holistic Email Metrics Matrix

Measuring the short- and long-term impacts of your email campaigns on your brand's business and on your email recipients



It shows that the impact of an email campaign ripples outward, affecting:

1. The business directly in terms of revenue and leads generated, for instance
2. The business indirectly as part of omnichannel campaigns or by influencing the performance of other channels more generally

3. Inbox providers and how they perceive the business as a sender of email
4. Subscribers and how they perceive the business and its emails

Email marketing campaigns can be felt individually in the short-term—as well as cumulatively over the long-term as part of your overall email program. For instance, a particular email send could do serious damage to your sender reputation, but you might not see the damage manifest in terms of blocks or a blacklisting until you've sent several more subpar emails.

Let's break down each quadrant of the Holistic Email Metrics Matrix and which short- and long-term metrics are in each...

Direct Business Impact

These metrics help brands measure how their email campaigns and their email program are directly affecting their sales, profits, web traffic, and other important business key performance indicators.

In the short-term, email metrics like conversion rates and email campaign revenue demonstrate the direct value of having sent a campaign. While the goal of one email may be to generate registrations of a webinar (lead generation) and another may be to create sales (conversions), these are generally the top metrics for determining the success of an email campaign.

Email Campaign Success

- Duration of engagement
- Clicks & click rate
- Post-click behavior (browsing, carting, etc.)
- Conversions & conversion rate

- Email campaign revenue & profit
- Lead generation

In the long-term, email metrics like email program revenue show the overall success that your email channel is having. For a more subscriber-centric view of revenue, look at revenue per subscriber and subscriber lifetime value.

Email Channel Success

- Email program revenue & profit
- Email revenue per email
- Email revenue per subscriber
- Subscriber lifetime value
- Subscriber RFM (recency, frequency, monetary)
- Email marketing return on investment (ROI)
- Lead pipeline value, etc.

Email metrics to watch: The duration of engagement, or time spent engaging with an email, is becoming an important way to measure the impact of interactive emails, which require marketers to look at email engagement in new ways because they effectively pull landing page content into an email.

Interactive emails will also likely require marketers to differentiate between an email open and an email interaction. The former is the firing of a tracking pixel within the non-interactive portion of an email, and tells you the subscriber viewed the email. The latter is the firing of a tracking pixel that's placed inside the interactive portion of an email, such as inside an email carousel or hamburger menu, and tells you the subscriber engaged with the interactive element.

Indirect Business Impact

Subscribers don't always follow the highly measurable golden path that we want them to. Sometimes they see an email, don't open, but then go to your store or call your call center to convert because of it. Other times they open an email and then open their browser and type in your URL directly and convert.

Because of these and other common behaviors, marketers can significantly under-measure email marketing's impact if they're not connecting the dots.

In the short-term, looking at the web traffic, mobile app activity, social media activity, store sales, and other activity that your brand experiences during the 48 hours after an email is sent can give you a good idea of the omnichannel influence of a particular email campaign. Keep in mind that your goals may be changing from email to email, and also that one of your goals might be to reduce activity in another channel, such as call volume to your call center.

Email Channel's Omnichannel Influence

- Email campaign's indirect effect on web traffic & sales, mobile app activity, store traffic & sales, social media activity, direct mail effectiveness, call center volume, etc.

In the long-term, looking at metrics like the web traffic, mobile app activity, social media activity, store sales, and other activity that your brand experiences during the 48 hours after you send an email versus days that you don't, can reveal the omnichannel influence of your email program.

Email Program's Omnichannel Influence

- Email program's indirect effect on web traffic & sales, mobile app activity, store traffic & sales, social media activity, direct mail effectiveness, call center volume, etc.
- Customer lifetime value of subscribers vs. non-subscribers

- Customer RFM (recency, frequency, monetary) of subscribers vs. non-subscribers

Email metric to watch: Comparing the customer value of subscribers compared to non-subscribers is a great way of measuring some of the otherwise hard-to-measure impact of email campaigns on customer behavior. For example, if your customers who subscribe to your emails spend \$147 per year on average and your customers who aren't subscribers only spend \$100, then that difference speaks to the impact of your email program, regardless of the level of email engagement of those customers.

SUBSCRIBER RELATIONSHIP

Email marketing is a give-and-take channel. In order for brands to win with email, subscribers have to feel like they're winning as well. Maintaining a healthy subscriber relationship shows that your emails are giving your subscribers value.

In the short-term, email metrics like opens and clicks indicate positive subscriber reactions, while unsubscribes and complaints indicate negative subscriber reactions.

Subscriber reaction

- Opens & open rate
- Clicks & click
- Click-to-open rate
- Unsubscribes & unsubscribe rate
- Spam complaints & complaint rate

In the long-term, the reactions to those individual campaigns affect the size of your list and how engaged that list is, which are key signs of the overall health of your email marketing list.

Email List Health

- Active list size
- List growth & churn rate
- Inactivity rate
- Length of inactivity
- Open reach (percent of subscribers who have opened at least one email in past X days)
- Click reach (percent of subscribers who have clicked at least one email in past X days)
- Tracking metrics by acquisition source

Email metrics to watch: Often, a good portion of the negative reaction to your emails will come from one or two acquisition sources—such as email list rental and co-registration, which are among the five most problematic subscriber acquisition sources. Tracking email performance by acquisition source can reveal which ones are causing outsized problems and are in need of revamping or being shut down.

Inbox Provider Relationship

In addition to pleasing subscribers, email marketers also have to please inbox providers, each of which can have different expectations for senders. Inbox providers look at how your subscribers react to your emails—including tracking many actions that marketers can't see, such as foldering and deletes without opens.

However, they also look at how you treat their platform. For instance, if you generate a lot of hard bounces by trying to send email to accounts that don't exist on an inbox provider's platform, that tells them that you may be buying email addresses, guessing at email addresses, not removing addresses that previously bounced, or not doing enough to avoid typos and transcription errors. Similarly, if you're hitting old, inactive

email accounts that the inbox provider has recycled into spam traps, then it tells them you're not paying attention to list hygiene.

In the short-term, inbox providers look at behaviors which demonstrate that subscribers are engaged with your emails. Unfortunately, some of these behaviors—such as foldering, deletes without opens, and spam trap hits—are impossible for marketers to see. Other behaviors, such as forwards and duration of engagement, can't be seen without special analytics. Even spam complaints can be tricky, since Gmail doesn't report them through a traditional feedback loop.

Email engagement

- Opens & open rate
- Duration of engagement
- Deletes without opens
- Replies
- Forwards
- Social shares
- Foldering/archiving
- Soft and hard bounce rates
- Recycled spam trap hits
- Spam complaints & complaint rate

In the long-term, how users of a particular inbox engage with your emails and whether you abuse their platform adds up, potentially leading to deliverability problems. Inbox providers look at engagement, bounce rates, and spam complaints

over a period of time (often 30 days). So if one campaign has a spike in negative metrics, that probably won't cause deliverability issues. But if you have a string of such campaigns, then you're surely in trouble with one or more inbox providers.

Deliverability

- Delivered rate
- Inbox placement rate
- Blocks
- Blacklistings
- Tracking metrics by inbox provider

Email metrics to watch: Inbox problems have different tolerances for certain behaviors, which is due in a large part to the different demographics and attitudes of their user bases. So you might experience problems with, say, Gmail and not AOL. You'll only know if you track email performance by inbox provider.

See the Whole Metrics Picture

Many email programs are focused almost entirely on the direct business impact of their email efforts. That's due in part to the fact that that's how they're measured by executives.

That's unfortunate because in many organizations up to half of an email's impact will be felt in other channels. Proving those effects and getting credit for them could have a massive impact on email marketing budgets.

Similarly, only focusing on company-centric metrics exposes brands to growing subscriber inactivity and deliverability issues. To have a well-balanced, high-

performance email program, brands have to have a broad, four-quadrants approach to email metrics.¹¹

¹¹ <https://litmus.com/blog/holistic-email-metrics-matrix-are-you-seeing-the-whole-picture>

EMAIL TESTING

Via Chad S. White at Litmus

A/B testing can help you uncover high-impact changes in your subject lines, email design, landing pages, and more. How big can the gains be?

“ECOMMERCE BRANDS THAT A/B TEST THEIR EMAILS GENERATE 20% MORE REVENUE ON AVERAGE.” –ALEX KELLY (MAILCHIMP) AT LITMUS LIVE 2017

To A/B test your emails, all you need to do is present two variations to two different groups of your subscribers and then listen. The metrics will tell you their preference, which you can then act on either in the short-term by sending the winning variation to more of your audience, or in the long-term by applying that preference to future campaigns.

That sounds simple—and to a degree, it is, thanks to email service providers and testing software providers rolling out functionality that makes email A/B testing much easier to execute. However, it's also rather simple to mess up your email A/B testing and either come to the wrong conclusion or undermine your results completely.

Doing a bunch of email A/B testing and then realizing that you didn't actually learn anything actionable because of poor execution is painful. To avoid that fate, here are 13 tips that will ensure you're getting the most out of your email A/B testing:

1. TEST YOUR AUTOMATED AND TRANSACTIONAL EMAILS, NOT JUST YOUR BROADCAST AND SEGMENTED EMAILS.

Nearly 39% of brands never or rarely A/B test their broadcast and segmented emails, according to Litmus' 2017 State of Email Creative report. That's a missed opportunity,

but there's even more money left on the table when you look at automated and transactional emails. More than 65% of brands never or rarely A/B test their automated emails and 74% never or rarely A/B test their transactional emails.

That's a shame because while A/B testing your broadcast and segmented emails gives you a competitive edge, A/B testing your automated and transactional emails gives you a huge edge. Successful email programs are 70% more likely than less successful programs to A/B test their triggered emails at least once a year. And successful programs are 95% more likely than less successful ones to A/B test their transactional emails at least once a year.

Both of those actions are in the top 10 of 20 Things Successful Email Marketing Programs Do.

While triggered emails are often lauded as set it and forget it programs, remember that Nothing in Email Marketing Is 'Set It and Forget It.' These emails account for the majority of email marketing revenue at nearly 13% of brands, according to Litmus' State of Email Creative report. And that percent is only going to grow in the years ahead.

2. FOCUS YOUR EMAIL A/B TESTING EFFORTS ON CAMPAIGN ELEMENTS THAT ARE MOST LIKELY TO MOVE THE NEEDLE ON PERFORMANCE.

Sometimes tiny tweaks to minor elements can move the needle for you, but it's generally wise to focus your testing on key email elements, such as subject lines, calls-to-action, hero images, and headlines.

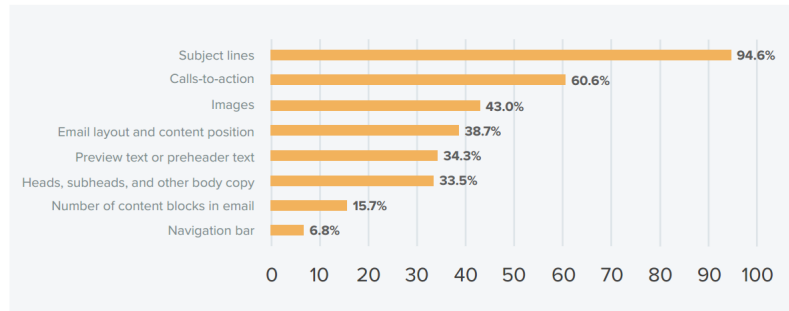
According to our survey of more than 3,500 marketers for our State of Email Creative report, this is where most brands currently focus their email A/B testing efforts. You should, too.

In addition to those elements, your automated emails have other elements that are worth testing. In my book, *Email Marketing Rules*, I recommend testing:

Email Elements A/B Tested

Which email elements does your company regularly A/B test? (Select all that apply.)

1,832 respondents

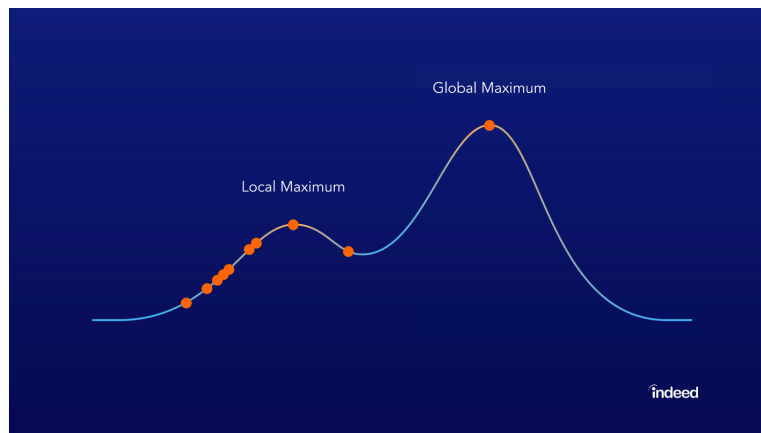


- Different trigger logic for automated emails
- How quickly to send the message after it's triggered
- Whether to send a series of automated emails
- The delay between automated emails in a series
- Under what conditions an automated email in a series is skipped
- Under what conditions an automated email series ends

3. UNDERSTAND WHETHER YOUR TESTING WILL GET YOU CLOSER TO A LOCAL MAXIMUM OR A GLOBAL MAXIMUM.

Are you testing incremental tweaks or radical changes to your email? It's important to understand which because, as Indeed Product Manager Janie Clarke pointed out at Litmus Live San Francisco, small tweaks can help you get to the top of a local maximum, but won't help you discover a new global maximum. To find that, you'll need to try an entirely different approach.

For example, testing the color of a button or testing a text link versus a button is only going to help you get closer to optimizing that email design—or reaching a local



maximum. However, testing a copy-heavy design versus an image-heavy design or an interactive email versus a text-only email, for instance, might help you find the best way to communicate your message—or discovering a global maximum.

4. LIMIT YOUR A/B TESTS TO ONE THING AT A TIME.

Unless you're doing multivariate testing, you're going to want to keep your A/B tests limited to one change per test. For example, you could test...

- A green button versus a blue button
- Email copy with social proof included versus no social proof
- A lifestyle hero image versus a product hero image
- A percent-off discount versus a dollars-off discount

Having more than one difference between versions A and B makes it difficult to clearly determine which element led to the difference in performance.

5. HAVE A CLEAR HYPOTHESIS.

Don't make random changes just to see what might work. Know what you are trying to achieve and have a solid rationale for why what you're testing will help you achieve the desired goal.

For instance, if you're trying to boost conversions, you might create one version of your email copy where the call-to-action is above the fold to make it more visible and another version where content precedes the CTA and tries to generate strong interest in the CTA. Also, if you wanted to see if addressing your new subscriber by name in the subject line of your welcome email boosted conversions, you would test one subject line with the personalization and another without.

Sites like [behave.org](https://www.behave.org) can give you lots of ideas of tests to try based on what other brands have done.

6. CHOOSE A TESTING VICTORY METRIC THAT IS ALIGNED WITH YOUR CAMPAIGN GOAL.

We can't stress this enough: Be sure to test far enough down the funnel—which in most cases means testing as far down the funnel as you can. Most email campaigns try to generate either email conversions or sales conversions, so your email A/B tests should focus on moving those metrics, too.

Where some marketers go wrong is that they think subject lines can only affect opens, email content can only affect clicks, and landing page content can only affect conversions. Not true! The different stages of an email interaction don't operate in isolation. They all work together, because subscribers experience them all together.

When you embrace that, you realize that the goal of a subject line isn't to generate opens. It's to generate openers who are likely to convert. And similarly, the goal of email content isn't to generate clicks. It's to generate clickers who are likely to convert.

Not convinced? It's easy to confirm for yourself. Just run a few subject line A/B tests and look at how the different subject lines affect activity all the way down the email interaction funnel.

Also, who cares if subject line A generates more opens than subject line B if the latter generates more conversions? And who cares if email content A generates more clicks

than email content B if the latter produces more conversions? We guarantee that your boss doesn't.

7. USE TEST AUDIENCE SEGMENTS OF SIMILAR SUBSCRIBERS.

Just like you control the changes that you make to versions A and B of your email, you also need to control who gets each version. You want your two test groups to be composed of the same kinds of subscribers, whether that's new subscribers, subscribers who are customers, or subscribers in a particular geography, for instance.

8. USE TEST AUDIENCE SEGMENTS OF ACTIVE SUBSCRIBERS.

Similarly, you're going to want to ensure that both groups of test recipients contain active subscribers who are regularly engaging with your emails. Otherwise, if version A goes to a group of subscribers who are much more active than the group that got version B, then version A is more likely to "win" for reasons that potentially have nothing to do with what's in version A.

The one caveat is if you're testing reengagement emails, in which case you want to target inactive subscribers.

9. ENSURE THAT YOUR TESTING GROUPS ARE LARGE ENOUGH THAT YOUR RESULTS WILL BE STATISTICALLY SIGNIFICANT.

If your test audience is too small then the results of your test might just be due to randomness. Make sure that your results are statistically significant by having a big enough test audience.

[Kissmetrics](#), [AB Testguide](#), and [Optimizely](#) all have online calculators to help you out.

10. USE HOLDOUT GROUPS, WHEN APPROPRIATE.

For any email that you test, consider the effect of your subscribers not receiving that email at all. Having a holdout group of subscribers who don't receive an email is how you can measure that effect.

Holdout groups are especially valuable when it comes to testing automated emails. For instance, if you're testing the performance of a new shopping cart abandonment email, you want to make sure that a portion of cart abandoners don't get a cart abandonment email at all. Doing that allows you to measure whether your cart abandonment email is annoying subscribers or disrupting their natural shopping behaviors.

However, you can use a holdout group for any email you send to make sure that email is actually having a positive effect on your subscribers. Enterprise software company Atlassian has set up a system that requires testing of every email, including mandatory holdout groups, Atlassian Senior Product Manager of Engagement Platform Jeff Sinclair told attendees of Litmus Live San Francisco.

11. CREATE A TEST PLAN SO YOU TEST REGULARLY AND RECORD TEST RESULTS.

Ad hoc A/B testing is inefficient because it's sporadic and unfocused. To get the most out of your A/B tests, you need a plan. Develop a testing schedule that records:

- The theories you are trying to confirm
- Which emails you are using to test each theory
- The results of each test and how they impact your future testing plans

Aim to include an A/B test in at least 50% of your broadcast and segmented promotional emails, as our 2017 State of Email Survey research indicates that brands get little competitive advantage when they test less than that. Similarly, brands report a significant increase in success when they A/B test their triggered and transactional emails at least once every 6 months.

You'll also want to have a test plan because you'll need to...

12. CONFIRM THE RESULTS OF TESTS.

Any single A/B test is never conclusive forever. In the short term, any lift that you see may be the result of the novelty effect. Subscribers are attracted to the new, which can give any change you make versus the control a lift.

However, the novelty effect fades pretty quickly. So if you run the same test two or three times over a period of time, you'll wring out any novelty effect and be able to see the true impact of the change.

In the long term, consumer behaviors and attitudes change. The composition of your email list can also change over time depending on subscriber acquisition practices, changes to your product or service offerings, expansion into or retreat from certain geographies, and other factors.

The more definitive the success of a test, the longer you can probably wait to confirm it again. But eventually, you'll want to periodically reconfirm every test at least once or twice—which, again, is why an A/B testing plan is critical.

13. SHARE THE RESULTS OF YOUR EMAIL A/B TESTS WITH OTHER CHANNEL OWNERS AT YOUR COMPANY.

Jonathan Pay of Holistic Email Marketing told Litmus Live London attendees to be sure to share their email A/B testing insights with their web, social media, and ad teams. That's great advice, because email marketing learnings can fuel success in other channels.

Poor coordination across channels and departments was identified as the biggest challenge facing email marketers in 2018, according to a Litmus poll of more than 600

marketers. Sharing A/B testing results is just one more way that brands can foster an

Let's look at some channels to share your insights with

Hypothesis:	Factors tested:	Can share with:
Emotional question will generate more sales than a directive statement.	Subject line, CTA, title, copy	Website, landing pages, banner ads, PPC ads, social media, retargeting ads
"Double Loyalty points" will generate more sales than "2X loyalty points".	Subject line, CTA, title, copy	Website, landing pages, retargeting ads, social media
Emotive image of person smiling & wearing outfit will generate more sales than displaying outfit laid out.	Image	Website, landing pages, banner ads, social media, retargeting ads

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HOLISTIC
EMAIL MARKETING

omnichannel approach to marketing and the customer experience.

EMAIL MARKETING AUDIT

One of the most important activities marketing teams can do is proactively review your overall program, along with the various nuances of each tactic. Organizations committed to evaluating and improving their programs and tactics should do so on a regular basis.

For any organization's email marketing efforts, quarterly, bi-annual, or annual audits of those efforts will not only ensure campaigns and efforts are performing as needed, but also highlight areas of improvement, opportunities to increase efficiency, and/or reduce unnecessary expenses. The following email marketing audit was created by [Chris Sietsema](#) of [Teach to Fish Digital](#) and outlines an email marketing audit deliverable.

The five categories of the audit include:

1. Platform/Service Provider
2. Audience
3. Design
4. Process
5. Metrics

Platform/Service Provider

Ultimate Question: Is there a better alternative for sending emails than what is used presently?

Objective Appropriate

- Are email program objectives aligned with functionality?

- Based on your existing business goals, is the current email service provider (e.g. ConstantContact, Campaign Monitor, MailChimp, Salesforce Marketing Cloud, etc.) a feasible match?
- What important tasks cannot be accomplished with the chosen service provider today?

Right-Sized

- Is the existing platform big enough or too small?
- Do business requirements call for more sophistication (automation, CRM integration, lead scoring capabilities) from the service provider? Or is the current email tool-to-task match the equivalent of killing a bumblebee with a bazooka?

Future Focused

- At what point will there be a need to upgrade to a more advanced email service provider?
- What specific functions and operations will be necessary in the near future as the program evolves?

Sender Reputation

- What is the current SenderScore for the program?
- Based on this score, should the platform in use today be abandoned, and should the program be migrated to a different email service provider?

Audience

Ultimate Question: Are there opportunities for improvement with customer records management?

Acquisition

- How are new customer records acquired?
- Is the practice of list rental or purchase avoided? Just say “hell no” to buying or renting lists.
- Are contacts informed properly about how their information will be used?

On-Boarding

- What messages are delivered to new contacts upon sign-up? Are expectations for message delivery and frequency set properly?
- Are there opportunities to improve the content that is delivered to new contacts?
- Are other content assets and methods to connect with the brand (e.g. customer service, social media, mobile applications, etc.) introduced?

Segmentation

- Are customer records segmented in a meaningful way?
- What methods can be used to divide customer records to improve message efficacy and avoid irrelevant email delivery?
- How can the segmentation process be improved by relying upon self-selected parameters (via survey) or behavior monitoring (based on previous activity/engagement)?

Unsubscribe/Preference Process

- Is the unsubscribe option clear and easy to identify within each message?
- Are requests to unsubscribe handled responsibly?

- Does the program offer a way for email recipients to choose their preferences?

Design

Ultimate Question: how should design be modified to represent the brand and appeal to all audiences?

Channel Appropriate

- Is the current email design right for the email channel?
- Is the design comprised of of one single image? Does it strongly resemble a direct mail piece, a flyer, or an outdoor board?
- Does every email message include a physical mailing address and a subject line that does not deceive (re: CAN SPAM, CASL, GDPR compliance)?

On Brand

- Is the email design consistent with other brand assets?
- Does the email design conform to existing brand standards and guidelines?

Optimized for Mobile

- Does the email render well on smaller mobile device screens?
- Does the email utilize the @media query for responsive design?
- How should the mobile version of the email design be modified to appeal to recipients on the go?

Client Compatible

- How does the email render in all email clients? (Hint: use Litmus or Email on Acid)
- Are there email clients that are more important than others based on their popularity among recipients?
- How does the email look in clients that are traditionally troublesome like the dreaded Outlook 2010, Outlook 2013, and Yahoo Mail?

Process

Ultimate Question: How are various aspects of the email program managed and in what ways can they be improved?

Frequency

- How often do contacts receive messages?
- Based on response rates and engagement levels, how should frequency be modified?
- Should frequency for certain audience segments be different from others? Read more on finding the optimal email frequency [here](#).

Message

- Does the overall message align with the motivations of the audience to request email communication in the first place?
- How are brand assets (content marketing productions, events, video, graphics, etc.) utilized to encourage a response from the audience?

- How should the message differ based on audience segments? Is there a need to modify the message for certain recipient groups?
- Are there opportunities to develop a nurture program (or drip campaign) for contacts and prospects?

List Hygiene

- What methods are used to maintain list integrity?
- Are some recipients removed or sequestered after long periods of inactivity?
- Does the program include email verification either at sign-up or after extended time frames?

Testing

- What email tests have been run with recent messages? What elements have been tested (e.g. subject line, from name, content, call to action, etc.)?
- Does the program entail an A/B split or multivariate approach to testing? What improvements can be made to the testing process?
- How are results from previous tests interpreted and put into play for subsequent messages and campaigns?

Metrics

Ultimate Question: How is the email program measured today and what methods can be introduced to gauge success more accurately?

High Level Performance

- At what rate are email messages successfully delivered to their intended recipients?
- What are the current open and click rates for the campaign/program?
- What has the trend for delivery, open, and click metrics?
- What is the monthly/quarterly/annual rate of list growth? List churn?

Traffic Generation

- What is the click response to key content placed within the email?
- How does email compare to other channels with regard to website visits? Time on site? Pages per visit?
- What kind of messages have a high rate of success when it comes to delivering website visits?

Sales and Activity

- How does email perform with respect to generating sales?
- Does email have a recognizable impact on the bottom line? Does the email channel make it rain?
- What other key performance indicators (downloads, event registrations, product demo views, etc.) have been impacted by the email channel?

The Correct Gauges

- Are the metrics used to evaluate the ongoing performance of the email appropriate?

- What other performance metrics should be considered given the nature of the program?
- What goals or benchmarks should be set for the email campaign(s) in the coming year?

FOOTNOTES AND CREDITS

- 2018 Email Marketing Industry Report from Campaign Monitor - <https://www.campaignmonitor.com/resources/guides/2018-email-marketing-industry-report/>
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