# Contents

*Foreword*  
*Introduction*  

## Chapter 1  Understanding Email Marketing Today  1

- How We Got Here  2
- What Email Means to Your Audience  5
- The Five Types of Email  6
  - Awareness  8
  - Consideration  9
  - Conversion  10
  - Product Usage  10
  - Loyalty  12
- Understanding the Economic Impact of Email  14
- Test Your Knowledge  15

## Chapter 2  The Five Critical Elements of Every Email You Create  17

- Creating Brand Impact  18
- Determining How Much Brand Equity Your Emails Carry  19
- Adding Intelligence to Your Design  22
  - Basic Elements of Intelligent Email  22
  - Using This Insight to Your Advantage  24
- Driving the Purchase  26
  - Waging the War Against Email ADD  28
  - Beyond the Email Content: What You Need to Know  29
- Creating Transactional/Service Messages  30
- Adding Viral Marketing Elements  34
- Two Ways to Define Success of Your Viral Marketing Efforts  35
- Best Practices for Creating a Buzz Using Viral Efforts or Word of Mouth  36
- Test Your Knowledge  37

## Chapter 3  Getting Ready to Build Your Email Marketing Efforts  39

- Aligning Your Strategy with Your Tools  40
- Determining Your Tools: A Ten-Point Strategy  40
- Evaluating Vendors  44
  - A Checklist to Maximize Your Vendor Selection Process  45
### Organizational Readiness: Resources Required for Success 49

### Budgeting for the Future 52

### Justification: Selling Your Boss on the Return on Investing in Email 53

### Test Your Knowledge 55

## Chapter 4  What Happens Once You Send Your Email 57

### Defining the Analytics Framework 58

### Start with Your Email Marketing Plan, and Expand It to Include Your Company Growth Plan 59

### What to Do If Something Goes Wrong 64

### So, What Do You Do When It Happens to You? 67

### Revisiting Your Budget 68

### The Email Marketing Database and Future Multichannel Efforts 70

### Phase 1: Awareness 71

### Phase 2: Engagement 71

### Phase 3: Consideration 71

### Phase 4: The Buy 72

### Making the Most of Your Email in a Multichannel Environment 72

### What This Means When You Are Setting Up Your Initial Email Database 72

### The Top Five Ways You Can Mess Things Up If You Are Not Really Careful 74

### Test Your Knowledge 75

## Chapter 5  Eight Key Drivers of Your Email Campaign 77

### Key Driver 1: Email Address Acquisition 78

#### Your Website 78

#### Other Channels 82

#### Third-Party Sources 84

#### Welcome to the Campaign! 87

### Key Driver 2: Creative/Copy 88

#### The From Line 89

#### Subject Lines 89

#### The Spam Check 90

#### The Width of Your Email Template 91

#### The Length of Your Email Template: Work Above the Fold 92

#### Email Creative Best Practices 92

### Key Driver 3: Making the Data Work 93

### Key Driver 4: Multichannel Integration 95

### Key Driver 5: Technology (Delivery, Deployment, and Design) 96

### Key Driver 6: Reporting/Analytics 98
Key Driver 7: Privacy/Governmental Control .......................... 100
State Registries ........................................................................ 101
Privacy Policy Best Practices .................................................. 101

Key Driver 8: Reactivation .......................................................... 104

Test Your Knowledge. .............................................................. 105

Chapter 6 Preparing Your Email Marketing Strategy ................. 107

Week 1: Preparing Your Resource Arsenal ............................... 108
Monday: Getting Smart (the Seven Essential Truths About Email Marketing) 109
Tuesday: Evaluating Tools and Resources ................................ 112
Wednesday: Budgeting ............................................................. 116
Thursday: Related Marketing Initiatives .................................. 119
Friday: Getting the Boss to Sign the Check .............................. 123

Week 2: Building the Blueprint for Success ............................... 124
Monday: Evaluating Your Current House File and File Size Needs 125
Tuesday: Creating the Acquisition Plans .................................. 126
Wednesday: Focusing on the Opt-in Process and Customer Preference Centers 128
Thursday: Reviewing the Opt-out Process ................................. 132
Friday: Making Sure Your Landing Pages Are a Good Place to Land 133

Week 3: Counting Down to “Go Time” ..................................... 138
Monday: Mapping Out a Realistic Strategy ............................... 139
Tuesday: Defining Your Data Transfer Process ......................... 142
Wednesday: Making Sure Your Tracking Links Will Work ............ 144
Thursday: Checking for the Deliverability Basics ....................... 147
Friday: Testing for Actionability ............................................... 151

Week 4: Testing Your Way to the First Campaign ....................... 152
Monday: Choosing the Subject Line Strategy ............................ 152
Tuesday: Making Sure Your Content Can Be Seen ..................... 153
Wednesday: Ensuring Personalization Is Accurate .................... 156
Thursday: Remembering That Emails Get Forwarded and Saved .... 158
Friday: Going Through the Success Checklist One More Time ....... 159

Test Your Knowledge. .............................................................. 159

Chapter 7 Month 2: Ensuring Success as You Launch Your Campaign 161

Week 1: Sending Your First Campaign ..................................... 162
Monday: What to Do Once You Hit Send ................................ 162
Tuesday: Reading Reports ....................................................... 163
Wednesday: Managing Customer Service Replies ...................... 166
Thursday: Matching Your Response Rates to Your Forecast and Plan 167
Friday: Keeping Your Database Clean and Your Reputation Strong .... 169

Week 2: Creating a Plan to Optimize Your Results ...................... 171
Monday: What Your Reports Are Really Saying ........................ 171
Tuesday: Analyzing the Effectiveness of Your Creative ................ 173
Wednesday: Pulling Together the Comprehensive Report ............... 178
Thursday: Optimizing the Opt-in Points on Your Website ............. 180
Friday: Creating Your Test ....................................................... 184
Week 3: Measuring Email’s Impact on Other Channels . . . . . . . . . . 187
Monday: Measuring the Role of Email in a Customer’s Purchase 188
Tuesday: Determining the Value of Your Email Addresses and Campaigns 193
Wednesday: Increasing Email Sending Costs to Improve Top-Line Results 196
Thursday: Exploring Web Analytics and Email Integration 198
Friday: Finding and Targeting Your Advocates 202

Week 4: Promoting Your Email Results Within Your Organization . 206
Monday: Affecting Email Used in Other Parts of Your Organization 206
Tuesday: Sharing Results with Your Online Peers 209
Wednesday: Sharing Results with Your Offline Peers 210
Thursday: Using Your Email Results for PR Purposes 211
Friday: Looking Ahead to Dynamic Content 213

Test Your Knowledge. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 214

Chapter 8 Month 3: Adding Bells and Whistles 215

Week 1: Using Email as a Feedback Tool . . . . . . . . . . . . . . . . . . . . . 216
Monday: Leveraging Email Surveys 216
Tuesday: Designing an Email Survey 217
Wednesday: Polls in Emails 220
Thursday: Email Focus Groups 221
Friday: Email-Driven Testimonials 222

Week 2: Creating Video- and Audio-Enabled Emails . . . . . . . . . . . . 226
Monday: Deciding Whether Using Audio or Video Is Right for Your Emails 227
Tuesday: Building the Five Layered Emails 228
Wednesday: Making Your Video Email Viral 230
Thursday: Making Your Video Email an Integrated Part of a Larger Campaign 232
Friday: Allowing Your Reader to Create Their Own Video Email 233

Week 3: Creating Mobile Email . . . . . . . . . . . . . . . . . . . . . . . . . . . . 234
Monday: Why Your Email Needs to be Mobile 235
Tuesday: The Mobile Email Creative 236
Wednesday: How Many Readers in Your Database Are Reading “on the Run”? 239
Thursday: Defining Your Mobile Email Preference Center 240
Friday: Making Your Current Email Strategy Work in a Mobile World 241

Week 4: Creating Social Email . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 243
Monday: When Email Is Used on Social Networks 244
Tuesday: Response Guidelines for Social Email 245
Wednesday: Reviewing Results for Social Email 247
Thursday: Social Messaging: Thinking Inside the Box 249
Friday: Keeping the Use of Social Email in “Check” 251

Test Your Knowledge. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 252

Chapter 9 Getting Ready for Year 2 and Beyond 253

Iterative Financial Analysis: Analytics Over Time. . . . . . . . . . . . . . 254
A Top-Down View of Annual Performance 254
Analyzing Individual Subscriber Segment Performance 255
List Health 255
Financial Performance/Budget to Plan Performance 255
The Necessity of Rebudgeting 256
ESP Refresh: Evaluating Your ESP and Technology Partners 257
Assessing Future Trends 260
Journey On 261

Appendix A Vendor Resource List 263
Associations, Events, and Publications 264
Email Service Providers 264
Delivery Service Providers and Reputation and Accreditation Management Services 265
Market Research, Agencies, and Consultants 265
Technology Vendors 266
Web Analytics Vendors 266

Appendix B Email Checklists 267
Email Design 268
Content 268
Subject Line 268
Preheader/Header 268
Preview Pane 268
Message Construct 269
Recovery Module 269
Footer 269
Code QA Testing 269
Precheck HTML File 269
Precheck Text File 270
Conduct Rendering Testing 271

Glossary 273
Index 284