



## Email Marketing Pre-Flight Checklist

By Megan Ouellet, Director of Marketing • Listrak, LLC • February 21, 2007

For a successful company to grow, it needs well-defined business processes that are properly tested, highly integrated, and clearly documented. That way, new employees may be brought up to speed quickly while having the peace of mind that they are following the correct workflow, and, therefore, they are doing the job accurately.

Over time, as technology improves the processes must evolve to accommodate the changes. However, these changes must also be documented and incorporated into the business processes in order to ensure that the appropriate steps are being taken and tasks are being completed efficiently.

It is important for companies to refine and document tasks at all levels. Any job that is repeated daily, weekly, monthly, or annually should have its best practices identified and its workflow verified and recorded so organizations know they are working economically and proficiently.

One critical business process that is easily overlooked by many organizations is the pre-flight checklist for email marketing. By spending a few minutes reviewing a pre-flight checklist prior to sending out email campaigns, email marketers can ensure that their messages will be opened, read, and responded to favorably by their subscribers and target audiences. However, if this step is skipped, it could lead to disastrous results, including low deliverability, missing links and graphics, and high unsubscribe or reported spam rates.

Listrak, an award winning provider of email marketing, has put together the following pre-flight checklist that organizations may use as a guide before sending out email campaigns. However, like every other business process, organizations must test each step and decide what works best for their company.

## Have Goals been Clearly Defined?

Before marketers should even begin to write an email, they need to decide what they would like to accomplish with the campaign. Do they want to introduce a new product and drive customers to an Ecommerce site? Are they announcing a new feature and want subscribers to sign up for a product demo? Or do they want to increase brand awareness by sending out monthly newsletters to keep recipients informed on corporate news? Email marketing will accomplish all of these goals and more; however, each marketer must decide in advance what specific responses and goals they wish to achieve with each email campaign.

Email marketing goals should fit into an organization's overall business objectives. However, the goals must also align with previous performance rates from past email campaigns in order to remain reasonable and achievable. For example, if a previous email announcing the availability of a new product garnered a result of two percent of recipients purchasing the product, it is not logical to expect a similar email campaign to achieve a five percent conversion rate. Marketers should set incremental goals for each campaign and they should use targeted messaging to achieve these goals.

## Are Logistics in Place so the Campaign may Succeed?

Often times, miscommunications in the work place may doom a campaign before it even begins. Marketers must work closely with the sales and product teams prior to a campaign launch to be sure all necessary logistics will be in place the day of the announcement so they can quickly and accurately respond to customers.

In order to plan accordingly, email marketers need to understand the way customers respond to messages. After an

email campaign is sent, it is typical for 40-50 percent of all responses to take place in the first two hours. It is crucial for marketers to have everything in place to manage the amount of traffic that email campaigns generate. This includes scheduling the appropriate staff members to be available during the campaign launch, having the correct amount of inventory on hand to accommodate the expected response rates, ensuring websites and landing pages are updated and servers can handle the high increase in traffic the day of the launch, etc.

Many email campaigns have successfully captured the readers' attentions only to fizzle when the website crashes due to a sudden spike in volume or the sales team or the product itself is unavailable at the time of launch when demand is greatest. Having a well-defined plan in place before the email campaign is sent will greatly increase the marketer's ability to reach his or her goals.

## Are Tracking Tools Available?

Marketers must plan in advance how the messages will be tracked in order to measure its effectiveness. Without this, there is no way to know if goals were achieved.

Many email marketing service providers, such as Listrak, offer detailed tracking and analytic tools. Prior to sending an email campaign, marketers should decide how they will track the campaign to measure success. Evaluating data at random times may lead to a false impression of the actual results.

There are many factors that go into tracking an email message. The first thing a marketer should look at is the number and percentage of recipients that opened, read, and clicked through a message. Then, marketers should take it one step further and look at the individual recipients that opened, read, and clicked through the messages. Marketers should also monitor items such as unsubscribe rate, forward rate, bounce

reports, etc. They may also track more detailed reports, such as geographical tracking and visual overlay tools. The more details they have, the more accurate the results will be.

Marketers may also want to integrate web analytics with their email marketing software. Doing so will give them the tools they need to build detailed customer profiles that may be used to send targeted emails based on their website viewing habits. For example, a customer may click through the email campaign to arrive at the landing page, and from there, he or she may click through to the company's website. While it is important for companies to know which subscribers are viewing their sites, they can use web analytics to find out which pages the subscriber visited, which links were utilized, and what information was downloaded. Knowing this information prior to sending an email campaign will boost campaign performance as marketers may design future messages based on the usage habits of their subscribers.

Setting goals in advance and putting together the tools needed to successfully run the campaign and track the responses will help the marketer build a profitable and lucrative campaign.

## Has the List been Segmented and Reviewed for Errors?

Prior to sending the message, marketers must decide which subscribers are best suited to receive the message and which ones will have the highest probability of responding to the offer. It is a mistake to skip this step as studies have shown that targeted email campaigns have a 250 percent higher response rate than general email blasts. This means that the marketer can send the message to fewer people but generate a greater response because the emails are personalized and customized to the needs of the recipients.

There are many ways to segment the subscriber list. Marketers

may decide to send a message to a particular geographical region or a certain age group. They may even use more detailed information, such as product preferences or purchase history, to determine the correct audience.

This is also a good time to focus on list hygiene to ensure messages don't bounce due to misspellings. Many email marketing software packages, like Listrak, have this feature built in so errors such as sam@alo.com, jane@yahoo.com, and sarah@gmail.cmo are corrected automatically before being sent out.

## **Has the Campaign Content been Reviewed?**

Email marketers only have a matter of seconds to convey their messages to the readers so messages should contain a concise message consisting of a bulleted list of important points and a clear call to action. Email marketers should keep messages brief and to the point.

Prior to sending a message, marketers should review the message several times paying close attention to the call to action, personalization, unsubscribe and contact links, and, most importantly, empty claims and hyperbole.

Many times, marketers get overly excited about their products and they dilute the message with fancy corporate-speak, such as "We are dedicated to utilizing world-class, next generation technology to provide the world's best, most innovative solutions that are scalable and flexible enough to be used today and will grow as your company grows for use tomorrow anywhere in the world."

While messages like this have become a common form of marketing messages, email marketers must avoid it at all costs as it is wordy, unclear, and full of empty promises and hype.

## **Does the Message have a Great Subject Line?**

Much like an invitation to a party, the email subject line sets the mood of the email. It must attract the recipients while conveying the overall objective, call to action, and corporate identity of the sender. And, once again, it must be brief and to the point.

Best practices of writing a great subject line include personalizing it with the recipient's name, including an offer and a time frame, and using popular keywords or phrases while avoiding overused words such as "free" and "guaranteed". For more information, please read Listrak's white paper "Subject Line Best Practices".

## **Has the Email been Properly Designed?**

Although email is used as an informal communications tool, email marketing must be designed with the same care and attention to detail as every other marketing piece developed by an organization. If it looks like it was thrown together as an after thought, the recipients will treat it as such. However, campaigns that have a clear and simple layout, yet keep corporate branding in place, let the recipients know that the email is from a trusted source so they are comfortable opening and reading the messages. A clear and simple design will also help the message avoid spam blocks.

Well designed email campaigns include call to action buttons that make it easy for the recipients to unsubscribe, forward to a friend, and contact the sender's company. Other factors to consider when designing the campaign include the use of color and graphics, the pros and cons of HTML messages verses plain text messages, and the appearance of the message in different email clients, which is discussed later in this white

paper.

For more information on HTML verses plain text messages, please read Listrak's white paper "HTML or Text: Practical Advice on Campaign Formatting". Also, changes have recently been made with the way that Outlook 2007 renders emails. To be brought up to date on these changes, visit <http://msdn2.microsoft.com/en-us/library/aa338201.aspx>.

## **Has the Message been Tested through Spam Score?**

Many email marketing software packages, like Listrak, contain a Spam Score feature that evaluates messages using specific tests that determine whether or not the message will be delivered as spam. Spam Score not only rates the message, it also gives detailed reports on the areas of the email that may present a problem so marketers can edit the message prior to sending it to the list. A low Spam Score greatly increases the deliverability of the message.

## **Has the Message been Tested in Different Email Clients?**

After completing the message and reviewing it for errors and deliverability issues, email marketers should test the email campaign in different email clients to ensure the integrity of the campaign. This is accomplished easily as marketers only have to set up email accounts with AOL, Yahoo! Mail, Google Mail, MSN Hotmail, and Outlook, and then forward the message to the different accounts to see how the message appears through the different email services.

Even if the message looks perfect in one email client, it could be missing graphics or look sloppy due to the way the message was rendered in the recipient's inbox. If this happens, it will damage the perception that recipient has of the sender's

company. The only way to know for sure how the message will look is to test it through different email services.

## **Does the Message Comply with the CAN-SPAM Act?**

This is one of the most crucial steps of the entire email marketing process, and it is sometimes mistakenly overlooked by many companies. If messages do not comply with the CAN-SPAM Act of 2003, the sender's company may be fined or charged with a criminal and civil offense.

The CAN-SPAM Act calls for unsolicited email campaigns to have several items in place in order for the message not to be labeled as spam. However, even if sending permission-based emails, marketers should still add these items into their campaigns.

- An opt-out feature
- A valid subject line and header (routing) information
- The physical address of the mailer
- A warning label if the email contains adult content

Also, it is very important that the recipients may unsubscribe through the opt-out button or by replying to the message with common phrases such as "unsubscribe" or "remove" in the subject lines. In the past, responses like these sometimes bounced back to the members as the sender's email address either didn't exist or Spam Block wouldn't allow the message to go through due to the subject lines. Senders must set up a valid email address for responses and the inbox must be monitored daily.

## **Has the Correct Day and Time been Chosen to Send the Campaign?**

To send the message, marketers must choose a day and time

that has generated the most responses from the specific target group in the past. If this data is unknown to them, they may ask the Webmaster to research website traffic as this will show them when the target audience is most active and available. Marketers may want to split the campaign into two or three email sends in order to track the response times. While this requires more work on the front end for the email marketers, it will give them valuable information that will boost future email campaigns.

Following this pre-flight checklist prior to every email campaign will help marketers develop a foolproof business process that will greatly enhance their overall marketing strategies while increasing sales and customer satisfaction.

## About Listrak

Listrak is a leading provider of hosted email marketing software, allowing permission-based marketers to manage, send, track and grow their email marketing investment. We deliver email marketing intelligence through our intuitive web-based application. Leading marketers have come to rely on this intelligence to better manage email in their multi-channel marketing mix.

Listrak software helps companies, agencies and associations better manage customer relations in their marketing campaigns. Its web-enabled interface helps marketers engage their customers using an advanced profiling and personalization engine. Listrak's world-class support and professional services assist clients with enterprise integration. Its clients include L'Oreal, Motorola, Jeep, Pearle Vision, PR Newswire, The Islands of the Bahamas, and the Pennsylvania Department of Health.

To learn more about the many ways Listrak can strengthen your email marketing campaigns, or to sign up for a 20-minute web-based tour, visit [www.listrak.com](http://www.listrak.com).