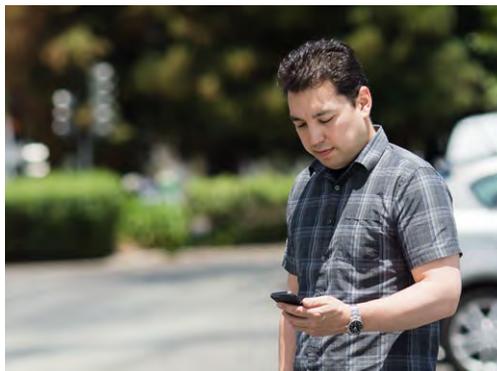
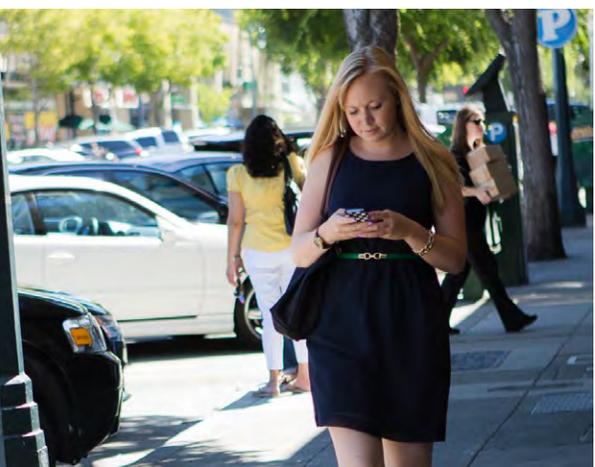




THE DEFINITIVE GUIDE TO

ENGAGING

EMAIL MARKETING



# TABLE OF CONTENTS

- 03 **Why Should I Read the Definitive Guide to Engaging Email Marketing?**
- 04 **Part One:** What is Engaging Email?
- 17 **Part Two:** Trusted
- 51 **Part Three:** Always Relevant
- 97 **Part Four:** Conversations, Not Campaigns
- 109 **Part Five:** Coordinated Across Channels
- 123 **Part Six:** Strategic - The New Metrics for Email
- 136 **Part Seven:** Graduating from ESP to Marketing Automation
- 152 **Appendix:** Email Marketing Experts
- 153 **Appendix:** Reference Links
- 154 **About Marketo**

## INTRODUCTION

# WHY SHOULD I READ THE DEFINITIVE GUIDE TO ENGAGING EMAIL MARKETING?

Buyers today are more empowered. Information is abundantly, overwhelmingly available, and buyers are using that easy access to tune out unwanted marketing messages while simultaneously seizing control of their buying processes.

**In this environment, old-fashioned “batch and blast” email will serve only to alienate buyers. With short attention spans and intelligent buying and browsing habits, digitally-savvy consumers want personalized, relevant communications.**

To keep up with today’s buyer, you need to know:

- What makes email truly trusted and engaging
- How to talk with each of your customers individually, rather than talk at them as a group
- How to engage your audience with cross-channel conversations, listening and responding effectively

This Definitive Guide to Engaging Email Marketing (#DG2EEM) covers the five attributes of engaging email:

- **Trusted**
- **Always relevant**
- **Conversational**
- **Coordinated across channels**
- **Strategic**

As a “Definitive Guide”, it also covers all sorts of email topics, including writing subject lines, designing emails for mobile, building and managing your list, avoiding spam filters, integrating email and social, and more. The guide also talks about the latest in email technology, including what to look for in a modern email service provider.

We hope this guide will help you tell richer, more compelling, and ultimately more engaging stories within your email marketing and beyond. Throughout it, you’ll find checklists and worksheets to help you assess your strategy and examples of great email marketing to inspire you.

On any given day, the average customer will be exposed to 2,904 media messages, will pay attention to 52 and will positively remember only four (SuperProfile 2010).

**How do you ensure that your email is one of the four that gets remembered? The answer:** your email must be more trusted, more relevant, and more strategic. It must be more engaging.



PART ONE:  
**WHAT IS  
ENGAGING EMAIL?**



# PART ONE: WHAT IS ENGAGING EMAIL?

## THE NEW DIGITAL BUYER

Meet today's buyer. She has the upper hand when it comes to making purchasing decisions. Tech savvy and brand sophisticated, she is wise to the ways of marketing, and she expects a lot. She believes you should inform and even entertain her, but never bore or, worse, irritate her. And she's fickle — if you don't keep communications interesting, she'll opt out lickety-split.

Three major trends have emerged out of the recent — and rapid — evolution of buyer behaviors across email, social, search, and the Web.

### 1. Buyers are more empowered:

Thanks to information abundance combined with better search and sharing technology, product information is now ubiquitous. The Web provides consumers with instant information gratification. And mobile devices add a wherever/whenever dimension to every aspect of the experience. Consumers can access detailed specs, pricing, and reviews about goods and services 24/7 with a few flicks of their thumbs on their smartphones. Meanwhile, social media encourages consumers to share and compare.

Today's buyers are increasingly self-directed when it comes to making purchasing decisions. They have broad access to resources and proactively gather information across a number of digital channels, often developing brand perceptions before they ever interact directly with a brand. By the time a buyer comes to you, he's probably already made his purchasing decision, so it's time to throw out the old model of a persuasive shop girl greeting your customer at the door.

And as for you sales guys, the idea of taking a customer out for golf sounds great, and it may even happen occasionally, but you know it's not feasible for everyone. You manage a portfolio of hundreds or thousands of customers!



### Customer Engagement for Competitive Advantage

According to Forrester Research, we are now in the “Age of the Customer.” Today, advances in technology allow every company to tap into global factories and supply chains, and even the leanest startups can access all the computing resources they need from the cloud. The ability to tap into the cloud is no longer considered an advantage; rather, it's a way of life. Today, being the customer's first choice is the only remaining source of competitive advantage, and competition is fierce. To win, companies must be obsessed with their customers, focused on understanding them and engaging with them better than anyone else.

# PART ONE: WHAT IS ENGAGING EMAIL?

## THE NEW DIGITAL BUYER

### 2. Buyers know how to opt out:

The junk mail of yore kept consumers prisoner because they couldn't "break out." But today's buyers can easily opt out of marketing communications they don't want. If you're sending marketing emails and tracking your results (and we hope you are!) you probably know that gut-sinking feeling well when a campaign underperforms and causes a lot of opt-outs – or, worse, spam complaints!

But consumers who take the initiative to unsubscribe from your emails might only be the tip of the opt-out iceberg. Many more consumers might be "passively opting out" – simply ignoring the emails you send. We're all getting better at tuning out the noise of today's digital circus, and the result is that most traditional marketing techniques, which are based on "renting attention" from the buyer as they go about their business, are becoming less and less effective as buyers get more tech-savvy.

### 3. Consumers have higher

**expectations:** Today's buyers expect companies to keep seamless track of their purchasing history, communication preferences, and desires. If your system isn't a well-oiled data machine, you'll lose brand loyalty fast.

Consumers look for a unified and personalized experience across all of your touchpoints: your website, social media and photo platforms (Facebook, Twitter, Instagram), email marketing, etc. They want to find the information they are looking for in the medium that is most convenient for them at the moment. Whether they're in front of their computers at work or in lines at post offices on their mobile devices, they expect an experience that's streamlined and consistent – and it must be personal, too. They also expect you to recognize them – this is where it becomes critical to capture and store data over time and across channels – and then feed them the exact information they want at the moment you interact with them.

It's an exciting – yet challenging – time to be a marketer. **It's no longer sufficient to simply push static information to buyers in a mass advertising model, not even in segmented batches.** You must fundamentally shift the ways you engage with customers across online channels throughout their lifecycles. And to do this, you must learn to **engage each and every prospective customer individually and personally.**

"Building on the vast increase in consumer power brought on by the digital age, marketing is headed toward being on-demand – not just always 'on,' but also always relevant, responsive to the consumer's desire for marketing that cuts through the noise with pinpoint delivery."

– McKinsey, "The Coming Era of 'On-Demand' Marketing"



# PART ONE: WHAT IS ENGAGING EMAIL?

## EMAIL MATTERS MORE TODAY THAN EVER BEFORE

In 2009, *The Wall Street Journal* published an article claiming that email was dead. Ironically, it was the most emailed article of the day.

Just about every day since then, someone has published an article or blog post echoing email's demise. In fact, if you Google "email is dead," you'll get over 1.5 million results. (To emphasize just how radical a number that is, comparison searches bring up only 280,000 results for "blogging is dead," 180,000 for "social media is dead," and only 2,500 for "podcasting is dead." All of these numbers were current at the time we wrote this in June 2013.)

But the reports of the death of email have been greatly exaggerated, and the hysteria around the notion only shows that email is more important than ever. While companies now have the flexibility to communicate via traditional channels, such as direct mail and TV, as well as through newer channels, such as social media, email is still the quickest and most direct way to reach customers with critical information.

Why? Because email is the one channel your audience accesses regularly. **We – consumers – are addicted to email.**

"The reports of my death have been greatly exaggerated."

– Mark Twain



### Quick Quiz

1. How many times a day do you check your email?
2. How many times have you checked your email in the last hour?
3. How soon after you wake up do you check your email?
4. Have you checked your email while reading this guide?

## PART ONE: WHAT IS ENGAGING EMAIL?

# EMAIL MATTERS MORE TODAY THAN EVER BEFORE

### Email: Alive and Well

On any given day, your customer may or may not visit your website, blog or Facebook page; but with few exceptions, customers check their email every day, if not multiple times a day. Scratch that — how do you make it through all those meetings? It's more like multiple times an hour!

Despite pundit cynicism, the stats around email are resoundingly positive. For example, there are currently 3.3 billion email accounts in the world.

(Source: [Mashable](#))

What's more:

- Of Americans age 12 and over who are active online, **94% cite email as one of their regular activities.** (Source: [Pew Internet and American Life Project's Generations 2010 report](#))
- Jay Baer, Social Media Speaker, Author and Coach, says that **58% percent of adult Americans check email first thing in the morning.** (Source: [MarketingSherpa 2013 Email Summit](#))

Email is very much alive. Plus, it's still the number one way for marketers to communicate directly with customers.

According to new research:

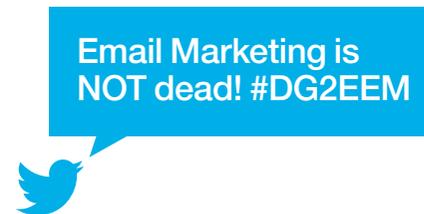
- **Email is the customer preference.** In a recent survey, a staggering **77% of consumers** reported that they prefer to receive permission-based marketing communications through email — and email was the number one source for all age groups including 15-24! (Source: [Waldow Social](#))
- **Email generates nearly a 2X return compared to other channels.** For every dollar spent on email marketing in 2011, there was a \$40.56 return. Compare that to other channels, such as search engine marketing, which is the next closest at \$22.44. (Source: [Direct Marketing Association and Smart Data Collective](#))

- **Email investment is slated to increase.** 64% of companies indicated their organizations' investment in email marketing was expected to increase in 2013.

(Source: [MarketingSherpa 2013 Benchmark report](#))

The point is, email is not going anywhere. As a marketer, it's still your number one tool for reaching customers fast.

If you agree that email marketing is NOT dead, go ahead and take a quick break to tweet:



“Where do you tell people to send important calendar items, documents, or discussions about important topics, either for work or home? Our guess is that ‘Facebook’ wasn’t your answer. It was probably email.”

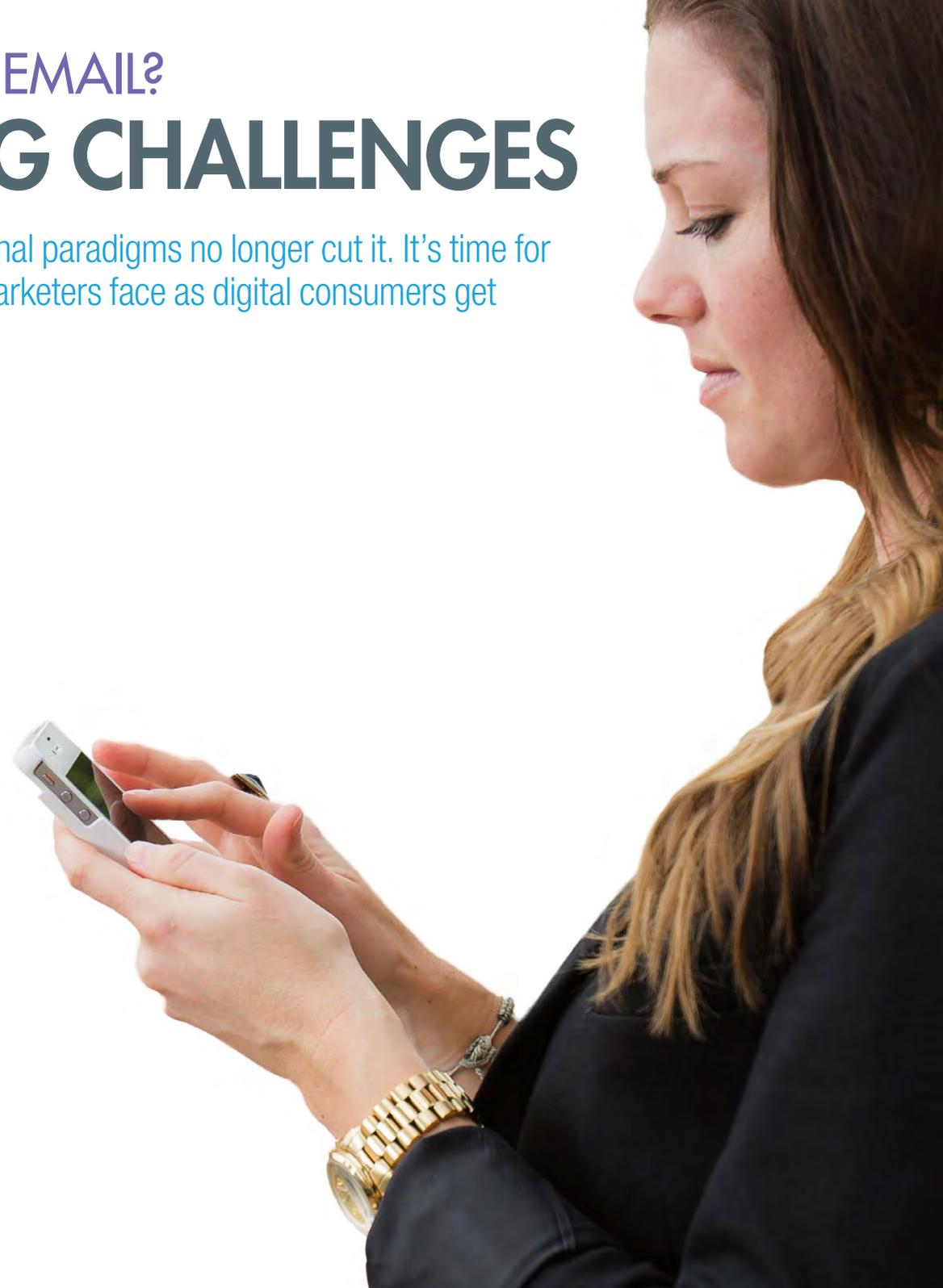
– Jason Falls, Digital Strategist and Co-author of “The Rebel’s Guide to Email Marketing”

# PART ONE: WHAT IS ENGAGING EMAIL? BUT EMAIL IS FACING CHALLENGES

Email still matters – perhaps more than ever – but traditional paradigms no longer cut it. It's time for a reality check regarding the new challenges that email marketers face as digital consumers get more sophisticated.

Here are the key areas of this new challenge:

- **The Economics of Attention:** Information abundance and attention scarcity make it harder than ever to get buyer attention
- **Opt-Out, Screen Out, Tune Out:** Consumers don't want to feel they are being marketed to, and will find ways to tune out unwanted communications
- **The Cross-Channel Marketing Revolution:** New communication channels mean email can no longer be a standalone channel
- **Imprecise Metrics:** Imprecise metrics that don't show true impact means that email struggles to be strategic



# PART ONE: WHAT IS ENGAGING EMAIL?

## BUT EMAIL IS FACING CHALLENGES

### The Economics of Attention

The rise of the Internet has resulted in a quick transition from information scarcity to information abundance.

The world is producing information faster than the human mind can wrap itself around the data. According to a 2011 IDC report titled [Extracting Value from Chaos](#), the amount of global digital information created and shared worldwide grew nine-fold from 2006 to 2011, growing to 2 trillion gigabytes. This number is expected to quadruple by 2015.

Information abundance means attention scarcity. Social scientist Herbert Simon first talked about attention economics when he wrote, “In an information-rich world, the wealth of information means a dearth of something else: a scarcity of whatever it is that information consumes. What information consumes is obvious: attention of its recipients.”

This means it is only getting harder and harder for your emails to engage consumers.

### Opt-Out, Screen Out, Tune Out

People are inundated with pitches, advertisements, and other interruptions on a daily basis. Consumers are marketed to so often that, as a matter of self-defense, they’ve raised a psychological “anti-marketing shield.”

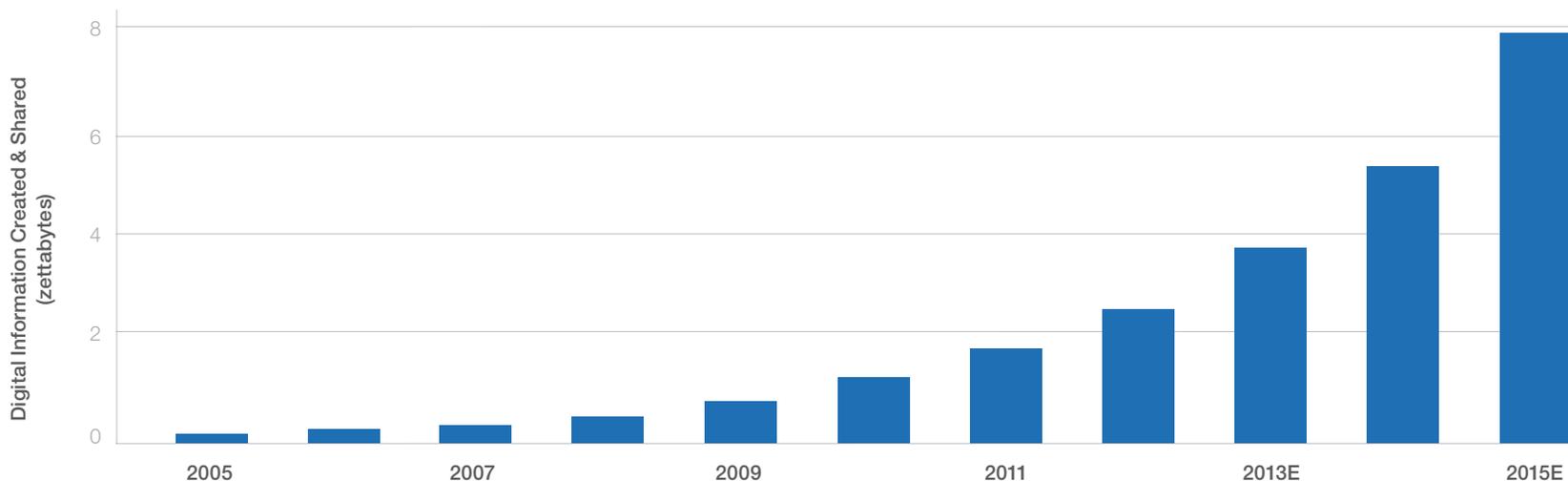
This is particularly the case when it comes to email content. Consumers with a vested interest in achieving “Inbox Zero” have many tools to help them sweep and filter unwanted emails. They create their own definitions of junk mail using custom filters in their email software, and if they

don’t like a message, they’ll not only make sure they don’t see it again, but they’ll also tell others about their displeasure.

And, let’s face it, most marketing emails pretty much suck. Even if yours don’t, that doesn’t mean they’ll interest your audience. What’s creative and alluring to you might just look or sound like another sales-y, drone-toned e-blast to your end viewer: “Hi, are you ready to buy? Hi, are you ready to buy? Hi, are you ready to buy?”

Don’t be that guy.

Global Digital Information Created & Shared, 2005 – 2015E



Source: IDC report  
“Extract Value from Chaos” 6/11.

# PART ONE: WHAT IS ENGAGING EMAIL?

## BUT EMAIL IS FACING CHALLENGES

### The Cross-Channel Marketing Revolution

Today's buyer seeks relevant and personalized content across all digital channels: email, mobile, social, display advertising, you name it. Omni-channel, customer-focused marketing is no longer nice to have; it's a must-have.

Companies that want to put customers at the center of their marketing strategies must engage them across the board, but this is only possible when marketing teams have a channel strategy that unifies their products and teams.

Traditional email marketing tools were designed for just one channel – email. It started as a single communications channel with no core connection to other marketing channels. Even today, companies using standalone email service providers (ESPs) are stuck with a legacy approach that doesn't take into account the reality

that today's buyer is adept at multi-tasking across channels — engaging with email in one moment, a website the next, and then flitting across to social media. And he does it all while talking on the phone or texting. Traditional ESP solutions can't adequately address this level of sophisticated multi-channel customer engagement. Nor can ESPs adequately capture all the online and offline behavioral patterns that marketers must track to stay on top of customer whims.

To spearhead the movement toward true cross-channel coordination, a new breed of email marketers is quickly rising to the top. These forward-thinking marketers are embracing strategies that leverage email as the best platform to tie together the customer relationship over time and across all marketing channels.

### Imprecise Metrics

With traditional ESP solutions, the marketer has to manually sort through multiple reports to track unsubscribes, clicks, opens, bounces, and so on for each email campaign. The insight these reports provide is, unfortunately, not that insightful with regard to customer engagement. When stuck with imprecise and generic metrics, email marketing remains merely a tactical channel, relegated to the sidelines instead of becoming a strategic part of leadership's revenue plan.

Marketers waste valuable time struggling to connect the basic metrics provided by their ESPs to the more strategic metrics that company executives actually care about, such as customer engagement and revenue impact.

## PART ONE: WHAT IS ENGAGING EMAIL?

# ENGAGING EMAIL MARKETING DEFINED

Consumers are always on, always connected, and always overwhelmed. If you want to connect with them, you have to work hard to engage them. In order to be truly effective, email marketing must become more trusted, more relevant, more conversational, and more strategic.

**Think about it: you probably pay the most attention to emails from friends, family, and colleagues, people with whom you have genuine, trusted relationships.**

Sure, the relationship between a brand and a consumer is never exactly the same as the relationship between friends and family, but marketers can narrow the gap.

Brands can enjoy some of the benefits of a trusted relationship by marketing to the buyer in a natural, non-marketing-speak way that truly engages him.

**The best marketing doesn't feel like marketing at all.**

If you can genuinely engage your audience through email marketing, you can build direct, trusted relationships across all channels. Do this right, and you'll be the company that cuts through the noise.

“Remember that the best campaigns aren't about you or what you want subscribers to do. They're about your subscribers and what they want.”

– **Matt Blumberg**  
Chairman & CEO of Return Path



When implemented effectively, modern engagement marketing can significantly enhance your organization's ability to increase revenue, maximize return on marketing investments, and increase the lifetime value of your customers. Marketo has found this to be true across almost every industry, including:

- Business services
- Education
- Financial services
- Healthcare
- Manufacturing
- Media
- Technology
- Telecommunications
- Travel and leisure

## PART ONE: WHAT IS ENGAGING EMAIL?

# ENGAGING EMAIL MARKETING DEFINED

### The 5 Key Attributes of Engaging Email

To engage and succeed, your marketing emails must, above all else, be:

## 1. TRUSTWORTHY

(Part 2)

## 2. ALWAYS RELEVANT

(Part 3)

## 3. CONVERSATIONAL, NOT CAMPAIGN-BASED

(Part 4)

## 4. COORDINATED ACROSS CHANNELS

(Part 5)

## 5. STRATEGIC

(Part 6)

Once we've covered all five of these key attributes of engaging email, we'll talk about technology in Part 7, and how marketing automation can help you graduate from basic email services to real, hit-it-out-of-the-ballpark engagement strategies.

Ready to dive into greatness with your email marketing? Flip or click the page.

“With each advance in digital communication and with every new information source, social connection, or mobile device improvement, the customer becomes more powerful. Tactics that captivated buyers yesterday lack luster today. One such out-of-touch tactic is ordinary email. Email remains a core workhorse of communication, but to gain the attention and loyalty of today's discerning buyers — and to avoid irritating them — it must be enhanced with the capability to engage.”

– IDC Workbook, *Graduating from Email to Engagement: Using Marketing Automation to Achieve Success with Today's New Buyer*, June 2013

# PART ONE: WHAT IS ENGAGING EMAIL?

# ENGAGING EMAIL MARKETING DEFINED



## Score Your Email Marketing Engagement

What is your company's current level of email marketing engagement? Circle a number next to each marketing tactic below, then add up your score at the end.

	We don't have a process or guidelines for this.	We have an informal process with a few loose guidelines or guidelines that are inconsistently followed.	We have a formal process with guidelines we adhere to consistently.
Tracking the impact of email marketing on revenue	1	3	5
Integrating email with other marketing tactics	1	3	5
Using sophisticated segmentation to target relevant messages to smaller groups	1	3	5
Creating messages that are relevant in terms of content, recipient, and timing	1	3	5
Using email to craft consumer conversations instead of "blasts"	1	3	5
Proactively building a bigger list of subscribers	1	3	5
Consistently setting and meeting subscriber expectations for email timing, frequency, and content	1	3	5
Monitoring our deliverability statistics and regularly cleaning "our" subscriber database	1	3	5
Testing, analyzing, and continuously improving "our" email communications	1	3	5
<b>Subtotal</b>			

**Total:**

### Score 9-15 : Barely Doing the Basic

You're doing email marketing, but you haven't begun to tap into its real potential — you could be doing more harm than good.

### Score 16-29 : Getting There

You're on the right track for consumer engagement, but you could be doing a lot better.

### Score: 30-45: Truly Strategic

You understand that being engaged with your audience is the only way to compete in today's cross-channel marketing world.

# INFLUENCER ROUNDTABLE: EMAIL IS NOT DEAD; IT'S EVOLVING



We asked, “What’s your reaction to the following statement? Email is not dead; it’s evolving.”

Take a look at the answers:

“I would recommend that anyone who thinks they need to prove the value of email in a world where Facebook is one of, if not the biggest sender of email in the world, to stop sending email for a whole month and see if they keep their job.”

– **Dela Quist, Email Marketing Leader  
CEO of Alchemy Worx**



“Clearly email is not dead, but it’s not purely evolving either, it’s growing. From improved inbox placement and increased revenue to reduced deployment costs, marketers now see the value of growing their email programs and cultivating an engaged list. Therefore they are increasingly creating more tailored, customer-focused email dialogues. That’s evolution. But this increased sophistication does not necessarily reflect a decrease in email frequency, quite the opposite; it often represents an increase in volume and more email-driven revenue. That’s growth.”

– **Scott Hardigree, Founder at Indiemark,  
Co-Founder at Bright Speed**



“Having run an email-focused agency for over 10 years, I have heard one too many times why and how email’s death is imminent. It is beyond resolute and anyone in digital marketing knows that email marketing remains the digital marketing hub. The last few years have brought a more dynamic evolution to email than the past decade has seen. We have seen mobilized email for smartphones and tablets, marketing automation and social media help take email to the next level. Bottom line, with email driving more revenue and ROI than its digital marketing brethren, it is well positioned for a healthy and long future.”

– **Simms Jenkins, Founder & CEO  
of BrightWave Marketing**



# INFLUENCER ROUNDTABLE: EMAIL IS NOT DEAD; IT'S EVOLVING



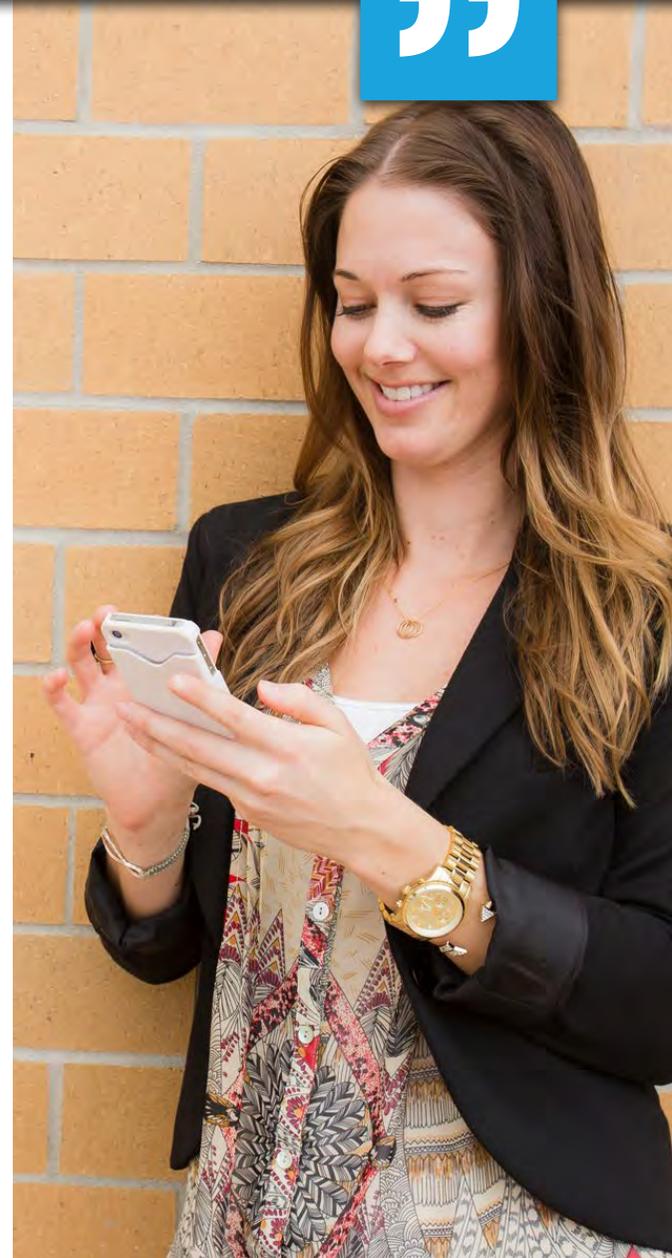
"The fact is that email is the glue that holds the entire Internet Marketing infrastructure together. From transactional services, business communication, personal communication, marketing and promotion, email is the way business is done. The whole "email is dead" idea started as a way of differentiating social media channels in an attempt to draw in more advertising and promotional dollars. Years later, social media channels have never enjoyed the ROI that email still enjoys. You have to be in the inbox to be a player".

– **Bill McCloskey**  
Founder at Only Influencers



"First and foremost, email has never been dead nor has it ever been dying. In fact, it has always been evolving and will continue to do so in the years to come. Evolution in email marketing has been overshadowed in recent years by the rise of social and mobile, but more and more technology companies who innovate in the email space are emerging and thriving".

– **Andrew Kordek**  
Co-Founder Trendline Interactive



PART TWO:  
**TRUSTED**



# PART TWO: TRUSTED ENGAGING EMAIL IS TRUSTED EMAIL

Only with trust will consumers let your email past their filters and into their lives. Set expectations during an opt-in process, and then fulfill those expectations with every email you send.

Trusted emails have lower bounce and unsubscribe rates, and higher deliverability. Conversely, if you don't have trust, you will have lower opens, clicks, conversions, and so on — and your messages are more likely to be marked as spam.

## Spam is in the Eyes of the Consumer

Spam, Spam, Spam, Baked Beans, Spam ... a few of the many menu items in the famous Monty Python sketch from the 1970s. These days, when we hear the word spam, it's usually not about a can of meat — although today's version of spam can be just as nasty.

There are legal definitions of spam — in the U.S., for example, spam can be classified as any email that violates the 2003 CAN-SPAM Act (again, no relation to canned spam) or any other countries' bulk email laws. **In the eyes of consumers, however, the definition of spam is arguably broader and less forgiving.**

After reviewing 130 million IP addresses that sent nearly 20 trillion emails, Experian noted that 85% of all messages received by ISPs were classified as spam.

To consumers, spam might represent:

- Any email they don't expect.
- Any email they don't want.
- Any email that prompts them to hit the "This is spam" button.
- Any email they might have signed up for, but later decide they don't want.
- An easy way to opt-out.

DJ Waldow, one of the authors of this guide, tells a story of watching his wife mark a legitimate email — a communication she had opted into — as spam. Why did she do that? A negative in-store experience turned her off to the company.

For our purposes here, **spam** is defined as **"the opposite of engagement."**



## The Subscriber Covenant

It's crucial to gain and keep the trust of your audience so they don't mark your communications as spam. We approach this with something we call "The Subscriber Covenant" — **an implicit promise to deliver value in exchange for consumer trust.**

If "The Subscriber Covenant" were a letter, it might read something like this:

*Dear Subscriber,  
We promise to:*

- *Send emails that you actually want.*
- *Deliver those emails when you want them.*
- *Use the data we collect from you to send targeted, relevant information.*

*Sincerely,  
A Marketing Department that Wins*

Keep "The Subscriber Covenant" top of mind when deploying your email marketing campaigns.

# PART TWO: TRUSTED ENGAGING EMAIL IS TRUSTED EMAIL

## Consistency Leads to Trust

One way to build trust with your email marketing is to be consistent. We all lean in to routine — from the amount of milk we put in our coffee, to the route we take home from work. Routine gives us comfort and makes our lives easier.

When someone knocks on your door, if you don't recognize that person through the keyhole, your initial reaction probably ranges somewhere between annoyance and dread. The same goes for unexpected emails; subscribers don't generally like surprises. When you are consistent, your subscribers recognize your emails the moment they arrive.

Here are five ways to create and maintain email consistency:

1. Be consistent with your **timing**. Send emails at the same times and on the same days of the week.
2. Be consistent with your **frequency**. Send the same number of emails every month.
3. Keep **types of content** consistent.
4. **Brand** consistently. Your emails should usually look similar.
5. Use consistent **naming and subject lines**. Your emails should “act” similar when they hit a recipient's inbox.

You can also use consistency to train your subscribers to take certain actions, such as click through to a landing page on your website. For example, if a subscriber knows that your emails typically start with a two or three paragraph teaser, followed by a link to the full story online, she might develop the habit of skipping the teaser and going straight for the story.

A predictable routine breeds security. When subscribers understand your behavior, they are less likely to unsubscribe or complain, and more likely to take positive action.



## The Occasional Surprise

Aiming to be consistent does not mean you can't send the occasional one-off email. There might be a strategic reason to send a unique, valuable message on a different day and time, or in a different format than usual. If you have established a pattern of trust, your audience is likely to accept the inconsistency — and may even respond well to the “surprise.”



## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

Before you can fulfill and maintain expectations, you must first set them. Expectations start with the opt-in. A smart opt-in process sets an accurate and positive notion of what's to come, and how "it" will arrive.

### Choose the Right Opt-in Type for Your Business

There are various tactics for building your list of opt-in email addresses, but, in general, they fall into three categories:

1. Single opt-in
2. Single opt-in with a 'Welcome' or 'Thank You' email
3. Confirmed or double opt-in

#### Single Opt-In

##### How it works

A new subscriber enters her email address and possibly other information (demographics, preferences, etc.). She is immediately subscribed and will automatically receive the next email campaign. There's no need for her to take an additional step.

Implicit opt-in occurs when a consumer fills out a form, e.g. in order to download content or register for an event. The website's privacy policy must state that performing this action automatically opts the user into email marketing. This is a commonly used method in the business-to-business (B2B) sector, and typically B2B audiences understand the implications of providing their email addresses.

Explicit opt-in requires the user to voluntarily sign up for email marketing. Often, this takes the form of a checkbox on a registration page. Often checked by default, this option reads something like, "I want to receive news and updates."

##### Pros

- Requires the least amount of effort on the part of both the company and the customer.
- There's no place for a subscriber to drop the ball, which can happen when she's required to "confirm" her opt-in.
- Most quickly leads to a big list.

##### Cons

- No opportunity to set expectations with your audience; the first email they receive is your next marketing message.
- Unless you have a system for catching bad email addresses, you run the risk of being targeted by spambots submitting phony addresses. This is annoying and could cost you credibility with your ESP.
- If a subscriber forgets that he opted in, or doesn't realize he has opted in, the risk is high that he'll mark your email as spam. This is particularly true with implicit opt-ins and when too much time has elapsed between subscriber sign up and your first communication.
- Less consumer effort in the sign-up process generally means less connection to your brand overall. Single opt-in tends to attract less committed subscribers, who will either actively or passively opt out of your emails later.
- In some countries, implicit opt-in is actually illegal. Check the laws of the countries in which you market.

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Single Opt-In with Welcome Email

#### How it works

A new subscriber enters his information and implicitly or explicitly opts-in as described above. In this case, an immediate auto-response email thanks and welcomes the subscriber. This email includes a customized message that tells him what to expect in future emails, and when to expect them.

#### Pros

- The welcome email provides a great opportunity to engage each new subscriber. It's courteous, and it also serves as a good way to begin earning the trust of your subscribers while setting proactive expectations.
- A welcome email and/or landing page prompt provides an opportunity to link to a bonus opt-in incentive.
- If a welcome email bounces, you know to filter out that address. Bye-bye, spambots!

#### Cons

- Similar to basic single opt-in, less effort can equal less engagement and more risk of opt-out or being marked as spam.
- You still run the risk of sending the welcome emails to bad addresses, which can negatively impact your future deliverability.

### Confirmed or Double Opt-In

#### How it works

A new subscriber enters his email address and, depending on your needs, other information and content preferences. The post-subscribe thank-you page may alert him to look for an email. Once he receives that email, he'll need to click on a link or button to confirm the subscription.

#### Pros

- Asking subscribers to confirm their subscriptions separates the committed from the simply impulsive. Those who click on the link really want to receive your emails.
- Requiring a manual confirmation action separates humans from bots. A bounced confirmation email can be filtered out right away.

#### Cons

- You're asking subscribers to take an extra step, which is a risky request in this age of instant gratification. After all, they've already told you they want your emails with their initial opt-in request; asking them twice might annoy them.
- There's a risk that an interested subscriber will get distracted before she can click "confirm" in the follow-up email, or, worse, that your email will get lost or filtered. As a result, you may lose interested subscribers.

Marketo's Benchmark on Email Marketing study showed that a clear opt-in method increases trust by 10%, while cheap shortcuts, such as using third-party lists and data vendors, actually decrease trust by 10%.

[Marketo Benchmark on Email Marketing](#)

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Problems with Assuming Opt-In

Spam is in the eye of the beholder, and any time you assume or use implicit opt-in, or use a list of email addresses you secured elsewhere, you're taking a risk that your valuable messages will be considered junk mail — even if you technically have legal permission to send them. For example:

- **You got a name from a tradeshow list or other activity you sponsored.** When a consumer registers for something you've sponsored, lets you scan his nametag at an event, or drops a business card in a fishbowl, it does not necessarily mean he's asking for future email marketing. If the recipient is not expecting your email, you may not be building trusted engagement.

- **Someone handed you her business card.** An executive handed you her business card after being introduced by a colleague at an event. Does this mean she wants to receive your marketing emails? Probably not.
- **You already have a list of contacts.** You give your admin your entire contact list to enter into your email database or CRM system. A month later, everyone on that list receives an unsolicited email from your company. This is a way to break trust — fast.

A better option: When you meet a potential subscriber through any of these means, send a “Nice to meet you” email with a button or link inviting him to your email communications. Give him a great reason to accept! Provide value and maybe include an incentive. If he opts in, great; if not, you know to be more circumspect with how you use his email address in the future.



## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Expert Opinions on Single vs. Double Opt-In

**Single Opt-in:** According to DJ Waldow, one of the guide's authors, the single opt-in is the best option for most companies. After all, building an email list is one of the most valuable things a company can do in terms of marketing, and lists grow fastest with single opt-ins. DJ is also not a fan of the question implied by a confirmation email: "Are you really, really sure?" If someone tells you they want to be on your list, believe them!

[\(Read DJ's entire article on this\)](#)

**Double Opt-in:** Seth Godin, creator of Permission Marketing, is an advocate for the double opt-in. "Real permission is different from presumed or legalistic permission," he says. "Just because you somehow get my email address doesn't mean you have permission. Just because I don't complain doesn't mean you have permission. Just because it's in the fine print of your privacy policy doesn't mean it is permission either." If you take the time to get a subscriber's permission, with confirmation follow-through, you gain the advantage of his abiding loyalty and engagement.

### Set Expectations During Opt-In

Opt-in is an opportunity to build trust and to set expectations about what's to come with your email marketing. The page where a subscriber enters her email address is your first chance to establish a positive relationship.

Use your opt-in page wisely. Explain in simple and compelling language what she will get after entering her information: "Enter your email address to download our white paper" or "Get a special subscriber discount when you sign up for our newsletter." The value you offer might seem obvious to you, but it might not be crystal clear for others, at least not from the beginning.

Your opt-in should:

- **Explain "What's In It For Me (WIIFM)?"** Subscribers want to know why they should subscribe; so tell them right up front. Remember, marketing is about meeting their needs, not yours.
- **Explain exactly what types of content** you'll be sending: Let your subscribers know they might receive updates, deals, coupons, offers, advice, news, events, or general information.
- **Set expectations for frequency and timing.** (We'll talk more about this later.)
- **Give subscribers choices**, if you can. Offer them the ability to sign up for emails on certain subjects versus others, or for a weekly digest versus a daily message.

# PART TWO: TRUSTED ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

## Other Tips for Opt-in Pages

**Privacy Policy:** Your privacy policy is crucial. It's not just mandatory legalese, but also another opportunity to establish trust and set expectations with your Web visitors. Here's a link to Marketo's privacy policy:

[marketo.com/trust/privacy.php](http://marketo.com/trust/privacy.php).

The mention of your policy doesn't have to be dry verbiage; it can be a simple promise not to spam your audience, like this example from Funny or Die:



JOIN THE **funny** OR **DIE**  
NEWSLETTER

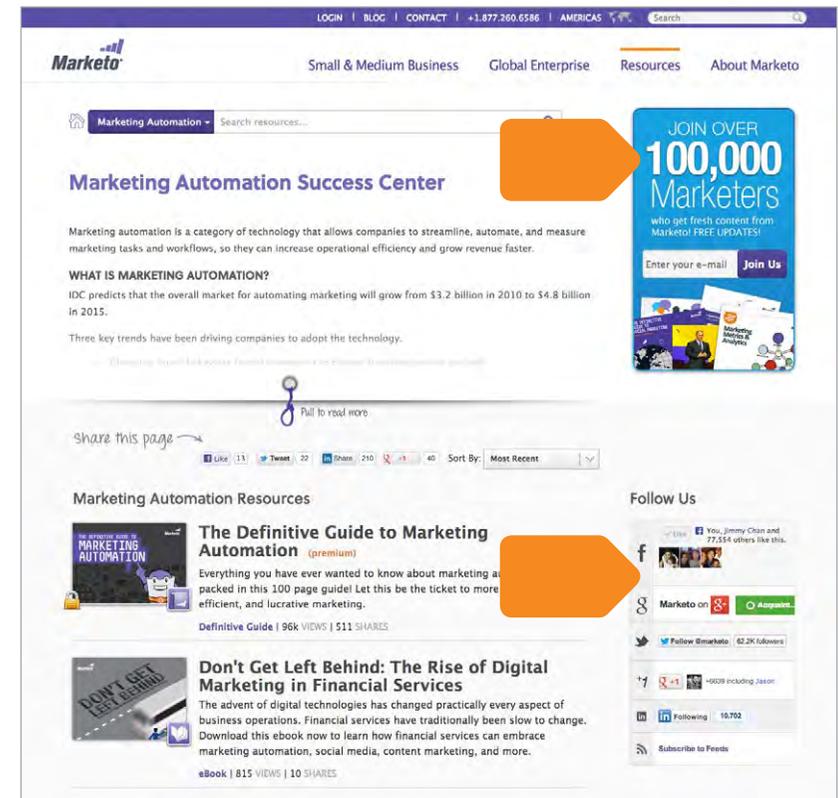
The best of Funny or Die.  
PLUS EXCLUSIVE CONTENT

Your Email

We will not use your email for anything sneaky.

**Social Proof:** Including social proof of your popularity can help validate the message of your opt-in form, e.g.:

- “Over 750,000 professionals have subscribed.”
- “Join the 200,000 others who get our weekly newsletter.”



Marketo

Small & Medium Business Global Enterprise Resources About Marketo

Marketing Automation Search resources...

**Marketing Automation Success Center**

Marketing automation is a category of technology that allows companies to streamline, automate, and measure marketing tasks and workflows, so they can increase operational efficiency and grow revenue faster.

**WHAT IS MARKETING AUTOMATION?**  
IDC predicts that the overall market for automating marketing will grow from \$3.2 billion in 2010 to \$4.8 billion in 2015.

Three key trends have been driving companies to adopt the technology.

JOIN OVER **100,000** Marketers who get fresh content from Marketo! FREE UPDATES!  
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share this page  13  22  210  40 Sort By: Most Recent

Marketing Automation Resources

**The Definitive Guide to Marketing Automation (premium)**  
Everything you have ever wanted to know about marketing is packed in this 100 page guide! Let this be the ticket to more efficient, and lucrative marketing.  
Definitive Guide | 96k VIEWS | 511 SHARES

**Don't Get Left Behind: The Rise of Digital Marketing in Financial Services**  
The advent of digital technologies has changed practically every aspect of business operations. Financial services have traditionally been slow to change. Download this ebook now to learn how financial services can embrace marketing automation, social media, content marketing, and more.  
eBook | 815 VIEWS | 10 SHARES

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f You, Jimmy Chan and 77,554 others like this.  
Marketo on      
Follow @marketo (62.2K followers)  
+6029 including Jason  
Following 16,702  
Subscribe to Feeds

# EXAMPLE: SOUTHWEST AIRLINES

Southwest Airlines is known for its creative, fun, and “simple” marketing. Its email marketing opt-in process is no exception. This example from the Southwest Airlines website has all of the essential elements.

1. The headline sets a clear expectation of what’s going to happen when the subscriber fills out the form, and the banner above it reinforces the promise.
2. The thumbnail email examples give subscribers a visual cue of what to expect.
3. The accompanying text lists not only the content of future emails, but also how often they will be delivered.
4. The form does not ask for a lot of information. Simple. Direct. Easy. This usually equates to more opt-ins!
5. This checkbox lets subscribers choose to receive a monthly newsletter in addition to the weekly emails.
6. Southwest also provides another option to get alerts: “DING.” While this is not specific to its email marketing list, it does give potential subscribers another way to connect.

Subscribe to Click 'N Save® Email Updates

**FINDING GREAT *deals* IS EASY,**  
Especially when we deliver them straight to you.

1 SIGN UP FOR **CLICK 'N SAVE**® E-MAILS AND DOWNLOAD **DING!** TODAY

2  Weekly Special Offers E-mail

3 Be one of the **first to know about fantastic travel deals** on...

- Southwest flights,
- car rentals,
- hotel offers,
- Southwest Vacations

...delivered directly to your inbox each week!

4 **CLICK 'N SAVE** EMAILS

\* First Name  \* Last Name

\* E-mail Address

\* Verify E-mail Address

Rapid Rewards Membership Number

Southwest In a Nutshell Email Updates [View Sample](#)  
Also subscribe me for "Southwest In A Nutshell", a monthly e-newsletter filled with SWA news and promotions!

5 **DING!** Alerts to your desktop or your iPhone®

- Enjoy discounted, limited-time only deals on specific flights.
- All deals are exclusive to DING! so you can only get these deals through the DING! desktop app or DING! on your iPhone.
- Customize your app so you only receive deals relevant to your home airport.

6 **DING!** DESKTOP APPLICATION **DING!** APP FOR iPhone

# EXAMPLE: WALDOW SOCIAL

While not as visually appealing as the Southwest Airlines example, Waldow Social's opt-in form clearly states what's in it for potential subscribers and sets expectations up front.

1. A catchy newsletter name builds brand recognition. The repetition of the "W" sound is what does it here.
2. What's in it for the reader is clearly communicated.
3. The phrase "a weekly recap" sets expectations for frequency, and "delivered on Friday" dials down the timing more precisely.
4. A "preview" link offers an example of what to expect.

## EMAIL UPDATES

Please complete the form below if you'd like to be added to **The Waldow Social Weekly**.

**BONUS: All new email subscribers get discounts on products such as my new online course, *Email Marketing Made Simple***

1

### The Waldow Social Weekly

The **Waldow Social Weekly** is a weekly recap of the best of the best email marketing content, delivered on Friday, directly to your inbox.

Want to see what this email will look like? [Preview it here](#). (Note: You may have to enlarge the image)

*Note: Only email address is required.*

Email Address \*

2

3

4

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Email frequency and timing

Your opt-in page is a great place to set expectations for the frequency and timing of your emails. You can be specific (“every Friday”), establish email cadence (“weekly”), or let subscribers know they should be on the lookout for unscheduled emails (“new product alerts”).

The most important thing to remember about setting expectations is to meet them. If you tell your subscribers you’re going to send a weekly email, and then bombard them daily, they’ll quickly unsubscribe, ignore your messages, or mark them as spam.



### “When should I send emails?”

Determining the best time and day to send your emails is a challenge. Despite what some people will tell you, there is no perfect or best time to send. Timing is established after knowing what works best for your audience, based on captured user data and other parameters. Some strategies to test:

- **Time of opt-in:** If a subscriber opts in to your newsletter at 2PM PST, you can reasonably assume that’s a time he is online.
- **Early bird:** If you schedule your emails to arrive in the early morning, you can be at the top of the email pile when folks arrive at the office. Note, however, that as smartphones become more ubiquitous, people check their email earlier and earlier in the day — often long before they actually get to work.

- **Time Zone:** By capturing IP addresses at opt-in, you can segment your list to send emails based on where subscribers live, so that every subscriber gets your email at the right time for their time zone.
- **Domain:** Send emails to subscribers using personal email domains (Gmail.com, Yahoo.com, AOL.com, etc.) during the early morning and evening hours. Those using work-related domains (e.g., company.com) should receive emails during the day.

Whichever tactic you choose, pick a send time and own it. Remember, once you set an expectation with your subscribers, stand by it consistently. (Note: this does not mean that you cannot send “one-off” emails on a different day of the week or time of the day. It also doesn’t mean that you cannot — and should not — be testing to see what works best for your audience.)

### “How often should I send emails?”

Ultimately, the answer depends on the level of perceived value you deliver in each email. For instance, daily deal emails, such as those from Daily Candy, Groupon, and Living Social, have high value and deserve daily frequency. Help A Reporter Out (HARO), an email service that connects product and service experts to journalists looking to write on-topic stories, sends emails three times a day! According to The Rebel’s Guide to Email Marketing, some HARO users even set their alarms for 5:45 AM EST, so they don’t miss the first message of the day!

For most businesses, however, once a day is much too much. A general rule to follow: **If you find yourself wondering if you’re sending one too many emails, you probably are.**

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Post Registration: What to Expect Next

Once subscribers have offered up their information, it's a good idea to immediately serve them a "Thank You" page. This page serves a few purposes:

1. It says "Thank You," which is just good manners.
2. It tells subscribers that the opt-in actually worked.
3. It answers subscribers' questions about when to expect their first email and what it will look like.

You can stand out from the pack by adding unique, funny, or creative language and graphics, or maybe even include a short Thank You video to this page. Your subscribers have already exhibited their willingness to be engaged, so this is a great time to seize their enthusiasm. Invite them to follow you on social media, subscribe to your blog, or learn more about your product or service via content links. It's also a good time to ask them to refer their friends.

### The Welcome Email

As soon as someone registers, your email marketing software can immediately send them a welcome email. The anatomy of a welcome email looks something like this:

- Thank you!
- Congratulations, you are now subscribed!
- Here is your offer (fulfill the promise of the opt-in by sending the coupon code, content, or other promised offer).
- Here is what to expect next, and when to expect it.



# PART TWO: TRUSTED

# BUILDING THE LIST

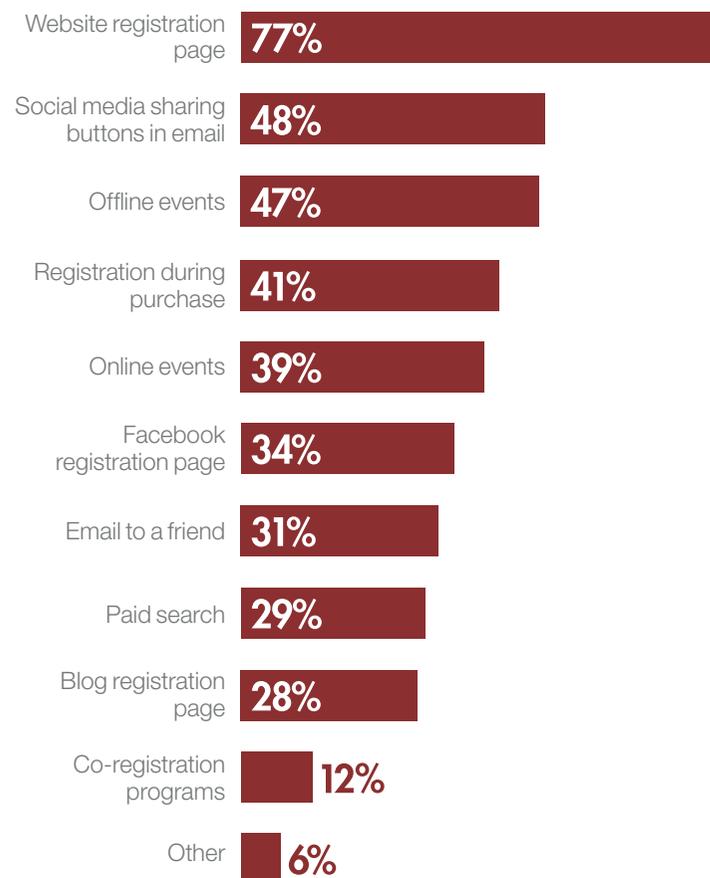
A key goal as an email marketer should be to grow your list of engaged subscribers. You will lose up to 30% of subscribers each year due to email attrition, and not all engaged subscribers will become paying customers. To grow your business, you need to feed the top of the funnel with list-building tactics.

## Building Your List on Your Website

According to a [2013 MarketingSherpa study](#), 77% of marketers ask for an email address on their websites. Your website is arguably the most effective place to collect email addresses.

There are two ways to do this:

- 1. ASK.** When you give your visitors great reasons to subscribe — news, updates, discounts, promotions, and freebies — they'll often gladly give you their email address.
- 2. FORCE.** With gated content, such as premium areas of your site and contest pages, an email address is the key that opens the gate. If email opt-in is only implied, however, be aware that the user may not actually be requesting future email marketing.



## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Email Opt-In Form

#### Placement Options

Having too many opt-in forms on your website could be a turnoff for potential new subscribers. On the other hand, if you relegate your opt-in form just to your home page or your contact page, you run the risk of missing visitors who come in the back door. You need to strike a balance.

Here are some traditional placement options, as well as a few you might not have considered.

#### 1. The sidebar.

Depending on the design and flow of your site, putting an opt-in form in a sidebar might be very effective. If you “pin it” — anchor the opt-in on users’ screens as they scroll down the page — it’s never out of their sight. Marketo uses this on our [blog](#).

#### 2. The header.

If someone comes to your site hoping to sign up for your newsletter, the first place he’ll look is probably the top of your page. Consider placing an opt-in form right in your header, or adding “sign up” as a top menu tab. This is what Waldow Social does.



## PART TWO: TRUSTED

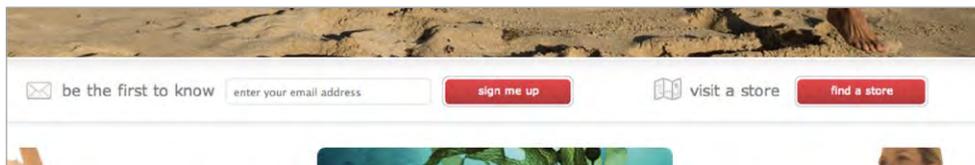
# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### 3. The footer.

Like the header, your footer is a logical and traditional place to put an opt-in form. In fact, even if you have opt-in options elsewhere, think about also having a simple text link to “subscribe” somewhere in your footer.

### 4. Smack in the middle.

The bold and brazen might consider an increasingly popular option for opt-in placement: right in the middle of your content. As visitors scroll down, they won't miss it. This is how active-wear company Lululemon does it:



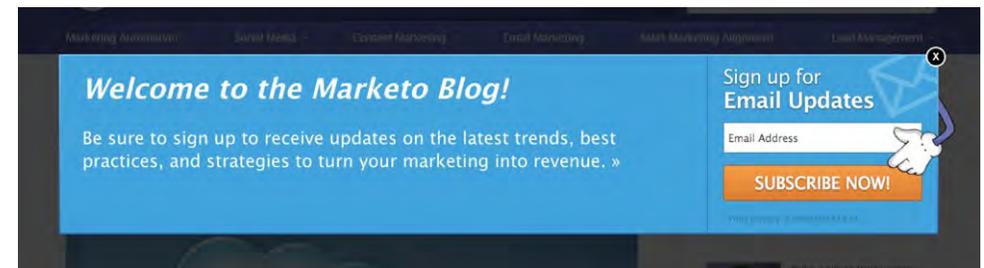
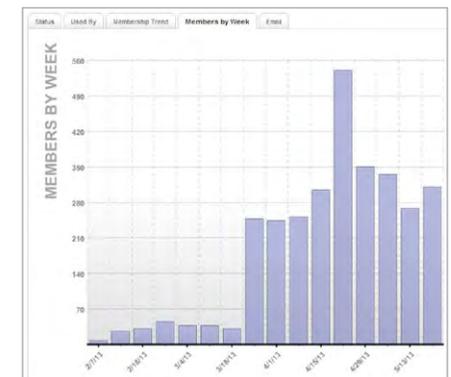
### 5. At the bottom of your content.

If your blog is popular, or if you have other well-read content available on your site, consider adding an opt-in form at the end of each post or article. If a visitor has taken the time to read an article, you already have a certain level of buy-in, so it's an appropriate time and place to ask for more!

### 6. A lightbox.

Pop-ups can be irritating, but they can also be very effective. They're certainly worth testing. You have plenty of options with lightbox opt-ins — you can have them appear after a certain period of time or present one to visitors as they navigate your site. Health and fitness source Greatist attributes 82% of its list growth to its pop-up opt-ins, and Funny or Die contends that 75-80% of its list (of over a million) has come from its pop-ups. Here's an example of Marketo's lightbox, which is only presented to non-subscribers once every six months.

By the way, Marketo's subscriber numbers have skyrocketed since we added the lightbox:



## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### 7. Welcome Gate.

You can redirect your visitor to an opt-in landing page before they arrive on your main website. Waldow Social does this, and has found that nearly 50% of its list comes from the Welcome Gate.



### **Nail the Landing (Page)**

An optimized landing page can make all the difference between a visitor subscribing or abandoning your page. Landing pages are so important that we've devoted a resource center and a guide to them:

[Marketo Landing Page Resource Center](#)

[Landing Page Optimization Success Kit](#)

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST



### 15 Other Ways to Get Email Addresses:

1. Via online whitepaper/eBook/webinar online registration.
2. In the middle of an e-commerce checkout experience.
3. During an actual in-store checkout experience.
4. Via QR code
5. Through a prompt at the end of a survey
6. Via your Facebook page.
7. Through Twitter, particularly using Twitter's new [Lead Gen Cards](#).
8. When an existing subscriber shares your email in any social media and one of their friends opts-in to your list.
9. Using old-school paper advertising techniques
10. On billboards. Yes, those things you see from the freeway.
11. Through aerial advertising: airlines, hot air balloons, blimps.
12. During tradeshows. Have a tablet on hand to easily opt-in new contacts.
13. During presentations. You know, at tradeshows and conferences.
14. Through an online pop-up or pop-under.
15. With a suggested opt-in prompt on a paper receipt or invoice.

Hey @Marketo! Here's another tactic to grow your email list:

#DG2EEM



# PART TWO: TRUSTED MAINTAIN YOUR LIST

**It's not enough to build a list – you also need to maintain it. This means letting subscribers manage their preferences or opt-out if they wish. And it means proactively cleaning and culling your list based on response data.**

## Subscription Centers

One of the best ways to establish trust with your audience is to allow them to take control of communications — they should never feel trapped.

You can be smart about your opt-out by creating a subscription center on your website. When subscribers click “unsubscribe,” they will be taken to the center and given the option of changing their communication preferences or the frequency with which they receive your emails. Maybe they still like you and don't really want to leave you — they just want to see less of you.

Most opt-out forms are pretty bare: you ask a subscriber to enter his email address — if it's not pre-populated — and, perhaps, his reason for leaving. As a marketer watching a subscriber march out the door, wouldn't it be better to give him one last chance to stay by offering a few subscription-frequency options in a human, friendly voice that lets him know you care about his needs?

Here's a great example from Bonobos, a men's clothing line:



**BONOBOS**

**How much Bonobos do you want in your life?**

**Frequency Preferences**

- How about once a week? Let's take it slow, Bonobos.
- Once a month. I like you, Bonobos. LIKE.
- It's not you, it's me, Bonobos. I need a 30-day break.
- Unsubscribe. \*Sniff\*. It's over, Bonobos.

**Email Address \***

email@email.com

Update Preferences

When a Bonobos subscriber clicks “unsubscribe” in an email, he's taken to his preferences page, where he can choose how often he'd like to receive messages, including never. Through the use of appealing language and humor, Bonobos is savvy about offering options that decrease a subscriber's likelihood of unsubscribing.

As a result, Bonobos retains 25% of those who would have otherwise opted out.

In your subscription center, give your subscribers options such as:

- A list of all current subscriptions. Show subscription details.
- The ability to customize preferences. Checkboxes make it simple to change subscription options.
- A pause option. For subscribers going on vacation, or who simply need a break from the information stream, offer the ability to pause for a certain period of time. This option can help decrease your unsubscribe numbers.
- The ability to “opt-down.” Opting down allows subscribers to receive fewer — but not zero — emails.

EXAMPLE:

# MARKETO'S SUBSCRIPTION CENTER

At Marketo, we allow subscribers to choose which "channels" to subscribe to, unsubscribe, or simply pause for 90 days.

Make sure your call-to-action buttons, such as "save setting" and the essential "unsubscribe all," are clear and prominent.

The screenshot displays the Marketo Subscription Center interface. At the top left is the Marketo logo. Below it, the title "SUBSCRIPTION CENTER" is centered. A text input field contains the email address "jon@marketo.com". Underneath, the section "YOUR SUBSCRIPTIONS" is shown, featuring a single subscription card for "Premium Content" with a checkmark and a help icon. Below this, there are two columns of settings: "BEST PRACTICES" and "EVENTS". The "BEST PRACTICES" column has radio buttons for "For Marketing", "For Sales", "For Executives", and "None", with the "For Marketing" option selected. The "EVENTS" column has checkboxes for "Webinars" and "Seminars and Conferences", both of which are checked. At the bottom, three prominent orange buttons are displayed: "SAVE SETTINGS", "UNSUBSCRIBE FOR 90 DAYS", and "UNSUBSCRIBE ALL". Two orange callout arrows point to the "SAVE SETTINGS" and "UNSUBSCRIBE ALL" buttons respectively.

# EXAMPLE: FAB'S SUBSCRIPTION CENTER

Fab does a great job with its subscription center. In its center, customers can choose email delivery days and the content they want to receive: sales information, order confirmations, invites, and/or inspirational emails.

The screenshot shows the Fab.com subscription center interface. At the top, there is a search bar and navigation tabs for Furniture, Home, Art, Vintage, Jewelry, Women, Men, Pets, Food, and Fun. The main heading is "Follow What You Love. Personalize Your Fab Experience." Below this, there are two featured categories: "Art" and "Food", each with a "You Follow" status and a "Notification Settings" icon. The interface is divided into several sections, each with a toggle switch and a description:

- Weekly Theme Shops** (ON): Email me about special weekly themed shops on topics ranging from Mother's Day to Cinco de Mayo to Japanese Design.
- The Fab Outlet** (OFF): Email me about weekly deep discounts in the Fab Outlet.
- Special Events** (ON): Email me about special promotions, new features, one-off events, and other cool stuff. Don't worry, we promise to only do this occasionally when we've got something truly interesting to announce.
- This Week On Fab** (OFF): Email me once weekly about the most popular new arrivals, as well as the most exciting upcoming events.
- My Orders**:
  - Email me when I place an order and when the order ships.
  - Also, email me whenever there is a status update on my order.
- My Invites** (ON): Email me every time my invited friends join.
- You are subscribed** (ON): I want to keep receiving Fab.com's emails.

## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Clean Inactive Subscribers

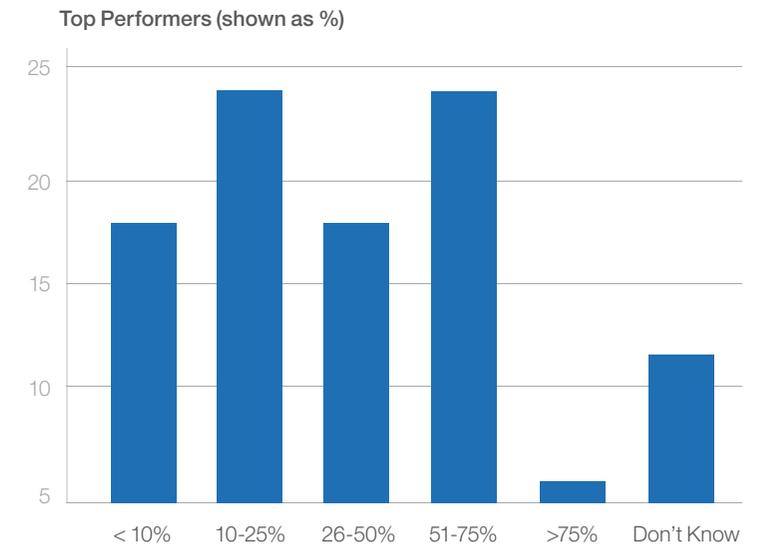
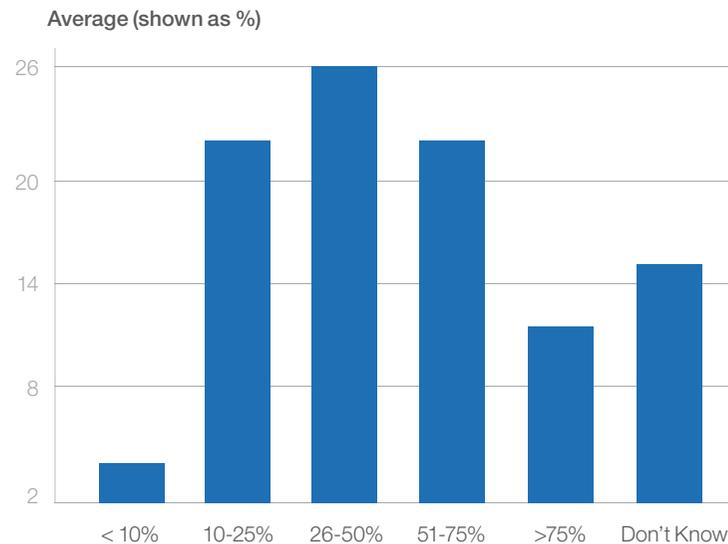
Do you suspect that a lot of your subscribers have emotionally opted out? The [Marketo Benchmark on Email Performance](#) study found that most marketers are pretty sure a significant percentage of their subscribers are inactive — neither opening email, reading them, nor bothering to unsubscribe.

When we asked, “What percent of your lists do you consider inactive?” the most common answer was 26-50%, with more than 20% of respondents saying 51-75%. What’s more, the top performers — those who tend to be the most on their email game — were even more cynical about the average level of engagement of people on their lists.

If you can identify your inactive subscribers, remove them. This can save you money — especially if your email marketing service provider charges you per email sent or number of active contacts — and it can save your reputation as a sender and lead to a higher deliverability rate.

### What Percentage of Your List is Inactive?

Marketo Benchmark on Email Marketing



## PART TWO: TRUSTED

# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

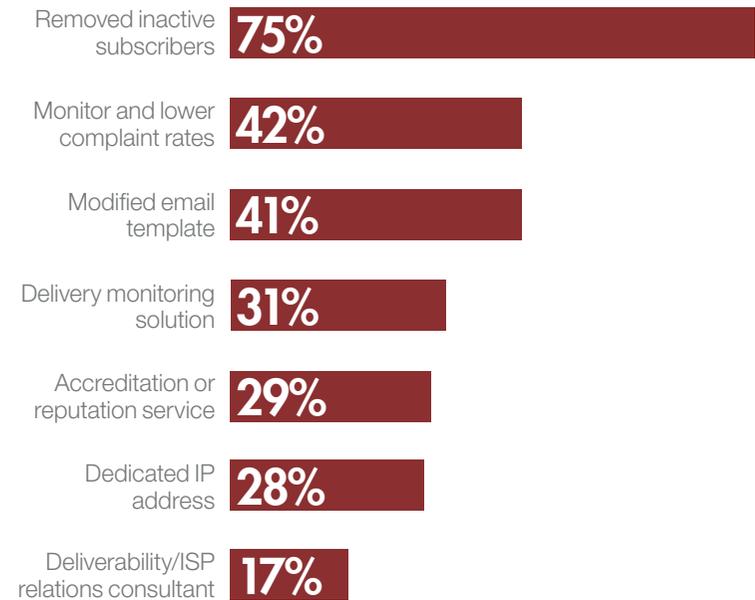
“In the end, removing inactive subscribers is often the action needed to get your mail back to the inbox and in front of your customers.”

– Melinda Plemel, ReturnPath



*“As an organization’s email marketing program matures, routinely and methodically ‘scrubbing’ its subscriber list becomes a greater priority,”*

according to [MarketingSherpa’s Special Report: CMO Perspectives on Email Deliverability](#). Scrubbing means removing email addresses that bounce after each campaign. Conduct a thorough sweep of your list every 4 to 6 months, and you’ll get rid of inactive subscribers and “spam traps”.



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded September 2010, N=245

## PART TWO: TRUSTED

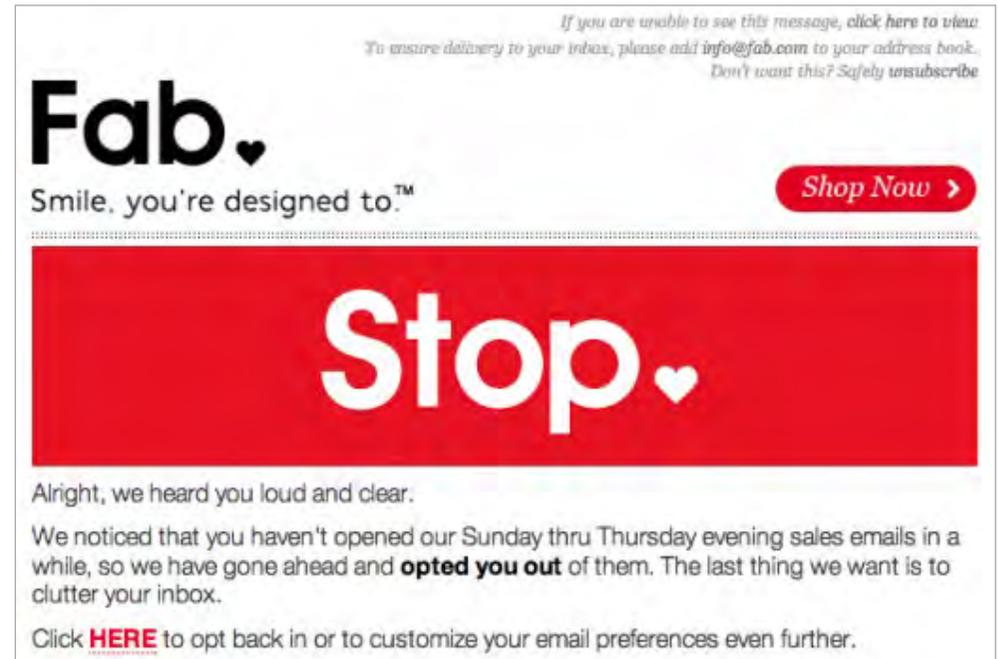
# ENGAGEMENT UP FRONT: DEVELOP AND MAINTAIN A QUALITY LIST

### Reactivating Subscribers

Before removing inactive subscribers, consider giving them one more chance to stay in touch. With a re-engagement campaign, you might just find that some of your “zombie” subscribers come back to life.

There are a few ways to bring them back into the fold:

- 1. Send a series of emails to just those subscribers that have not opened, clicked, shared, or converted for a while.** In each message, give them the option to remain on the list or opt out. Once you've sent your final email in the series, go ahead and remove those who haven't responded. They're dead to you, after all. (Pun intended.) (Note: The “not converted” part of this query is essential. If you don't include this, you risk removing subscribers who may not be active clickers, but are your biggest purchasers!)
- 2. Mass unsubscribe the inactive subscribers** and send them a final email that includes an option to re-subscribe. Remember Fab? That's what they did recently.
- 3. Pick up the phone and call your inactives.** This is a more aggressive and labor-intensive marketing operation, and it assumes that you have a database of phone numbers. But the payoff could be worth it if your call is perceived as great customer service. Gary Vaynerchuk from Wine Library did this a few years ago with some amazing results.
- 4. Run a direct mail campaign.** This takes time and money, but, like a phone call, it allows you to communicate with — and hopefully re-engage — subscribers through another channel.

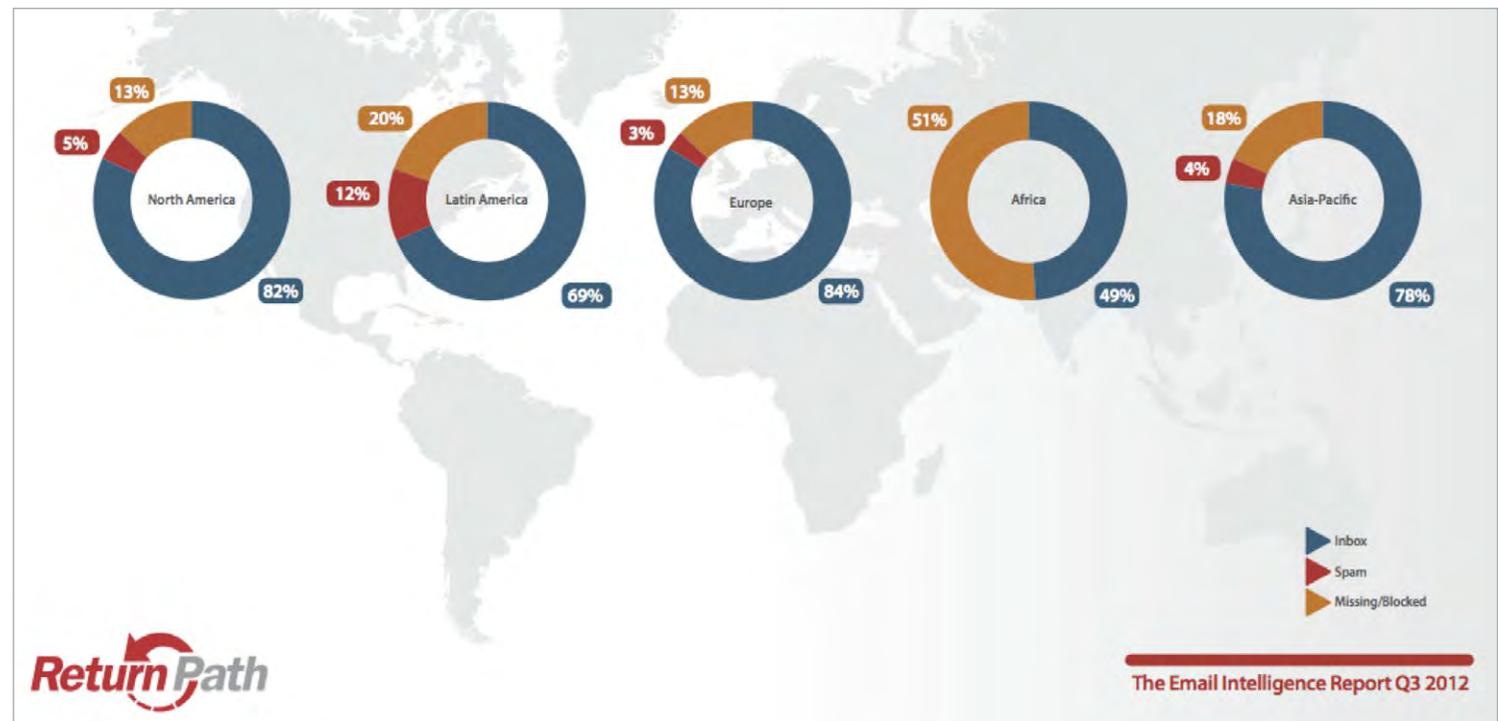


# PART TWO: TRUSTED EMAIL DELIVERABILITY

There's no question that email software and the people who use it are getting better at filtering out spam. This is good since it makes it easier for engaging emails to get through — but without a strong focus on deliverability, sometimes even quality, permission-based emails can get filtered out of your subscriber's inboxes.

According to [Return Path's Email Intelligence Report Q3 2012](#), 18% of permission-based email in North America never reaches the inbox: 5% is classified as spam, and the remaining 13% simply goes missing. While 82% inbox placement is not a horrible number, marketers would agree that there is certainly room for improvement.

In this section, we review what drives modern email deliverability and show how the best practices of engaging email can improve your deliverability.



(Source: Return Path Email Intelligence Report Q3 2012)

# PART TWO: TRUSTED

# EMAIL DELIVERABILITY

## Your Reputation as a Sender Is Crucial

Email deliverability is more and more about your reputation as a sender and less about the actual content of your emails. This does not mean that content is not important, but it does mean that marketers need to give plenty of attention to how their emails are being delivered.

When it comes to modern email delivery, it's good to know the fundamentals.

## Algorithmic Filters

Most email applications use algorithms to compare all incoming emails to those marked as junk. Any email with a similar sender, links, or content is more likely to be considered spam. But the analyzing doesn't stop there: The subscriber's internet service provider (ISP) remembers the URLs and domains in the spam. If those URLs and domains are reported, then any other email containing them has a harder time getting through to the recipient — even if it's from a completely different sender.

## Spamtraps

Spamtraps are email addresses created to catch spammers in the act. So, you want to be scrupulous about your email list building to avoid them at all costs.

In an article titled “A Brief Guide to Spamtraps,” Word to the Wise founding partner Laura Atkins describes a spamtrap as an “[email] address that was never used but still received mail. By definition these addresses were never handed out, advertised or even used by a human... These traps tell the trap

owner that the sender is randomly creating addresses or buying lists from someone who is. These are useful for identifying sources that are sending mail without permission.”

If you're not a spammer, you're probably thinking that you don't have to worry about spamtraps. But it can be all too easy to end up with spamtrap email addresses on your contact lists if you're not using secure opt-in techniques, or if you're buying or borrowing email lists from unsavory sources.

Read [Laura's great article](#) for details regarding different types of spamtraps.

“More than 80% of all delivery issues arise because of a problem with your sending reputation.”

– **George Bilbrey,**  
President of Return Path



“Filtering improvements are going to give recipients more and more control over their inbox. In fact, I don't think there will be one inbox view, each individual user will be able to customize their own inbox based on preferences”.

– **Laura Atkins, Email Deliverability Expert and Owner, Word to the Wise**



# PART TWO: TRUSTED EMAIL DELIVERABILITY

## Blacklists

Blacklisting is a process of actively monitoring the Internet for reports of senders sending unsolicited commercial email, and then publicly listing that information on Internet sites for others to reference as a measure to fight spam. Many ISPs and independent organizations use these blacklists as a reference filter applied to their inbound mail servers to aid in preventing spam, and to encourage internet security.

### [SBC - Email Blacklisting](#)

## Bounce Handling

ISP and email receiving systems are moving away from standard email address validation more and more by using their own custom bounce codes. Modern email marketing service providers need to know what all the different new bounce codes mean so they can properly process soft and hard bounces while giving senders the visibility they need to manage their email campaigns.

## Shared or Dedicated IP

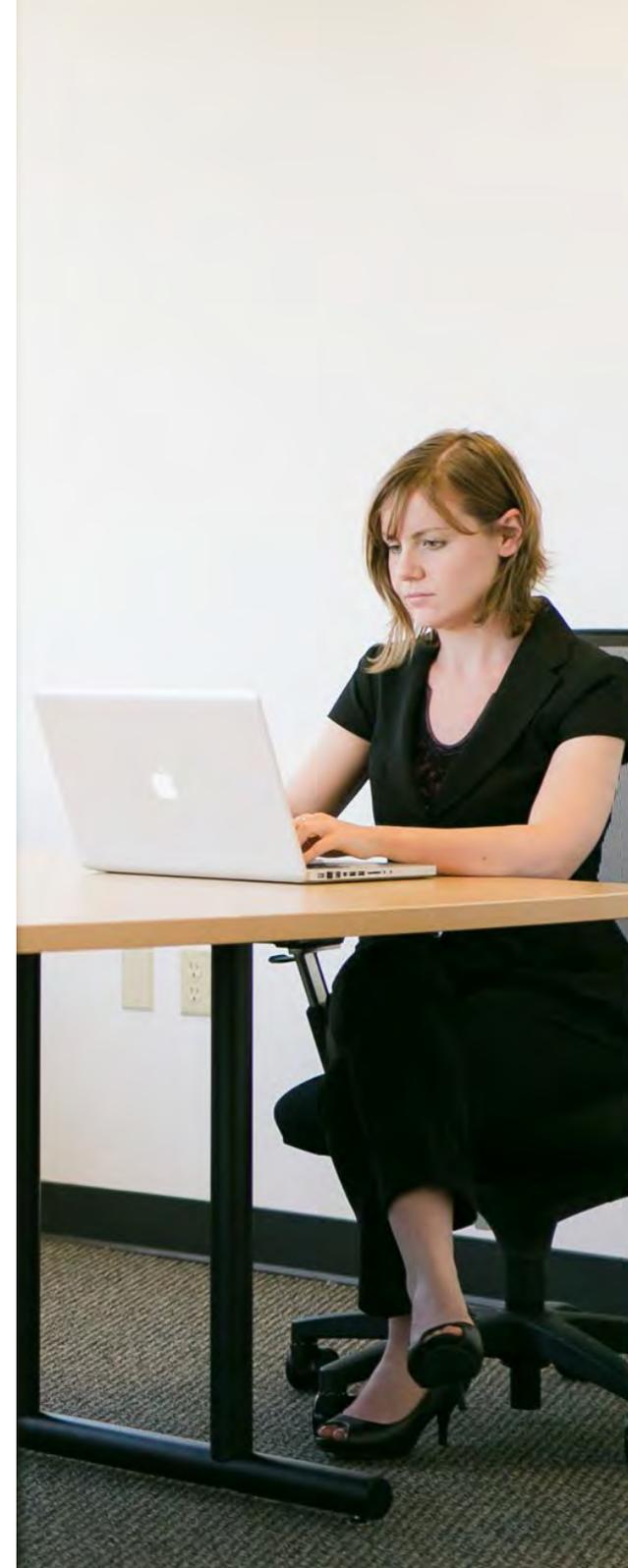
If you are a low-volume sender, a shared IP address might suffice, but if you are a high volume sender, a dedicated IP is usually best (assuming you are a “good” sender).

## Authentication Protocols

Use protocols to help email receivers separate legitimate messages from spam and malware, so less false-positive filtering occurs. The most common email authentication protocols are DKIM (DomainKeys Identified Mail), SPF (Sender Protection Framework), and SenderID.

## Receiver and ISP Relations

Your email provider should be able to handle relationships with ISPs and receivers, especially if your legitimate emails are getting marked as false-positive spam.



# PART TWO: TRUSTED EMAIL DELIVERABILITY



## Gmail's Tabbed Inbox?

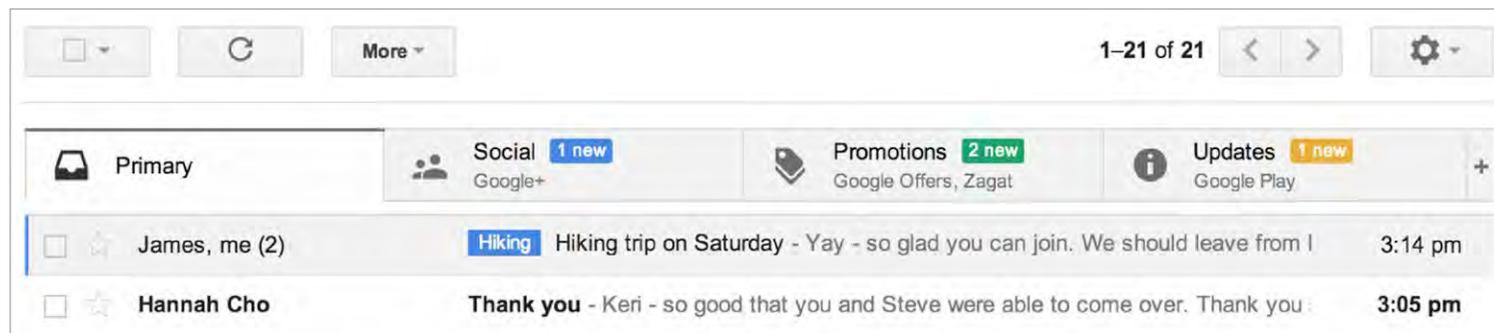
Gmail's new tabbed inbox automatically filters incoming email into one of several "buckets" (tabs) – primary, social, promotions, updates, and forums:

- 1. Primary** – Email from your family and friends, as well as other messages not classified as bulk (one to many). Also, any message that does not fit nicely into the other tabs will fall here.
- 2. Social** – Email from social media networks such as Facebook, LinkedIn, Twitter, Google+, and so on.
- 3. Promotions** – Email marketing messages from companies, brands, and individuals – any messages that are sent from an email service provider and/or marketing automation company as well as any "mass" (bulk) mailings will probably land in this tab.

- 4. Updates** – Email from blog commenting services, confirmation/transactional emails, Google calendar reminders, and other "updates." Note: Sometimes "promotional" emails will end up here as well.
- 5. Forums** – Email from any listservs or other "groups" (forums) you are part of.

There's been lots of discussion about what this means for email marketers ("does the new Promotions tab kill email marketing?"). We think not. But it means that the themes of the guide become more important than ever. If you send timely, relevant, engaging, valuable, human emails to people who want them, the Gmail changes will have little impact.

This is because if someone wants your email, they'll find it. And if they know your emails are consistently valuable and/or enjoyable, they'll open them – even if they're sitting next to a bunch of other, less engaging emails.



# PART TWO: TRUSTED EMAIL DELIVERABILITY

## Engagement Matters to Deliverability

How your recipients engage with your emails is a major factor in future deliverability. Since the summer of 2012, engagement data has become a prominent measure of deliverability at some of the major ISPs. Big league email providers, such as Yahoo!, Gmail, Hotmail, and Outlook, have made it clear that they analyze which emails their users open and click through to gauge whether emails from a particular sender are spam. If users are not opening and clicking certain emails, to the spam folder they eventually go.

Yahoo! has acknowledged that as it more precisely analyzes user behavior to weed out spam, some genuine senders might find themselves facing deliverability challenges. And, time will tell, but we predict that if a consumer always engages with emails from a particular sender, then Gmail will eventually move those emails from the Promotions tab to the Primary tab, just as they did with the older Priority Inbox.

This is why engagement matters even for deliverability.

Consumers use the spam button to tattletale on companies that send unwanted emails, even if they initially opted in to receive them. If recipients don't want or expect your emails, they are more likely to mark them as spam. Disturbingly, Return Path reports that recipients are more likely to tag your email as spam than to simply unsubscribe, even if your "unsubscribe" link is conspicuous.

"Mail providers and mail clients are going to have more sophisticated filters that measure user interactions with mail and preferences for content. This is why it's so important to figure out how to tailor email content to the audience."

– Laura Atkins, Email Deliverability Expert  
and Owner, Word to the Wise

# PART TWO: TRUSTED

# EMAIL DELIVERABILITY

## Content still matters (some)

We haven't yet talked much about the actual content of your emails. This is not because content is meaningless; it's just that reputation and engagement matter more. However, if you find that your emails are landing in junk boxes, despite your adherence to all the deliverability best practices we've mentioned, then it's probably time to review your content.

## Trigger Words

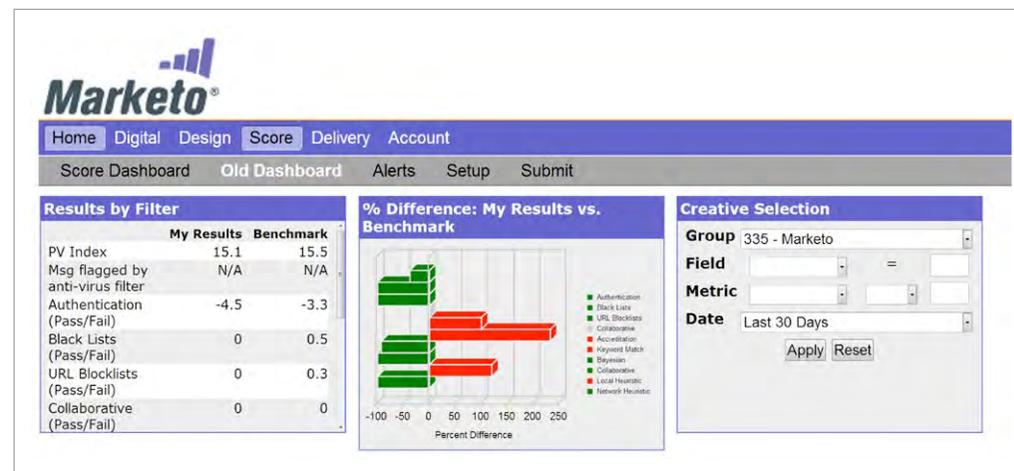
The rules of content are ever-changing. It used to be that if your emails included certain "trigger" words, such as "free," there was a pretty good chance they would never reach the inbox. Today, however, those once-forbidden words no longer cause email marketing messages to get blocked.

Here's the best advice we can give you for determining what not to do with content: **Look at the emails in your own spam folder, and don't do what those guys are doing!**



## Check Your Content

You can use a spam content check tool, such as Marketo's [Email Deliverability Power Pack](#) solution, to get a sense of whether or not your email content is "spammy" and make sure your content isn't inadvertently raising red flags with ISPs or email clients.



Screenshot: Marketo Email Deliverability Power Pack

# PART TWO: TRUSTED

# EMAIL DELIVERABILITY



## Deliverability: a Partnership between Email Provider and Sender

With all the issues surrounding deliverability of your marketing emails, you can see how important it is for a sender (that's you) to work closely with a provider (your email marketing service) to make sure sent emails are getting through to recipients. Deliverability is a shared responsibility. Here's how it breaks down:

### The Provider's Responsibility

1. Your provider is responsible for making sure its email technology is up-to-date and compliant with today's legal requirements. This means it must optimize the back-end of its delivery platform for reduced friction with corporate filtering systems. A good provider must also cultivate good relationships with receivers by applying proactive issue resolutions, feedback loops, and whitelisting practices.
2. A modern email marketing service provider will allow you to segment your contact lists into sub-lists so that you can target specific customers with specific messages. This is essential to keeping your audience engaged with relevant content and making sure the right person gets the right message at the right time.

### The Sender's Responsibility

1. As a sender, you must keep your lists clean, take the time to understand your audience, and craft carefully-targeted messages that are relevant to specific subscriber sub-lists.
2. You are ultimately responsible for what you send and to whom it's sent. Corporate email systems keep a close eye on how the subscribers under their watch are interacting with your emails. They score you based on your engagement levels, so you want your subscribers to open, click, forward, save, and print on a steady basis. If your subscribers are ignoring you, you are in danger of being blacklisted.
3. If you send relevant messages to a willing opt-in list, you'll build a good deliverability reputation; if you don't, your reputation will suffer.

# PART TWO: TRUSTED EMAIL DELIVERABILITY

## Seven Best Practices for Deliverability

Take the following proactive steps to give your emails the best chance of hitting the inbox:

### 1. Follow the trust and engagement mantra.

Give your subscribers a good reason to opt in and set clear expectations about what's to come. Then, follow through on your promises with timely, targeted, valuable emails.

### 2. Use responsible methods to build your lists.

Verify all new email addresses before sending your messages, and regularly scrub your contact lists to remove inactive addresses.

### 3. Choose a solid email marketing service provider.

Make sure the vendor you choose is sophisticated enough to handle bounce codes, feedback loops, and connection optimization.

### 4. Create engaging content.

On its own, bad content won't prevent your emails from being delivered, but if your content is boring or irrelevant, people won't engage with it or, worse, will mark your emails as spam.

### 5. Manage your complaint rate.

If your email marketing service warns you that complaints made against you are high, take the warning seriously. Set up an email address — [abuse@your-domain.com](mailto:abuse@your-domain.com) — that a representative of your email marketing service or an anti-spam organization can use to contact you with any complaints. Register that email address with [www.abuse.net](http://www.abuse.net), an anti-spam advocacy group and resource center, to show anti-spam organizations that you are responsible and that you've given thought to the email abuse issue.

### 6. Be proactive about closely monitoring your reputation metrics.

Get your email reputation score to learn what you need to change about your program in order to improve your reputation and your inbox placement rates. Return Path, a leader in email intelligence, offers a product called Sender Score, which, in addition to providing you with your reputation score, shows you how your email marketing program stacks

up against your competitors'. Sender Score's proprietary algorithm ranks a sending IP address on scale of 0 to 100, where 0 is the worst score and 100 is the best. Ranking is based on factors such as complaints against you, volume of your emails, your external reputation, number of unknown users, and amount of rejected emails. Another reputation monitoring option is SenderBase. Part of the Cisco IronPort SenderBase Security Network, SenderBase rates your IP as good (little-to-no threat activity), neutral (within acceptable parameters), or poor (showing a problematic level of threat activity).

### 7. Be transparent.

Let your subscribers and potential subscribers know how you're doing when it comes to complaint rates, bounces rates, and your Sender Score rank. Here's how Marketo presents this data to give our clients confidence that their emails are getting delivered. For more on this, see [Marketo's Trust page](#).

([marketo.com/trust](http://marketo.com/trust))

Month	Trusted IPs		All IPs	
	Cisco SenderBase Good/Neutral/ Poor	Return Path Sender Score 0 to 100	Cisco SenderBase Good/Neutral/ Poor	Return Path Sender Score 0 to 100
June 2013	Good	99	Good	97
May 2013	Good	99	Good	96
April 2013	Good	99	Good	96
March 2013	Good	99	Good	98
February 2013	Good	99	Good	95
January 2013	Good	99	Good	95
December 2012	Good	98	Good	95

# PART TWO: TRUSTED LEGAL ISSUES

Being a law-abiding email marketer is a big part of establishing trust, not just with your audience but also with ISPs and other companies.

With email marketing, the “country of reception” principle usually applies. This means the law of the country of the recipient of an email applies, even if you (the sender) are situated abroad. This makes it important to understand the nuances of each country you market in. Wikipedia has a big list of [Email Spam Legislation by Country](#).

This guide is not meant to be a legal document, and we’re not lawyers, so we can only give you an overview of legal compliance. Play it safe – be sure to consult with legal counsel or a member of your company’s compliance team for specifics of the laws in your region.

## United States

When it comes to the legalities of email marketing in the U.S., the Controlling the Assault of Non-solicited Pornography and Marketing Act of 2003 — also known as the [CAN-SPAM Act](#) — is the governing law. The CAN-SPAM Act, updated in 2008, makes it possible for spammers to be fined \$11,000 per violation. Yes, that’s right — \$11K for sending one inappropriate email! Authentic marketers must stay on their toes to avoid using deceptive language in their email headers, subject lines, and from and reply-to addresses.

The following brief from the Bureau of Consumer Protection Business Center breaks down the law into seven main requirements for email marketers:

1. Don’t use false or misleading header information.
2. Don’t use deceptive subject lines.
3. Identify your messages as ads.
4. Tell recipients where you’re located.
5. Tell recipients how to opt out of receiving future emails.
6. Honor opt-out requests promptly (within 10 days).
7. Monitor what others are doing on your behalf.

For more information, read the Bureau of Consumer Protection Business Center’s full Compliance Guide, and the [updates to the CAN-SPAM Act](#).

## Australia

Here are the key requirements of the Spam Act of 2003:

- Consent - make sure you have consent to contact the recipient and can prove you have obtained it.
- Identify - include accurate information to identify yourself or your organisation as the authorised sender of the message.
- Unsubscribe - make sure your messages have a functional unsubscribe facility, so that recipients can unsubscribe at any time.

# PART TWO: TRUSTED LEGAL ISSUES

## European Union

The European Directive on Privacy and Electronic Communications covers all direct email marketing messages, including charitable and political messages. It specifies that direct marketing email messages may be sent only to subscribers who have given their prior consent (“opt-in”). Prior permission is required for all business-to-consumer (B2C) communications, though in some cases a prior business relationship will suffice for business-to-business (B2B) communications.

Regardless, all emails must include opt-out instructions. Furthermore, disguising or concealing the identity of the sender on whose behalf the communication is made is prohibited, and companies registered or operating in the EU need to state their company details on every electronic business communication sent from their organization.

With marketing in Europe, it’s especially important to understand nuances of specific countries. For example in some countries (including Germany), the sender of the email has to be able to provide an objective evidence that he received the consent of the recipient.

For more, see our ebook: [How New EU Privacy Laws Will Change Your Marketing.](#)

## Canada

The Canadian Anti-Spam Law (CASL) was passed in December, 2010. For an email marketer, the most important piece is the consent requirement; CASL prohibits senders from mailing anyone who has not explicitly requested that mailing. The consent must be affirmative, so implicit consent or even a pre-checked box on a registration page is NOT acceptable.

CASL also requires clear identification of the sender of any electronic message, each message must include the sender’s valid postal mailing address (valid for at least 60 days after the mailing), and each message must have an unsubscribe method that is clear, prominent, and able to be “readily performed.”

For more, see the following resources:

- [Canada’s Anti-Spam Law \(CASL\): What Does It Mean For You?](#)
- [Canada’s Impending Anti-Spam Legislation: What You Need to Know to Be Prepared](#)
- [CRTC Issues CASL \(Canada’s Anti-Spam Law\) Regulation Guidelines](#)

“Always remember email law is a guiding framework, to be blended with your engagement strategy, your message, and your content.”

– Duncan Smith  
CEO of iCompli

”

# CASE STUDY: K12

“Marketo has really looked at K12 as a partner... and has been incredibly interested in our roadmap and how they can help us get to the next level.”

– Dianne Conley, VP of Marketing Operations & Technology, K12

”

## AUTOMATED EMAIL MARKETING MAKES THE GRADE FOR K12'S B2B AND B2C MARKETING

### Highlights

- Highly focused marketing: K12 increased productivity, reducing the need for hundreds of emails to 4 per campaign.
- Efficient marketing: K12 leveraged Marketo to shrink the number of its landing pages by 150% and more effectively aggregate the data.
- Democratized marketing: Automated email marketing empowers large numbers of users, maximizing how resources are used across the company

### Challenges

K12 is the nation's leading provider of online education for grades K-12, offering award-winning solutions to public and private educational institutions, as well as to individual students and families. K12's goal was to have one solution for their B2B and B2C marketing. They required a smart system that would allow for exceptional revenue analysis and seamless integration with Salesforce.com. They also wanted the benefits of scalable marketing tools while engaging parents earnestly about critical choices for their children's education.

### Solution

Marketo's intuitive interface empowered K12's marketing and enrollment teams to begin to democratize campaigns across their organization. In the B2C realm, this means that the agility and robustness of Marketo enables K12 to have very meaningful conversations with families about their children's education, and to

nurture those relationships not only authentically, but cost-effectively. Once K12 decided on Salesforce.com, Marketo was the obvious choice for their email marketing solution as both systems share the same data model and database, enabling K12 to get the most out of their lead-routing algorithms.

As K12's VP of Marketing and Technology, Dianne Conley explains, **“With Salesforce.com and Marketo, it was very important for us to think about how the systems would work together rather than thinking of them as isolated platforms.”** K12 can track the entire customer lifecycle, from initial touch point, to lead acquisition, to lead nurturing and conversion — allowing for a big picture view of what's really going on in the pipeline and insightful business decisions.

### Benefits

Since adopting Marketo, K12 has successfully leveraged more of its resources — the intuitive platform is being adopted by ranks of business teams, enabling K12 to reach out to a vast number of prospects and customers in a conversational way. Additionally, K12 has streamlined its processes, reducing landing pages by 150% and producing dynamic campaigns with 3 or 4 emails rather than hundreds. Ultimately, it's allowing K12 to reach out to its database both efficiently and meaningfully — and that's channeled directly to the top line.

K12 is looking strategically across their organization to create a plan to scale their business with Marketo.



PART THREE:

# ALWAYS RELEVANT



# PART THREE: ALWAYS RELEVANT

## ENGAGING EMAIL IS RELEVANT

Relevance means knowing who your audience is and what they want from your emails. Impersonal and poorly timed messages make your subscribers think, *You don't know who I am. You don't know what I want. You just don't get me.* If you aren't relevant, your subscribers will opt-out – or emotionally opt-out.

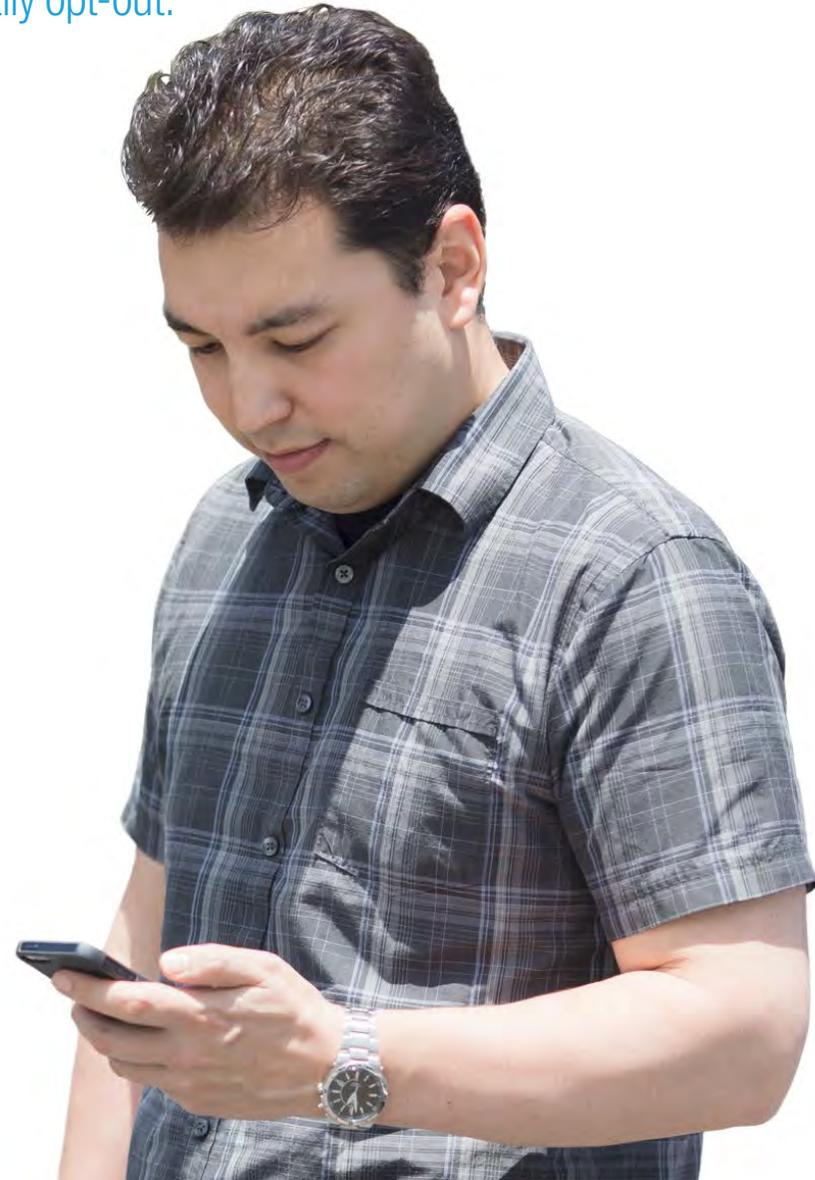
Being relevant means sending the right content to the right person at the right time. This part covers three topics related to relevance:

- 1. Talk to the right people.**  
Segment and target by using an email marketing solution that's easy to customize and manage.
- 2. Say the right things.**  
Put thought into your content; call on a talented team to write and design your emails.
- 3. Improve, always.**  
Optimize and test to learn what works and what doesn't.

“Your email content has to be compelling and in line with the subscriber’s stated needs and their behavior. Done correctly you have not only increased relevancy and engagement – you’ve significantly increased sales and lifetime value.”

– **Scott Hardigree**  
Founder at Indiemark

”



# PART THREE: ALWAYS RELEVANT

# SEGMENTATION AND TARGETING

Consumers are becoming more and more comfortable with targeted advertising and personalized content. They expect marketers to know almost everything about them, and to use that information to create customized experiences.

When consumers visit Amazon.com, they look for recommendations to be fed to them based on what they've purchased in the past: "You bought this, so you might like this." Data-driven customization is commonplace now across all platforms, and email is no exception. **Everyone can market like Amazon.**

Consumers increasingly expect when they share information with marketers — either explicitly at opt-in or implicitly with their buying and browsing habits — that those marketers will use that data wisely.

## Segmentation Means Higher Engagement

One of the most valuable ways to use consumer data is to segment and target your lists. Consider this:

- "Email marketers estimate 30% of email revenue derives from targeting to specific segments." — DMA's [National Client Email Report](#) - 2013
- "Segmented email campaigns produce 30% more opens than undifferentiated messages." — Monetate's [Intelligent Email Marketing that Drives Conversions](#) - 2012
- "76% of all email marketing revenue came from more advanced practices than generic broadcast email." — DMA UK's [National Client Email Report](#) - 2013

"More than half of email marketers say that their biggest challenge is targeting subscribers with relevant content. The key to creating engaging campaigns starts with having a clear understanding of what is truly relevant to your subscribers".

— Andrew Kordek  
Co-Founder, Trendline Interactive

# PART THREE: ALWAYS RELEVANT

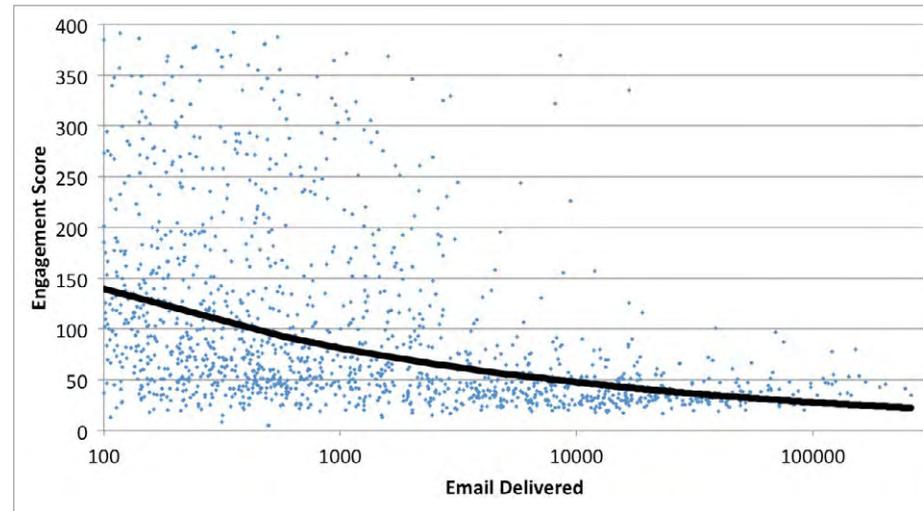
## SEGMENTATION AND TARGETING

Small, segmented sends are more engaging than large, untargeted sends. Marketo's research shows that sending targeted content to smaller groups leads to higher engagement. This makes sense, of course, since the smaller the group, the more focused – and therefore relevant – the message can be. It's basically impossible to be relevant with a “least common denominator” message sent to a large group.

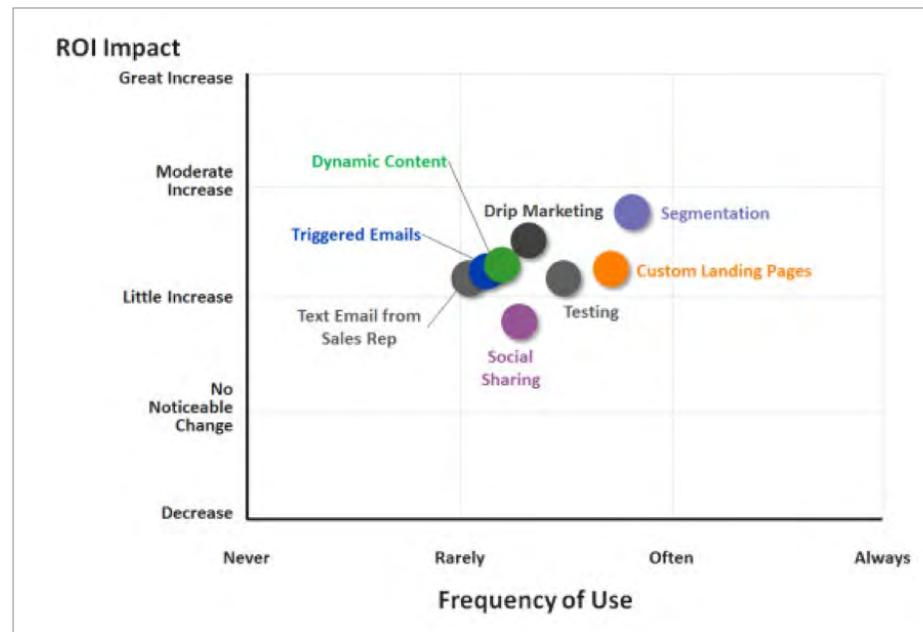
Additionally,

[The Marketo Benchmark on Email Marketing study](#)

found segmentation to be the highest ROI tactic used by email marketers — higher even than drip marketing or dynamic content.



**Source:** Marketo Benchmark Study research showing the relationship between smaller, more targeted email sends and higher engagement. See Part 6 for the definition of Engagement Score.



# PART THREE: ALWAYS RELEVANT

# SEGMENTATION AND TARGETING

## Types of Segmentation

The two main ways to segment your list are:

- 1. Who they are:**  
Demographic attributes, such as income, title, age, and location.
- 2. What they've done:**  
Past behaviors and transactions.

As we will see, segmenting according to behavior is the single most essential tactic an email marketer can adopt to increase relevance.

## Segmentation Based on Demographics

Knowing who your contacts are is an important part of being relevant in your messaging. Here are eight common ways to segment using demographics:

- 1. Gender**
- 2. Age (or birth year)**
- 3. Job title**
- 4. Company size**
- 5. Industry**
- 6. Interests**
- 7. Geography**
- 8. Birthday month**

As we will see, segmenting according to behavior is the single most essential tactic an email marketer can adopt to increase relevance.



## Segments Are Used In Two Ways:

- 1.** To pull targeted lists, and send different emails to each segment.
- 2.** To customize a single email for different segments using dynamic content. Dynamic content allows you to create one email template with content that varies based on the recipient. (We go into detail about this later in the guide.)



# PART THREE: ALWAYS RELEVANT

# SEGMENTATION AND TARGETING

## Example: Segmenting by Age

In the campaign below, Fit For Me segmented customers using each subscriber's year of birth, and then adjusted the tone of the writing and images to be relevant to each group. Even though you may not be able to read the copy of the message, you can clearly see how the images are adjusted based on age.



## Personas

Personas are research-based profiles of archetypal customers that represent the needs of many. Creating personas brings a human element to your campaigns by allowing you to focus on your customers as real people, and then communicate with them on a more natural level. You can name each persona, give them a storyline, and even assign lifestyle attributes and pain points. For example:

- **“Sam the Shopper”** is partial to impulse purchases and likes to “add to cart,” provided that each additional item is under \$25 and relevant to his needs.
- **“Cyril the CEO”** is an information-hungry whitepaper hoarder, who is looking to league up with thought leaders in his field.
- **“Wendy the White Wine Enthusiast”** will buy any California white that isn’t a heavily-oaked Chardonnay, and that happens to be offered in bulk at a discount greater than 20%.

If you haven’t already, take the time to create a few buyer personas that represent your customer base, and then use those personas to segment your communications.

For more on personas, visit our blog and read [“Improve Your Targeting and Tell a Story By Creating Buyer Personas.”](#)

# PART THREE: ALWAYS RELEVANT

# SEGMENTATION AND TARGETING



## Keep Your Forms Short, But Your Data Rich

Where do you get this demographic information?

Ideally, keep your Web forms short to help prevent users from getting frustrated and giving up on the conversation process. So how do you get that data without directly asking them? Try the following:

- 1. The Page Two Experience:**  
Capture basic contact information on the first page of your site, and then ask for more information on subsequent pages. Waldow Social successfully uses this technique.
- 2. Progressive Profiling:**  
When you recognize repeat Web visitors, ask for new information each time they fill out a form. With each completed form, you progressively add to their profiles.
- 3. Preference Center:**  
Once customers have subscribed to your email marketing, invite them to your email preference center, where they can customize their profiles and help you help them.
- 4. Data Augmentation Services:**  
There are many vendors specializing in either business data or consumer data, that can help you “clean” and augment your data.
- 5. Click Paths and Transactions:**  
By paying attention to a user’s click path and transaction activity, you can make inferences about his demographics. For example, marketers at Bluefly infer gender based on whether a shopper visits the women’s section of the site or the men’s section. But be careful; your buyer might be shopping for a spouse, friend, or significant other! As another example, at Marketo we present a navigational choice by offering links to “Solutions for Small Business” and “Solutions for Global Enterprise” on our site.

## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

Knowing who your customers are is great, but *knowing how they behave* is even better.

Actions speak way, way louder than words. Knowing your prospects in terms of their personas and demographics tells you what they might be interested in, but knowing how they behave tells you what they definitely are interested in. You can ask your contacts about their interests in an effort to cater your content to those interests, but, the truth is, they rarely provide accurate data, and interests change over time.

### Learn to Read Buyers' Online Body Language

Behavioral data can be highly predictive of future decision-making patterns and road-to-purchase activity. A prospect's browsing and search activity relate directly to his intent; his social sharing activity can indicate future purchase possibilities; and emails opened, links clicked, and content consumed indicate good ol' interest.

The information gleaned by paying attention to a consumer's digital behavior is her online body language. By tracking and interpreting online body language, you can determine where she is in her buying journey and what problems she might be trying to solve. You can even begin to figure out what interests her, what annoys her, and what persuades her.

**When you combine online body language with transactional and purchase data — transactional history, products purchased or owned, usage data, and so on — you have solid and very powerful information to go on.**

But when behavioral data is not used, your emails could be considered dissonant interruptions. The last thing you want is for a subscriber to wonder why you sent him a discount coupon on Friday for a product he purchased on Thursday. Without behavioral targeting, what you consider a nice drip campaign might feel more like water drip torture to a recipient.

Always be aware of the laws related to capturing customer activity data. If your privacy policy isn't accurate, or if you're capturing data without informing customers, it could be considered a breach of browser security. In many countries, this could violate privacy, data protection, and consumer protection laws. Consult legal counsel for the specifics in your jurisdiction.

## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### The Value of Behavioral Targeting

When David Daniels, co-founder of the Relevancy Group, was an analyst at Jupiter Research (acquired by Forrester Research in 2008), he reported that targeting emails based on Web click-stream data increased open rates by more than 50%, and increased conversion rates by more than 350%.

Similar research from Gareth Herschel at Gartner found that **event-triggered campaigns performed five times better than traditional batch campaigns.** Forrester research recently found that only 17% of companies assessed themselves as mature practitioners of behavioral marketing – but those mature practitioners grew revenue faster than they planned (53% versus 41%).

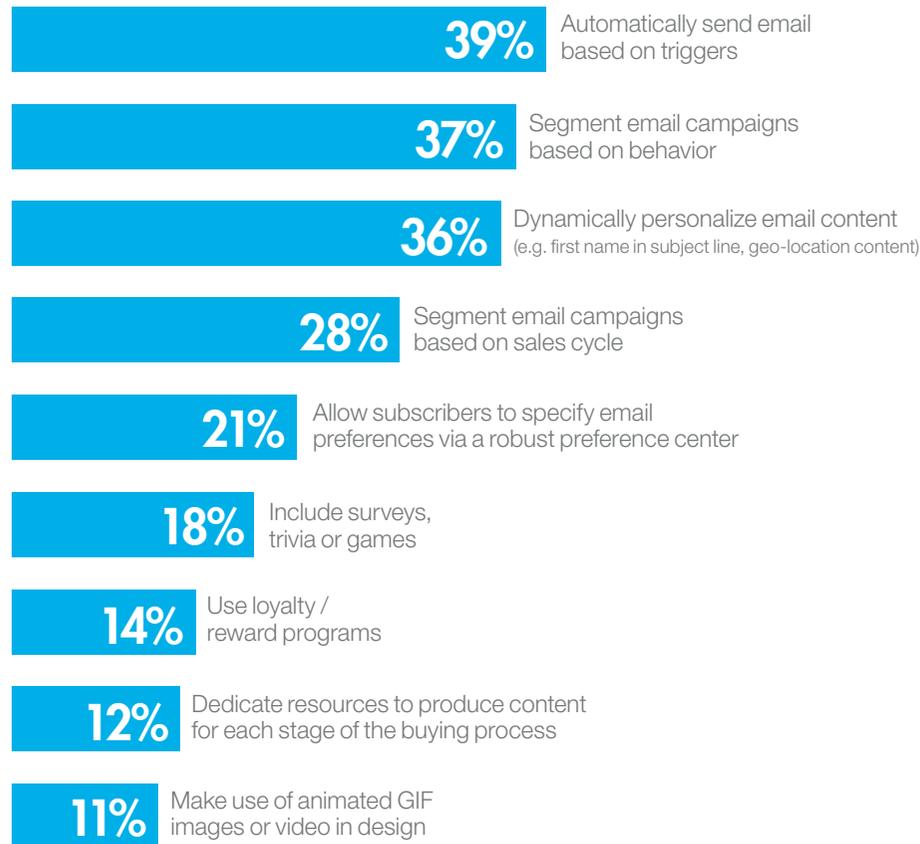
Target Type	Open Rate	Click-through Rate	Conversion Rate
Untargeted broadcast emails	<b>20%</b>	<b>9.5%</b>	<b>1.1%</b>
Triggered from user actions	<b>27%</b>	<b>9.3%</b>	<b>2.3%</b>
Targeted with web click data	<b>33%</b>	<b>14%</b>	<b>3.9%</b>

Source: Jupiter Research

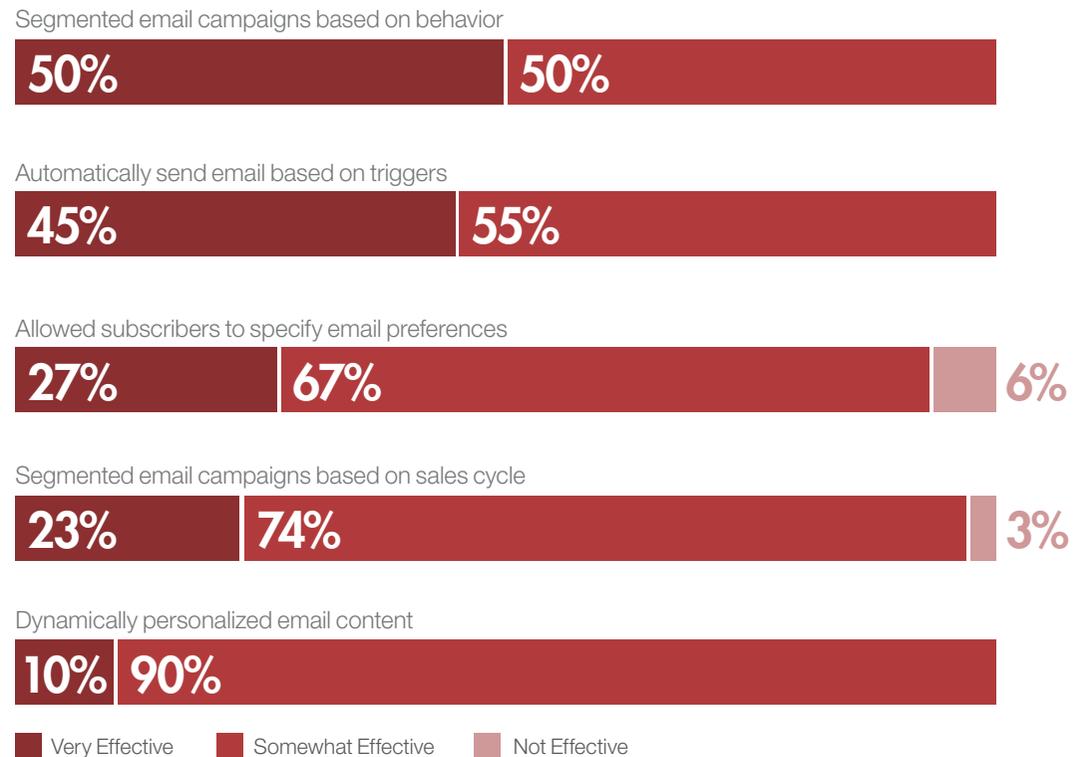
## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

Triggered emails and segmenting campaigns based on behaviors are the top tactics to improve email engagement.



**Chart: Relevancy Improvement Tactics = Level of Effectiveness**  
Q. Please indicate the level of effectiveness for each of the relevancy improvement tactics your organization is using.



## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

“Online behavioral models built with Web traffic, search behavior, lifestyle data, and demographics are particularly effective at identifying prospects not found with traditional demographic prospecting models.”

– McKinsey, *The Coming Era of ‘On-Demand’ Marketing*



### Campaigns Based on Topic of Interest

At Marketo, we created different email engagement tracks based on focused topics that might interest customers: email marketing, social marketing, and marketing automation, to list a few. We then used behavioral triggers to determine when to add a person to each track.

For example, when a prospect downloads social content, we assign him to the social marketing nurture track. In that track, he receives a set of social-marketing focused emails. Once he’s received all of our social content, we automatically trigger him back into the regular track. By using these smart segmentation tactics, we’ve experienced much higher engagement.

	Standard Nurture	Triggered Interests	Lift
Open %	<b>21.7%</b>	<b>34%</b>	<b>57%</b>
Click to Open %	<b>23.4%</b>	<b>37.1%</b>	<b>59%</b>
Click %	<b>5.1%</b>	<b>12.6%</b>	<b>147%</b>

## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### Examples of Behavior Targeting

Here are some basic examples of behavioral targeting.

#### Email:

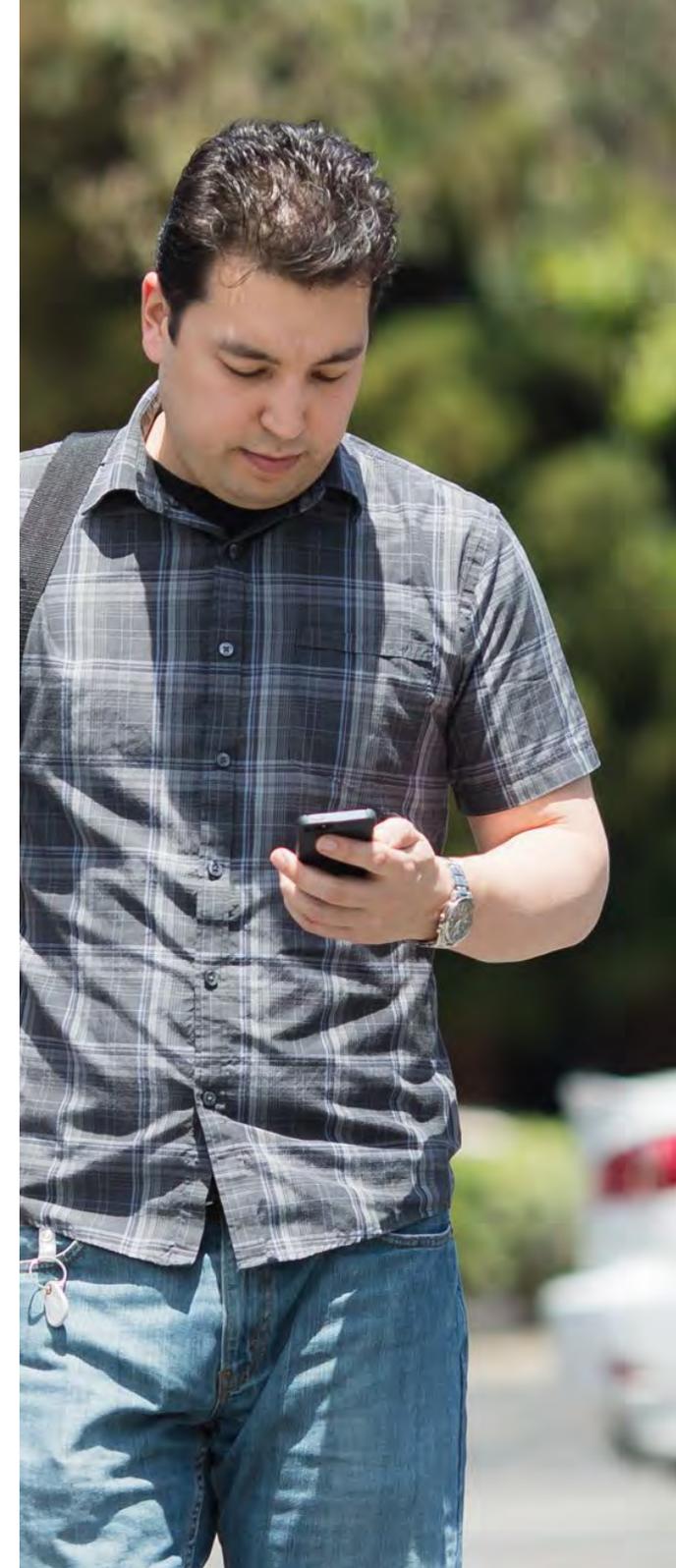
- Which emails did a consumer open and/or click on?
- Which emails did she NOT open and/or click on?
- Which type of offer does she respond to most often?
- How long ago was her last interaction with an email — three days, three weeks or three months?
- Who responds frequently, who rarely interacts?

#### Social:

- Did a consumer mention your company on Twitter?
- Did she navigate to your site from Facebook?
- Did she share one of your messages?
- Did she comment on one of your blog posts?

#### Website:

- Did a consumer visit your website? If so, how recently?
- What content did she download or view?
- What keywords were used to navigate to your site?
- How long did she stay on your website?
- How many pages did she view while there?



## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### More Examples of Behavioral Targeting

There are many other ways to use behaviors in email targeting.

#### Campaign Response

Target new campaigns based on how buyers have responded to prior campaigns. If a consumer always responds to content downloads but never to event invitations, stop targeting her for events. Instead, give her more content to download. This tactic requires the ability to track conversion success or, even better, to look down the funnel to see what actually happened during her experience.

#### Remailing

Remailing is like retargeting for email. With it, you give your original email a second chance by sending it again a few (3 to 5) days later — and perhaps with a different subject line — to contacts that did not open it. You could also resend emails to those who opened, but did not click, with a different call to action, or with altered content. E-Loan recently garnered 13% more purchases as a result of a three-part email promotion strategy: recipients were sent similar emails (with a slightly different message) on three different occasions.

#### Content Interactions

The content a consumer views tells you a lot about his interests. For example, if a consumer uses the mortgage calculator on a financial services company's website, he is likely interested in mortgage products. Making the connection between content interaction and email targeting is vital, and not that hard. If a prospect has read reviews of a particular product on your site, common sense dictates that you would promote that product.

If another prospect visits a key product Web page twice in one week, send him a special offer, and alert the sales team! On a related note, if a consumer has already seen content offered on your website, then it makes sense to exclude him from an email campaign promoting that content.

#### Revenue Stage

Use different messages for prospects that have never bought and are not currently evaluating solutions, prospects who are actively evaluating solutions, and active customers. You can identify these segments by integrating your email with your transactional or CRM system.

#### Transactional Data

Using actual transactional data can be one of the most powerful forms of behavioral targeting. For a financial services company, this can include balance information and deposit and withdrawal transactions. For a telecommunications firm, it can include data usage and add-on purchase history. A travel company noticing that a particular customer travels to Paris every April can use transactional data to offer a related discount.

## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### Non-activity

Targeting emails based on “missing” behavior can be just as powerful as targeting specific behaviors. For example, you can target consumers that do not respond to a campaign (no open; no click; no conversion) or that have not visited your website in a specific amount of time. A more sophisticated example: a customer who regularly makes a deposit on the first Friday of the month, but then misses a date, might deserve a check-in.

### Propensity Models / Scores

You can use scores to predict propensity for customer behaviors, such as readiness to buy, probability of responding to offers, retention actions, cross-sell offers, and likeliness to churn. This can be based on statistical models, but you can also score based on simple rules. For example, you might assign a customer two points every time he visits your website, and four points each time he downloads a whitepaper.

### One-Time Buyers vs. Repeat Buyers

Loyal customers require a different message than those merely sampling your goods. Out of all the choices they have, they’ve chosen your company not just once, but many times. Your loyal customers are also the people who with each transaction tell you they want you to succeed. Make sure they understand how important they are to you.

### Example: Segmenting

In the campaign below, the surgical weight loss center Slimband segments their lists based on surgery date and surgery recovery stage. Demographic data is based on what your business cares about, so for Slimband, they customize based on information pertaining to surgery and recovery. Take a look an example email Slimband customizes for their patients who are day 1 post-op.



Post-op Recovery



Day 1

[Home](#) | [My Slimband Community](#) | [Blog](#) | [Tools](#) | [Events](#) | [Contact](#)

#### DAY 1: CLEAR FLUIDS STAGE

It's been one day since your surgery and today you begin your clear fluids stage. Clear fluids can include chicken, beef, and vegetable broths, as well fruit juices like apple, cranberry, and grape. You will be following the clear fluid plan for the next 5 days.

It is crucial that you **remember not to eat anything during this stage**, as doing so could lead to severe pain and complications with your band.

It's a good idea to mix things up to avoid boredom. You might try having a glass of half apple, half cranberry juice for variety, or try making your very own homemade broth.

Remember to drink lots of water to stay hydrated but avoid drinking any soda, fizzy water or other carbonated beverages as these will not only cause gas pain but could also lead to complications with your Slimband. When drinking, take small sips rather than gulping the liquid down, and do not drink with a straw as it can also lead to excess gas.

#### DAY 1: TIP OF THE DAY



**Dr. Patrick Yau**  
Chief Bariatric & General Surgeon

“Staying mobile will help you avoid gas pain, a sharp pain in the shoulders coupled with chest tightness that some patients experience in the days following surgery. Moving around should provide some relief.” – Dr. Patrick Yau

#### Action of the Day

## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### Anniversary

Target customers based on the anniversary of a purchase. Norm Thompson, a men and women's fashion retailer, does this well. Exactly one year after a customer makes her first purchase, she receives an email thanking her for being a loyal customer and offering her a 20% discount off her next order. See Waldow Social for how Norm Thompson perfects its messaging in this campaign.

### Replenishment Date

Companies that sell consumable products can predict when buyers will run out by looking at typical usage patterns, and then send an offer to replenish in advance of the predicted date. Mapping customers' buying cycles is a great tactic for small items, such as hearing aid batteries, as well as big-ticket items, such as car leases.

### Other Date-Based Data

PaperStyle, an online invitation and stationery store, targets brides-to-be by sending a series of email reminders based on crucial dates: when to send invitations, when to think about wedding favors, and when to buy bridal party gifts. PaperStyle has found that targeting brides in this way generates an open rate three times that of their bulk mailings, and a click rate twice as high. Additionally, PaperStyle found that these emails generate four times the revenue of their bulk mailings.

As another example, Algonquin College of Applied Arts and Technology, the largest college in Eastern Ontario, recently embarked upon a revitalization of its recruitment processes. The college replaced its traditional batch and blast email campaign with automated conversations based on various factors, including a prospective student's graduation date.

In this program, prospective students were sent invitations to on-campus events, program sessions, and tours, and they were provided with application process information and important application dates.

As a result, prospective student engagement soared: Algonquin's open rate is now 23.5%, with some individual click through rates climbing to over 10% from 2-3%. They also saw an increase in visitor loyalty of 8.1% over the previous year.



## PART THREE: ALWAYS RELEVANT

# A BETTER WAY TO SEGMENT: BASED ON BEHAVIORS

### Cart Abandonment

Shopping cart abandonment is the scourge of ecommerce for vendors. In fact, many sources cite shopping cart abandonment rates in the mid-60% range. There are a lot of potential reasons for this, including that some consumers use shopping carts to compare prices and shipping rates before they're ready to commit, and others get distracted or frustrated before completing the purchase. But regardless of the rationale, cart abandonment is a good reason to use a behavioral targeted campaign to nudge your subscribers to finish their order.

Send one personalized email reminder, or even a series of reminders to follow up! According to the e-tailing group's 2012 Merchant Survey, shopping cart abandonment emails was the single highest ROI personalization technique used by e-tailers, with 55% of those surveyed responding that such campaigns were either very successful or somewhat successful.



### Recency, Frequency, and Monetary (RFM Analysis)

Direct marketers have been using recency, frequency, and monetary (RFM) analysis for years to sort customers by most recent purchase date, dividing them into equal groups and assigning points to the groups.

For example, if you use quintiles (which is most common), the 20% that make up the most recent purchasers are given 5 points; the next group, 4; and so on, until you get to the bottom 20%, which are given a score of 1. With segmented RFM groups, marketers can target promotions to each group separately. One campaign could target the top most recent buyers, for instance, while another could be aimed at those who haven't made a purchase in a long period of time. You do the same thing by frequency of purchase and total monetary value of the consumer's spending.

Using quintiles, you end up with 125 segments of equal size, coded from 5-5-5 (5 points for very recent purchases, 5 points for very frequent purchases, and 5 points for high value purchases) down to 1-1-1 (1 point for responding a long time ago, 1 point for responding only once, and 1 point for resulting in little or no value).

This technique works great in traditional marketing models like direct mail, where sending is expensive per piece and it might behoove a company to send only to the customers most likely to buy. But since email campaigns carry a much lower cost — perhaps as low as zero marginal cost, depending on the email provider — RFM doesn't make a lot of sense for email marketing. ***More specific behavioral strategies — targeting based on actual products purchased, content consumed, keywords used — makes more sense.***

# PART THREE: ALWAYS RELEVANT

# FROM DUMB LISTS TO A SMART DATABASE

Relevancy and engagement are powerful sources of value — but they require sophisticated targeting that combines online body language (web traffic, search behavior, email response) and transactional data with lifestyle and demographic data (personas).

However, while this engaging level of targeting is not a new concept, it's still not commonly used in practice. Why? Because traditional email service providers have not made it easy.

## Dumb Lists and Technical Queries

In a perfect world, every interaction that individual consumers have with your brand would be collected and stored in behavioral databases, so you could target and customize every single message easily. Unfortunately, many marketers don't yet live in that world. According to Forrester, only 45% of marketers are currently capturing and consolidating customer behavioral data from multiple channels into a single database. Data comes from many sources, and customer-facing systems don't always talk to each other. Social data, for example, is sometimes connected; sometimes it's not. Website data is almost never connected to transactional data.

**Traditional ESPs don't help much with data aggregation. Sure, they can track email behaviors and feed their customers reports on open and click-through rates. But they lack connection to other behavioral data and are unable to inform communication with more personal behavioral cues.**

These ESPs work primarily from imported lists and spreadsheets. We call these "dumb lists," for obvious reasons. Anything sophisticated requires pulling custom lists with complex queries written by technical experts — not marketers. They are made up of API calls, SAS code, and SQL queries. Not sure what these acronyms mean let alone stand for? You're not alone.

When marketers are forced to deal with complicated technical jargon and customized code, they are at the mercy of IT for explanations. This makes acting on behavioral data quite challenging for the average marketer using a traditional ESP. Less agility means it takes longer to react to opportunity. Ultimately, it means that sophisticated behavioral targeting is often not done because it's too difficult. And when it's not done, you can say bye-bye to relevant engagement.

# PART THREE: ALWAYS RELEVANT

## FROM DUMB LISTS TO A SMART DATABASE

Sample email provider interface for “basic” queries – complex for most marketers.



Sample email provider code for behavioral query  
(e.g. click a specific URL)

```
Select SubscriberKey AS EmailAddress  
from _Click  
Where like = '%www.your URL.com/corporate.html%'
```



### The Problems with Lists

Many traditional email service providers use lists for their marketing. However, lists can present problems, including:

- **Lists require marketers to re-create the wheel.** Each time a company wants to send a new email, marketers have to “pull a new list” — which often requires working with a technical resource, slowing the process way down.
- **Lists treat each list subscriber the same.** A list might be “every person who bought a product from us at some point.” This is a very broad, one-size-fits-all approach, and doesn’t promise the most relevant messaging.
- **Companies tend to use lists over and over and over.** Beating your customers into submission is not the answer.
- **Lists lack history when pulled fresh for each email.** Every new list compiled lacks the knowledge gained from the experience of the last send. Companies eventually end up with thousands of messy and hard to manage lists!
- **Lists lack actionable visibility.** When the metrics are tied to the list and not to the actual subscriber, or to an intelligent segment of subscribers, it’s hard to read and learn from them.

# PART THREE: ALWAYS RELEVANT

# A SMART DATABASE

# WITH SMART LISTS

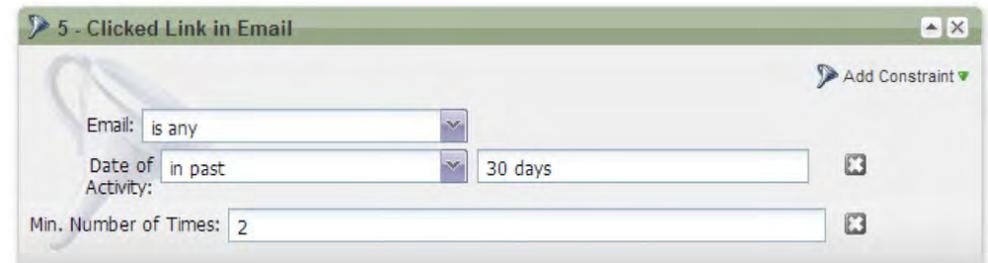
There are progressive email marketing providers offering behavior-smart databases at their core. These marketing automation providers offer a secure and trusted repository of demographic and behavioral data to power intelligent communications.

Companies that use marketing automation get a database that serves as the system of record for all prospect and customer interactions within marketing, sales, and transactional systems. The result: a single place from which marketers can build highly targeted campaigns tied to trackable information about each individual contact.

With a smart database, marketers also have the ability to easily segment their subscribers using various filters, such as:

- **Demographic:** name, location, age, registration source, household, preferences, score, custom fields, etc.
- **Email history:** sent, opened, clicked, bounced, unsubscribed, etc.
- **Social:** shared content, referral, poll answer, etc.
- **Website:** visit, clicked link, completed form, referral source, search query, etc.
- **Campaign history:** campaign membership, campaign response, campaign success, etc.
- **Custom:** purchase history, deposit, withdrawal, cart abandonment, data usage, etc.

Within many of these filters, segments can be created by existence of behavior — timeframe of behavior and number of times the behavior occurred — as well as inactivity.



Marketo Screenshot: Easy drag and drop

## PART THREE: ALWAYS RELEVANT

# A SMART DATABASE WITH SMART LISTS

Best of all, because these systems are built for marketers, not engineers, the functionality is accessible to an entire team. They make it easy to create “smart lists” using drag and drop functionality similar to creating a playlist in iTunes. You can combine filters to create specific lists: subscribers ages 18-25 who shared content via social, or customers with balances above a certain amount who visited the loans page twice in the last month. Plus, you can track campaign and response history for a solid record of how segments have performed.

This type of system makes marketing self-reliant, so that marketers can easily create and manage sophisticated behavioral-targeted campaigns on their own, without having to enlist the help of technical support. That means you spend less time modifying spreadsheets and waiting for IT, and more time building engaging, relevant campaigns.

*Marketo's Smart List builder combines demographics and powerful behavioral filters with real-time triggers in an easy-to-use marketing interface.*

The screenshot displays the Marketo Smart List builder interface. At the top, it shows 'Use Advanced filters' with a dropdown set to '1 AND (2 OR 3 OR 4)', along with 'Collapse All' and 'Expand All' buttons. The main area contains four filter rules:

- 1 - Job Title:** Job Title: contains Director
- 2 - Filled Out Form:** Form Name: is Contact Us
- 3 - Visited Web Page:** Web Page: contains pricing; Date of Activity: in past 30 days. A note below states: 'Note: Data of this activity type is archived after 90 days'.
- 4 - Shared Content:** Social App: is GLOBAL LOCAL ASSETS.Social for

On the right side, there is a 'Find...' search bar and a list of triggers and filters. The 'Triggers' section includes: Alert Was Sent, Campaign was Requested, Click Link, Data Value Changed, Filled Out Form, Had Interesting Moment, Lead Partition Changed, Lead was Created, Lead was enriched with Data, Progression Status was Char, Revenue Stage was Changec, Score was Changed, Segment Changed, Visited Web Page, Was Added to List, Was Removed from List, and Webhook is Called. The 'Filters' section includes: Lead History, Email, Social, Lead Attributes, Company Attributes, and Segmentation Filters. An 'Auto-Save' timestamp 'Jun 13, 12:36 PM PDT' is visible in the top right corner.

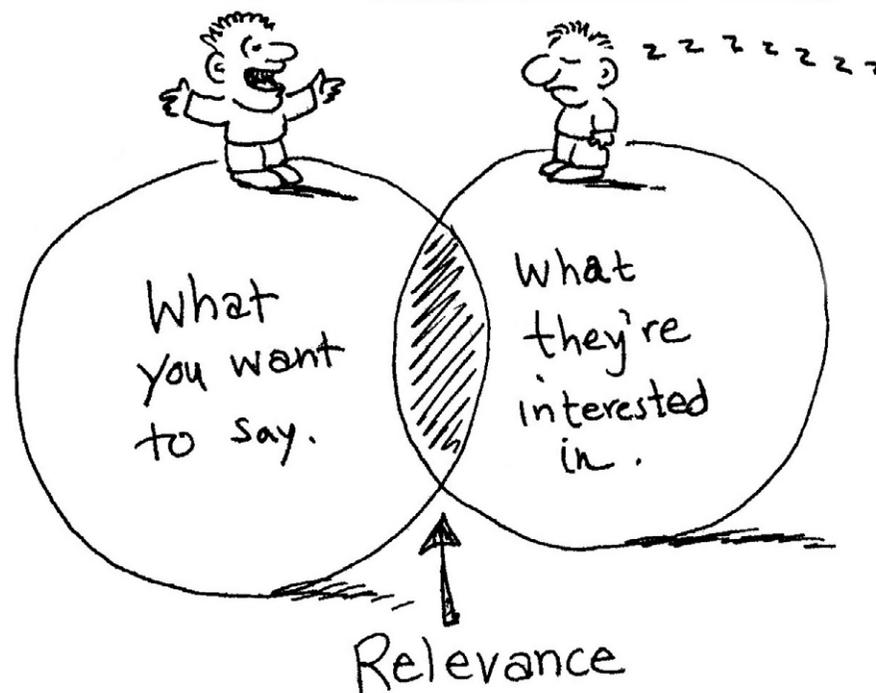
# PART THREE: ALWAYS RELEVANT

## CONTENT AND DESIGN

While segmentation and targeting are certainly the most important aspects of keeping your marketing relevant, content also matters — a lot.

In order to engage your audience, your content must be “human” — likeable and personalized. It should also be helpful and educational — or, at the very least, entertaining. And it should be timely.

In this section, we’ll show you how to create great email content, and we’ll share tips on optimizing some of the most important pieces of your content: the subject and “from” lines. We’ll also discuss the latest trends in email design, how to design for mobile, and how to design for recipients who don’t allow image downloads.



### Direct Marketing Economics

According to an old direct marketing rule of thumb:

- Targeting is responsible for 50% of your audience response
- Creative is responsible for 20%
- The actual offer is responsible for 30%.

# PART THREE: ALWAYS RELEVANT

# CONTENT AND DESIGN

## Engaging Content is Human

To be engaging, your company and your content must be human.

Many of today's email marketing campaigns are boring and impersonal: Opt-in forms read as if written by robots, email subject lines are dull, and copy is stale and laden with corporate-speak. But it doesn't have to be that way!

Some companies, such as **MarketingProfs**, really know how to nail the human aspect of an email:



The language is friendly and conversational, making it pretty obvious that a human wrote it. (Note: As it turns out, Ann Handley – Chief Content Officer at MarketingProfs – DID write this email). Notice the language in the second paragraph; it's personable, likeable, and witty.

Urge your copywriters to err on the side of being more human, not less, in email messages (and on your web pages and opt-out form).

**“Effective engagement is inspired by the empathy that develops simply by being human.”**  
– Brian Solis, Author of “Engage!”

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

Take a look at another example from ReachForce and LeadMD. In planning to attend Marketo's User Summit, LeadMD worked with ReachForce to try a new take on the conventional, cliché traffic builder email. Instead, they wanted to try something more conversational and humorous. They even finessed fake Marketo tokens so it would resonate with the audience. The campaign received a 42.8% email open rate and a 300% improvement over the previous year in booth visits.

There is no silver bullet when it comes to creating engaging and relevant content, but we've got a free guide, titled "*Creating Content that Sells: A Guide to Content Marketing for Demand Generation*," which we encourage you to download. This guide will teach you how to effectively engage the right prospects with the right content by using smart email marketing techniques that target buyer personas.



Hi Pierce,

In case you are being inundated with the same AMAZING marketing emails that I am. I thought I would share an easy cut and paste you can use for your replies:

"Hi - Yes I am excited to go to {{(Marketo Summit)}}, thanks for asking {{(unnamed sales rep who never contacted me before)}}. It will be life-changing!

And yes - Your booth sounds amazing, too. Your incredibly creative {{(ipad)}} giveaway is sure to be a great traffic builder. You'll be demoing? At your booth? Who would a thunk it? Yes, your solution will certainly change my demand generation life - or would if you understood my {{(buyer persona)}} {{(company revenues)}} {{(experience using Marketo)}}."

Oh Yes, those sales guys. We hire email copywriters for a reason, yo.

So, no cheesey emails. Just saying if you really **want to get something valuable at the summit, check out what you can pick up from me at ReachForce, Booth 36.**

And yes, that is the 8-incher. Nothing but the best from ReachForce.

See you in class {{(at Marketo University)}} {{(taking my certification exam)}} at our Booth {{(36)}} as we introduce {{(fully Marketo integrated continuous data quality management including lead de-duplication and automated merge)}} as part of our new Connected Marketing Data Hub and as I present {{(Will the real lead please stand up? Tips and tricks to get a set of data)}}.

Mary Firme, Chief Lead Accelerator  
ReachForce | Connected Marketing Data Hub  
(512) 327-9000  
Email: mfirm@reachforce.com | <http://www.reachforce.com>  
LinkedIn: [linkedin.com/in/maryfirme](https://www.linkedin.com/in/maryfirme)  
Twitter: [twitter.com/ReachForce](https://twitter.com/ReachForce)

\*and of course, we are not giving away free beer any night but Monday, and as for the gold, that's what you'll find in your data after working with ReachForce!!

The one thing to boost email marketing engagement is to be human.



## 5 Ways to Be More Human in Your Email Marketing Message

- Ditch the corporate "Frankenspeak."
- Add humor.
- Include customer stories.
- Weave in real-world events and pop culture.
- Don't take yourself too seriously!

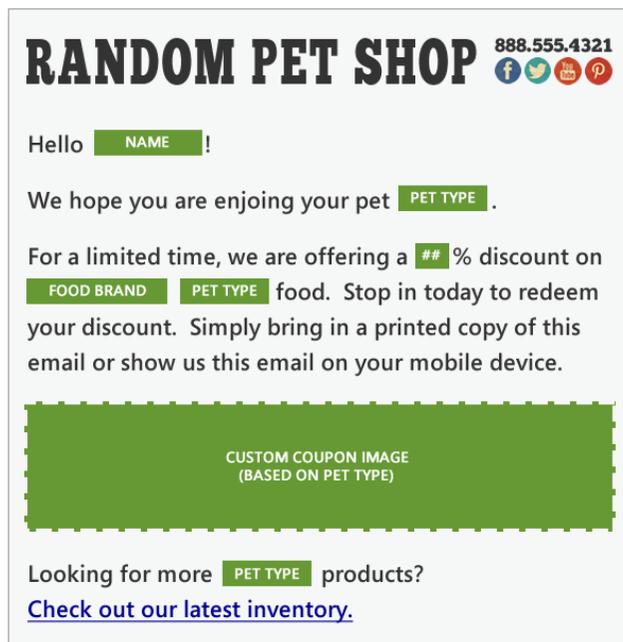
# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

## Engaging Content is Personalized

There are two ways to help your email marketing content be relevant to your subscribers:

1. Use personalization techniques
2. Use dynamic content

Here is a generic email that shows both of these in use. The small fields such as name and pet type are personalized; the larger custom coupon is dynamically inserted content.

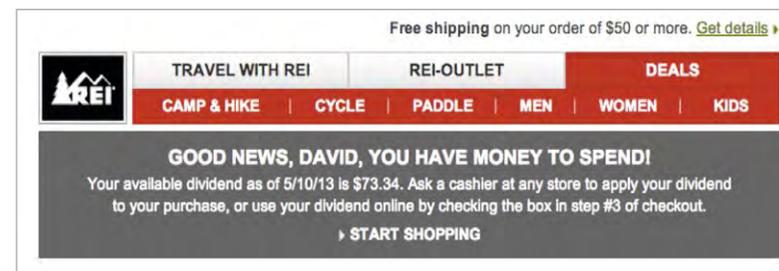


Source: Chris Siestema, Teach to Fish Digital

## Personalization

An example of personalization includes using a subscriber's first name within the subject line and/or body of the email — "Cindy, we have a special offer for you!" — and adding data that's specific to that subscriber. You've probably received personalized emails like this.

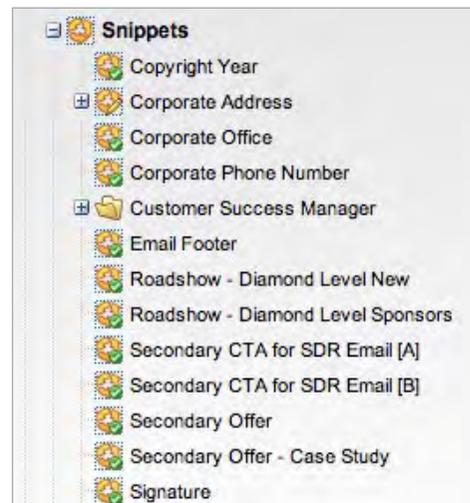
The following email from REI reflects personalization done well. It includes both the subscriber's first name and his unique dividend information, making it highly relevant to him.



# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

To take personalization even further, use “snippets” to dynamically insert entire blocks of copy into your emails. Snippets require zero technical skills and are easily reusable and editable in a text interface. At Marketo, we often use this tactic to personalize attributes such as office location (based on the recipient’s region), and the subscriber’s gender.

Here is an example of a snippet used to populate an email footer on a landing page in Marketo:



```
Regards,  
{{lead.Lead Owner First Name:default=Ryan}}  
  
{{lead.Lead Owner First Name:default=Ryan}}  
{{lead.Lead Owner Last Name: default=Hammer}}  
{{lead.Lead Owner Job Title:default=Sales Development Representative}}  
{{lead.Lead Owner Phone Number.default=+1.650.376.2301}}
```

Regards,  
Ryan



**Ryan Hammer**  
Sales Development Representative  
Phone: 650.376.2301  
Email: ryanh@marketo.com  
www.marketo.com

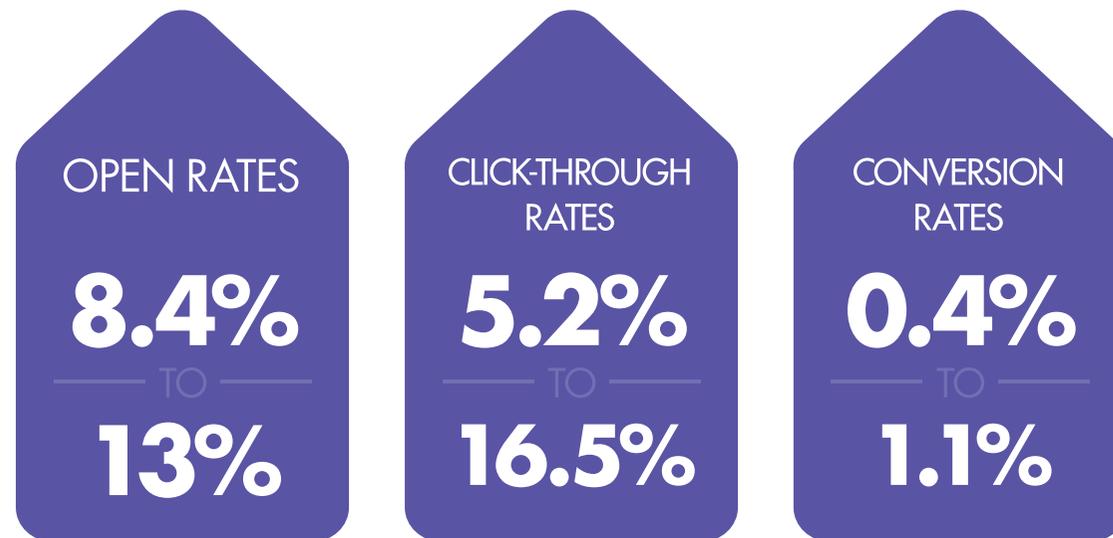
 Let's Connect!

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

## Dynamic Content

Dynamic content allows email marketers to create one email template with content that varies based on the recipient. The content is determined based on the attributes of each individual subscriber. For example, a travel company might customize messaging to its subscribers by home airport. A marketer at that company doesn't have to create hundreds of different emails for every single home airport possibility; he simply sends one email using dynamic content. If one subscriber's home airport is DFW and another's is BOS, each subscriber receives a slightly different email based on the flight specials available from his home airport.

Socialware, a Marketo customer, dynamically customizes its emails and landing pages based on the industry and role of each recipient — marketing, sales, IT, and so on. Using vertical, functional, and firm-specific dynamic content, Socialware has increased:



Source: ROI of Dynamic content for socialware

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

SmartBear also uses dynamic content to change the free trial CTA based on which product a lead has already trialed.



## Tips for Using Dynamic Content to Improve Marketing ROI

1. Don't customize for the sake of customization. Focus on varying the content that's relevant to your personas.
2. Work on your data quality to ensure that customized fields are populated with accurate information.
3. Plan ahead. Dynamic content requires more creative input and testing.
4. Review all versions created by dynamic content before sending to eliminate errors.

SMARTBEAR

Greetings Software Professional,

Thanks so much for checking out our "12 Months of Software" presentation. Here's the link to it again: [http://www.v2.smartbear.com/12-Months-Software\\_ThankYou.html](http://www.v2.smartbear.com/12-Months-Software_ThankYou.html)

Feel free to share it around :-)

Happy New Year,

Goran Begic  
SmartBear Software  
[www.SmartBear.com](http://www.SmartBear.com)

**TestComplete**  
by SMARTBEAR  
Start a 30-day no cost TestComplete Trial Today

SmartBear Software provides tools for over one million software professionals to build, test, and monitor some of the best software applications and websites anywhere – on the desktop, mobile and in the cloud. Our users can be found worldwide, in small businesses, Fortune 100 companies, and government agencies. Learn more about the SmartBear Quality Anywhere Platform, our award-winning tools, or join our active user community at [www.smartbear.com](http://www.smartbear.com) on Facebook, or follow us on Twitter @SmartBear.

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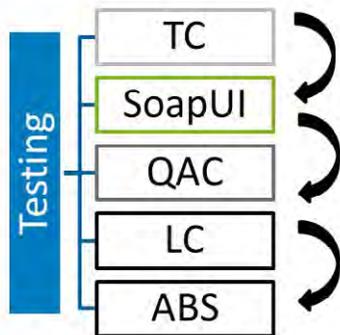
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# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN



## Personalization Can Backfire

Personalization can backfire if you are creepy or aren't confident in your data. You will know some things for sure (maybe a person's age), but many more things are merely estimates. If you send emails that are more personalized than your data quality can support, consumers may be confused and turned off.

Instead of sending emails that say "You bought product X and visited page Y so we're sending you offer Z", simply use the information you know to craft messages that will be relevant to people who had those behaviors – without mentioning the information you know specifically.

# PART THREE: ALWAYS RELEVANT

# CONTENT AND DESIGN

## Content: What to Say

Now let's discuss what your emails are actually about.

Your email should do one of four things for a prospect or customer:

1. Solve his problem
2. Save him money
3. Make him smarter
4. Entertain him

Take a moment to think about the glut of email marketing messages you receive every day. Which ones do you open? We guarantee they fit into one (or more!) of the four categories above.

## Sources of Email Content

Where do you get content for emails, especially content-rich communication and nurture emails? Here are a few common sources:

- **Original:** Content that you create. It's yours, and only yours, and it cannot be found anywhere else online or in print. Giving your audience original content in an email is great incentive for them to opt in.

- **Repurposed or Reimagined:**

Content that you've already published on your website, in a blog, on a podcast, and/or as video can often be repurposed for email marketing. If the content offers unique benefits on different platforms (video versus a bulleted list, for example), it's a great opportunity for you to cross-promote your different marketing channels.

- **Curated:** A newer trend in email marketing, curation is the process of finding useful industry content from various sources and then sharing it in email campaigns, often with a customized summary or introduction to why it is useful.

- **User-Generated (Community):**

Asking your community to help create content can inspire your creative team and engage subscribers. Social media is perfect for this. You can send an email that links to a poll you've created on Twitter or Facebook, and then post the results of the poll within another email. Community content can also come from blog comments, customer testimonials, and reviews.



## Types of Email

Most emails will serve one of the following purposes. Be sure the content of your email is appropriate for the purpose.

- **Transactional:** An operational email, usually related to a purchase – a receipt or confirmation, for example.
- **Promotional:** An email meant to stimulate an action (purchase, registration, usage, etc.).
- **Alert:** An email triggered by a certain event, such as the one you receive when your flight is delayed or when someone asks to connect with you on LinkedIn. Alerts offer convenience.
- **Relationship development:** An email that is meant to simply maintain and build a relationship over time; no action is needed.
- **Communication:** An email that is meant to update or communicate information (e.g. a newsletter).
- **Reminder:** A 'nudge' email sent to a subscriber who has abandoned her online shopping cart. Daily deal sites like Groupon use this method to remind users of coupons that have not been redeemed. Other companies send consumers reminders for scheduled events.

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

## Timely Content

Being relevant often means being timely. Leverage real-world events and current industry goings-on. Did something big happen recently in your city, state, country, or the world? Can you tie it back to what's going on in your email, say, through a graphic or headline? Or — if appropriate — is it cause for an email of its own?

When integrating news events into your marketing, be sensitive to the dynamics of the news. It's best to affiliate with positive events rather than those that are negative or tragic. American Apparel took a lot of heat for sending this email during Hurricane Sandy:



On the other hand, if during the time of the Superbowl you have a hunch that a commercial relevant to your industry will be featured during the telecast, have an email ready to go that looks something like this:



Marketo scheduled this Superbowl email to run at 5:40PT, in order to give a buffer after the halftime ads had been shown. The timeliness of the email generated great results:

- The email was sent to 20,000 marketers in the US and Canada
- It had a 13.5% open rate, yielding a 16.5% click to open rate
- More than 680 people responded to the poll and forwarded it to colleagues and friends

With your finger on the “send” button, so to speak, you can release it in the moment for that priceless human effect.

Note: When using timely content in an automated campaign, it's crucial to set “content expiration” dates. This is especially important for emails related to events.

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

## Educate, Don't Sell

We're in the post-hard-sell age. Consumers are savvy about avoiding ads, but willing to engage with interesting, relevant content. In other words, an email that includes a sales pitch will alienate your subscribers, but one that contains good content will please them. So, keep this rule of thumb in mind: Your content is on track if your subscribers find it valuable — consume and interact with it — even if they never purchase a product from you.

For example, imagine you lead the email marketing team for a hospital. You can assume that, at any given moment, most of your subscribers wouldn't respond to the urgency implied by a subject line that reads, "Do You Need to Visit the Hospital?" So, to appeal to your entire audience, you would write a subject line that's more inclusive: "Five Things to Look for in a Hospital" or, even better, "10 Ways to Stay Healthy and Avoid the Emergency Room." These subjects will appeal to readers who happen to have a current need, as well as to the bulk of your readers who might turn to your hospital when the need arises.

"Focus on creating opportunities to invite customer engagement, rather than tearing the door down."

— MarketingSherpa



## The 411 Approach to Content

While your messaging should always be centered on educating or entertaining consumers, not every single message you send has to be educational or entertaining.

Tippingpoint Labs and Joe Pulizzi of the Content Marketing Institute devised what they call the 411 approach to marketing on Twitter, which touts that for every self-serving tweet you post, you re-tweet one relevant tweet that you've read, and share four pieces of content written by others. With this approach, you engage in the conversation, build awareness, and help spread interesting content without coming across as pushy or narcissistic.

You can apply the 411 approach to email marketing as well. As you plan your conversations, schedule four educational or entertaining emails for every soft promotion (e.g., event invitation), as well as every hard promotion (e.g., discount coupon).

Consider another dating analogy: If you focus on only being funny and smart, you might end up in the dreaded friend zone. Sometimes, you have to make a move to take your relationship to the next level.

# PART THREE: ALWAYS RELEVANT

# SUBJECT LINES

The subject line of an email is one of the first things a recipient sees in her inbox. And she's likely to make a snap judgment based on that line about whether to open, ignore, delete or — ack! — mark as spam.

Not every subject line needs to be Pulitzer Prize-worthy, but there sure is power in a subject line that's magnetic. Let's face it, if you can get a subscriber to open your email, you're doing a good job, but if you can get her to stop what she's doing and open your email immediately, you're winning!

“Email subject lines are a form of headline. They perform the same function as a headline by attracting attention and getting your email content a chance to be read.”

– Brian Clark, Copyblogger



“Do subject lines matter? The short answer is yes. The somewhat longer answer is, HELL YEAH.”

– Waldow Social



## Subject Lines Typically Perform One of the Following Actions:

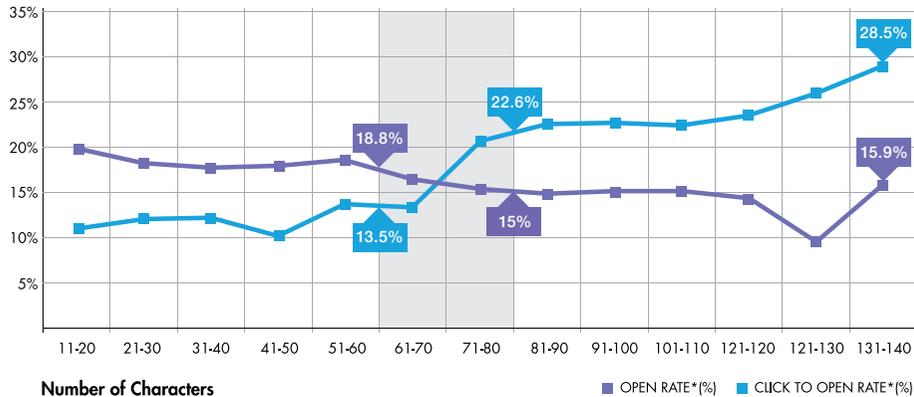
- **Educate:**  
“7 things content marketers can learn from fiction writers.”
- **Ask a question:**  
“Did you miss this?”
- **Announce a sale or new product:**  
“Save up to 50%: Our semi-annual sale starts today.”
- **Offer a solution to a problem:**  
“Pay down your loan.”
- **Jump on a popular topic:**  
“The state of the Facebook newsfeed: What's working now?”

# PART THREE: ALWAYS RELEVANT

## SUBJECT LINES

### How Long Should Subject Lines Be?

While some marketers argue that subject lines should be short (30-50 characters long), shorter is not always better. According to a study by Alchemy Worx, a UK-based email marketing agency, longer subject lines actually have higher click-to-open rates.



Companies for which email marketing is everything, such as Groupon, sometimes experiment with extremes when it comes to subject line length. Groupon often sends emails with very long subject lines, such as this one, which is 42 words!

**Subject:** *One Oil Change, Three Oil Changes with Inspections, or a Four-Wheel Alignment (Up to 78% Off) | 10 or 20 Gym Passes (Up to 69% Off) | Salon Package with Cut, Style, and Two-Color Highlights; Shellac Manicure; or Acrylic Nails (Up to 51% Off)*

As well as very short ones, such as this:

**Subject:** *Wine*

Shorter subject lines make sense if you fear your recipients won't read the entire thing. This is a genuine concern, especially when subscribers read on mobile devices, where your message can get butchered or shortened. Consider what could happen if this subject line got cut off after, say, 26 characters:

**Subject:** *Get up to 70% off children's fashion*

That's right, you'd end up with this, a possible public relations nightmare:

**Subject:** *Get up to 70% off children...*

# PART THREE: ALWAYS RELEVANT SUBJECT LINES

## When to Break the Subject Line Rules

There are a lot of “always do this; never do that” rules surrounding the intricate science of email marketing subject lines. Consider breaking the rules occasionally to see what works best for you and your audience. Of course, to break the rules, you first have to know what they are. Here are some of the top “bossy” tips we’ve heard (and rolled our eyes at):

### Rule: Never use the word *free*.

This is no longer a sure-sign of email deliverability problems; search your own inbox for companies using the word and you’ll see that a good reputation dominates. Plus, FREE is a very powerful motivator for action. Vermont-based flour and baking resource company King Arthur Flour ran an A/B subject line test: In email A the subject line was Ends Thursday: FREE SHIPPING; in email B, a more creative subject line was used (Hawaiian Pizza — the secret’s in the crust). While email B resulted in a higher open rate, email A had a nearly 400% higher conversion revenue.

### Rule: NEVER USE ALL CAPS.

**Wrong again.** Look in your inbox right now. Chances are pretty high that there are many legitimate emails from well-known brands that include all-caps subject lines. As long as you’ve tested this style to confirm your audience responds positively, go ahead and use it.

Norm Thompson	Wonderful, WASHABLE sued! It's real! 10% off + <b>FREE SHIPPING</b> - Can we p
WhichTestWon	<b>Free</b> A/B Testing Handbook PDF download for you - You're invited to download
Solutions	Last chance   <b>Free</b> shipping ends at midnight - Brighten your home with battery
Fabric.com - Deals And S.	<b>Free</b> Blanket Tutorial - Save 25% Off Minky, Flannel, Chenille, And More! - Fabri
NOOK by Barnes & Noble	David: Get 4 <b>FREE</b> eBooks from NOOK Newsstand - To ensure you receive you
DIRECTV	<b>FREE TRIAL</b> : 9 Premium Channels Exclusively in HD! - It's time to experience t
me (2)	Social Fresh West. ( <b>FREE</b> ) Beer. Waldow Social Logo. - Yo. Just wanted to "nu
Audible.com	Get a <b>FREE</b> audiobook today! - Home My Library Wish List Best Sellers Custom
Social Media Marketing	Do you market on Facebook? Get <b>FREE</b> access to the largest Facebook Marke
Lands' End	40% off SHOES – 2 days only + <b>free</b> shipping - Plus, enjoy <b>free</b> shipping, no mir
Sur La Table	New from Miyabi: Artisan SG2 + <b>Free</b> Shipping - Miyabi's Leading Edge + <b>Free</b>
John Jantsch	[Duct Tape] How to get a <b>free</b> copy of The Referral Engine - DJ, It's launch week
Norm Thompson	Good food, good deal! <b>FREE SHIPPING</b> on any \$49 order! - Dive into holiday fc
Lands' End	Columbus Day Sale! 40% off 1 item + <b>free</b> shipping. - What will it be? Save 40%
Solutions	<b>Free</b> shipping ... your reward for shopping early - We have a few good surprises

“Emphasize value. The subject line is the first thing an email marketer should focus on crafting, not the last thing dashed off just before the campaign goes out the door. Assuming the sender’s email reputation is solid and their email is getting delivered, the subject line is the one thing everyone’s going to see.”

– Ken Magill  
President of the Magill Report

*Email inbox searching for emails using “Free” in subject. Note this is not a junk folder.*

# PART THREE: ALWAYS RELEVANT CONTENT AND DESIGN

**Rule: Never include fake FWD: and RE: in subject lines.** We tested this rule in a recent Marketo campaign, and found that our email with the fake forward had an open rate of 19.9%, while our email without the forward earned a rate of 17.9%. Additionally, the click-to-open rate was 5.3% for the email with the fake forward, compared to 3.5% for the one without. That said, some email marketing purists argue that these gimmicks are deceptive, so always test how your audience response to this kind of approach.

**Rule: Never use symbols.** We're seeing symbols used more and more in subject lines. While symbols may provide a short-term lift in open rates because they are unique and stand out, you shouldn't base a long-term strategy on them. The novelty may wear off, and not all email clients support symbols. If you do choose to use them, be sure to test across a variety of platforms and devices. Learn more about how to use symbols in your subject line at [EmailKarma.net](http://EmailKarma.net).

Well-known brands that currently use symbols:

**Angie's List:**

♥ Share the Angie's List love

**Travelocity:**

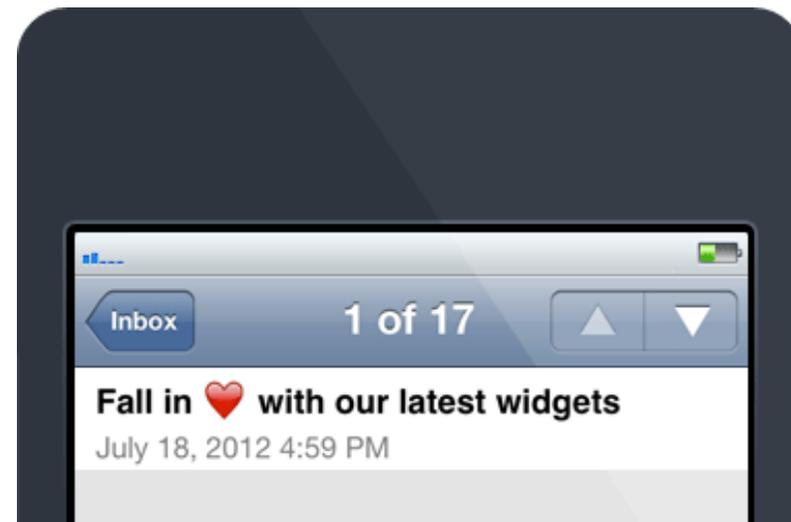
✈ Fly from \$49 Each Way

**Staples:**

★ Don't miss your bonus coupon inside. Open now!

**Pottery Barn:**

🕒 Days Only! Free Shipping and Monogramming on holiday favorites



# PART THREE: ALWAYS RELEVANT

# CONTENT AND DESIGN



## Email Marketing Rules

### You Simply *HAVE* to Break

When it comes to email marketing, there are a lot of purists out there who say you should ALWAYS do this or NEVER do that. Consider all of the “best practices” that are floating around online. From PowerPoint presentations to old white papers, archaic eBooks and other resources that are just plain outdated, they promote rules that used to be true.

The reality is, as long as you are not breaking any laws, not much is black and white. (That said, we do strongly encourage you to consult counsel for anything legal. We are not attorneys!)

**That’s why we’ve made a list of 17 email marketing “rules” that you absolutely, 100% must break\*.**

1. NEVER use words like “free” or “deal” or “discount” in an email subject line.
2. ALWAYS keep your email subject lines between 30 and 50 characters.
3. ALWAYS use double opt-in when growing your list.
4. NEVER use a pop-up (or pop-over) to collect email addresses.
5. NEVER send a mostly-text email.
6. NEVER send a mostly-image email.
7. NEVER send an email with one big image.
8. ALWAYS have a good balance of images to text.
9. NEVER send “ugly” emails.
10. NEVER have fun.
11. NEVER use ALL CAPS in an email subject line.
12. NEVER use animated gifs in the body of an email.
13. NEVER put the unsubscribe button or link at the top of an email (or make it obvious).
14. ALWAYS send an email during the middle of the week.
15. NEVER send an email at the end of the day.
16. NEVER send more than one email per day.

*\*\*“Break” is a fancy way of saying test to see what works best for your audience. Don’t assume that all of these rules will work for you simply because they worked for someone else. Test. Tweak. Then, break the rules. Figure out the best approach for your community.*

# PART THREE: ALWAYS RELEVANT

## THE “FROM” NAME

Trust, trust, trust. We can't make this point enough: Your goal as a marketer should be to earn enough trust from your subscribers that they are willing to open your emails.

Along with the subject line, the sender name — or “From” name — is a critical factor in a subscriber's decision to open versus delete your email. If a subscriber doesn't recognize you or doesn't trust you, he's far less likely to open your email, and he might even mark it as spam. Shudder!

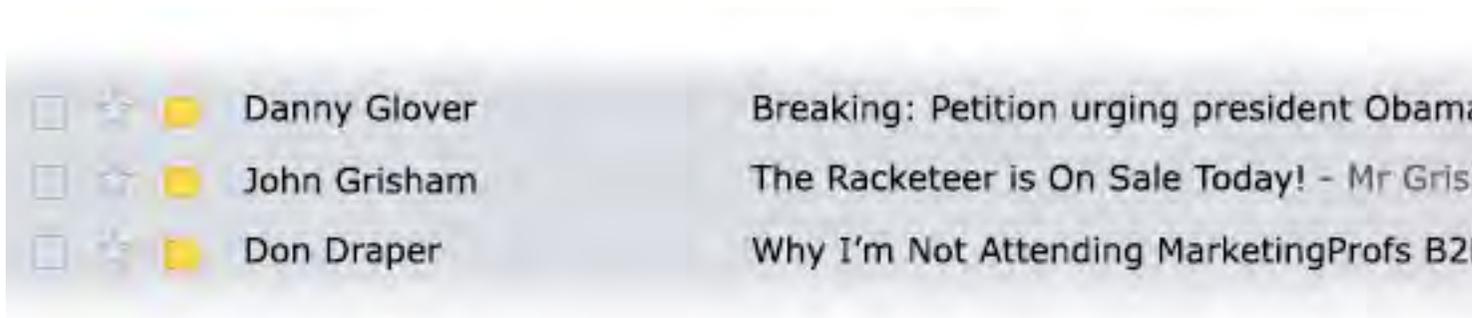
There are many different ways to set up your From name. Here are some options:

- **Company or Brand Name:** Apple, Travelocity, and The Gap, for example.
- **Product or Service:** “Mileage Plus” is sometimes used by United Airlines as a From name.
- **Personal Name:** Use the name of a specific employee at your company (e.g., the sales executive that owns the account).
- **With a Phone Number:** Include an office or mobile phone number so your customers can contact you easily after reading your email: John Smith | 555-123-4567.
- **Campaign-based:** Marketo sometimes sends nurturing emails from “Marketo Nurturing” or “Marketo Events” so subscribers know exactly what to expect before opening.
- **Gimmicky:** Celebrity names or names of those famous within your industry.



Some companies use a combination of From-name tactics. MarketingProfs, for example, is known for mixing and matching various styles:

Jen Kelly - MProfs Partn.
MarketingProfs
MarketingProfs Today
Sharon, MarketingProfs
Kathy Bushman, Marketing.
MarketingProfs Events Te.
Corey O'Loughlin, Market.
Ann Handley, MarketingPr.
MarketingProfs: Email Ne.



*Note: These are actual from names and subject lines from real emails we've received! Can you guess who the sender is? Tweet us!*



#DG2EEM

## PART THREE: ALWAYS RELEVANT

# EMAIL DESIGN



**Congratulations! You've gotten your subscribers to open your emails. Now, what do they see? Think about not only how your content reads, but also what it looks like.**

While it's true that beauty is in the eye of the beholder, here are a few basics to guide you to design success:

- Think about the width of your email. Most common is 600 pixels.
- Remember that Flash, JavaScript, video and other rich media won't work in an HTML email.
- Focus on what will appear "above the fold" in the preview pane on desktop computers, laptops, and on mobile devices.
- Pretty is not always better; sometimes text-heavy emails can be quite effective. Publisher's Clearing House often uses text-heavy emails that get 40% open rates and 87% click-to-open rates!
- Provide a plain text version for subscribers who simply don't like HTML versions.

# PART THREE: ALWAYS RELEVANT EMAIL DESIGN

## Images

Most email clients now block all images by default, so users must take the initiative to unblock if they want to see them. The semi-good news, according to David Daniels of The Relevancy Group: “55% of consumers stated that they turn on the images in the emails that they receive, which rivals the 57% of consumers who state they check their primary personal email account on their mobile devices.”

Nonetheless, many recipients will be looking at your emails without images. Here are a few steps you can take to respond:

- **Create bulletproof buttons** that look like images but are actually cleverly formatted HTML. The buttons ensure that subscribers will see the most important points of your email, regardless of whether or not they’ve blocked images. The folks at Mass Transmit have created a cool bulletproof button generator. Give it a try!

- **Use image “alt” tags** so that recipients who’ve blocked images know what they’re missing. For example, a picture of a red cashmere sweater could have an alt tag that reads, “red cashmere sweater.” If you’re offering 15% off of the price of that sweater, the alt tag should definitely read, “15% off red cashmere sweater.”
- **Test animated GIFs.** Starbucks used animated GIFs in a February 2012 email. We can’t animate the example for you in this guide but, if you squint, you can probably imagine the stars “falling” down the page.



- **Get creative with images-off design.** Check out what the creative team at [Pizza Express](#) did:



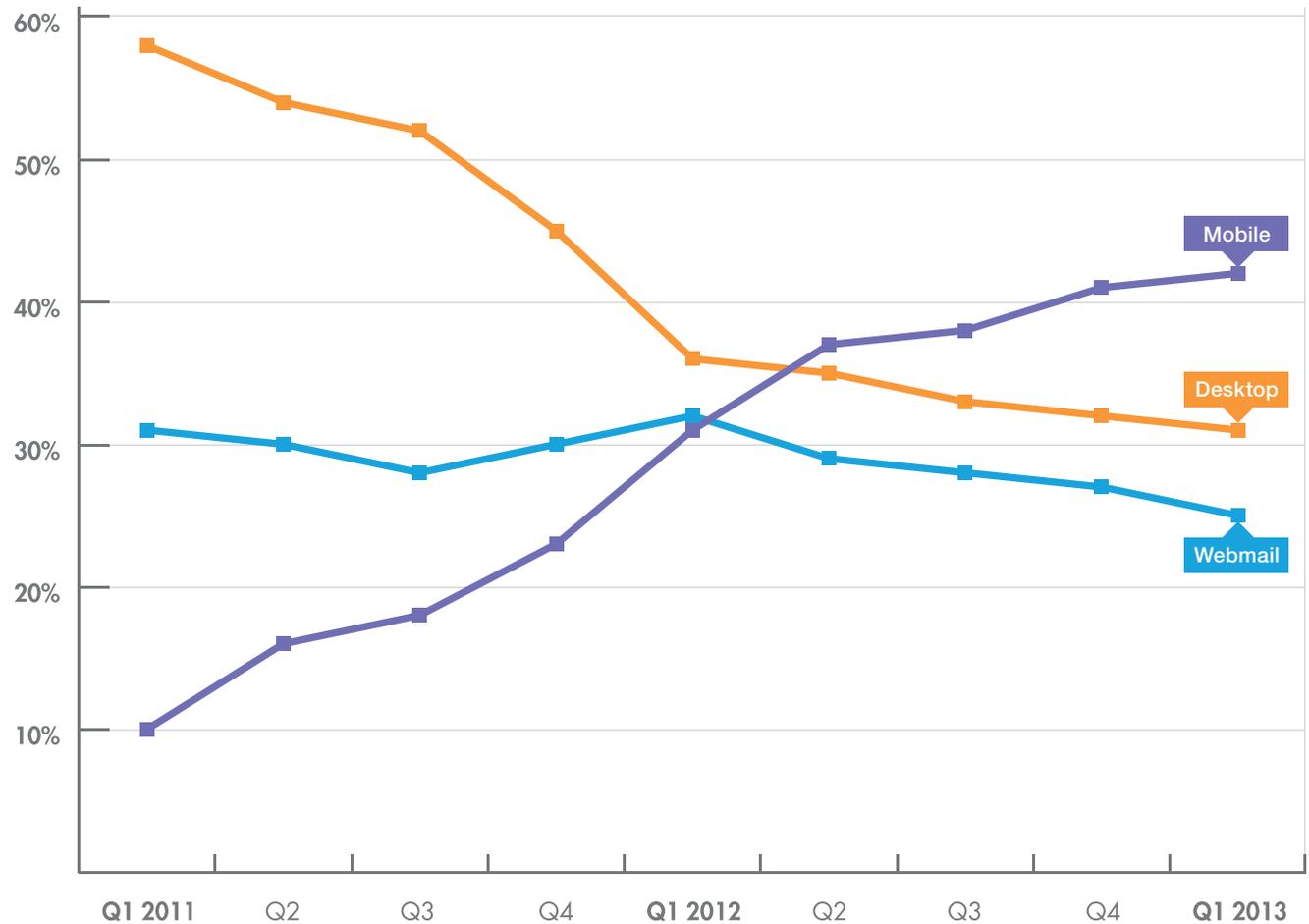
Once again, it comes back to trust. In order to get subscribers to care enough about your images to download them, they must have confidence in your content.

# PART THREE: ALWAYS RELEVANT

## MOBILE DESIGN

Eighty-one percent of people read their emails on mobile devices, and **41% of commercial emails were opened on devices** in the second half of 2012. This is up from 27% a year earlier, and from 13% at the end of 2010. When we see the numbers for 2013 and beyond they are sure to be even higher.

Yet even with all this explosive growth in mobile email, **58% of email marketers are still not designing for it**. And MarketingSherpa reports that 31% of marketers don't even know their mobile email open rate!



Source: [Litmus](#)

# PART THREE: ALWAYS RELEVANT

# MOBILE DESIGN

## Scalable and Responsive Design

There are two common design options for mobile — scalable or responsive:

- **Scalable:** The layout is clickable and the type is readable, even when reduced 50% in size. Scalable design avoids large widths and includes big type and big buttons.
- **Responsive:** The layout of a page responds based on the proportions of the screen on which it's presented. This design is becoming increasingly common for use in emails, as well as on websites.

## Media Queries

Media queries allow you to control the layout and display of your email based on the mobile device that is being used to open it. However, it's important to know that not all mobile email clients support media queries. Style Campaign, a company that specializes in responsive email design, maintains a good list of what is supported by various clients.

You can also use media queries to fine-tune your code with designs for specific devices and situations, including horizontal vs. vertical layout, and even iPad-specific layouts. Media queries also let you include mobile-specific CSS to handle single-column layouts and widths under 600 pixels. But there are a few things to remember when using media queries:

- Most people access mobile email on 320 x 480 pixel screens.
- If a device does not support responsive design, then it will be scaled. So it's worth thinking about a scalable design, nonetheless.

- Readers use their fingers to select items, so use pronounced image buttons and keep them simple. Links and buttons with a minimum target area of 44 x 44 pixels (per Apple guidelines) are ideal.
- Make sure images are readable when resized, or include mobile-specific images. The minimum font size displayed on iPhones is 13 pixels; anything smaller will be upscaled and could break your layout.
- Use *display: none*; to hide any part of the design that is unnecessary for email. Extra callouts and social sharing buttons may work on a desktop or laptop computer, but can clutter a mobile experience.
- Pay attention to the pre-header — the preview shown in many mobile email clients. Give your pre-header language the same care and attention that you apply to your subject line, and avoid simply displaying 'view in browser' text.



## @media Support Across Mobile Apps

iPhone native	✓
iPad native	✓
Android 2.1 native	—
Android 2.2 native	✓
Android 2.3 native	✓
Android 4.x native	✓
Gmail mobile apps	—
Mailbox iOS app	✓
Yahoo! mobile apps	—
Windows Mobile 7	—
Windows Mobile 7.5	✓
Windows Mobile 8	—
BlackBerry OS 6	✓
BlackBerry OS 7	✓
BlackBerry Z10	✓
Kindle Fire native	✓

Source: [stylecampaign.com](http://stylecampaign.com)

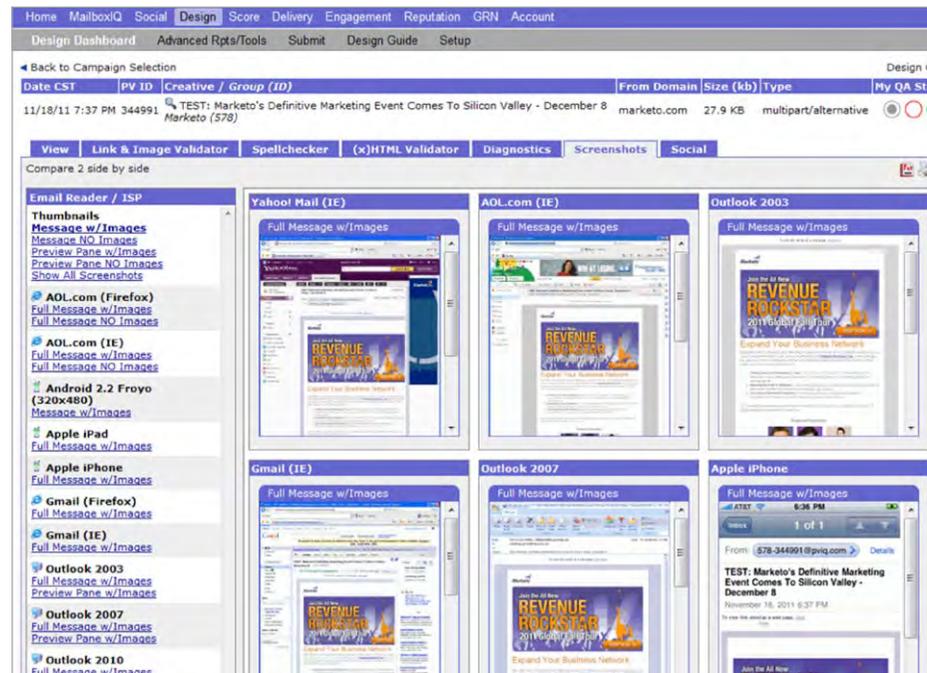
# PART THREE: ALWAYS RELEVANT

# DESIGN TESTING

## Design Testing across Clients

One of the most frustrating things about designing for email is that you have little control over what your audience actually sees. There are a lot of different email clients across desktop and mobile and tons of variation in how they display HTML and handle previews panes. To make things worse, users can customize email appearance by changing font size and turning images on or off. The same email client can even display messages differently from ISP to ISP! If there's one thing you can be sure of, it's that your email doesn't look the same to all subscribers.

You can't control everything, but you can test your design across different clients. With enough resources, you could do this manually, but, better yet, you can use a tool such as [Marketo's Email Deliverability Power Pack](#) to automate the testing process. Here's what the output of our tool looks like.



Source: Marketo Email Deliverability Power Pack



## The 6 Golden Rules of Mobile Email

by: **Simms Jenkins**

**CEO & Founder of BrightWave Marketing**

I believe mobile to be the biggest thing to ever impact email. It can also affect your brand since email closely ties to how your brand is perceived. If you send too many emails, offer a poor user experience, bad rendering, etc., your brand equity can suffer. Good mobile email drives revenue. According to Adobe, 71% said mobile purchasing decisions are most influenced by emails from companies. That is huge!

1. Smartphone owners are more likely to read emails than make calls
2. Consumers read more emails on mobile devices than a browser or desktop
3. How your email looks on smartphones matters to consumers
4. Understand where your subscribers read your email to determine the right approach
5. What you are trying to accomplish in your mobile email should impact your approach & strategy
6. Device matters and behavior varies

# PART THREE: ALWAYS RELEVANT

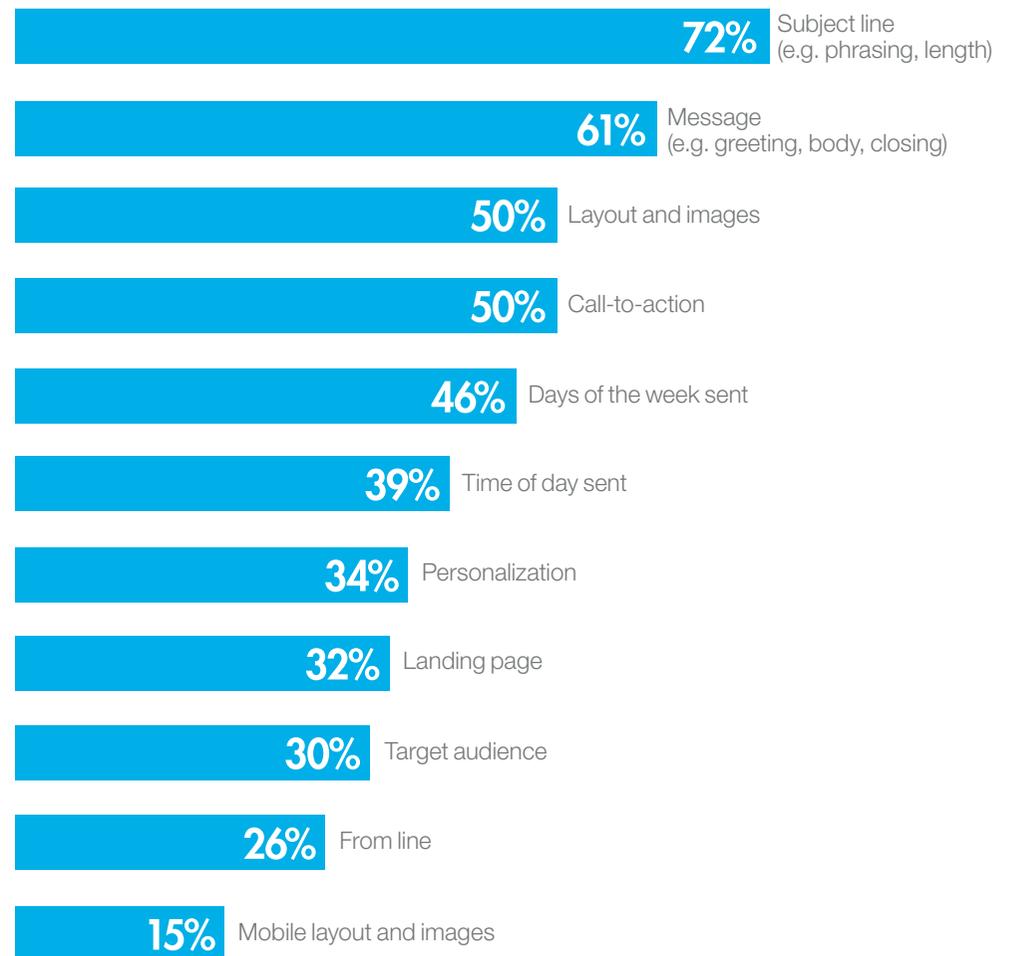
# TESTING AND OPTIMIZATION

Best practices are those that are best for YOUR audience.  
You must test to see what resonates most with your subscribers.

One of the most powerful aspects of email marketing is that it can, indeed, be tested, which is crucial to the success of your campaigns. There are no golden rules for how to run your campaigns, and that can be frustrating; but rules don't exist because what works for one audience won't necessarily work for another. Testing is your biggest ally.

## What to Test

Historically, the subject line has been the most popular marketing email element to test, followed closely by the content of the message itself. But as MarketingSherpa highlights in this chart, there are many other elements of your emails that are just as testable:



Want to learn more about testing? Visit:

[Marketo's The Ultimate Guide To Test Statistics](https://bit.ly/11ZkASJ) (bit.ly/11ZkASJ)

Are you among those who self-proclaim, "I'm not good at math"? If so, we've got a [handy calculator](#) you can use.

This calculator was originally designed for landing-page conversions, but it works great for email numbers. Just replace "page views" with "emails sent," and "conversion rate" with "click-through rate."

Source: MarketingSherpa Email Marketing Benchmark Survey

# PART THREE: ALWAYS RELEVANT

# TESTING AND OPTIMIZATION

## Eight Tips for Pro Testing

1. Start simple. Test subject lines and headers first. It doesn't take a lot of time or creative work to come up with a few simple variants, and the return can be significant.
2. Test one element at a time. If you test more than one element, you won't be able to tell which variant drove the success.
3. Control for time of day and day of the week. If you're testing other variants, then send on the same day and at the same time to eliminate the timing variant.
4. Keep a log of all your tests. Record your findings so you can refer back to the specific variables tested and, more importantly, learn from them.
5. Make sure testing is part of your day-to-day processes. Testing doesn't have to be daunting, and it shouldn't be something you put off due to a lack of resources — it should be part of your daily routine.
6. Run tests on groups that are small, but large enough to determine a clear winner. The winning variables should then be incorporated into your larger mailing.
7. Don't forget that small differences can be significant. This is especially true if your sample sizes are large.
8. Listen to what your tests tell you! All the testing in the world won't matter if you're not making decisions and modifications to your campaigns based on what you've learned. Unused data is sad data, indeed.



Here are 25 elements we suggest you consider testing:

1. Subject line
2. From name
3. Day of the week
4. Time of day
5. Frequency
6. Mostly-images vs. mostly-text
7. Short copy vs. long copy
8. Links vs. buttons
9. Number of links
10. Unsubscribe at the top
11. First name personalization — in the subject line
12. First name personalization — in the email body
13. Animated gifs
14. Font colors
15. Font styles
16. Opt-down
17. Social sharing icons
18. Social connecting icons
19. Delivery by time zone
20. Call to action — number
21. Call to action — placement
22. Post-click landing page
23. Social proof
24. Tone — human vs. corporate
25. Copy length

What other email elements have you tested?  
Please share by tweeting us:

I tested \_\_\_\_\_  
#DG2EEM



# PART THREE: ALWAYS RELEVANT

# TESTING AND OPTIMIZATION

## What We've Learned at Marketo

At Marketo, we've run 100s of email tests to discover what resonates well with our target audience. Here are some examples, along with our findings – though keep in mind that this is what works for us, and your results may vary.

### From Label (Person vs. Alias)

To conduct this test, your email marketing solution must have the capability to insert personalized token information and/or merge field capability. Version A was sent from a human being (the lead's owner); version B was sent from a general marketing alias; the subject lines were identical.

Here are examples of the two versions:

- **Version A** From Name: Ryan Hammer, Marketo
- **Version B** From Name: Marketo Premium Content

**The winner:** Version A, which increased opens by 28% and increased CTR by 8%. Our hypothesis is that an email from a real person appears more engaging.

### Fake Forward

In our Fake Forward test, we tested an email that appeared as if a sales rep forwarded it to the subscriber to an email that was directly from that sales rep.

**The winner:** The test showed Fake Forward had significantly higher Open Rate (2% higher) and Click-to-Open Rate (2% higher).

### Salutations

Think salutations don't matter? Think again. Our test compared an email that included a salutation (e.g., Dear [First Name]) with one that didn't. The subject lines were the same.

**The winner:** The email with a salutation resulted in an almost 2.5% increase in Click-to-Opens, which translates to 49 more clicks. It was significant with a 95% confidence level, while open rates did not significantly differ.

### Email Body Length

Does shorter, more concise email content lead to more click-throughs than highly descriptive, longer email content?

**The winner:** We conducted two tests, both of which showed significant results in favor of shorter, more concise content. Our first test resulted in a 7% increase in Click-to-Opens, equating to 38 more clicks. The second test generated a 2% increase in Click-to-Opens, which translates to 66 more clicks. We believe difference exists

because not only are short emails less likely to overwhelm readers, but also they're not cluttered by text, so the CTA appears prominently.

### Bracketed Offer in Subject Line

This test applies to emails that offer a content asset. We tested two versions of subject lines by naming the asset (New eBook) in one and simply placing the word "Download" in brackets in the other:

- **Version A:** [Download] Make Your Facebook Posts More Shareable
- **Version B:** [New eBook] Make Your Facebook Posts More Shareable

**The winner:** Interestingly, the Open Rates did not differ. However, the click through was higher for the email that contained the word Download. That, we believe, is because the word Download doesn't just alert readers to an asset, but also instructs readers how to obtain that asset. In terms of confidence, the results were only significant to 80%.

# THOUGHT LEADERSHIP SNAPSHOT: ANDREW KORDEK, CO-FOUNDER, TRENDLINE INTERACTIVE



Andrew Kordek is the Co-Founder and Chief Strategist for Trendline Interactive, a strategic email marketing agency. He leads all strategy for Trendline clients, touching all aspects of email programs. He has over 22 years of sales and marketing experience. You can find Andrew writing, blogging, speaking, and generally obsessed with email marketing.

**MKTO:** What is your advice for creating engaging email marketing campaigns and content?

**AK:** More than half of email marketers say that their biggest challenge is targeting subscribers with relevant content. The key to creating engaging campaigns starts with having a clear understanding of what is truly relevant to your subscribers. You cannot achieve relevancy if you don't know what to say.

In order to form a baseline of what to say to subscribers, organizations need to gather insights on topics and types of communication that both customers and prospects find valuable, and then create a messaging strategy around the research. This research should be both qualitative and quantitative, and lead to a strategic messaging blueprint, which is then used to create a program charter that defines objectives and creates a value proposition for their subscribers.

Creating engaging email campaigns starts with research. It leverages existing and future content and is then optimized through testing and technology-driven insights. This is not an easy task, but then again the competition for inbox attention is every email that is more relevant than the one you just sent.

**MKTO:** Looking into your crystal ball, what does email marketing look like 5-10 years from now?

**AK:** In the next 5-10 years email will evolve in two important ways. First, the inbox as we know it will become a centralized communication hub whereby subscribers will be able to communicate with brands and other individuals via integrated social and email capabilities. The days where you will need separate apps to communicate on Facebook, Twitter, email and other social networks that have yet to be spawned will be history. This experience will be mirrored and unified across all devices.

The second and perhaps most difficult change for marketers is the increasing expectation that behavior can and will drive messaging relevancy. Someone's behavior in the store, on the website, in an app, an action in the car or even the television shows they watch will drive communications between brands and their subscriber. Brand loyalists will expect hyper-personalized communication and digital and marketing privacy will continue to be a topic of fierce debate around the world.

PART FOUR:

# CONVERSATIONS, NOT CAMPAIGNS



# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## NOBODY WANTS TO GET BLASTED

Commercial email marketing evolved out of the traditional direct-mail mindset, which is all about big campaigns sent to many, on the marketer's schedule, not the buyer's.

With email blasts, marketers realized that they could save a lot of money over direct mail — and reach their target audience much faster. It seemed logical that if sending 100 emails generated \$10 in revenue, then sending 10,000 emails should generate \$1,000. Batch and blast was off and running.

But marketers soon ran into a serious problem: **No one wants to get “blasted.”** What seemed like a dream solution for companies became a nightmare for recipients, who were inundated with messages.

Think about the word blast for a moment. What does it bring to mind? An explosion? A batch and blast email strategy is, indeed, like an explosion — a violent shattering or blowing apart of something that often results in more damage than benefit.

Popular marketing expressions such as *batch and blast*, *hit the database*, and *e-shot*, certainly don't have positive connotations. The sentiment behind the words is telling. When you batch and blast, you are essentially admitting that your emails are not individually relevant.

The days of batch and blast are numbered. Contemporary subscribers expect personal and relevant emails on a non-disruptive schedule.



# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## NOBODY WANTS TO GET BLASTED

### From Direct Mail Origins to Ongoing Conversations

Just getting your messages to recipients is not enough; you have to give subscribers reasons to engage with those messages. This means abandoning the idea of batch and blast and entering into a relationship-oriented mindset that continuously builds engagement with consumers, one by one and over time.

We now have the opportunity to listen and respond to every customer at every stage of his purchase process, keeping him engaged and helping to drive his purchasing decisions. Emails should flow in logical fashion through smart marketing tracks to create engaging, personalized conversations.

**Email needs to evolve from campaigns to conversations.**

### What Does an Engaging Conversation Look Like?

We've used the word "engaging" quite a bit so far, but what does it really mean in terms of email marketing?

For starters, engaging means that your email marketing content stimulates a dialogue that's organic and free-flowing. Just like a real-world conversation, the dialogue you start should foster a two-way conversation. In other words, an engaging email doesn't just talk to a recipient; it also gives him a reason and an opportunity to respond, and fits into a broader conversational arc.

Put another way, having a conversation means you:

- Listen and adapt
- Send messages that flow one to the next

“Sense and respond’ communication in the digital world requires automation that monitors for explicit and implicit behavioral cues, captures that data (senses) in a rich behavioral database, and then uses the data to customize a valuable response (responds). Marketing automation platforms, sometimes known as campaign management systems or marketing operations systems, are one of the primary technologies used for this kind of ‘sense and respond’ digital dialogue.”

– [Graduating from Email to Engagement: Using Marketing Automation to Achieve Success with Today's Buyer](#), an International Data Corporation (IDC) Workbook, sponsored by Marketo

# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## NOBODY WANTS TO GET BLASTED

### Listen and Adapt

A romantic date goes badly if all you do is talk about yourself. The same holds true for marketing conversations. If you don't listen — really listen — to your prospects and consumers, you'll never earn the chance for a "second date," let alone a long-term commitment.

To start a two-way conversation, you must provide content relevant to a consumer's interests. Then, you must be willing to adjust your content based on how that consumer responds. It's great to automate workflows that map to a buyer's journey, but they can't be static workflows; you must be willing to adjust them as you observe how your buyer actually navigates across channels.

Here's how to listen and adapt in email marketing:

- **Use behavioral filters to target.**

As discussed in Part 3, behavioral filters ensure relevance in your email marketing. So, start a conversation with a smart subset of your contact list based on unique profiles and behaviors. Then, continue to watch your subscribers' behaviors as the campaign progresses and your conversation with each recipient diverges down its own unique behavioral path.

- **Trigger messages and adjustments based on behaviors.**

When a prospect does something meaningful on your website, in social channels, or offline (such as making a purchase at a physical store), you need to be able to respond with a relevant, timely email. When you automatically send a prospect a message based on an action she took (or didn't take), you allow for the message to be delivered at the moment your brand is on her mind. You are communicating with her on her terms, not yours. But if you miss these triggers, and simply blast emails to your entire list as your promotional calendar dictates, you ignore your potential customers and their buying signals.

As a simple example, imagine you're a marketer at a food company, and your goal is to drive sales for a particular brand of salad dressing. You have two marketing messages — one about the health aspects of the dressing, and the other about how kids love the taste. In practice, you find out that Customer A responded to the health message, but that message did nothing for Customer B. By listening for a lack of response to your initial marketing message, you can automatically deliver the "your kids will love it" message to Customer B.

# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## NOBODY WANTS TO GET BLASTED

### Send Messages That Flow One to the Next

Good email marketing conversations evolve over time. They tell stories that have a beginning, a middle, an end, with each component flowing naturally from the last and weaving a plot.

Each step in the conversation should flow from prior communications and move the relationship forward. Here's what an engaging conversation might sound like:

- Welcome! Here's what to expect.
- Check out this article.
- Here's a cool video.
- See our latest offering.
- Share this with friends.
- Here's what others like.
- Download our new book.
- Happy birthday!
- Are you ready to buy?
- Here's more great content!
- Join us at our event.
- You like X, so check out Y.
- Here are some fun ways to learn more about our products (or services).
- Take this survey?
- You haven't bought X yet, so here's a 10% discount.

“Every interaction is a link within the context of a communication supply-chain. Don't look at each discrete message, or even each campaign, as a unique event with a direct link to the end result.

Marketing is not a candy machine. Instead, view each as a link in a chain of events each of which leads to other actions.”

– [IDC Technology Marketing Blog](#)

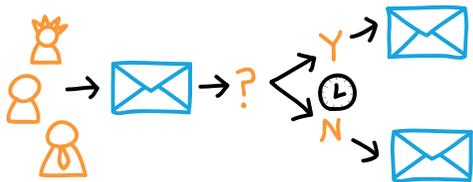
# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## TRADITIONAL TOOLS DON'T CUT IT

There's no doubt that engaging conversation is a great marketing technique. So why aren't more companies using it effectively? Turns out, flow-chart approaches don't work for real-world conversations.

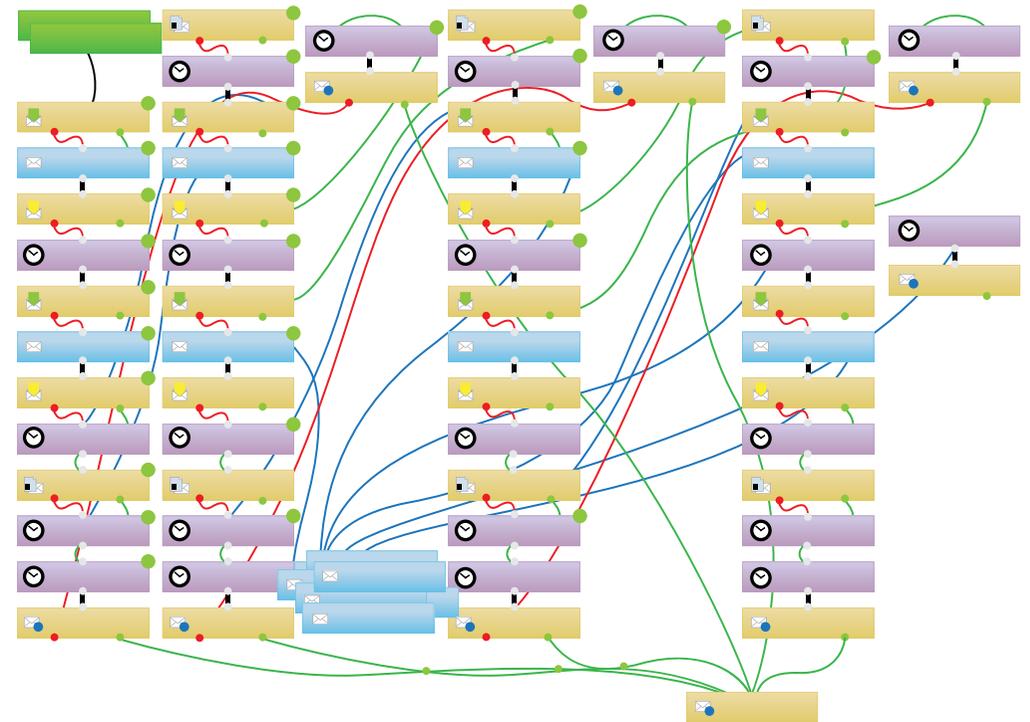
### Flow Charts Don't Flow

Perhaps you began by sketching out a plan on your whiteboard during a marketing meeting:



It made perfect sense while planning, but now that your campaign is live, your prospects and buyers aren't taking the actions you mapped out. You did your best to script the conversations, but people are unpredictable. Think about it: you can prep for a cocktail party by coming up with some great conversation points based on things you've read or seen on television, but you can't control how the people you meet at the party will react to your conversation. All you can do is make a loose plan, and then be willing to adapt in real time.

Similarly, with email marketing conversations, you can do your best to map countless if-then scenarios, but in an attempt to cover all your bases, you might end up with visual spaghetti.



# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## TRADITIONAL TOOLS DON'T CUT IT

Complex flow charts quickly cause problems for marketers because they are:

- **Confusing.**

Charts can get so complicated that only technical experts can understand them. As David Raab, marketing technology expert and consultant, wrote in his blog: *"I never saw a flow chart interface that actually did a good job handling complexity. So I've reluctantly concluded that flow charts are only suitable for serious technical experts."*

- **Less agile.**

Flow charts require rebuilding workflows when new content is added. Subscribers who are already partially through a track won't ever get the new content if it's scheduled early in the sequence. Or, if the content is scheduled for the end, they might not receive it for months. Making changes requires you to reprogram complex flow charts – which can quickly get unwieldy.

- **Error prone.**

It's almost impossible to act intelligently on information that's hard to follow. Complex flow charts can cause you to send expired or duplicate content, or even too much content to subscribers. The last thing you want is to send prospects an invitation today to an event that was held last week, or to receive an email from a subscriber who is fed up with your constant messaging.

Marketers using flow charts can't keep up with the dynamic, interactive nature of behavior-based conversational marketing. They're handicapped when it comes to customizing their dialogue with customers.

*"My own opinion is quite firm: flow charts don't work. They look good in demonstrations and can lay out simple processes quite nicely. But they get impossibly convoluted once you try to do something complex."*

**– David Raab, Marketing Technology Consultant & Analyst**

# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## CONVERSATIONS: A BETTER WAY

Years of experience at Marketo have shown us that there's a better way to manage engaging consumer conversations.

### **1. Easily add new content**

An intelligent solution will let marketers easily drag and drop relevant content where they want it in the stream of communications, and the system will automatically deliver appropriate messages to each recipient at the perfect time. This means that subscribers always get the freshest and most relevant content.

### **2. Schedule content to activate and deactivate**

With traditional solutions, it can be hard to remember to activate content at the right time or deactivate it when it's no longer relevant. Plus, the more complex the workflow, the more error-prone management can be. A better solution is to support content activation and expiration dates for each message, and let the system automatically activate and deactivate it for you at the right time.

### **3. Automatically limit email frequency**

Sending too many emails can kill your campaign and quickly lead to high unsubscribe rates. So, look for solutions that let you control the number of emails any one recipient will get — regardless of the communication streams in which he takes part. You simply set limits and let the system do its thing.

### **4. Never serve the same dish twice**

It's never relevant to send a subscriber an offer for content she's already downloaded or a product she already owns. A smart conversational solution monitors content consumption across channels — not just within your email marketing — and ensures that customers don't receive duplicate content or offers. For example, if your prospect downloads an eBook

from your website just before an email promoting that book is scheduled to go out, the system should be smart enough to know that this prospect shouldn't get that email, and deliver the next most relevant piece of content instead.

### **5. Know when you've run out of content**

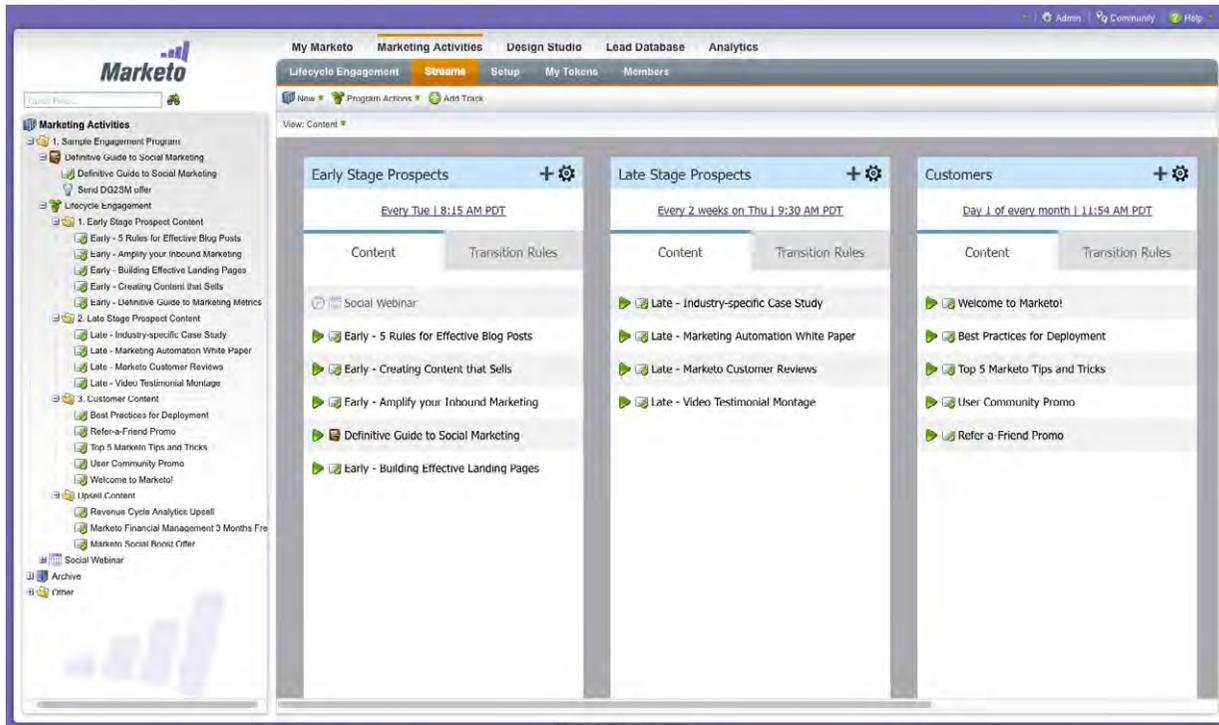
With regular flowcharts, there's no indication when a consumer hits the end of your content stream, which can result in large numbers of subscribers falling out of the string of conversations. Instead, the solution should track when consumers have exhausted all the content in a stream and alert the marketer that it's time to input new content or switch streams.

### **6. Engage across even more channels**

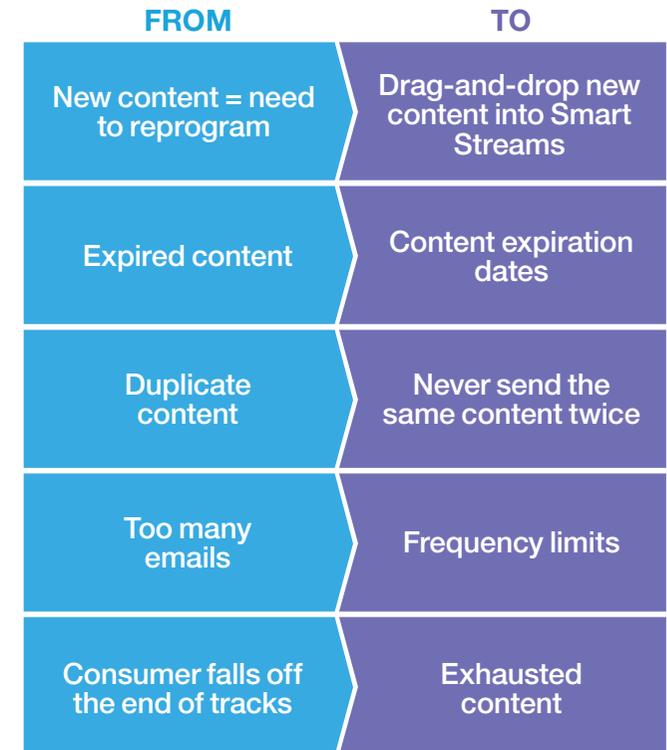
You want to engage your prospects and customers wherever they are most apt to hang out, but traditional email solutions don't let you do that, because they are focused on, well, email. As we'll explore in Part 5, an automated solution for marketing conversations enables you to listen and adjust the conversation based on information over any channel (e.g., trigger engagements based on mobile application usage, or interacting with online videos) as well as coordinate messages over other outbound channels including direct mail and SMS.

# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## CONVERSATIONS: A BETTER WAY



Marketo's Customer Engagement Engine intelligently and automatically manages the timing and distribution of the right content to the right person at the right time.



# PART FOUR: CONVERSATIONS, NOT CAMPAIGNS

## A BETTER WAY

### Automation Makes Personal Conversations Scalable

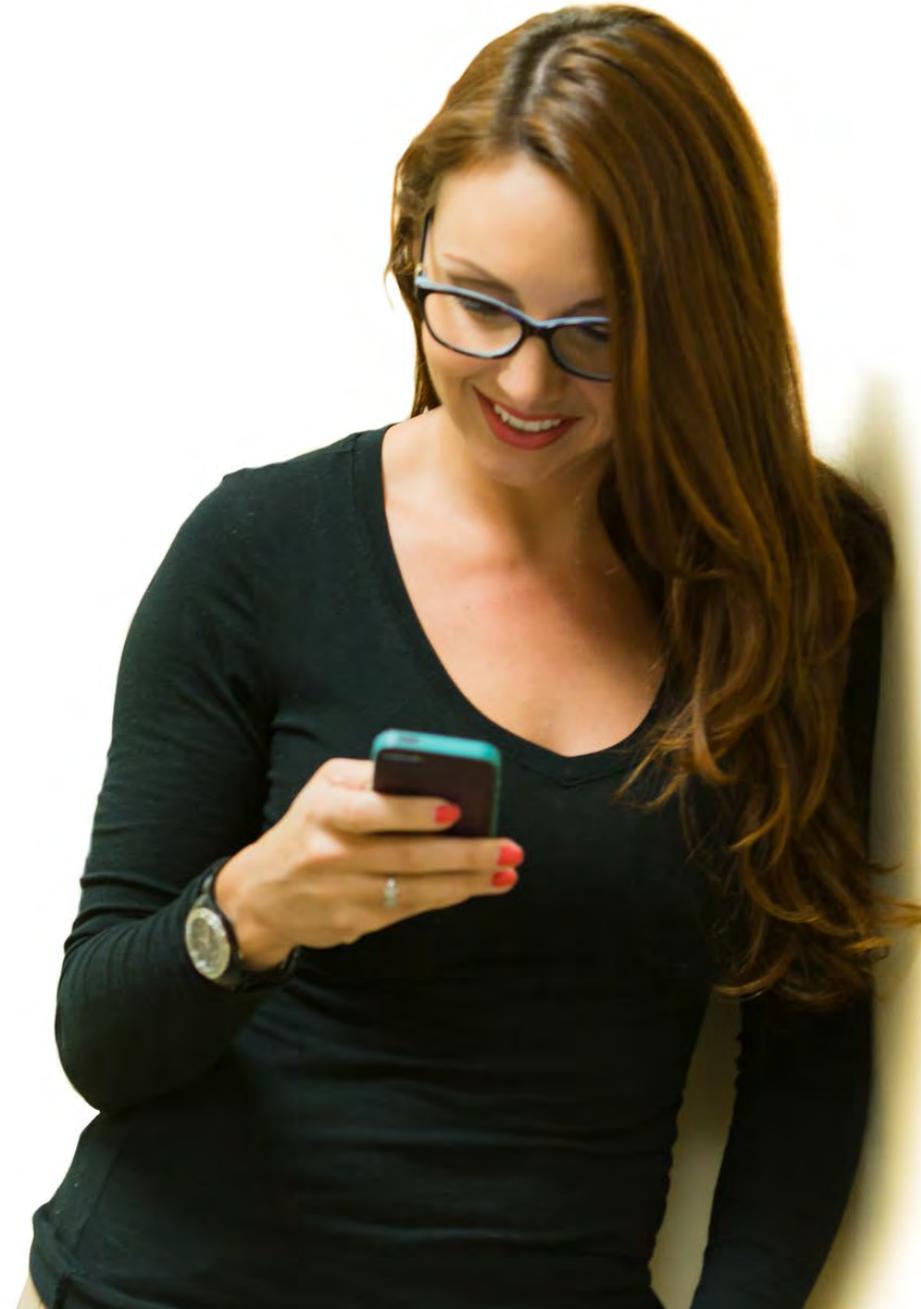
Having a conversation with one subscriber at a time is easy, and you can even do it manually. You could probably even manage dozens of consumer conversations manually, in fact. But there is a real scalability issue when your subscribers start to number in the hundreds, thousands, or millions, because you still want to have relevant, personalized conversations with each and every one.

Some companies try to implement these processes using the wrong tools. Remember the “I Love Lucy” episode in which Lucy took a job working at a candy factory? She could handle packaging when it involved just a few chocolates, but as the volume increased, things got messy (and funny!). When your subscriber volume increases, it’s as if your conversations are on a fast-moving conveyor belt. Without the right technology to keep you up to speed, your marketing could become a mess, and no one will find humor in that!

**That’s why automation is critical to customer engagement — there is no other way to have one-to-one conversations with your customers on a large scale.**

Automation allows you to be relevant to each and every one of your customers lets them feel listened to and respected. Remarkably, in this new digital era, we’re back to the good old-fashioned business ethic of putting the customer first!

When your subscribers number in the hundreds, thousands, or millions, you need the right technology to keep up with the volume and engage customers in respectful and relevant one-to-one conversations.



# CASE STUDY: TRIMBLE



## WITH AUTOMATED EMAIL MARKETING, TRIMBLE POSITIONS ITS DEALERS TO DELIVER SALES

### Highlights

- Actively supports their dealers and distributors by sharing valuable lead insights for trial downloads, accelerating conversion rates
- Transforms data aggregation and greatly reduces manual processes, which improves ROI and allows for deeper focus on marketing campaign quality

### Challenges

Best known for commercializing GPS technology, Trimble offers over 500 products that are used for a variety of applications including construction, surveying, agriculture, fleet and asset management, transportation and logistics, and public safety. Trimble products are used in over 141 countries, and their 6,500 employees are assisted by a highly capable network of dealers and distribution partners. One of many divisions leveraging Marketo is the Trimble Heavy Civil Construction division, who supply advanced automation and lifecycle solutions which incorporate precision machine control, software, site positioning, telematics and real-time connectivity. Trimble Heavy Civil Construction recently implemented Salesforce.com to manage their leads globally and with that realized their previous email service provider was not providing the level of engagement with clients they were hoping for. As Tamara

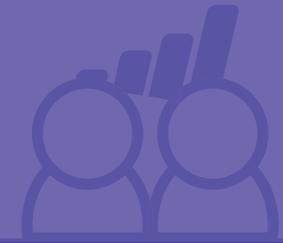
Schoder, Marcom Project Manager for Trimble's Heavy Civil Construction division, explains, "Before our Marketo implementation, we weren't confident that we were getting the most out of our tradeshow, website and customer opt-in lists. We didn't have an integrated way to measure and manage success." Trimble wanted an easy-to-use platform that integrated seamlessly with Salesforce.com and that possessed advanced functionality to assist their channel partners in nurturing leads to enhanced sales.

### Solutions

After researching the top Gartner-reported automation vendors, Trimble chose Marketo. Immediately after migration, Trimble's marketing team was freed from numerous data management chores and could finally focus on creating compelling campaigns and programs. Before Marketo, when Trimble wanted to send out specialized content to their regional

dealers, they were forced to hand sort address lists and communicate in one-off emails. With Marketo, Trimble segments campaigns with precision and communicates with specific dealers about support issues, webinars, and events that specifically pertain to their clients' needs. Trimble's marketing has been able to energize customer acquisition for dealers and distributors by automating nurture campaigns associated with its free trial download. For example, when potential clients visit Trimble's website, and take advantage of the free software, Marketo enables Trimble to follow up at each stage of the free trial. With Marketo, Trimble makes sure opportunities are cultivated with customized campaigns. From data collected from form fill outs, Trimble can assess an opportunity—whether it's a small or large company and how many people from the same company have downloaded a trial. They can follow behavior in the pipeline and know if a lead

# CASE STUDY: TRIMBLE



has filled out a form, downloaded software, or opened a newsletter. Trimble's marketing passes on valuable lead data to their dealers, who then have the ability to engage opportunities in meaningful conversations that close deals. The net effect: significant increases in conversion rates.

## Benefits

With Marketo, the Trimble Heavy Civil Construction division has improved their relationship with their dealer networks by providing active support. Sharing valuable insights on opportunity behavior with dealers has also improved Trimble's sales processes. With Marketo's metrics, Trimble's marketing team proves the value of their efforts and quantifies the leads that they attract and nurture. After a year of using Marketo, Trimble has seen impressive reductions in time and resources for managing their databases.

"The difference between using our previous email marketing tool and leveraging Marketo's full-fledged automation has been night and day. Before, we were passing spreadsheets of leads to sales and had mostly anecdotal data to support strategic decisions. Now, we're sharing valuable behavioral insights with the field and managing our campaign development much more efficiently. Marketo has completely transformed our sales and marketing process."

– **Tamara Schoder**  
**Marcom Project Manager – Heavy Civil Construction**  
**Division, Trimble**



PART FIVE:

# COORDINATED ACROSS CHANNELS



## PART FIVE: COORDINATED ACROSS CHANNELS

# CHANNEL AGNOSTIC CUSTOMER EXPERIENCES

Today's consumer moves seamlessly – and sometimes quite quickly – across digital and offline channels. She jumps from an email, to social media, to your website, to your 1-800 number, and then back to social media, all without losing momentum. And she does so from whatever device is most handy in the moment.

The modern, digitally-empowered consumer is channel agnostic: she doesn't think in terms of committing to channels. In fact, she typically interacts with your company over at least two channels each month, and according to a recent Experian QAS® survey, 36% of U.S. organizations interact with customers and prospects in five or more channels every month.

For that reason, *omni-channel business* — a new paradigm that concentrates on a more seamless approach to consumer engagement through all available channels — is now mainstream across many industries, including retail, financial services, automotive, healthcare, manufacturing, services, and technology.

The channel-agnostic consumer has become the undisputed controller of her relationship with a brand. Now, more than ever, the customer is in charge. She is living her life on her own terms and engaging with brands when and how it's most convenient for her.

Marketing is no longer just about being multi-channel. Today, it's about being omni-channel — delivering an integrated customer experience across every single platform. This requires a single, cross-channel view of the customer and the ability to coordinate messages and interactions across touch points.



# PART FIVE: COORDINATED ACROSS CHANNELS

## ORGANIZATIONAL AND TECHNOLOGY BARRIERS

In [Multi-Channel Experience](#), an article on 360Connex's blog, writer Jeannie Walters asks, "How do you best serve customers when they are jumping from device to device while posting on your Facebook wall and calling your customer service line at the same time?" If you don't have the right tools and strategies to deliver seamless integrated experiences across channels, you don't serve your customers well.

Of course, companies don't send mixed marketing messages intentionally or because they don't care. The problem is that most companies are just not prepared to deliver integrated channel experiences. The consumption and buying habits of Internet-savvy buyers have zoomed ahead of companies' organizational and technical abilities to communicate and interact with them.

### Organizational Barriers

Traditional marketing organizations divide teams into channel or product groups that work in isolated silos to meet their goals. A company might have one group for direct mail and another for online marketing. These teams often create their own campaigns, track their own metrics, and have their own budgets. But even if one team is doing a bang-up job exceeding its goals, it could be duplicating the content efforts of the other teams.

Customers don't consider the Web, social media, and email from the same company to be separate entities, and get confused and overwhelmed by a stream of what often appears to be contradictory messaging. We've all gotten an email from our favorite airline promising flights from one place to another for low fares. But when we navigate to the website to take advantage of the offer, we can't find it. This is frustrating for the consumer, and an easy way to lose her trust.

### Technology Barriers

Most companies aren't equipped with the technology they need to integrate the customer experience. The tools we've used for years to connect with customers are focused on single channels, such as email, mobile, Web, print, and so on. Messages delivered via each of these channels come from different technology platforms, which can get complicated and create problems quickly.

Your customers don't care – and likely don't even know – which technology platforms you use; they're interested only in their personal multi-channel experiences. Don't expect the consumer to adapt to you; you should adapt to the consumer. To meet their expectations, you have to move from channel- or promotion-centric marketing to customer-centric marketing powered by cross-channel technology.



### DemandGen Report

What are your biggest obstacles to achieving your customer marketing/management goals?

- 52%** - Managing multiple, disparate systems
- 44%** - Insufficient data to support segmentation/targeting initiatives
- 36%** - Manual reporting/insufficient
- 36%** - Lack of integration between channels (web, social, etc.)
- 27%** - Over-reliance on one off communications
- 23%** - Inconsistent messaging between divisions / branches
- 19%** - Inability to determine/communicate with customers' preferred channel

# PART FIVE: COORDINATED ACROSS CHANNELS

## BECOMING MULTI-CHANNEL

Delivering an integrated, cross-channel consumer experience is the new mandate for marketers. They will need platforms that aid them in listening to their audience and proactively responding over any channel.

Multi-channel marketers need tools to help them:

- **Listen.**  
Pay close attention to consumer behavior across all channels to create a single, integrated view of the consumer persona.
- **Act.**  
Manage and personalize conversations with consumers across channels.

### Listen

Imagine you had a great phone conversation yesterday with one of your best customers about a new service offering. Now imagine that after you read this, you go out for a cup of coffee and run into him on the street. “Hi! So glad we bumped into one another,” you say. “I want to talk to you about a great service we’re offering!” Your customer responds with a puzzled look. He thinks you have a terrible memory or that you’re confused.

The same thing happens when a customer receives dueling messages from you on different marketing platforms. If you’re not listening to him across different channels, you’re not delivering an integrated experience. To create relevant interactions with a consumer over any channel, you need to understand that consumer’s behaviors across all channels – you need a single, cross-channel view of the customer.



### Identity Resolution and Profile Building

Identity resolution is key to creating a successful customer experience across platforms. The ability to know that

- jon@marketo.com (email)
- @jonmiller (Twitter)
- +jonmiller2 (Google+)

are the same person is a key aspect of any cross-channel database.

“Fewer than 10 percent of brands are executing true cross-channel communications informed by one view of the customer.” – **The 2013 Digital Marketer**, Experian



# PART FIVE: COORDINATED ACROSS CHANNELS

## BECOMING MULTI-CHANNEL

### Act

Engaging conversations with consumers should be maintained seamlessly as your subscriber moves from one channel to the next.

A conversation you start in an email must continue when the consumer navigates to your website, and shouldn't skip a beat when he jumps over to your Facebook page. Instead of competing against each other with disconnected messaging, or repeating information the customer has already absorbed, your email and different marketing channels should work together to coordinate the customer's experience.

Here are just a few examples of how email can work with and complement other channels. (See the next section for a deep-dive on email and social.)

### Display / Retargeting

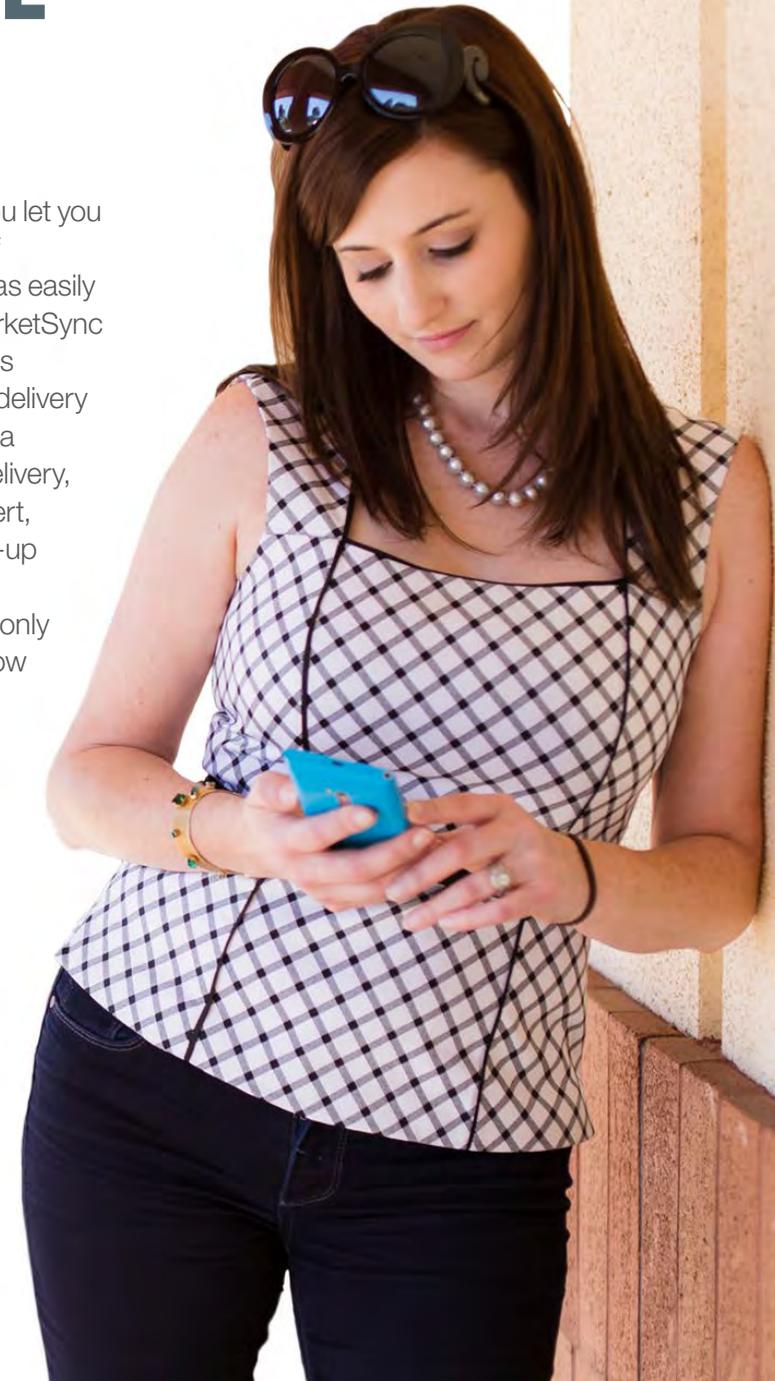
Some companies are including a retargeting pixel in the emails they send to prospects and customers (including emails sent by individual employees). This sets a cookie on the subscriber's machine, which allows the company to target specific display ads to them as they navigate the Web. Done well, it can create more coordinated experiences between the messages the subscriber sees over email and on online.

### Web

Your website is of course a great place to capture new email addresses, but also it's a great place to continue conversations. The Web experience can and should be dynamically personalized to reinforce and extend the dialog started in emails.

### Direct Mail

Companies like Cloud2You let you send direct mail as part of marketing conversations as easily as you send an email. MarketSync offers a solution that sends packages and tracks the delivery of those packages; when a consumer signs for the delivery, the system receives an alert, which can trigger a follow-up email, phone call, or both. Integrating in this way not only allows conversations to flow across channels, but also beyond the digital.



# PART FIVE: COORDINATED ACROSS CHANNELS

## BECOMING MULTI-CHANNEL

### PURLs

PURLs are personalized URLs. Customers type a custom URL into their browser from a postcard they receive in the mail. This address brings them to a landing page designed specifically for their persona. By offering them targeted Web content in this way, you can improve conversion by 30% or more. Here's an example of a Marketo designed postcard Marketo that includes a PURL:



(Postcard: Front)



FIRST-CLASS MAIL  
US POSTAGE PAID

### Marketing can make you crazy. We can help.

You know your job's tough when it starts to invade your daily life. Perhaps you're still bed-ridden from the last bad lead you passed to sales. Or your 8-year-old daughter is sick of hearing why you didn't meet your KPIs this month.

Fortunately, Marketo can make your job easier. Built by marketers, for marketers, Marketo combines everything you need to manage events, campaigns, and customer programs—including email marketing, nurturing, and scoring—plus eye-opening analytics that measure your marketing ROI and forecast marketing's impact on revenue.

See the rest of the postcard series and create your own at [marketo.com/wecanhelp/LindseySchmid](https://marketo.com/wecanhelp/LindseySchmid)

(Postcard: Back)



# PART FIVE: COORDINATED ACROSS CHANNELS

## BECOMING MULTI-CHANNEL

### Stores

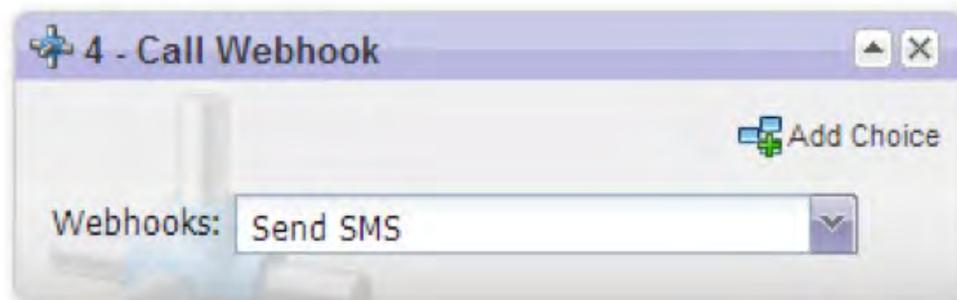
Use email to drive traffic to stores, dealers, and other physical locations by promoting special events, local news, and in-store discounts. Also, use store visits to capture email addresses (*"Would you like your receipt emailed to you?"*), adding walk-in customers to your mailing list.

### Video

If you're running a TV or online video campaign, use email messaging to refer to it in your copy: *"As seen on TV!"* or *"From our YouTube channel."* You can offer your loyal customers longer 'directors' cuts' of videos if they click on a link in an email. You can also use email to promote upcoming television and video events: *"Rachael Ray will be cooking with our mustard on her show on Friday morning. Don't miss it!"*

### Other

Multi-channel consumer dialogues can trigger intelligent interactions over many other channels to support and complement email communications. For example, a phone call can be a powerful follow-up to an email promotion, an automated voicemail can supplement email reminders to attend an event, and an SMS message can prompt consumers to respond to an email promotion.



# PART FIVE: COORDINATED ACROSS CHANNELS

## BECOMING MULTI-CHANNEL

### Email is the Digital Glue

Email is the digital glue that holds all these new channels and communication forums together.

In an omni-channel scenario, email is the anchor channel — the one channel that all the other channels refer back to and rely on. This is good news for email marketers, because it means they're leading the evolutionary march toward true cross-channel coordination.

When it comes to carrying the customer relationship across channels, email messages have two advantages:

1. They're proactive, reaching out to consumers at the right time and with relevant messages.
2. They're everywhere. Thanks to the rise of mobile, email is accessible on any device at any time, and from virtually any location.

“Email is the ‘digital glue’ of the new media landscape, and a medium that is not to be overlooked. Email is the Internet’s dominant application, and is where the attention is of our audiences on the most frequent basis.”

– [Greg Cangialosi](#),  
Founder & CEO, Blue Sky Factory

“Email marketing is well-suited to integrate with a multitude of existing and emerging communication channels to deliver precise value in this ever-evolving environment.”

– [MarketingSherpa](#)

“Email is the hub of all digital messaging. It’s not the end-all-be-all, but email is the glue that keeps marketing channels together.”

– [Simms Jenkins](#), CEO of Brightwave

“Email continues to be the communication tool linking together in-store activity, online shopping, social sharing, and Web-based searches. ... Triggered emails communicate with consumers at the moment they need valuable information, to assist their progression on the path to purchase.”

– [MarketingSherpa CMO](#)  
[Perspectives on Email Deliverability](#)



# PART FIVE: COORDINATED ACROSS CHANNELS

## SOCIAL MEDIA AND EMAIL

There are cynics who predict that the rapid adoption of social media will lead to the decline of email marketing. Simply put: They're wrong. People are using email as much (or perhaps more) than ever before. But it is true that social networking is forcing email to evolve and adapt.

Before getting into the evolution of email marketing fueled by social media, let's remember just how much social networking sites rely on email. Sure, you can tweet on Twitter and post to Facebook. You can pin visuals on Pinterest. You can even publish videos and pictures with witty captions on Instagram. But in the end, it always comes back to email.

Twitter, Facebook, Google+, Instagram, Pinterest, and LinkedIn all require an email address just to sign up for and log into their platforms. (A few social sites do let you sign in with a phone number as an alternative, but people who use a phone number for ID are in the minority these days.) Several social networks send weekly or monthly email newsletters by default, and they provide many options for email notifications.

When you want to make sure someone gets your message, you email her. And when you want to get that message to a lot of people at once — and to be sure they'll see it — you definitely email them. For example, Evernote is an app that functions as a progressive to-do list. In March of 2013, Evernote's IT team discovered suspicious activity on their network and needed to notify users — fast.

How did they choose to communicate? Email, of course. LinkedIn experienced a similar data breach in 2012, and ultimately used email to alert its user base. But unlike Evernote, LinkedIn first announced the news on its blog and on Twitter — more passive modes of communication.

Those messages raised the ire of several online bloggers, who chided LinkedIn for not using email as a first mode of communication.

[\(Read more about LinkedIn's email gaffe on Waldow Social.\)](#)

Social mediums are not trying to replace email, because email is essential to the way they operate, and to the way we all operate.

“Email is for conversations that are urgent and important. Social media is for conversations that are less urgent and less important; they still have a place.”

– Jay Baer, Social Media & Content Marketing Strategist

”

# PART FIVE: COORDINATED ACROSS CHANNELS

## SOCIAL MEDIA AND EMAIL

### The Symbiotic Relationship between Email and Social

There are three ways email marketing and social media can team up heroically:

- 1. Social Connecting:** Use email to grow your social followers.
- 2. Social Sharing:** Use email to extend the reach of your message through social channels.
- 3. Social Promoting:** Use social media to grow your email list and promote your email marketing messages.

### Social Connecting

Social Connecting means leveraging your email list to increase your social media followers, ultimately benefitting your email marketing. Here's a social connecting curriculum to help you plan:

- **Social Connecting 101:** Include social media icons in the header, footer, sidebar, or main body of your email campaign so it's easy for people to find and connect with you on social platforms.

- **Social Connecting 201:** Include social media icon links in your emails, along with encouraging text: "Like us on Facebook"; "Follow us on Twitter"; "Subscribe to our YouTube channel"; or "Follow our Pinterest board."
- **Social Connecting 301:** Include social media icon links in your emails and give subscribers reasons to follow you. (Remember what's in it for me —WIIFM?) Reasons might include deals, discounts, or news only available on social media. You could even run a contest to give subscribers an extra incentive to connect.
- **Social Connecting 401:** Send a dedicated email to your list, asking them to connect with you.



### Email Marketing (Batman) & Social Media (Robin)

Like Batman and Robin, email and social media have a symbiotic relationship. If email marketing is Batman, then social media is Robin.

Batman is the "*Caped Crusader*." He's always around when Gotham City needs him. He's trustworthy and dependable. When the bat signal goes off, Batman swoops in to save the day. Like email, he's awfully powerful by himself, but he's sometimes even more effective with a little help.

Robin is the "*Boy Wonder*". He helps Batman fight evil and get the job done! Like social media, he's young, full of ideas and enthusiasm.

Like the Dynamic Duo, email and social media are most effective when they cooperate. Your social media followers tend to be less committed than your email contacts at first. When you successfully transition social media followers into email subscribers, your email marketing list gets bigger, and your subscriber loyalty grows. And when you drive your email subscribers to your social feeds, you create deeper engagement. You and your success metrics will agree that both channels benefit.



# PART FIVE: COORDINATED ACROSS CHANNELS

## SOCIAL MEDIA AND EMAIL

### Social Sharing

You don't just want your email subscribers to follow you on Facebook; you want them to actively share the content of your emails with their Facebook friends. When your email recipients are so connected to the content of your emails that they are compelled to share it through their social networks, you've hit the cross-channel content jackpot. Here's your curriculum for social sharing:

- **Social Sharing 101:** Include social sharing links in your email messages so it's easy for people to share right from your content. "Share with your network" (SWYN) is the new "forward to a friend" (FTAF). Recent research indicates that SWYN links have a click-through rate of 0.5% — five times that of FTAF.

- **Social Sharing 201:** Encourage the use of a hashtag in your emails for social. For instance, Piperlime, a retailer, created the hashtag #sandalweek within an email campaign to start a trend on social media and make people think about buying sandals. Even better, include a "tweet this!" link in an email. When the reader clicks on the link, a pre-written tweet pops up that you've already customized with hashtags and an @YourCompany Twitter handle. As long as the tweet is less than 140 characters, you can include any message you want. In this example from Waldow Social, there is a link to opt-in to the email newsletter, providing a closed loop of #winning #marketing:

- **Social Sharing 301:** Create a social sharing contest. Make a game out of it, and provide incentives and rewards for sharing.

For marketers, the ultimate goal of social sharing is to extend the reach of email marketing messages. If your email subscriber list has 100,000 names, then the people you know are just the tip of the iceberg — imagine how many people they know! Even if a small percentage of your recipients click "share," your number of followers can increase dramatically.

If you are (& are reading this now), [please tweet this!](#) Did you know you can [view this email in your browser?](#) Not loving the content anymore? Feel free to [unsubscribe](#). No hard feelings.



# PART FIVE: COORDINATED ACROSS CHANNELS

## SOCIAL MEDIA AND EMAIL

### Social Promoting

Social promoting is about driving traffic in the other direction — from social media to email marketing. It can make non-subscribers aware of the advantages of subscribing, and it can let current subscribers know to be on the lookout for your latest email message.

Here's your curriculum for building bigger lists with the help of your social media sites:

- **Social Promoting 101:** Send a tweet or post an update on your Facebook page that includes a link to your most recent email marketing campaign.



- **Social Promoting 201:** Include a link in a tweet or on Facebook inviting non-subscribers to opt-in.
- **Social Promoting 301:** Build an email opt-in app that lives on your Facebook page, and occasionally promote it in your status updates. You can also amplify the promotion with paid social advertising options, e.g. targeting Facebook users who perhaps follow your competitors or industry-related companies but who aren't yet on your email list.

- **Social Promoting 401:** Target consumers who are on your recipient list but haven't opened an email by placing a duplicate offer in their Facebook feed using custom audiences.

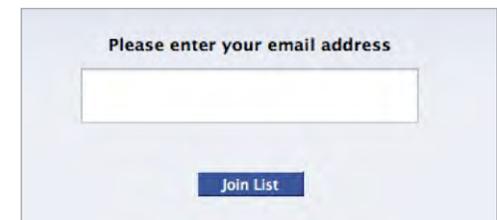


### Cowgirl Creamery

Most email marketing services offer a way to create a tab on your Facebook page for an email opt-in. You can customize how the tab reads and the order in which it appears in on your main profile. Here's an example of one company, Cowgirl Creamery, putting "Join Our Mailing List" front and center on their Facebook page:



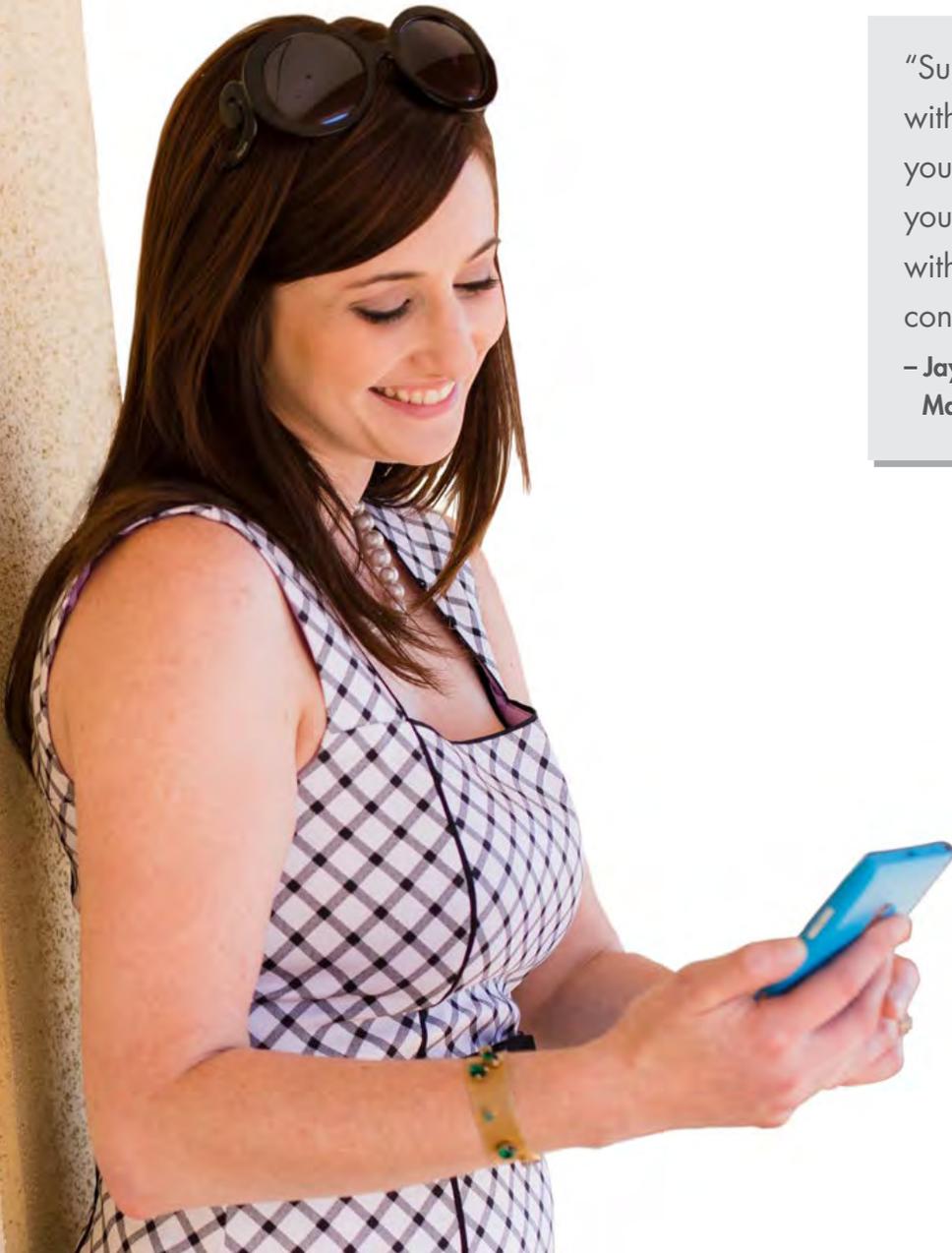
Clicking on the tab brings you to:



It's all done without ever leaving Facebook.

# PART FIVE: COORDINATED ACROSS CHANNELS

## SOCIAL MEDIA AND EMAIL



“Surround your customers with options to interact with your brand, and the chances you will be able to interact with them at all go up considerably.”

– Jay Baer, *Social Media & Content Marketing Strategist*



### Bonus Tips for Combining Email and Social

Running social campaigns is great, but making every campaign social is better. When you connect your email and social marketing efforts, they enhance one another.

Here are some ideas:

- Supplement each email address in your database with that contact's social media data.
- Increase opt-in conversion rates with social sign-in capabilities on your forms.
- Feature a Facebook and Twitter connect button in email opt-in confirmation messages so that enthusiastic new subscribers don't miss out on other ways to connect.
- Add a Facebook and Twitter connect button to email unsubscribe pages for recipients who'd rather stay in touch over social networks.
- Listen for keywords that are used by your audience in social media, and then send segmented emails that use those keywords.
- Watch who your followers follow, and use their content interests to help augment your segmentation strategy.

# THOUGHT LEADERSHIP SNAPSHOT: MATT BLUMBERG, CHAIRMAN & CEO OF RETURN PATH, INC



**Matt Blumberg is Chairman & CEO of Return Path, Inc,** is the pioneer of many innovations in email marketing, including Email Change of Address, email deliverability, whitelisting, and reputation services. Matt was listed as one of New York's 100 most influential technology leaders by the Silicon Alley Insider in 2008, he was one of Crain's New York's Top Entrepreneurs in 2012, and he was an Ernst & Young Entrepreneur of the Year finalist in 2012. Matt is also an author and blogger.

**MKTO:** What is your advice for creating engaging email marketing campaigns and content?

**MB:** The best campaigns aren't about you or what you want subscribers to do. They're about your subscribers and what they want. They may buy kitchen equipment or golf clubs, but what they really want is help becoming better cooks and golfers. A knife skills primer or a troubleshooting diagnosis of left-handed swing problems—maybe even an interactive video—will be infinitely more engaging than lists of product SKUs. When every campaign delivers legitimately valuable content, your subscribers will engage. They'll read your messages, they'll become brand advocates, and most importantly, they'll buy.

**MKTO:** What's your reaction to the following statement? Email is not dead; it's evolving.

**MB:** Since 2010 we've seen more innovation in email than in the entire decade before it. Lately when we talk about emerging email technology, the examples we cite are typically already in use, as email technology is so rapidly advancing. Automated foldering is already the normal email experience. Utilities that turn the inbox into to-do lists, integrated calendars, social media monitors and messaging hubs, shopping engines and reservation managers are already popular and already part of the mobile user experience. Even communications technologies beyond the mailbox are being built on top of email – try joining a social network without an email address. Email has always been transforming, but the speed of change has increased radically over the past few years.

**MKTO:** How can we integrate email into our marketing strategy – not merely into the marketing mix?

**MB:** This is a loaded question, but maybe not for the obvious reason. Of course we think strategists should focus more on email, but its real transformational power lies in what email data can tell us about our business. The same data that can optimize email revenue should also be guiding efforts to better understand customers, markets, and brands. The way audiences engage with campaigns can reveal critical insight into product positioning, brand perceptions, and shifting trends that impact decision making across the entire organization. We talk about email as a revenue engine, but the data and intelligence that email generates may ultimately be worth far more to a business than the (admittedly impressive) ROI it generates.

PART SIX:

# STRATEGIC: THE NEW METRICS FOR EMAIL



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## ENGAGING EMAIL IS STRATEGIC EMAIL

Engaging email is strategic email, and as we've learned, traditional email campaigns are not strategic. To achieve strategic value, email marketers need better metrics.

Using the right metrics doesn't just help you finesse what you're sending to your recipients and when you're sending it. Appropriate metrics also let you measure the worth of your marketing tactics.

"Bottom line, with email driving more revenue and ROI than its digital marketing brethren, it is well positioned for a healthy and long future."

– Simms Jenkins  
Founder & CEO BrightWave

Top executives in your company care about things like:

- Driving customer engagement
- Measuring and proving ROI
- Beating the competition
- Making buyers happy and customers successful
- Controlling risk
- Managing and leveraging the growing complexity of changing buyer behaviors, channels, and technologies
- Growing revenue and "making the number"

**It's no secret that top executives don't really care about the Open Rate or Click-through Rate of your last email campaign.** If you can't convince your top executives to care about email, you won't get the budget or resources you need to make email a core part of your strategic marketing plan, and won't be able to take advantage of its potential.

In this part of our guide, we'll cover best practices for using traditional email metrics. Then we'll introduce a new email metric for engagement, and also explain how you can strategically tie email to revenue.



### Strong relationship between strategy and email marketing results

Top email performers spend significantly more time on strategy than their counterparts. In fact, the Marketo Benchmark on Email Marketing found that top performers spend more than three times the amount of time per month on email strategy than average performers do:

	Avg.	Top Performers
Hours Per Month	62	123
Creative (design and copy)	23%	20%
Segmentation and targeting	12%	13%
Strategy	14%	22%
Email layout and processing	18%	17%
Reporting	10%	13%
Content creation	23%	16%

# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

# EMAIL MEASUREMENT BASICS

Before we discuss sophisticated measurement strategies, let's review the common metrics used by ESPs. We'll define each one, where appropriate, share benchmark values for average companies and top-performers, and share tips for how-to results.

Here are the seven most common email metrics:

1. Sent
2. Delivered
3. Bounced
4. Opens / Open Rate
5. Clicks / Click Rate / Click to Open Rate
6. Unsubscribe Rate
7. Marked as Spam

## Sent

**Definition:** Your sent metric is the number of emails that actually moved through the sending mail server (your ESP). This may or may not be the same as addresses on your sending list; it depends upon how your ESP tracks what's been sent (whether or not it includes "bad" email addresses in the final count). Remember, while some of your emails are sent to bad addresses, they certainly don't get received. Marketo defines Sent as the number of valid contacts who were sent an email.

**How to optimize:** If your goal is to increase the number of emails sent, you have to grow your contact list! But for this to work, your list also has to be healthy. The healthier your list, the more emails are sent successfully.

## Delivered

**Definition:** Delivered refers to the number of emails that were sent and not rejected by a receiving server. It's important to understand that Delivered does not mean it landed in the recipient's inbox. Marketo defines Delivered as the number of contacts who were successfully delivered at least one message.

**How to optimize:** Again, ensure that your email list is healthy; take precautions to prevent bad email addresses or spam traps from being added to your list. For a refresher, refer to Part 2, where we covered the ways to build and maintain a healthy list.



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## EMAIL MEASUREMENT BASICS

### Bounced

**Definition:** Bounced email is the opposite of Delivered email. There are two types of bounces:

1. *Hard bounces* are messages that are permanently rejected (emails denied due to an invalid email address or because the recipient's server has blocked the sender's server).
2. *Soft bounces* are messages that are temporarily rejected because the recipient's mailbox is full, the server is down, or the message exceeds the size limit set by the recipient or ESP. Too many soft bounces to one address can eventually result in a permanent hard bounce.

In both cases, Marketo defines Bounced as the number of people (contacts) who were sent a message that bounced.

**The Value of Engagement:** The Marketo Benchmark on Email Performance found that top performers had lower bounce rates:

- Average companies: 2.1 – 5.0%
- Top performers: < 2.0%

**How to optimize:** Be proactive about preventing bounces:

- Your email provider should automatically remove recipients who bounce from your mailing list for future sends, but be sure to process soft bounces, such as “out of office” messages differently.
- Use a real-time email validation service to minimize the chance of a subscriber entering a bad email address — accidentally or on purpose.

- Scan your list(s) and check for obvious typos, like a missing period or mistyped domain name (myemail@aol, myemail@aolcom, etc.). These errors can be fixed on the spot.
- Provide a way for recipients to update their own email addresses. An online Subscription Center is a logical place for information updates. Keep in mind, though, that instead of navigating to the Web, subscribers will often click “reply” on a message to alert you to a change to their contact information. If you receive these replies, update your list quickly. (This is another reason to have a human managing your email replies, rather than using do-not-reply email addresses!)
- Consider calling or direct mailing recipients whose emails bounce to let them know that there's a problem with their addresses. You definitely want to keep in touch with recipients you believe have the potential to be high-value customers.
- Monitor delivery rates by domain. Track your Open Rates and Bounce Rates according to the sent-to domains. If the Bounce Rates for one domain are significantly higher than the others, your campaign might be the victim of spam filtering.

# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## EMAIL MEASUREMENT BASICS

### Opens / Open Rate

**Definition:** How many recipients opened (viewed) the email. Marketo defines Opens as the number of contacts who opened the email at least once, and the Open Rate as the number of opens / number of leads delivered.

Note that some ESPs report Total Opens versus Unique Opens. Total Opens include every instance of a recipient opening an email. In other words, if one subscriber opens the same email ten times, then it will be reported as ten Opens instead of one. Unique Opens signifies that no matter how many times a single subscriber opens the same email, it counts only as one time.

Opens are tracked by adding a small, personalized image (“pixel”) to the email. As soon as the image renders, the ESP will register that the email has been opened. Note that this means Opens is a difficult metric to track, and there is also no guarantee that an email opened was an email read.

Some challenges:

- If a subscriber loads an email with “images on” in the preview pane, the ESP will record as Open even if she doesn’t actually look at it.
- The ESP will record an Open if she selects it (opens it briefly) in order to delete it.
- If email preferences are set to “images off,” it’s entirely possible for the subscriber to authentically open and read your email without it being registered as an Open. As we mentioned earlier, most email clients do block images by default.

The bottom line is, the Open Rate is not 100% accurate, but it does serve as a good proxy for whether emails are being read, and as a relative measure to compare emails against each other.

**The Value of Engagement:** The Marketo Benchmark on Email Performance found that top performers had significantly higher open rates, showing the value of trust and quality targeting:

- Average companies: 10-15%
- Top performers: 16-20%

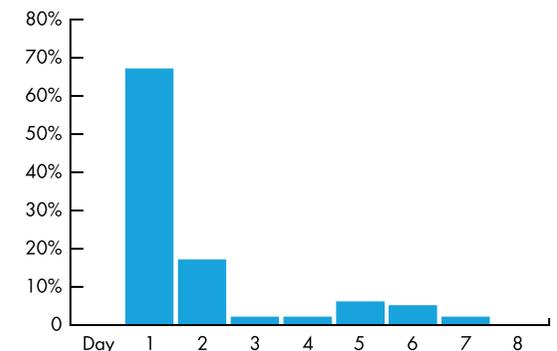
**How to optimize:** The Open Rate is primarily influenced by the following factors:

- 1. Targeting** – If your list is focused and well-targeted, your recipients will more likely value your email and open it.
- 2. The From Name** – A recipient is more likely to open your email if she recognizes (and trusts) the sender.
- 3. The Subject Line** – The subject line, or headline, is what sells your email. It plays a huge role in whether your

email gets opened, deleted, ignored, or marked as spam. As we detailed in Part 3, there are many ways you can design an effective subject line: long or short, straightforward or intriguing, etc. Again, test options to know which style is best for your campaign.

You can also increase the odds of recipients opening your emails if you remove from your list the contacts who have not opened your emails in the last six months.

**Marketo’s Open Rate Results:** When Marketo sends email campaigns, about 75% of those emails are opened the day they are sent.



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## EMAIL MEASUREMENT BASICS

### Clicks / Click Rate / Click-to-Open Rate

**Definition:** When a subscriber clicks on a link, button, or image within your message, a Click is recorded.

Marketo defines total Clicks as the number of people (contacts) who click at least one link in the email. In other words, like the Open Rate, no matter how many times a recipient clicks on the link(s), only one Click is recorded. Counting in this way provides a better measure of how many subscribers are truly engaged. This also ensures the Click Rate cannot be greater than 100%.

Click Rate equals the total number of Clicks divided by the total number of emails delivered (or, depending on the measure used, sent). The Click-to-Open (CTO) Rate is the total number of Clicks (per subscriber) divided by the total number of Opens. This means that  $\text{Click Rate} = \text{Open Rate} \times \text{Click-to-Open Rate}$ .

Marketers often pay more attention to the CTO than the Click Rate, since the CTO helps to separate the reasons for opening from the reasons for clicking.

**The Value of Engagement:** In the Marketo Benchmark on Email Performance, that top performers had better click rates and click-to-open rates:

Click Rate:

- Average companies: 2.1 – 5.0%
- Top performers: 5.1 – 10%

Click to Open Rate:

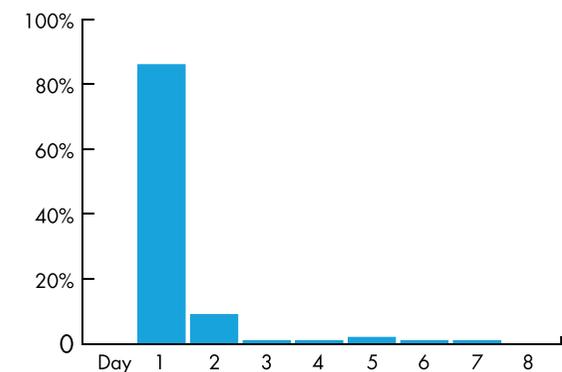
- Average companies: 11 – 15%
- Top performers: 16 – 20%

**How to optimize:** The unique Click Rate is a good indicator of how effective your content and your calls to action (CTAs) are within your email. If people are opening your emails but your Click Rate is low (or trending down), this usually means you need to tweak both your content and your CTAs.

- **Make It Easy:** Your CTA should be obviously placed (not hidden on the page) and include plain, clear language. Don't make your audience work to find or interpret it.
- **Multiple Links:** Test your CTA using multiple links for the same action. Try using an image link, one button link, and multiple links inline within the copy, each with different anchor text. Including many links to the same destination has been shown to improve email Click Rates.

- **Test, Test, Test:** If you've tested everything else, try testing the color of your CTA button. When it comes to your CTA Click Rate, testing is vital.
- **Create Scarcity:** Offering a deal for a limited time (or to a limited number of people) creates scarcity and a clamoring for the bargain. Subscribers often fear that they'll miss out if they don't act fast.

**Marketo's Click Rate Results:** When Marketo sends email campaigns, 2/3 of our recipients click them the day they're sent.



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## EMAIL MEASUREMENT BASICS

### Unsubscribe Rate

**Definition:** The number of contacts who click the “unsubscribe” link in an email and then follow through to successfully opt out.

**The Value of Engagement:** The Marketo Benchmark on Email Performance found that top performers had lower overall unsubscribe rates:

- Average companies: 0.11 – 0.20%
- Top performers: < 0.10%

**How to optimize:** In this case optimize means to shoot for the lowest number possible while avoiding being marked as spam. If someone wants off your list, it's far better for him to unsubscribe than to point a finger at you, so don't hide your unsubscribe link. Instead, place it in the footer of your message, because that's where we marketers have trained subscribers to look for it. To make sure that subscribers see the link, some companies also include an option to unsubscribe, along with friendly language, closer to the top of the email.

Then, once someone is on your unsubscribe page, use the various options described in Part 2 to let them manage their subscription and perhaps not unsubscribe completely.

### Marked-as-Spam Rate

**Definition:** The number of subscribers who reported your email as spam, divided by the number sent or delivered.

**How to optimize:** You want to do whatever you can to bring the Marked as-Spam-rate to the lowest number possible — ideally, zero. The more engaging you are, the fewer spam complaints you'll receive. Remember your goal: send timely, targeted, valuable, human content to people who have requested it.

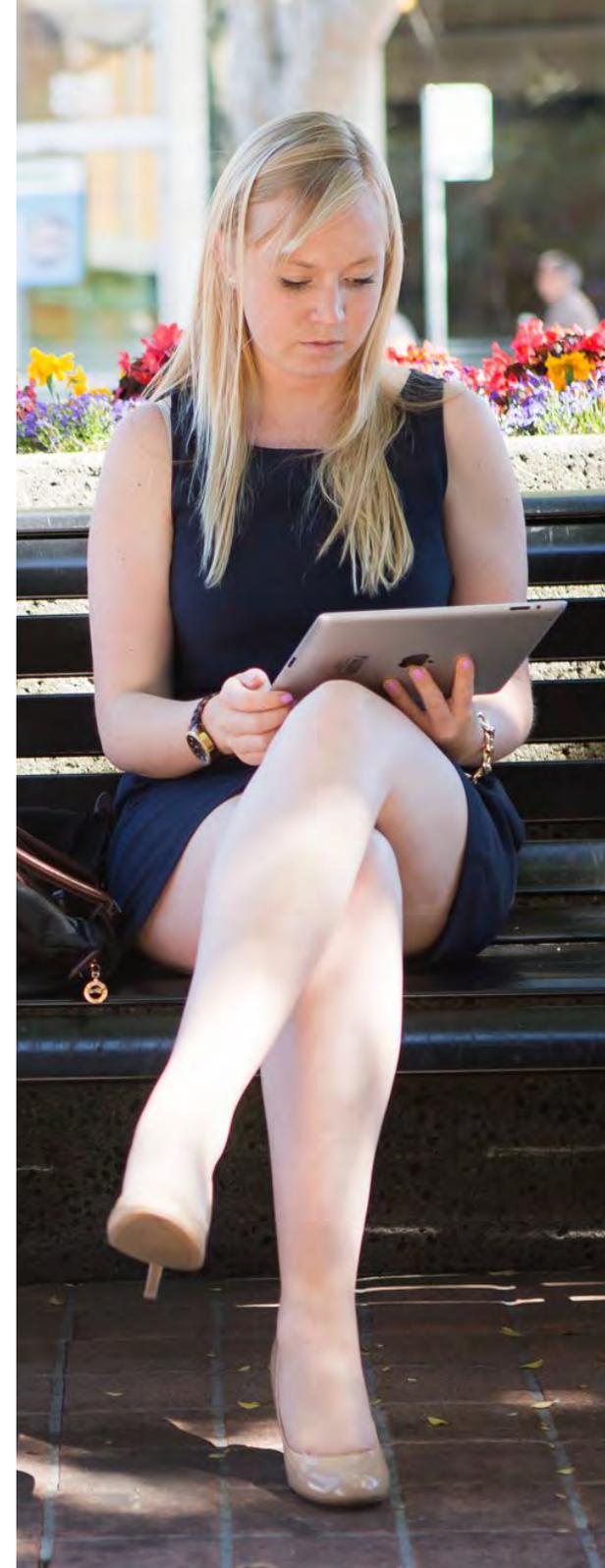
*Marketo follows these rules when computing our email metrics:*

**Rule #1:** Each email activity record is set to one — and only one — of the following values: Delivered, Hard Bounce, Soft Bounce, or Pending.

**Rule #2:** If the email record shows Opened, then it is counted as Delivered.

**Rule #3:** If the email record shows Clicked Email or Unsubscribed, then it is Opened and, therefore, counted as Delivered.

**Rule #4:** If the email is Opened, then any bounce is ignored. Otherwise, a Hard Bounced “wins” even if the email record shows Soft Bounced or Delivered.



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL ENGAGEMENT

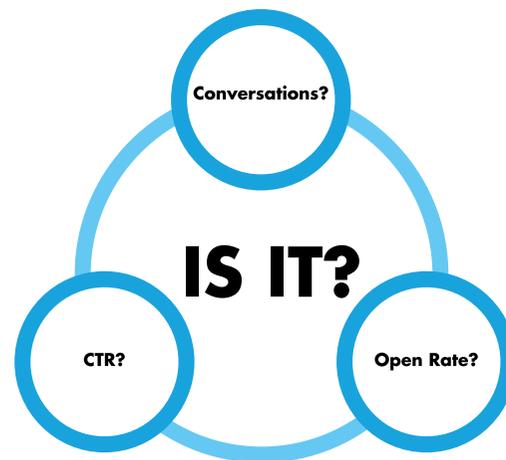
Engagement is more than an idea or a buzzword; it's a tangible way of interacting with consumers one-to-one across channels by listening, acting, and analyzing. With the right tools, engagement metrics can be managed and increased.

Operational metrics, such as Opens and Clicks, are not ideal for measuring engagement. Consider the following testing scenario:

- Email A has a high Open Rate.
- Email B has a high Click Rate.
- Email C has a high Conversion Rate.

Which of these emails had the best engagement? With traditional ESP solutions, no real insight is given into whether a campaign has actually engaged customers or deepened relationships. A marketer must pore over multiple reports and then apply guesswork to determine how an email performed in terms of engagement.

In order to accurately measure engagement, **you need a way to combine all the metrics of traditional ESPs — Open Rate, Click Rate, Conversion Rate, Unsubscribe, etc. — into one single measure.**



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL ENGAGEMENT

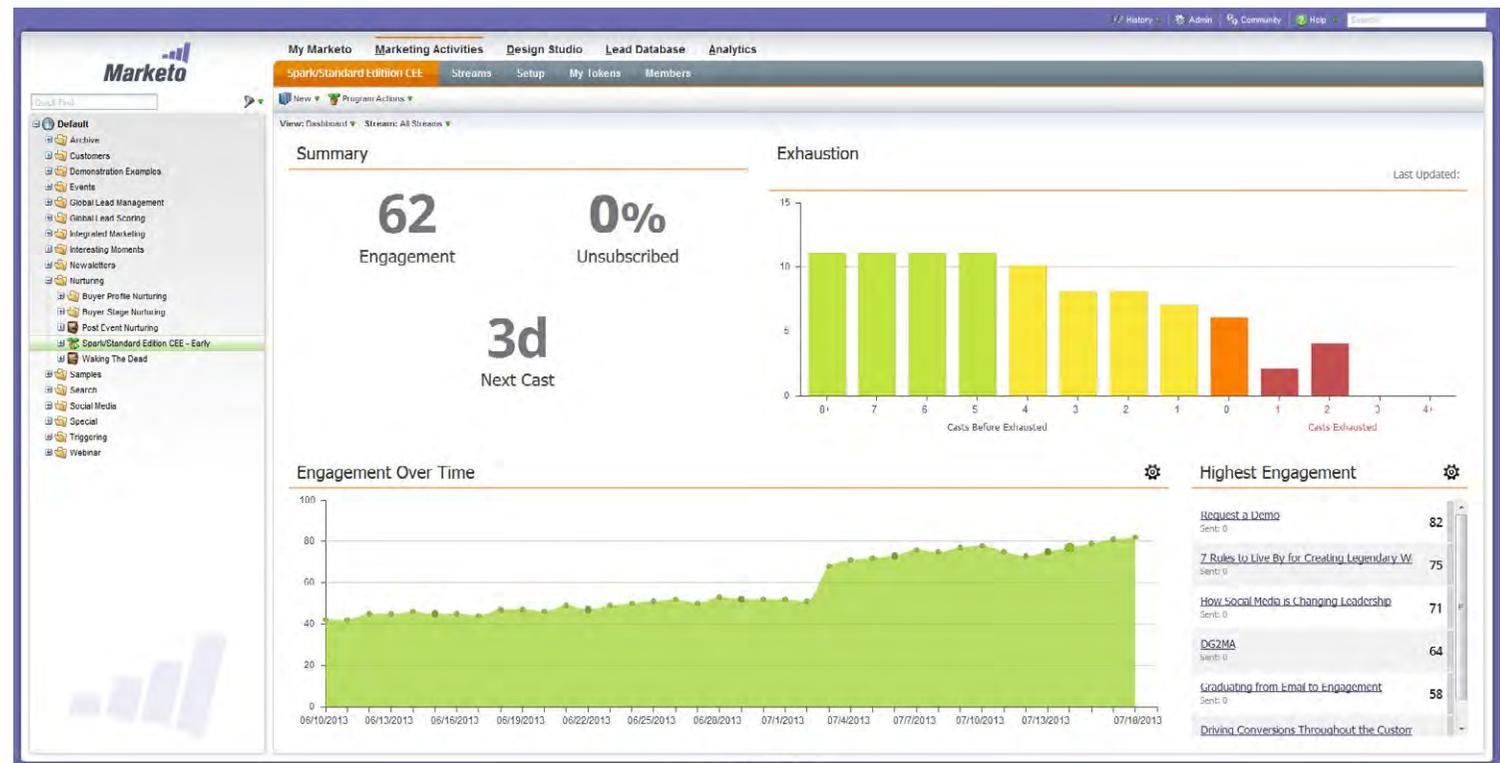
## Marketo Engagement Metric

The Marketo Engagement Score is a proprietary algorithm that our Data Science Team created to determine exactly how engaging each message is. It combines multiple data points — Clicks, Opens, Conversions, Unsubscribes, Program Successes, etc. — and then applies a statistical algorithm to create a single measure of engagement.

Our Engagement Score provides a standard way to measure the engagement of your messages over time, not just as isolated standalone incidents. With this new level of measurement, you can best accomplish the following:

- Fine-tune to improve the engagement of campaigns, continuously.
- See how the changes you make improve engagement over time.
- Test different messages and content streams against each other to find which are the most engaging.

This metric takes the guesswork out of your marketing metrics and applies a tangible number that you can wield when making future marketing decisions — not just decisions regarding email campaigns, but also those relating your entire omni-channel strategy.



# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL TRUE FINANCIAL METRICS

A riveting subject line or persuasive email copy is only as good as the revenue it generates: you don't just want Opens; you want actual sales.

Many email marketers obsess over traditional ESP metrics without ever connecting them to important financial numbers. This is not their fault — traditional ESPs don't provide the functionality to make this sort of connection.

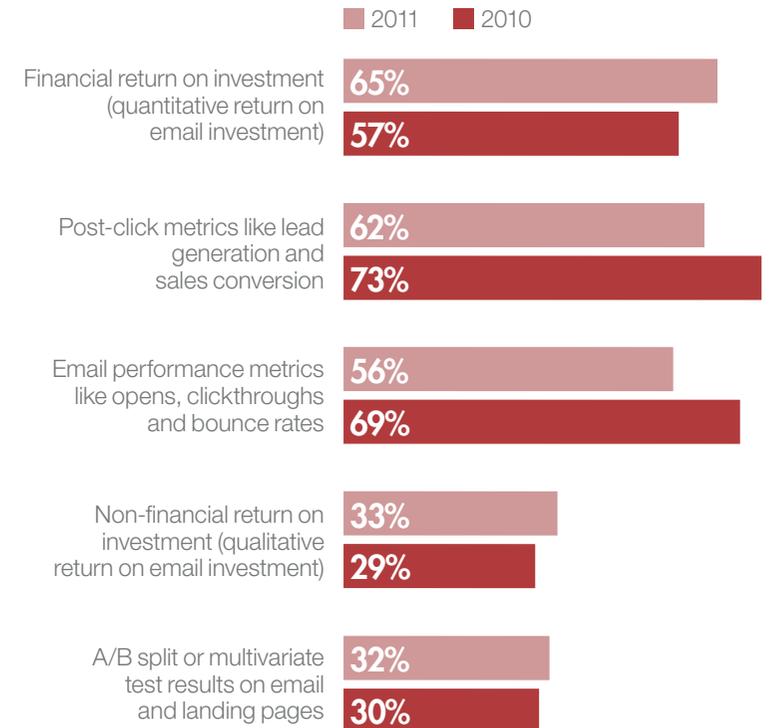
When you measure Opens and Clicks without comparing them to bigger-picture financial metrics, you'll generally always come to the same conclusion: **You need to send more emails. But more emails isn't always a good idea.**

Email measurement is moving beyond Opens and Clicks and toward true financial metrics, such as Revenue Impact and ROI.



## Mapping Marketing Back to Revenue

[MarketingSherpa](#) asked CMOs and senior marketing executives about the importance of various factors in measuring the value of email marketing programs, and found a shift in the factors used by CMOs. While basic metrics used to be considered sufficient, they aren't anymore. According to the survey, "today, CMOs presume email will provide a financial return on investment."



Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded July 2011, N=2,735

# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL TRUE FINANCIAL METRICS

## How to measure revenue impact of email programs

In its 2013 Digital Marketing Report, Experian noted that 35% of marketers cited response attribution as the most challenging multi-channel marketing issue for their organizations.

To become more strategic about measuring financial metrics in email marketing, start by recognizing that the consumer rarely makes a purchase as a result of a single campaign. Conventional marketing wisdom proposes that at least seven successful “touches” (forms of engagement) are needed in order to convert a cold prospect into a buyer.

Sometimes companies attempt to tie revenue to either a customer’s first touch or his last. But a better strategy is to allocate the value of every engagement across all of the marketing efforts that customer touched. Here’s how.

### Step 1: Count All the Successful Touches

In an omni-channel scenario, successful touches can happen across numerous channels. Perhaps the customer’s last touch point was your website, but prior to hitting “buy,” he spent time in an email, on your Facebook page, and on your Twitter feed. He may have even gone into a brick-and-mortar store before committing to the purchase online (or vice versa). When collecting all your touches, be sure to only count those that occurred before the action was taken — those that led to the action.

### Step 2: Assign Value to the Final Action

You might use your e-commerce platform, transactional system, or CRM as the system of record for how much the action is worth. A marketing automation tool can make this easy for you.



Marketo Deal Storyboard, showing all the marketing interactions with a customer before a sale.

### Step 3: Distribute That Value across Your Successful Touches

In a multi-touch attribution scenario, you assign a value to each successful touch. Often, this is best done with simple distribution: if a consumer touched five marketing programs, each touch point gets 1/5th of the credit for the ultimate value.

As simple as that seems, it’s often easier said than done, because most ESPs don’t support such sophisticated analysis. But modern marketing automation solutions can do this right out of the box.

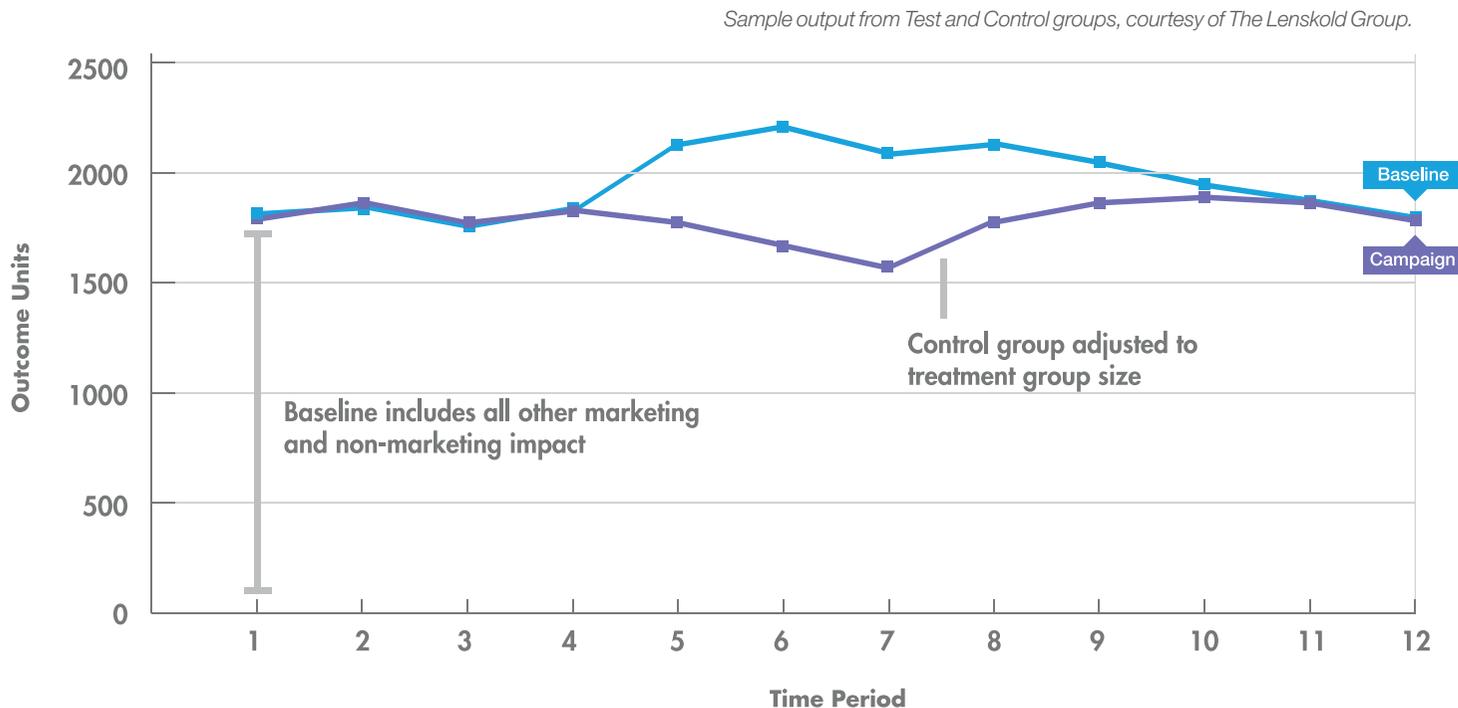
# PART SIX: STRATEGIC: THE NEW METRICS FOR EMAIL

## TRUE FINANCIAL METRICS

### Test and Control

A/B testing can be used to find emails with the best open rate, but it can also be used more strategically to measure the impact of broad programs. Just divide your target buyer group into two homogenous groups, and apply a program to only one of these groups. All other factors being equal, you'll be able to attribute any difference in subsequent buyer behavior to the marketing effort.

The outcome metric you ultimately measure can be anything — revenue, profit, traffic, retention — or all of those things.



### Measure Email Compared to Other Channels

**One final, but critical point: Don't just measure the performance and ROI of your email against other emails; instead, compare the results and ROI against ALL channels.** You might find that email outperforms other channels and you should invest MORE on email, or perhaps you'll find that in some cases LESS email investment is called for. The key point is to know what is working — and what isn't — across channels.

This sort of "marketing mix analysis" is an essential tool for a modern marketing department, but most ESPs are unable to provide for it. Since they're exclusively focused on email metrics, the best they can tell you is which of your emails should be sent more often.

For winning marketing across channels, you need a true omni-channel marketing solution that can help you measure and optimize your entire portfolio of marketing investments — not just email.

## THOUGHT LEADERSHIP SNAPSHOT:

# MARK BROWNLOW, WRITER & PUBLISHER AT EMAIL MARKETING REPORTS



Mark Brownlow is an email copywriter, business writer, and publisher at Email Marketing Reports. He has a focus on e-commerce and email marketing and contributes to many websites such as MarketingSherpa and MarketingProfs.

**MKTO:** What is your advice for creating engaging email marketing campaigns and content?

**MB:** There are lots of tools and tactics for ensuring that email marketing is FUNCTIONALLY very successful. For example, behavior-based and trigger emails still offer a lot of undiscovered potential: things like post-purchase follow-up messages, cart abandonment emails, emails customized to website browsing behavior, etc.

That all works and works well. But there's a reason I say "functionally" very successful. When you get locked into the tools and tactics mentality, you can lose sight of other opportunities that can keep your emails immune from the vast competition for subscriber attention (inside and outside the inbox).

It's a little old-fashioned, but it comes down to recalling that the recipient is not a number in a spreadsheet or an entry in a database, but a human (hopefully). And that human wants some kind of value in return for the time they spend on our emails.

That value can indeed be functional – a great deal, an insightful article, good advice. But there's value in personality too – engaging writing, clever design, creativity, humor, giving a platform to customers, sometimes giving value and asking for nothing in return. These are all things that help distinguish you from the competition when they're also offering a 15%-off everything sale.

**MKTO:** Looking into your crystal ball, what does email marketing look like 5-10 years from now?

**MB:** I have absolutely no idea. When I started online, AltaVista was THE search engine. Facebook wasn't even a gleam in Mark Zuckerberg's eye and mobile communication devices were pretty much exclusive to episodes of Star Trek. (And I'm not even that old.)

With the Internet so dynamic, predictions are hard (impossible really). The trick is to stay flexible and keep in mind that certain fundamentals don't change: you can dress up your messages however you like, but at the end of the day, delivering value is what counts for a lasting customer relationship.

PART SEVEN:

# GRADUATING FROM ESP TO MARKETING AUTOMATION



# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION TECHNOLOGY FOR ENGAGING EMAIL

Consumers have more control than ever, and marketers need to step up their game accordingly. Email service providers (ESPs), vendors that primarily provide batch and blast email capability, can't deliver the behaviorally-targeted engagement needed to stay relevant, let alone the integrated multi-channel conversations necessary to maximize the impact of marketing. Only an intelligent marketing automation platform is up to the task.

Throughout this guide, we've emphasized the five key factors that make email engaging and ultimately successful:

**1. Email must be trusted.**

It's essential that your emails set and then consistently meet subscriber expectations.

**2. Email must be relevant.**

You have an obligation to deliver the right content to the right person at the right time, based on a smart understanding of each subscriber's interests and behaviors.

**3. Email must be conversational.**

Buyers are individuals, and they deserve personalized communications. This means abandoning the idea of batch and blast campaigns and entering into a relationship-oriented mindset that continuously builds engagement with consumers, one by one and over time.

**4. Email must be coordinated with other channels.**

Your emails must be coordinated with interactions from every marketing channel, so that your customers' experiences are consistent and progressive.

**5. Email must be strategic.**

Always use the right metrics to measure your email marketing tactics and assess their effectiveness and worth. Then, make adjustments accordingly.

Traditional ESPs can't deliver on these musts. If you agree that your company needs email to be competitive and effective, it's time to graduate to marketing automation.



# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## LIMITATIONS OF TRADITIONAL EMAIL SERVICE PROVIDERS

ESPs came onto the scene in the mid-90s as email became mainstream and companies realized they needed to be able to send consumers large volumes of marketing messages. But as email marketing has become more sophisticated, ESPs have struggled to move beyond their original batch and blast origins.

Some ESPs have tried to evolve, but they are constrained by their very nature. Their databases are simple and lack easy integration with other enterprise systems. They were built for rapidly sending the same message to many, not for orchestrating intelligent one-to-one conversations, and are destined to always view everything through an email-centric, not omnichannel, lens.

### **Key limitations of traditional email service providers include:**

#### **Not relevant**

ESPs rely primarily on targeting audiences based on demographics and flat “subscriber” files. However, this kind of targeting ignores valuable information about buyer behavior that can be obtained by examining a buyer’s actions, or lack of actions, as they engage with content and trusted sources online and offline. Connecting to behavioral systems requires technical skills and complex queries, making traditional ESPs blind to valuable buyer behavior and, therefore, unable to build meaningful relationships with consumers.

#### **Not conversational**

ESPs don’t have the functional ability to allow one-to-one conversations over time. They send mass emails to an entire list at once. Sure, they can customize emails, but they aren’t built to facilitate evolving and customized two-way conversations between a company and each individual consumer. Marketers stuck using traditional ESPs waste an incredible amount of time manually simulating dynamic conversations with their various lists — valuable time that they could be using to optimize their marketing strategy and create fresh content.

#### **Not multi-channel**

Today’s buyer shifts rapidly and continually across channels, engaging with email one moment and with social media the next. But traditional ESPs were designed around one function: email marketing. Traditional ESPs have made modest attempts to integrate other capabilities such as social media, but without the backbone to support true cross-channel marketing, their small fixes don’t address the bigger problem. Traditional ESPs simply cannot comprehensively capture all the online and offline behavioral patterns that give marketers real insight into how their customers tick, and they cannot effectively or in a timely manner trigger action in other parts of the organization such as sales or call centers.

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## LIMITATIONS OF TRADITIONAL EMAIL SERVICE PROVIDERS

### Not strategic

ESPs only provide email marketing metrics. They can't track and measure the impact of marketing spend on revenue over time. Without a comprehensive and unified view of how spending is affecting revenue, marketers cannot compare the relative effectiveness of their investments. As a result, marketers are challenged in how to allocate and re-allocate resources to the channels and methods that have the greatest positive impact on revenue.

“Given the situation with today's buyer, standalone email is insufficient to produce or effectively judge engagement. In fact, email can be worse than inadequate. Instead of engaging buyers, improperly managed email can push buyers away.”

– International Data Corporation (IDC) Workbook: [Graduating from Email to Engagement: Using Marketing Automation to Achieve Success with Today's New Buyer](#), June 2013



### Lack of Automation

If you're a marketer using traditional ESPs, even sending a short follow-up email about an event is complicated.

1. You manually compile a list of people who attended the event. This isn't something the ESP keeps track of, so you probably do import and export to get names.
2. You determine which of the people on your list RSVP'd to the event, but never showed up, and then put them on a separate list. Another import/export.
3. You manually build two campaigns — one for those who attended, and another for those who didn't.
4. You manually send both emails — nothing is automated.

The time you spend manually gathering data, analyzing it, creating lists, and setting calendar notices for yourself in order to remember to simulate what you hope will appear to be a personalized marketing experience for your recipient is time that you'll never get back. But worse, this cumbersome process means that scaling your marketing efforts is pretty much impossible.

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

Marketing automation platforms succeed in all of the areas in which traditional ESP solutions fail, particularly when it comes to personalized, targeted marketing.

Although we've noted the importance of marketing automation throughout this guide, it's now time to dig into the details. Let's begin with a concise definition of marketing automation:

***Marketing automation is a category of software that streamlines, automates, and measures marketing tasks and workflows, so companies can increase operational efficiency and grow revenue quickly.***

### How It's Used:

Marketing automation is used to create a real-time, relationship-oriented approach to marketing across all online and offline channels.

### How It Works:

Marketing automation combines a marketing database, workflow engine, multi-channel interactions, and rich analytics in one powerful and easy tool.

### Why Companies Automate:

Marketing automation allows companies to streamline marketing processes and improve customer and prospect relationships to grow revenue.



# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

Marketing automation platforms can replace traditional ESPs to handle email marketing – both batch and real-time, personalized email messaging. But marketing automation goes way beyond email. Its functionality allows for (and ties email to):

- Landing pages
- Online forms
- Behavior tracking
- Relationship marketing
- Campaign management
- Customer scoring
- Customer lead generation
- Customer management
- Customer retention
- Cross-selling and upselling
- Event management
- CRM integration
- Social marketing
- Marketing analytics

By bringing all of this functionality together into one single platform, a marketer's world is simplified.

### Core Benefits of Marketing Automation

Marketing automation is indispensable to today's businesses because of three core benefits that traditional email marketing can't provide:

1. Saves time and money by automating processes and eliminating tedious and error-prone manual work. Marketing automation makes what used to be complex, simple.
2. Measures and optimizes marketing investments so that you can better track your marketing programs and assess their performance over time.
3. Compels faster revenue growth by dramatically improving customer engagement with relevant, personalized conversations to thousands or millions of contacts.

"A marketing automation solution delivers essentially all the benefits of an email marketing solution along with integrated capabilities that would otherwise need to be cobbled together using various standalone technologies."

– Gleanster Research

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Marketo's free 100-page **Definitive Guide to Marketing Automation** will answer all of your questions about how marketing automation can help your company, and how to be successful with it once you've made the decision.

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

**Five Essential Reasons to Graduate to Marketing Automation**  
It's time to stop using the term email marketing, and replace it with engagement marketing.

A marketing automation platform extends the benefits of email and provides an opportunity to mitigate email's shortcomings. When marketing automation is used to its full capacity, it becomes a full-fledged engagement-orchestration tool, enabling you to listen to consumers' unique needs and deliver what they want, when they want it.

Marketing automation performs new and valuable functions that standalone email solutions simply cannot, including several essential capabilities for "sense and respond" conversations.

Let's take a closer look at the functionality that marketing automation platforms provide.

Just as the introduction of Ford's Model-T in 1908 set in motion a revolution in affordable transportation that quickly made the horse and buggy irrelevant, today's powerful but easy-to-use marketing automation tools are rendering traditional ESPs old fashioned.



# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

### 1. Behavioral Targeting for Relevance

With marketing automation tools, you can build dynamic behavioral lists that segment customers and prospects by demographics and by behavioral data, such as Web activity, social sharing history, transactional history, and more. Marketers can then send the right message, in the right format, to the right person at the right time.

#### Dumb Lists vs. Smart Lists

While marketing automation tools use “smart” lists, which are dynamically generated according to buyer behavior using rich database functionality, traditional ESPs can only perform the most rudimentary segmentation using “dumb” static lists, or worse, spreadsheets. Behavioral filters often require complex queries written by developers, not marketers.

### 2. Relationship-building Conversations

Batch and blast. Spray ‘n Pray. Those tactics are yesterday’s news. Marketing automation tools automatically and intelligently provide consumers with the next appropriate and relevant message – which builds lasting relationships. Marketers use automation platforms to create a dialog using sophisticated conversational nudging, rather than disconnected missives. By taking into account where each customer is in relationship to your business right now, you’re able to create a connection that starts with the very first dialog you have with a customer, and lasts all the way through his stages of purchase, use, and loyalty.

#### Do You Want to Get Blasted?

Nobody likes the idea of getting “blasted,” but that’s exactly what most ESPs do – blast subscribers. At best, they succeed in sending similar messages to everyone on a list at the same times – at best, the messages won’t resonate; at worst, they will irritate and alienate recipients!

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

### 3. Coordinated

#### Multi-channel Campaigns

As today's consumers move seamlessly across digital and offline channels — the Web, mobile, social media, in-store, etc. — marketing automation enables coordinated marketing. It pays attention to the consumer's behavior on every channel and then takes responsive action. For instance, marketing automation knows when a consumer shares social content, and can use that data to target him with an SMS text, a personalized email, or even a phone call. By tracking an integrated chain of interactions via email, search, and social, marketing automation tools coordinate conversations with buyers across every channel.

For marketers used to working with the limited functionality of ESPs, it's exciting to know that marketing automation provides functionality to easily create personalized landing pages and forms right out of the box. Not only is marketing automation capable of following consumers across platforms, that's precisely why it was designed.

ESPs were built for email, and email alone; this makes ESPs ill-suited for the sort of omni-channel integration for which marketing automation was born.

### 4. Strategic Analytics

Marketers greatly appreciate how much better the analytics are on marketing automation platforms than with traditional ESPs. Marketing automation is meant to give a deep understanding of marketing ROI, to prove the revenue impact of campaigns. Company executives don't really care about Open and Click Rates; they want a measure of true engagement and actual financial metrics that tie email and all marketing to the goals of the entire company.

ESP reporting is limited to email-centric metrics, such as how many Opens and Clicks a batch and blast campaign garnered.

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

### 5. Customer Lead Management

Marketing automation takes a proactive stance on developing quality leads. At many companies, a large part of marketing involves reaching out specifically to consumers who have not yet bought, but who are good targets for future buying. Marketing automation platforms typically provide lead management functionality, including scoring, CRM integration, sales alerting, and lead recycling ability.

A good marketing automation tool will also provide a dashboard that you can use to follow your leads and their behaviors within your CRM system, if you're using one. Marketing automation ensures your company connects with potential customers before your competition does.

To traditional ESPs, customer lead management is a foreign concept.

I can explain a move from an Email Service Provider (ESP) to a marketing automation platform with an analogy: still photographs versus video. ESPs are like still photographs: you can get great stats from using one, but each campaign is effectively a snapshot in time. Marketing automation platforms are like videos: you can see the behavior of people in multiple campaigns over time, taking all the snapshots and connecting them together to make a flip movie or video out of them.”

– Joseph Zuccaro,  
Founder & President of Allinio LLC

”

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## ENTER MARKETING AUTOMATION

Comparing Marketing Automation with an ESP	Email Service Provider	Marketing Automation
Sends mass emails	✓	✓
Tracks open rates and clicks	✓	✓
Easy to build landing pages and forms	—	✓
Website behavior tracking	—	✓
Easy to create dynamic segments based on cross-channel behaviors	—	✓
Powered by a smart marketing database (demographics, behaviors, transactions)	—	✓
Easy to create multi-step campaigns with conditional logic	—	✓
Intelligently delivers content with Smart Streams	—	✓
Coordinate cross-channel interactions (direct mail, SMS, etc.)	—	✓
Social sweepstakes and referral applications	—	✓
Ability to define and measure a data-driven view of the buying cycle	—	✓
Customizable time series reporting on marketing performance	—	✓
Behavioral and demographic scoring to prioritize engagement	—	✓
Comprehensive and flexible integration with CRM systems	—	✓
Manage marketing budgets and forecasts seamlessly across teams	—	✓
Measures impact of marketing programs on revenue	—	✓
Ability to define and measure a data-driven view of the buying cycle	—	✓

# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## CASE STUDIES



**College with over 55,000 students**

**Challenge:** Batch and blast method was ineffective, needed to modernize student interactions

**Solution:** Marketo empowered Marketing to measure ROI impact, improved lead generation by 28%, and multiplied conversion rates thanks to new insight into student decision process



**Investment management products provider**

**Challenge:** Existing system only did untargeted email blasts; needed to generate campaign success results for sales and top management

**Solution:** Marketo drove targeted multi-layered campaigns, crucial behavioral insights for reps in the CRM, and automated Brinker's national and regional event process



**Fifth largest travel management company worldwide**

**Challenge:** No ability to segment, track and engage prospects based on buying behavior; lists had to be rebuilt from scratch each time the company undertook an email campaign

**Solution:** Marketo drastically reduced campaign launch time, increased email click-through rates, and improved sales and marketing collaboration to drive revenue

"Life before Marketo was like being in the dark ages. Marketo has put us into the modern era of marketing and helped us increase leads by 28% and sales by over 18%."

– Doug Wotherspoon, Exec. Director of Advancement, Algonquin College



"With Marketo, we've gone from being tactical, manual, and flying blind to being automated, empowered and strategic."

– Cate Vanasse, Marketing Manager, Egencia



# PART SEVEN: GRADUATING FROM ESP TO MARKETING AUTOMATION

## CHECKLIST: KEY CAPABILITIES

If your email solution can't do the following things, it's time to graduate to marketing automation.

### Smart Content

- Intelligently decide the next best piece of content for each individual recipient (as opposed to targeting content broadly)
- Allow new content to be easily added to ongoing conversations at precisely the point it would be most relevant for each subscriber
- Automatically remove content that is no longer relevant
- Offer behavior-based trigger responses based on real-time individual behaviors, rather than on pre-set schedules aimed at dumb lists
- Ensure you don't ever feed a customer content he has already consumed
- Limit communication frequency so that one subscriber never gets too many emails

### Omni-channel Engagement

- Provide WYSIWYG ability to build graphical Web landing pages and forms without help from IT
- Support engagement across all channels — not just email, but also social, Web, print, phone, and in-person
- Handle event marketing smartly, streamlining the entire event process with personalized invitations, registration prompts, timely reminders, and post-event follow-up
- Integrate smoothly with Facebook registration page publication so that your lead registration programs' EdgeRank continuously improves
- Handle social campaigns, such as polls, referral programs, and sweepstakes (e.g., "Enter to win an iPad" or "Refer three friends and get \$100")

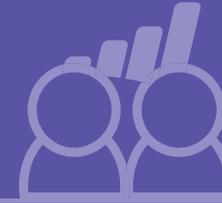
### Relevant Metrics

- Provide insight into which messages are driving the best engagement
- Support A/B testing so you can quickly and easily compare multiple landing pages and emails
- Use multiple scoring models to track interest in — and engagement with — multiple products or services
- Help manage marketing investments, including assigning top-down budgets to various groups, planning marketing spending across platforms, tracking open-to-spend numbers, ensuring budget compliance, coordinating workflows and permissions, and reconciling plans with actual invoices
- Use multi-touch revenue attribution to allocate revenue among all the marketing activities that successfully influenced a customer as she moved through the buying process

### Technical

- Offer role-based access options to give a manager one set of functions in the system, and a customer or third-party user another
- Separate work groups in order to define segmented contacts, campaigns, and assets that are only accessible for marketing purposes by certain specified users
- House a sophisticated marketing database with a simple user interface, so you get a rich view of all of your marketing interactions with customers, including their website visits, email interactions, purchases, campaign responses, social activity, and data history
- Offer progressive profiling so you can easily create dynamic forms that recognize known visitors and pre-populate any existing fields, all the while gathering additional information for each visitor's unique record in the database
- Use advanced segmentation to combine real-time triggers, demographic fields, and behavioral attributes into a single list that automatically changes as customers change

# VISION SNAPSHOT: CURVES GRADUATES FROM EMAIL TO MARKETING AUTOMATION



## Challenges

Started in 1992, Curves has grown into the largest fitness franchise in the world, helping women in over 90 countries lead healthier lives. Curves empowers women to take a practical approach to diet and exercise and combines this with a supportive club environment. With its tremendous growth, Curves grew largely on word of mouth without advertising or focused digital strategies. The company already had an abundance of valuable online resources, but most were only accessible to its members.

Curves leaders recognized the need for a strong, visible presence on the web. ***“We want every woman to see how much we can offer them in support of their fitness and weight loss goals,”*** explains Jacob Stark, Curves’ Director of Digital Strategy. ***“To be a thought leader, we needed to centralize those resources so that anyone, member or not, could go and quickly find what she needs.”***

Curves’ traditional email service provider was competent with traditional batch and blast email formats but those formats lacked crucial functionality to communicate relevant, conversational

content to potential members across multiple channels. To get back to the heart of Curves’ mission to “strengthen women inside and out,” Curves turned to Marketo.

## Marketo as the Solution

Curves heard about Marketo through their web development company. Stark and his team were also impressed by the amount of content Marketo shares with the world. ***“I realized that Marketo, too, is a thought leader in its industry,”*** adds Stark. ***“Marketo was providing a model of the path we want for Curves.”*** In order to distribute thought leadership to customers, Curves needed a solution that built meaningful conversations with its audience whether they were members or not.

Marketo’s marketing automation solution will help Curves create personalized, targeted conversations with potential clients to nurture leads into customers. While the previous solution sent leads directly to the bottom of the funnel, Marketo enables top and middle-of-the-funnel lead nurturing. Rather than simply placing leads in buckets of ‘ready to purchase’ or ‘not ready to purchase,’ Marketo offers a solution that can engage

and nurture leads through the buying cycle. Even in the period when consumers aren’t yet ready to make a purchase, lead marketing keeps Curves top-of-mind with the buyers. The Curves’ team was also impressed with Marketo’s simple, easy-to-use interface.

## Vision with Marketo

Curves recognized that the batch and blast emails with their previous email service provider weren’t going to build lasting relationships. What they needed was the more sophisticated approach that a solution like Marketo could offer. Curves intends to leverage Marketo to open the doors to its community.

By broadening the scope of their content, Curves can help invigorate people who have not yet succeeded at meeting their fitness and weight loss goals and demonstrate how Curves can be a partner and a supporter through the process. ***“We want them to feel support from other members, and from the company, as soon as they land on our website. We know that we gain the most influence with personalization and talking to our members about their specific journey,”*** says Stark. ***“Marketo gives us the power***

***“We want potential members to feel support from current members, and from the company, as soon as they land on our website. We know that we gain the most influence with personalization and talking to our clients about their specific journey. Marketo gives us the power to do that.”***

**– Jacob Stark**  
**Director of Digital Strategy, Curves**



***to do that.”*** Curves’ plan is to begin using Marketo for corporate marketing initiatives before introducing the solution to its franchise owners. With Marketo, Curves can nurture leads across channels to include social media.

Curves excels at developing community and conversation, and now with Marketo, Curves can leverage those strengths to incentivize people to take action. ***“With these tools, we can demonstrate to women that Curves is a group who will be involved in supporting their success. We can show people that Curves is a company they want to be working with.”***

# CONCLUSION

# ENGAGING EMAIL MARKETING

The old batch and blast model of sending one email to a big bucket of subscribers is no longer effective. Today, your emails must truly engage consumers.

Today's email marketing demands that your messages be: trusted, relevant, conversational, coordinated across channels, and strategic.

## Trusted

Information overabundance reigns, so consumers have become more sophisticated and savvy about focusing their attention where it counts. To get past their filters, you have to establish trust with consistency. Set an expectation in your very first email to subscribers and stick to it. You must also create the right opt-in process for your brand, offer consumers a convenient online subscription center, and honor what we call The Subscriber Covenant: send your subscribers emails they want, when they want them, and use the data you collect to send targeted, relevant information. By setting and keeping consistent expectations around your email marketing, you develop a relationship with each subscriber and become a familiar and welcomed presence in his inbox.

## Relevant

To be relevant, you not only have to know the demographics and firmographics of your subscribers, but also how they behave. Use your metrics, test often, and segment your subscribers into smart lists. Apply sophisticated behavioral filters to pinpoint their browsing and purchasing behaviors across channels. Most companies aren't doing this very well, so engaging consumers with relevant messaging will put you way ahead of the competition.

## Conversational

Listen to your audience, adapt to your subscribers' changing needs, and tell engaging stories over time. Engaging content is, above all, human — written by humans for humans. It's conversational, friendly, and never boring. Use behavioral targeting and dynamic content to create two-way email conversations that are not only trustworthy and relevant, but also interesting. Your content should always answer the question that's on every subscriber's mind: What's In It for Me? And your answer should be specific and compelling in every single email you send.

## Coordinated across channels

Email is the digital glue that holds all of your marketing together. Your email marketing must integrate with every channel you market through — your website, including landing pages; your blog; and all of your social media pages. When your email marketing exists in a silo, you're incapable of being effective in today's omni-channel world, where consumers jump seamlessly from email to your website to social. No matter which channel a consumer is in, each conversation you have with him should pick up where the last one left off. The only way to do this is with an automated tool designed to integrate email marketing across the Web.

# CONCLUSION

# ENGAGING EMAIL MARKETING

Email service providers are antiquated. Automated marketing platforms are designed to engage and convert your subscribers within and beyond your email efforts. *It's time to move beyond the term email marketing. The future lies in engagement marketing.*

## Strategic

Targeted, engaging emails call for better metrics that measure the levels of customer engagement with your brand and, more importantly, the actual ROI of your marketing campaigns. Old school email service providers (ESPs) can't deliver the metrics that automated marketing platforms can. Your Sent, Opened, Bounced, and Clicked numbers are important, but they don't tell you everything you need to know.

Automated marketing platforms deliver explicit engagement scores that take all the guesswork out of your marketing strategy and give you tangible figures from which you can make strategic marketing decisions that actually map to company goals. With automation, you can finally measure the true impact of your marketing.

"Successful engagement requires marketing automation."

– IDC



"Email Marketing. The future is very bright."

– Scott Hardigree  
Founder at Indiemark



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# APPENDIX: REFERENCE LINKS

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(bit.ly/gjKFvg)

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# #DG2EEM

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## About Marketo:

### Marketing Software.

### Easy, Powerful, Complete.

Marketo (NASDAQ: MKTO) provides the leading cloud-based marketing software platform for companies of all sizes to build and sustain engaging customer relationships. Spanning today's digital, social, mobile and offline channels, the Marketo® solution includes a complete suite of applications that help organizations acquire new customers more efficiently, maximize customer loyalty and lifetime value, improve sales effectiveness, and provide analytical insight into marketing's contribution to revenue growth. Marketo's applications are known for their breakthrough ease-of-use, and are complemented by the Marketing Nation™, a thriving network of more than 150 LaunchPoint™ ecosystem partners and over 30,000 marketers who share and learn from each other to grow their collective marketing expertise. The result for modern marketers is unprecedented agility and superior results.

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