HOPEWISER

New message

To

Subject

Email Marketing Best Practice|

The objective of this guide is to provide you with the essential information required to set up and deliver successful and compliant email marketing campaigns based on best current practices.

The guide focuses on the most crucial aspects of email marketing; it does not consider the specific functionality of the various Email Service Providers (ESPs)[1]. We believe this approach means the guide will be relevant to you, irrespective of the ESP you use, or plan to implement.

This guide does not assume you have any previous email marketing experience. Therefore, it offers insights for beginners and those with more advanced skills.

BACKGROUND

Email marketing is key to any marketing strategy. It is a powerful channel that allows the delivery of your brand, products, services and messages directly to your contacts' email inboxes.

You need to create emails that reach your recipients, encourage them to open and then engage with your content.

We can summarise four distinct phases of an effective email marketing campaign:

1 Deliverability

Maximise the number of contacts who will receive your emails.

2 List-building

Capturing contacts' email addresses and other first-party or zero-party data (more on this later!)

3 Segmentation

Choose the best possible match between your target audience and your content.

4 Content Creation & Engagement

Develop your message and offers to achieve your desired outcome. For example, brand development, product awareness, education, or lead/sales generation.

Send

[1] ESP is used throughout this guide to refer to an Email Service Provider. ESPs are web-hosted email delivery platforms that provide the functionality required to send bulk email campaigns to your target audience.

By following this guide, you'll be well on the way to creating email campaigns with high impact designs, great content and enticing subject lines. But, after so much hard work, how do you ensure your email gets to the inbox of your contacts?

Unfortunately, the rise in spam and phishing emails means even ethical marketers now must navigate the various automatic spam filters. These filters are on the receiving email systems, and they determine if your content is safe and worthy of being delivered to their intended recipient!

Another deliverability consideration is the validity and accuracy of the recipients' email addresses in your list.

There are four essential steps you must take to maximise the deliverability of your emails:

1. Choose a unique email sending domain or sub-domain
2. Add email domain verification
3. **email address validation** of your contact list
4. List warming

The set-up of the unique email sending domain and email domain verification is only carried out once. So too is the list warming. However, *email address validation should be carried out on a regular basis.*

The following sections explain these processes in more detail.

EMAIL SENDING DOMAIN

When you send your day-to-day emails, they will likely be sent from your organisation's domain (mycompany.com) or a sub-domain (email.mycompany.com, sales.mycompany.com etc). Because you're not sending mass emails from these domain/sub-domains (or you shouldn't be!), there is very little risk of them being blacklisted.

However, there is always a risk of being blacklisted when you send bulk emails. That risk will increase with the size of your list, particularly if your email data is low quality (see email address validation later).

Creating a unique sending domain or sub-domain that is reserved for your email campaigns means any issues that arise from sending bulk emails will not affect your corporate communications.

As an example, a unique sending sub-domain might be send.yourcompany.com (assuming that sub-domain, 'send', is not being used in any other part of your organisation). Alternatively, you could choose a Top-Level Domain (TLD) that your organisation is not using, however, be sure it reflects your organisation's brand.

Once you have chosen your unique sending domain for your email campaigns, you're ready to set-up email domain verification.

EMAIL DOMAIN VERIFICATION

When using a 3rd-party ESP, your email is being sent via their email servers. This makes it difficult for a receiving server to determine if your email is really being sent by your organisation or by a spammer.

With a reputable ESP, their sending domains/ IP addresses should be whitelisted and so more likely to be accepted by receiving email servers even without email domain verification in place. However, a spammer could still create an account with an ESP and send emails that look like they are from your organisation. Therefore, some receiving email-servers will treat unverified domains with suspicion.

Verification attempts to increase the confidence of the receiving email server that a) the email really is from your organisation and b) the content of your email has not been intercepted and changed after your sent it.

So, how do you verify your emails and email domain? With SPF, DKIM and DMARC! Don't worry, we will explain what that means next...

- **SPF** stands for Sender Policy Framework. It's a method for authorising your ESP to send email on your behalf.

- **DKIM** stands for DomainKeys Identified Mail which ensures your email has not been altered after it was sent.

- **DMARC** stands for Domain-based Message Authentication, Reporting and Conformance. Effectively this ties SPF and DKIM together. It provides a reporting mechanism back to the recipient's receiving email server telling it what to do with the email if it is considered suspicious. Not something a spammer would implement, which is why it improves confidence that the email is from a reputable source.

Your ESP will have tools to help you generate SPF, DKIM and DMARC records. These are then added to your email-domain configuration DNS[2] – this will usually require support from your IT department to set-up if you don't have the technical skills.

Once SPF, DKIM and DMARC are set-up, a receiving email server can look-up these records every time an email is received from your organisation via your Email Service Provider (ESP); the server will be confident the ESP is authorised by your organisation to send these emails on your behalf and that they have not been altered. A useful tool for monitoring your sender reputation is **Send Forensics**.

The other benefit of email domain verification is the recipient won't see a reference to the email having been sent by your ESP e.g. the sender displayed as 'yourESP on behalf of yourOrganisation'

Not only does that look better to the recipient, but it should also uplift open and click-through rates as their confidence will be higher that it is a genuine email sent by your organisation.

[2]The Domain Name System that translates domain names to their IP addresses.

EMAIL ADDRESS VALIDATION

The email addresses in your list may be malformed (data-entry error or spam) or even non-existent. For example, if a contact has gone away, web forms being submitted maliciously by a bot, or website visitors that didn't want to leave their real email address to download your latest whitepaper!

A large number of inaccurate or invalid emails will increase your email sending costs (based on list size) and may damage your sender reputation. This is because a high number of bounces (invalid, undeliverable emails) may be considered as spam.

For these reasons, the cleansing of your email lists should be as important to your organisation as the cleansing of your contacts' postal addresses.

Email validation, such as the service provided by Hopewiser, analyses each email address in your list and returns a report detailing which emails are deliverable, unconfirmed, unverifiable, disposable, undeliverable and harmful. All without sending any emails.

Once your list has been validated, you can be confident your emails are being sent to active and verified email addresses.

LIST WARMING

List warming is essential to improve your sender reputation, particularly when using a new sending domain or ESP.

It's an approach whereby you gradually increase the volume of emails you send with a specific focus on high engaging segments of your list i.e. contacts who are more likely to open and click your emails, and less likely to mark them as spam.

Start with small segments of 50 or so contacts per campaign and gradually increase the segment size over a period of about 2-4 weeks. During the warming phase you should be aiming for open rates of 20% to 30% and certainly no less than 15%.

Typically, high engagement segments to include in the warming phase are:

- **Recent web leads**

- **Customers**

- **Active website users**
  in the past 30-days or so

- **If you have an ecommerce business with marketing automation,** switch on automated flows for your welcome series, abandoned cart and browse abandon.

CONTENT CREATION

Emails are created in HTML (Hyper Text Mark-up Language) which defines the basic structure as tables, rows and columns. Content is then added – text and images – to the HTML plus CSS (Cascading Style Sheets) to handle the presentation of that content e.g. font-type and size, colours, attributes of the tables, rows and columns etc.

Historically, emails were built by coding HTML and CSS. While this is still done in some circumstances, email templates provided by your ESP simplify the process of email creation as they already contain the HTML structure and CSS presentation; you just add pre-defined blocks of HTML layouts and content as needed – it's all point and click with no coding required!

BRANDING & TYPOGRAPHY

All your communications in the public domain should adhere to your brand-style guidelines with respect to the choice of colours, button styles, icons and font-type used. If you do not have brand guidelines, it's best to create one prior to any email campaign.

TONE OF VOICE & COPYWRITING

The tone of voice of your email should always reflect your brand and be relevant to your audience. This means they will be more likely to respond positively to your copy as it feels relevant to them.

As an example, compare these two (slightly dry!) paragraphs for a fictitious company, Atom:

> "Atom is delighted to announce the arrival of the new SQX office chair. It can be purchased today from our online shop. The SQX brings a new level of comfort by adapting dynamically to any body shape. It achieves this with its patented, memory-foam padding that means users will experience less contact pressure than with padding often found in traditional office chairs."

With this paragraph, which adopts a warmer and friendlier approach, but still sounds professional (the changes are highlighted in *red*):

> "*We're* delighted to announce the arrival of *our* new SQX office chair. *You* can purchase it today from our online shop. The SQX brings a new level of comfort by adapting dynamically to *your* body shape. It achieves this with its patented, memory-foam padding that means *you* will experience less contact pressure than with padding often found in traditional office chairs."

These are trivial changes, but the second paragraph is more personal, and the recipient will feel like you are speaking directly to them; they'll be more likely to engage with your content and take the action you desire.

Other tone of voice considerations are dictated by your brand and market. For example, taking a formal or informal approach to copywriting. Current practice, particularly with Direct to Consumer (DTC) brands, is to keep the copy light-hearted and conversational (unless the subject is of a serious nature) however, it must always be respectful.

The copy you write when promoting a product or service should always include the features and the benefits they deliver to your customers.

The previous example paragraphs on the SQX office chair emphasises the customer benefit of the product (improved comfort), while the feature is the memory-foam padding that delivers this benefit.

It is also important to consider if the benefits you are promoting are important from your customers' point of view. If it is not, then it is not really a benefit and should be re-framed as such or disregarded.

Recipients of your emails will likely scan for content that is important to them and to determine if it's relevant and worthy of reading in more detail, or to ignore it. You can help them through emphasis and by "*chunking*".

Emphasis helps draw the recipients' attention to key phrases or messages; it can be achieved by bolding the text or linking it to a web page or document (so it's underlined anchor text).

Chunking is another technique to make your email easier to read. Basically, this means breaking longer paragraphs into shorter ones wherever possible.

As an example of these two approaches, consider the earlier email from Atom:

"We're delighted to announce the **arrival of our new SQX office chair**. You can purchase it today from our online shop [link to the product page].

The SQX brings a **new level of comfort by adapting dynamically to your body shape**. It achieves this with its patented, memory-foam padding that means you will experience less contact pressure than with padding often found in traditional office chairs."

SUBJECT LINES (AND A/B TESTING)

A well-written email subject-line must grab the recipient's attention and encourage them to open it! However, it must also be consistent with the content of your email otherwise it will be misleading and may annoy the recipient.

As an example of developing a subject line, let's say our content is the launch of the SQX office chair mentioned previously. We could start with:

[subject line A]: Meet the new SQX - our most comfortable chair yet!

You usually have the option to personalise subject lines with dynamically inserted content which can uplift open rates. Using a recipient's first name for example:

[subject line B]: Jane, see the all-new SQX - our most comfortable chair!

A/B testing of subject lines is supported by most ESPs, so you could split-test each subject line to see which receives the most opens or clicks. Often, you'll be surprised by the results and which subject line is the winner! Obviously, to achieve meaningful statistical results, your list size needs to be reasonably significant.

With A/B testing, your email is sent to a sample of your list. For example, 20% will receive subject line A and 20% will receive subject line B. The subject line that returns the most 'opens' will be used for the remaining 60% of your list.

ESPs will allow you to choose your own percentage split for the A/B sample size and the duration of the test. For improved statistical significance, plan your email send times so you can choose the largest test duration possible. Certainly not less than 4-hours. This gives recipients plenty of time to open your email.

CONTENT A/B TESTING

In addition to A/B testing of subject lines based on open rate, many ESPs will also support A/B testing of content. With this approach, you typically create two emails that have different content - this could be text, images and/or layout.

As with subject-line testing, both emails are sent to a sample and the winning content is sent after a set period. For content testing, the measured metric is usually unique clicks on all links or on a specific link within your email.

IMAGES

Striking images within your email will make it more attractive, help to communicate your key messages and improve engagement.

You will upload your images to your ESPs for hosting during email creation. In this way the image is not downloaded into the recipient's email until they open it (providing they have 'display images' switched on).

Some image considerations:

- **License your images**
  You should only use licensed images or your own images to avoid copyright infringement. Even if you have licensed your images, make sure you know what that licence includes i.e. are they OK for commercial use? Do you need to attribute the image creator/licence holder?

- **Keep text-to-image ratio in mind**
  As a rule, your text should make up most of your email content; emails that are mainly composed of images should be avoided as they can trigger spam flags and may not be displayed (see next point).

- **Keep your key messages as text**
  Do not include images that contain your key messages unless they are also repeated within the email's text. If a recipient has 'display images' set to off, they won't see them!

- **Check the image file-size and optimise**
  Image file-sizes can be very large particularly if you source your images from an image library. The larger the file size, the more time it will take for the recipient's client to display that image; a slow response will reduce engagement particularly if the recipient is viewing your email on a mobile, when not connected to Wi-Fi.

- **Always include the image alt text**
  This is the text associated with an image, if images are set *not* to display in the recipient's email client. Therefore, Alt text adds additional context to your email content if the recipient cannot see the image.

- **Link your images**
  When possible, always link your images to the relevant destination even if it has associated text with a link. Some recipients will click the image first.

- **Never embed the image itself into your email**
  Your images should always be hosted with your ESP, with links to those images within your email.
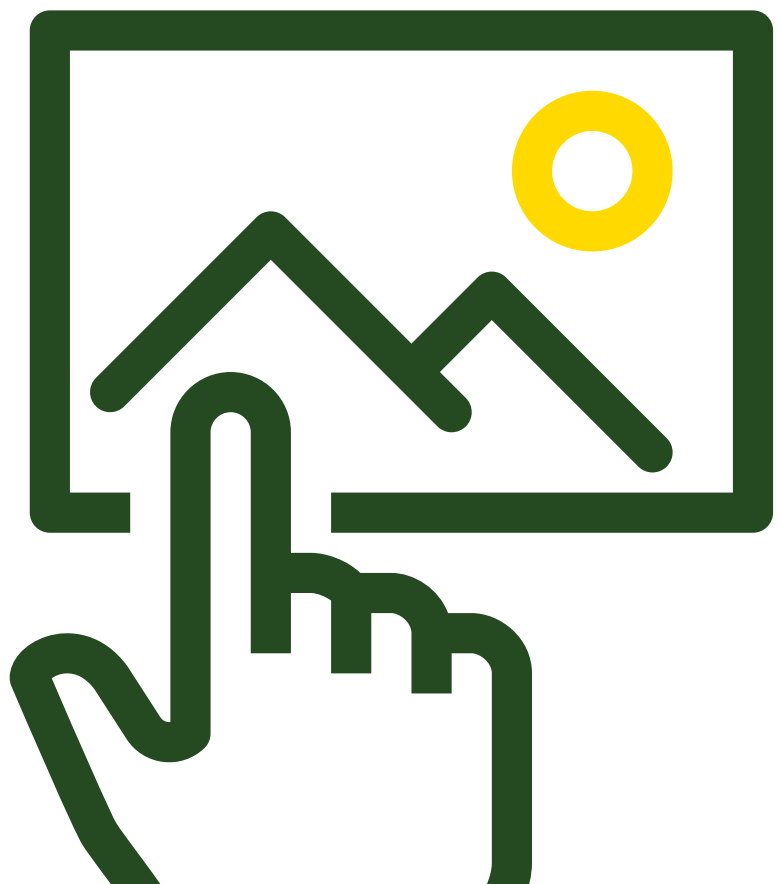
PREHEADER TEXT

Most ESPs support preheader text. The preheader is the first line of text that appears beneath the subject line in the inbox of mobile devices (and some desktop email clients such as Gmail) so it is an important element to convince recipients to open your email.

Though most mobile devices display 75 to 100 characters, you should focus your message upfront to catch the reader's attention and encourage them to open your email. A simple test is to view your email on your mobile to see how it displays.

PERSONALISATION

Personalisation is when you make the email subject line or content specific to an individual. In its simplest form, personalisation dynamically inserts a contact's personal details into your email such as their first name, surname, title and/or company.

Basic personalisation in this way is supported by most ESPs and, if done correctly, can improve email open-rates and engagement.

It's important to provide a personalisation fallback value if the contact data you want to insert does not exist for some of your contacts.

As an example:

> Hi [firstname,fallback=there],

If the data in your list does not include a contact's first name, the ESP will "fallback" and insert your specified value; in this case it will display to the recipient as "Hi Steve" if that recipient's first name is available in your list, or "Hi there" if it has no value.

Be sure to review your list for 'inappropriate data and correct it before adding personalisation. Sometimes subscribers to your list will use their email address as their first name!

OPTIMISING FOR MOBILE

It is likely that many of your recipients will view your emails on their mobile devices, therefore, it is important to ensure your emails are optimised for both desktop and mobile devices.

Email templates provided by your ESP should already be responsive and optimised for mobile devices – but make sure you check that this is true. A quick test is to always view your emails on a mobile device as well as on a desktop device. We've more about testing later in this guide.

LIST MANAGEMENT

LIST BUILDING

There's no shortage of suppliers offering email lists to purchase or to rent and whether these are worthwhile for your needs depends on many factors. Certainly, the reputation of the supplier is important and so too is how closely the contacts on the list match your target audience. You should always review the demographic data of any list you are considering.

Equally important is whether the supplier can assure you that those contacts have explicitly opted-in to receive emails from 3rd-parties. Get that in writing!

However, engagement will typically be lower from a 3rd-party list than building your own email list organically. So how can that be achieved? This is where zero-party data and first-party data are relevant.

Zero-party data is just the industry term for personal information a contact provides to you willingly i.e. with consent. That could include their name, phone number and company. To build your list using zero-party data you need to think in terms of an exchange: you offer a gated asset[3] - it could be a guide, whitepaper, or just more information (a contact form) – and the contact will provide their details in exchange.

First-party data is typically gained from an interaction with a contact, usually their website activity and transaction data if you have an ecommerce business. First-party data is still consensual if you provide the ability for a contact to opt-out of website analytics.

By combining zero-party data with first-party data you have much greater flexibility to segment your list and therefore improved targeting and personalisation.

SEGMENTATION

Segmentation is when you identify groups of contacts who share a common attribute or interest that you hold as data in your list.

For example, contacts within specified age bands, contacts who have purchased or viewed a product or service on your website, or contacts who are within 50-miles of your organisation's office for event invitations.

Segmentation is important because you can create email content that is tailored to a very specific audience. This will increase the relevance of the email to that audience and will usually improve engagement, including more opens and more click-throughs on the links within the email.

Segmentation is only limited by the available zero-party data and first-party data you hold, and by your imagination!

[3]A gated asset is one that can only be received by the contact submitting the information you have requested.

THE UNSUBSCRIBE PROCESS

All your promotional emails must have an unsubscribe link to be GDPR compliant, and it's good for your reputation too! When an individual clicks this link, the ESP will automatically unsubscribe that individual by adding their email to an unsubscribe list (or suppression list) and they will no longer receive your email campaigns. Most ESPs allow you to configure the unsubscribe list so it is applied globally or to a specific list. It's important to understand the difference.

As an example, suppose you have a contact who has subscribed to two of your lists: one list is for newsletter opt-ins and the other list contains competition entries. If you have configured your unsubscribe as being specific to a list, when that contact unsubscribes from a newsletter email you've sent them, they will no longer receive your newsletter; however, they will still receive emails you send to your competition list.

This is why it is best practice to configure your unsubscribes as a global suppression list so that unsubscribed contacts will receive NO future emails irrespective of which of your lists include them, avoiding compromise to your brand and reputation.

You also need to give special consideration to individuals who unsubscribe by contacting your organisation by replying to your emails or by calling you by phone: where does that opt-out get recorded and how is it added to your ESP unsubscribe list? This can be achieved manually, however, the best approach is to automatically synchronise your master lists in your preferred Customer Relationship Management (CRM) with the lists held by your ESP.

SUNSETTING CONTACTS

Sunsetting is a list clean-up process that can be controversial in many organisations!

Why? Because it is a process of identifying any non-engaging (and non-purchasing contacts) and removing them from all your future communications i.e. opting them out without those contacts making that request. Reducing the number of contacts in your list may appear counterintuitive, but there are benefits to doing so.

The most obvious is it will help your sender reputation with your ESP and with receiving email servers - they don't like seeing emails that are never opened and/or clicked, they look spammy! And if a contact is not engaging with your emails over an extended period, you're just shouting, and nobody is listening...

Removing long-term, unengaged contacts also improves your email metrics so they better reflect the actual performance of your campaigns. Finally, you're paying for those unengaged contacts; removing them and reducing your list size may drop you to a lower subscription tier with your ESP.

The criteria for sunsetting are flexible and you should experiment with segmentation before removing contacts. However, a good starting point is:

- Non-opens/clicks from past 6+ email campaigns **AND**

- Have never purchased **AND**

- Have not been active on your website for the past 3-months.

REVIEW & TESTING

By far the most important aspect of any email marketing campaign is proofing and testing! If you get this stage wrong, everything you have done to create your email campaign is compromised.

An email with errors will be bad for your brand and likely regarded by the recipients as unprofessional; it may even lose sales and/or encourage negative responses from recipients – both privately (replyto emails) and publicly (social media).

Here are some fundamental things that can go wrong with the content of your email:

- **Personalisation** not working correctly or including test values in a live send
- **Broken links** or links not pointing to the correct web page

- **Prices** in your email are different to the pricing on the destination page
- **Errors** in spelling and grammar
- **Email formatting issues** in different email clients
- **Not optimised** for mobile devices
- **Including content** that may trigger spam filters.

To minimise the risk of these potential errors, here are six review processes that should be followed prior to any final, internal approvals and the sending of your email:

- **Initial visual inspection**
  Visually inspect your email and read through the content at normal pace. At this stage you're looking for the most obvious errors in content and formatting. Also check what it looks like on a mobile device. Is it responsive and legible?

- **First proofing**
  If your ESP does not include an automatic spell-check of your content, copy and paste your entire email into Microsoft Word as plain text. Make sure spelling and grammar checking in Word is enabled. This should highlight most errors in the text which can then be corrected in your original email content. Don't forget to also check your subject lines for spelling and grammar! Another useful technique while your email content is in Word is to use the 'read aloud' function. Listening to your text read back to you, may identify some additional grammatical errors and misspellings.

- **Check your links**
  Manually click each text AND image link within your email. Check that they open correctly and that they link to the correct destination. Also be sure that the content you're referencing on a specific page is unchanged from when you first drafted your email.

- **Final proofing**
  Unlike the read-through in the initial visual inspection, the final proof should be carried out very slowly and read aloud to capture any missed errors in spelling and grammar. You should read the text with longer than usual pauses between words. When you come across a contraction such as you're, they're, we're, expand the contraction when reading it. In this way, your brain is less likely to compensate for any errors.

- **Client and spam testing**
  Most ESPs provide testing of your email across a range of email clients to make sure it appears as it should and that it will pass the most common spam filters. This may be included in their subscription or at an additional cost per email tested. It is certainly worth doing this if you are using a new email template or if you have concerns about any words that may be regarded as spam.
  (See Spam considerations).

- **Final test**
  Once the previous steps have been completed, send the email to yourself using random personalisation and the fallback values. In the received email, check all the links again. Your email should now be ready to send to your contact list.

There are several useful tools for testing how your emails will appear across a number of email clients (assuming your ESP doesn't offer this service). Two of the leading providers are **Litmus** and **Email on Acid**.

WHEN TO SEND YOUR EMAIL

Determining when the best time is to send your email is not an exact science. However, there are two useful sources to help you decide the best day of the week and time of day to send your emails.

One source is your Facebook data and the other is your Google Analytics data. Use the data provided by these tools to review when your FB fans and website visitors are most active.

However, it is unlikely that either will provide you with a definitive answer but together they will give a sense of when is the best time to send.

RESEND TO UNOPENS

Resending your email to recipients who did not open it the first time will increase your open rate. It is a common email campaign tactic, but you should be aware that it may also increase your unsubscribe rate if recipients perceive it as spam. However, the increase in the open rate will almost always outweigh the increase in unsubscribes.

As with many aspects of email marketing there are conflicting views regarding the best time to carry out these resends. Somewhere between one and four days is generally regarded as best practice.

You should test how your specific audience responds to a resend.

MEASURING YOUR CAMPAIGN PERFORMANCE

There are two ways to measure the performance of any email marketing campaign: the engagement with the email itself and the post-click activity of the email recipients.

ENGAGEMENT ANALYSIS: EMAIL SYSTEM METRICS

There are several primary metrics that ESPs provide to evaluate the performance of your email including:

- **Unique opens**
  This is the count of the number of recipients who have opened your email at least once. If a recipient has opened your email multiple times, they will only contribute one unique open to this count.

- **Non-opens**
  This is the count of the number of recipients who did not open your email. This group may also contain recipients who opened your email but did not have 'display images' enabled.

- **Open Rate**
  The open rate percentage is a measure of how many of your contacts within your target list received (non-bounce) and opened (viewed) your email. ESPs express this as a percentage and, typically, it's based on unique opens. For example, a 20% open rate means that out of every ten emails received, two recipients actually opened it.

- **Click-to-Open**
  This is a percentage measure of how many recipients clicked on a link within your email compared to the number of recipients who opened it. Links includes text links and image links. It is usually calculated [(unique clicks on any link/unique opens) x 100]. You should check how your ESP calculates click-to-open.

- **Bounces and bounce rate**
  Bounces are the number of recipients known to have not received your email i.e. where the receiving email server notifies your ESP of non-delivery. Bounce rate is the number of bounces calculated as a percentage of the total number of emails sent. There are several reasons why a bounce occurs to an email and these are detailed in the later section of this guide 'Bounces Types – ESP'

- **Email unsubscribe rate**
  This is a measure of how many unique recipients clicked the unsubscribe link in your email. It is calculated as [unsubscribes/unique recipients) x 100]
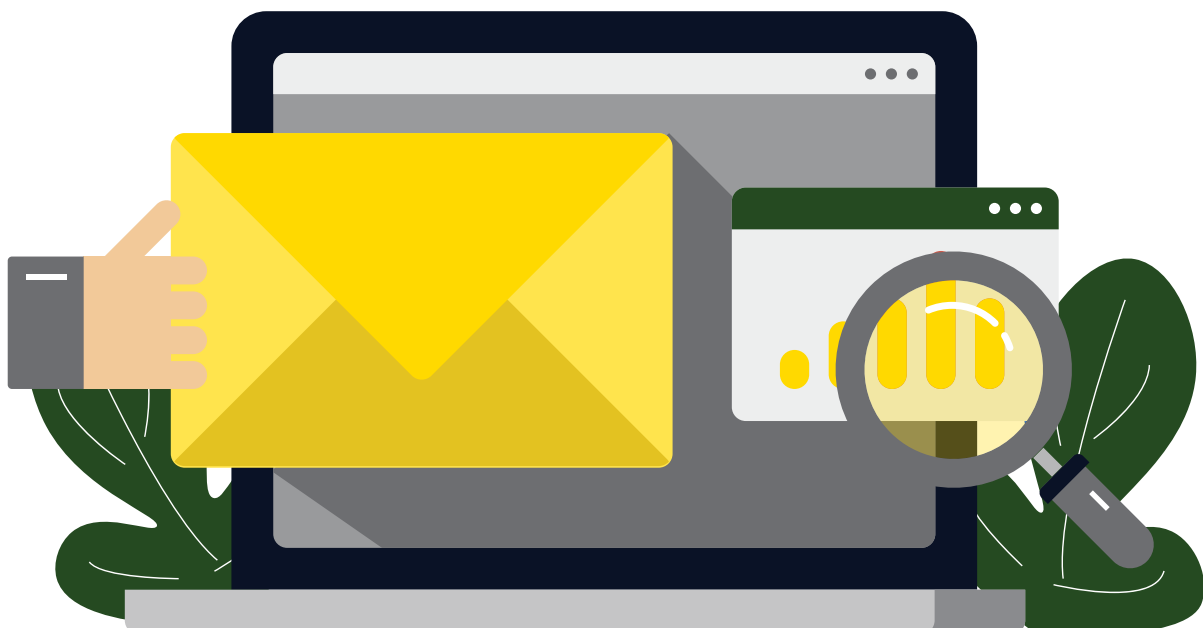
POST-CLICK ANALYSIS: TRACKING VISITOR BEHAVIOUR

Most ESPs support the creation of Google Analytics (GA) tracking urls that are automatically inserted into your email. This functionality may not be enabled by default so check how to do that with your ESP.

Once GA tracking is enabled, the ESP will automatically add tracking values to the end of the destination urls of all the links within your email. With this information, GA can correctly capture and attribute session and user data. A tracking url will typically look like this (with example values):

> https://yourorganisation.com/?utm_source=espname&utm_medium=email&utm_campaign=summersale&utm_term=anchortext

Here's an explanation of these elements using the above example:

- **utm_source=espname**
  The name of the ESP you used to send the email campaign.

- **utm_medium=email**
  This is so GA knows that the sessions starting on the destination web-page originate from an email campaign.

- **utm_campaign=summersale**
  This is the name you gave your email campaign

- **utm_term=anchortext**
  The word or phrase of the link text within your email

From your GA data, you should consider the following KPIs for your email campaigns:

ACQUISITION & BEHAVIOUR KPIS

- **Users and new users**
  How many unique users did your email campaigns drive to your destination web pages? How many of these are new users?

- **Sessions**
  How many sessions did your email campaigns generate?

- **Bounce Rate**
  Do bounce rates seem high from your email campaigns? Are there significant variations between different email campaigns? If so, why?

- **Pages per Session**
  How many pages do users from email consume in a single session?

eCOMMERCE KPIs

- **Product revenue**
  Have your email campaigns generated product sales?

- **Product revenue per user**
  How much product revenue per user (on average) is being generated by your email campaigns?

- **Average Order Value**
  Are average order values from email sessions changing?

- **eCommerce conversion rate**
  Is ecommerce rate from email sessions changing?

The above KPIs should be compared between email campaigns and for different analysis periods. For example, the current month compared to last month is useful, but the current month compared to the same month last year may account for any differences due to seasonality.

Another KPI that could be considered is the contribution of the email for a specific metric compared to your other digital channels. For example, is the contribution from email towards total product revenue from all digital channels changing?

UK GDPR COMPLIANCE & PRIVACY CONSIDERATIONS

The EU's General Data Protection Regulation (GDPR) is a directive that came into force for member states of the European Union on 25th May 2018. GDPR gave EU citizens more control over how organisations collect and use their personal data. In addition, it sets out specific obligations for businesses to safeguard and process personal data.

After the UK's exit from the EU on 31st January 2020, the ICO introduced the UK GDPR[4], which incorporates many of the EU GDPR's guiding principles.

A key aspect of GDPR is that individuals must have freely given their explicit consent for you to communicate electronically with them. When you gain consent, it must be "collected for specified, explicit and legitimate purposes".

Consent must also be demonstrable (i.e. you have proof of how and when it was provided), and the individual must be able to withdraw their consent at any time.

However, the GDPR concept of "legitimate interest" also provides some flexibility concerning explicit consent. An obvious example of legitimate interest is the sending of transactional emails regarding a customer's purchase.

Compliance with the UK GDPR is essential. Failure to do so can result in your business receiving a penalty of up to £17.5 million or 4% of global turnover, whichever is higher.

[4]https://ico.org.uk/for-organisations/guide-to-data-protection/guide-to-the-general-data-protection-regulation-gdpr/

THINGS YOU MUST DO FOR GDPR COMPLIANCE

- **Only send promotional emails to contacts who have given explicit consent to receive email from your organisation.** Explicit consent is an affirmative action taken by an individual, such as ticking an opt-in box on a web registration - form.

- **On any web registration form used to collect personal data,** you must include specific and unambiguous details what the individual is being asked to consent to.

- **Ensure you can show that consent is demonstrable** i.e. capture when and where the individual consented and what they consented to.

- **Do NOT implement a passive opt-in on web registration-forms.** An opt-in that's already checked by default or an opt-out that's unchecked by default are methods that are NOT compliant with GDPR

- **Include a link in every email that allows recipients to unsubscribe with one-click.** Your ESP should have an automated unsubscribe method and all reputable ESPs will not allow email to be sent if it does not include an unsubscribe link.

- **Ensure that any web registration-form encrypts an individual's data before they submit it.** In practice, this means hosting data-capture forms on secure web pages; ones with urls that begin with https://.

- **Be careful where your data is stored.** Using servers based in the USA may not be GDPR compliant. This is a complex area and many ESPs will argue that their USA based servers are GDPR compliant, but our belief at Hopewiser is that you should use European based servers to be safe. Under GDPR you can move data, if necessary, to countries where they have been granted adequacy decisions. Currently the list is: Andorra, Argentina, Canada (only commercial organisations), Faroe Islands, Guernsey, Israel, Isle of Man, Jersey, New Zealand, Switzerland, Uruguay, Japan, the United Kingdom and South Korea.

PROTECTING PERSONAL DATA

To ensure you minimise the risk of loss or theft of the personal data you hold, always consider who you are sharing this data with and why they need it – whether it's to be shared internally within your organisation or externally with a supplier.

Personal data should not be shared without first adding password protection & encryption to the file. Excel is often used to temporarily hold contact lists for email marketing purposes and the Excel file can be protected by encrypting it with a password.

We provide accurate global address and email validation and data cleansing services and software. Suitable for organisations of all sizes, our address software is fast, robust and easy to use.

Our rules-based solutions and services intelligently assess and match each address – that's why we're trusted by High Street Banks, Police Forces, and major Sports organisations.

Accuracy, Support and **Knowledge** are at the heart of everything we do at Hopewiser:

ACCURACY

Our rules-based solutions and services intelligently assess and match each address – that's why our accuracy is trusted by High Street Banks, Police Forces, and commercial organisations of all sizes.

KNOWLEDGE

We created the first address data software in 1982 and the sheer amount of data we have processed in that time sets us apart from everyone else in the market. So if we do things a little differently from others, it might be because we have information that they don't.

SUPPORT

Support is backed by our specialist development team. This means you get access to their expertise and problem-solving capabilities.

USEFUL TERMINOLOGY

GOOGLE ANALYTICS

- **User**
A user is more accurately described as unique device such as a PC, laptop, tablet, mobile, etc. used to access your website. A user could be a unique individual, however, if they access your website using a PC and then they visit again using their mobile, they will likely be identified as TWO unique users and not one.

- **Session**
A session is a unique visit to your website made by a user. For example, if a user visits your website on three separate occasions using their PC, three sessions will be attributed to one unique user.

- **Organic**
Users who arrive on your website by clicking on an unpaid listing on Search Engine Results Pages (SERPS) such as Google or Bing will be identified as being from an organic session.

- **Bounce Rate**
A user who arrives on your webpage and exits the website without visiting any other page is identified as a bounce. The bounce rate is a percentage and is calculated as the number of bounces divided by the number of sessions. Note that your ESP may define bounce rate differently from others (see section Bounces Types - ESP).

EMAIL

- **ESP**
Email Service Provider such as Campaign Monitor, MailChimp, DotDigital, Klaviyo, etc.

- **Unsubscribe**
When a recipient opts-out of email marketing. Usually achieved by clicking a link in your email.

- **Suppression list**
A list held by your ESP that contains opted-out email addresses. Your ESP will scan this list each time you send an email and suppress (not send) your email to these email addresses.

- **Bounce**
When an email you send cannot be delivered to a recipient. See Bounces Types - ESP for more details.

- **Alt Text**
The text associated with an image. The alt text is shown if images are set not to display in the recipient's email client.

- **Pre header**
The first line of text that appears beneath your email's subject line in the inbox of mobile devices and some desktop email clients.

- **Custom Fields**
These are fields an ESP will allow you to create so that you can capture custom data with your contact list. Custom fields are essential for segmentation of your lists.

For email reporting, bounces fall into two main categories: soft and hard bounces.

A **soft bounce** is when your ESP believes the issue is only temporarily stopping delivery of your email.

A **hard bounce** is a critical failure to deliver your email that can't be resolved. Often your ESP will automatically add an email address that produces a hard bounce to your suppression list.

Typical reasons for an email bounce include:

- **Hard bounce**
  Your email is permanently undeliverable to this email address. This could be because the address is fake or was entered incorrectly or the user mailbox or domain is no longer active.

- **Transient bounce**
  The recipient mail server can't deliver your email but will keep trying for a limited period. ESPs treat this as a soft bounce.

- **Mailbox full**
  The email server cannot deliver your email because the recipient's inbox is full. Your ESP may treat this bounce as a soft bounce as it is likely to be temporary. Your ESP will usually convert this to a hard bounce after several failed attempts to deliver your email.

- **Mail block**
  The recipient's email server is blocking inbound mail from your ESPs server. This may be due to your email looking like spam or a blacklisting of your ESP's sending domain or IP address – if it is the latter, you should raise this with your ESP.

- **Challenge response**
  The recipient has installed software as an anti-spam measure, that only accepts email from previously authorised senders. If the software doesn't know the sender, a challenge email is returned, requiring a specific action before the original email will be sent to the user. Your ESP may capture this as a soft bounce.

- **DNS failure**
  The recipient's email server is currently unable to deliver your email due to DNS issues on their end. Your ESP may treat this as a soft bounce.

- **Message too large**
  The size of your email — including all headers, text and images — is larger than the maximum size the recipient's mailbox allows.

- **Bounce but no email address returned**
  The recipient mail server bounced your email but it did not indicate which address it was bouncing on behalf of. This will be an issue if you have sent your email to more than one person within an organisation. You will know which organisation bounced the email, but will not be able to determine the specific receipient.

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