Includes new tips for leveraging Social Media, Web Analytics & SEO!

Email Marketing Best Practices

More than 130 best practices, strategies, and tips for business-to-business email content marketing

Proteus B2B MARKETING

About this eBook

Hello, Fellow B2B Marketer!

Email marketing remains one of the best ways to reach business-to-business prospects and nurture those contacts as they progress through the buying cycle.

If you're just starting B2B email marketing, I hope this eBook provides a framework for understanding the relevant issues and increases your chances of success.

If you've been doing B2B email marketing for some time, my hope is that you'll find several new things to think about.

This eBook:

- **Features more than 130 best practices, strategies, and tips for B2B email marketing**
- **Focuses on the most popular type of B2B email marketing—content marketing, such as email newsletters**
- **Goes beyond the email itself, discussing how to integrate and leverage social media, web analytics, and search engine optimization**
- **Covers general email marketing issues as well as those specific to B2B marketing**

Note to readers: Early in this eBook we cover more universal issues of content and design (although there are some specific B2B issues in there, too.) While we could have just included those practices that relate to B2B, doing so would have ignored many other factors important in the success of email marketing. As you progress through the eBook, you'll find more and more related to issues specific to B2B email marketing.

I hope you enjoy this eBook and that it helps you hone your strategy and tactics. If you find it valuable, please share it with your friends and colleagues by using the options below.

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All the best!

Galen

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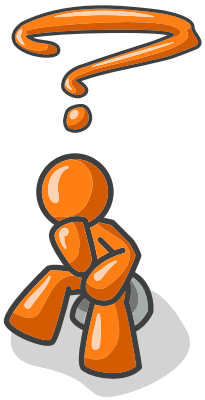
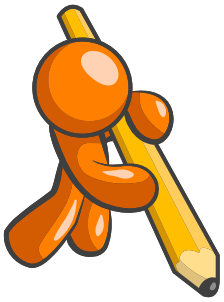
Determine your Email Strategy First



Before you decide on content, before you jump into design, you need to answer some questions:

- **Why.** Why are you doing this? What is your objective? (If you have more than one objective, prioritize them.) Is it lead generation, lead nurturing, brand awareness, public relations, positioning, something else? Whatever it is, write it down and agree on it.
- **Who.** Who are the intended recipients? What's in it for them? What roles or titles do they hold? What characterizes the nature of the organizations and the business climate in which they operate? What are their pain points? What's relevant to them? Are they users, specifiers, or buyers of your product or service? Do they make purchase decisions or just influence them? If you have groups that differ significantly, answer these questions for each group.
- **When.** At what point(s) in the buying cycle do you hope to influence recipients?
- **What.** What do you hope recipients will do? What action do you want them to take?
- **How.** How will you measure success? What will you track and analyze? How will you do this? Who will do this?
- **What's Next.** For those who subscribe, what will you want them to do next? What's the next step in nurturing the lead, deepening the relationship, building trust, reducing perceived risk, or encouraging trial?

Hard questions. Your job is to provide simple, concise answers. Organize them into a brief to be shared with and agreed upon by stakeholders. Boil it down to a single page. Design and content will go much easier once you have a strategy brief in place. You'll have a clear guide for designers and content creators, and you'll have a standard against which their efforts can be judged.



Content

Be Relevant

If you want to maintain a subscriber base and influence subscriber perceptions, you have to deliver content that's relevant to them. If you can't immediately identify how potential content is relevant to your desired subscriber base, you shouldn't proceed with creating the content. If you don't know what's relevant, ask your contacts, interview thought leaders, read and analyze content of successful bloggers and email marketers.

Create Content People Want to Share

People like great content. And if it's truly is great, they'll share it—through email, blogs, Twitter, LinkedIn, Facebook, social bookmarking sites, you name it. The opportunity for exponential reach is virtually limitless with all the convenient communication options within their grasp. So be creative. Be original. The web is full of redundant content. Give them things they can't get anywhere else.

Create an Editorial Plan

Map out the content for future issues. Create a schedule of content and the people responsible for creating it. By doing this, you'll ensure your content is aligned with your email strategy and business objectives—and you won't be scrambling to create content at the last minute. Make sure your rolling schedule covers at least three months or three issues in advance.

Provide Diverse Content in Initial Issues

Appeal to diverse interests of your subscribers. B2B prospects usually include multiple people within an organization who either directly make or influence decisions when a major corporate purchase or service contract is made. Initially, you won't know what appeals to a given recipient. By providing diverse content you increase your chance of having something relevant and valuable to newer subscribers. Let your email marketing build your brand and the relationship for a while. Later, once you have an established relationship, you can ask recipients what type of content they want or their roles in the organization. Then you can segment your lists and customize content for each segment.

Content continued

Write Good Headlines

You'd think this one would be a given, right? Go back to your email trash and read the headlines on emails you've deleted, and you'll see otherwise. Dull. Vague. Obvious. Overstated. Misleading. Irrelevant. Even dumb. This simple advice is often ignored—and no doubt, so is the email.

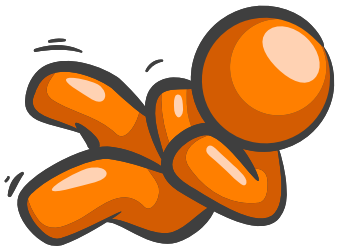
In B2B, conventional thinking suggests B2B professionals want things straightforward, direct. They're busy. All the more reason to write engaging headlines that compel readers to read copy. Unless the headlines look promising, there's little chance people will read the copy in your email, let alone click through to your site. You may have made it to the preview pane, but that's all the farther you'll go.

When writing headlines, ask questions. Promise a benefit. Solve a problem. Raise a concern. Confront a fear. Offer tips. Tell them something they don't know. Be clear and concise. If your email content continues on your website, you should also consider including keywords in your headlines that support your SEO strategies.

Use the More Link

Less is more so let your headlines and lead paragraphs entice subscribers to read more. Add a link (e.g., "read more") after the opening sentences of each article in the email. Brief copy introductions make room for more content and "more" links generate more click-through to your site.

Use Humor and Wit



Have some fun. It's an email newsletter, not an annual report. B2B doesn't have to be boring. Put some personality and life into your content. Use humor and wit to show your human side. Humor lets your subscribers know there are real people at the other end of your communications and wit shows you're also perceptive, astute, interesting, and intelligent. We know, easier said than done. So get some help writing if need be. And while humor can be great, always be careful not to offend.

Content continued

Add Interactivity

Create content that invites participation, like polls, surveys, quizzes, discussion boards, reader replies and comments, etc. Engage subscribers. Interactivity encourages engagement—and return visits.

Keep Your Call to Action Clear

When designing your email, keep your eye on what matters most. What do you want subscribers to do? Maybe it's clicking through to a specific article, or registering for something, or taking part in a survey. Ideally, your call to action should be evident in the subject line, the pre-header, headlines, links, and design.

Repurpose Older Content

Not all of your content needs to be new. You may have popular, high-value blog posts you've never featured in your email. The same might be true for a white paper sitting your archives. Also, you may want to think about creating a section in your email that promotes content from previous issues—either content that was popular or perhaps something good that previously appeared below the fold and didn't get much click-through because of its placement. Just be sure to review older content for current accuracy and relevance, and make sure any links in that content still work.

Promote Future Content

It's something that's rarely done—possibly because it's often a big enough challenge just generating content for the immediate issue, not to mention, you want each issue to have current and timely content. However, with a well-organized and managed email marketing content plan and schedule, it certainly is possible. Plan ahead. While your business readers are unlikely to wait with bated breathe until your next issue, teasing subscribers with future content may help retain subscribers who otherwise might unsubscribe (provided your future content holds something more relevant to them).

Content continued

Include a Positioning Statement

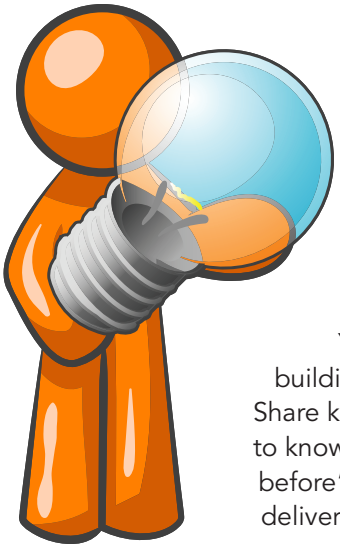
B2B companies can be somewhat nebulous. Sometimes it's difficult to discern what they do and the scope of their expertise. Make sure you include your positioning statement (not to be confused with your tagline) in the sidebar or footer of your newsletter template. Your positioning statement is that concise statement that clearly defines what you do, how you're different, and why it matters. (Don't really have one? You need one. For a whole lot of other reasons besides this.) Your readers may only know one facet of what your company does, never realizing you offer many other products or services that might be of interest to them. How many times have you heard, "Oh, I didn't know you did that?"

Also, if subscribers forward your email, the new recipient may not be familiar with your company at all. Here's a great opportunity to properly position your company to new prospects.

Keep your positioning statement to 2-3 sentences at most. If you can't do it in 2-3 sentences, you don't have a concise positioning statement. Go back and revise it.

Deliver Value—Not Self-Promotion

You've gotten them before—pseudo e-newsletters from your vendors full of nobody-really-cares content. Remember, it's about them, not you.



Unless you're introducing an honest, industry-changing breakthrough, avoid over-the-top product hawking under the guise of "news". Your long-term email marketing is not the medium in which to push overt sales messages or publish news releases. Also, keep corporate milestones, personnel promotions, etc. brief and "below the fold", unless they have strong meaning to your readers.

Your email-marketing program should be a long-term, relationship-building tool, with content that delivers real value to your subscribers. Share knowledge. Provide insight. Provoke thought. If it can elicit a "Good to know", "I can use this information", "Never thought of it that way before", "That's cool" in the minds of your subscribers, you have indeed delivered value and will retain and gain more subscribers.

Share:

Content continued

Display Comprehensive Contact Information

CAN-SPAM regulations require the inclusion of a physical (postal) address for commercial email marketing. However, you should always include a physical address regardless of the nature of your email. Doing so offers transparency and shows you are legitimate company with a presence in the "offline" world. A "bricks and mortar" address helps convey authenticity and credibility for your company and brand.

In addition to the physical address, be sure to include all contact information. Surprisingly, we often see email newsletters that just display an address, forcing the user to go to the sender's website to get other contact information, such as a phone number, email address, or a link to a contact form. Put all that information into your email so recipients can quickly contact you the way that works best for them.

Include a Personalized Introduction

Personalize your email marketing with a greeting addressing the subscriber by name. If you're marketing internationally, remember regional practices. The U.S. is more casual; first names are preferred. Other places are formal; titles and surnames are used.

Not only is personalization a nice thing to do, it typically generates more opens and click-through. Personalization helps reinforce the sender/subscriber relationship and adds credibility to the message. Personalization is easy enough to do. Just be sure data on your subscribers list is complete. Remember to set up an appropriate default such as "Dear Friend," so you never send a "Dear [blank]," in case you have contacts with missing data. Test your technology too, to ensure that a forward-to-a-friend doesn't produce a similar personalization issue.

Link to Your Home Page

Make it easy for subscribers to get to your website. Link your logo, masthead, etc…to your website home page. While they may have subscribed to your email marketing, they may not be fully familiar with your company. Provide a quick and easy way for them to get to your home page.

Content continued

Place Links to Key Areas of your Site

There's a chance that a subscriber may not be all that interested in your content. Sure, he may read headlines and the brief copy associated with them, but right now, he has a problem to solve—and maybe one of your products or services is the answer.

Linking to a particular section, service, or product on your site could be the most direct connection between the subscriber's need and your solution. It might be something the subscriber didn't know you offered. Or it might be the solution to a problem the subscriber couldn't define, put a name on, or even recognize.

Don't put a bunch of promotional copy with the links. Don't try to sell it. Just put in a few links with good anchor text in the sidebar of your email. If space is an issue, put the links in a footer. While you can include links like "Products" or "Services", you can also be more focused, linking to a specific product or service more aligned with your content.

Link to Others

You probably don't want to link out directly from your email, but you should consider including occasional outbound links in the body of the email content that continues on your site.

By occasionally linking out, you show your subscribers that you're interested in sending them valuable content, regardless of whether it comes from you. That can enhance their perceptions of you and your credibility. They know you don't have all the answers. Why pretend you do? Some things to consider are links to resources, reviews, articles, and other valuable content relevant to your subscribers' interests.

Content continued

Avoid Spammy Phrases

You probably recognize many of them just from perusing what lands in your junk mail box. Words like save, free, and win. Phrases like multi-level marketing, call now, increase sales, and join millions of Americans. Or use of ALL CAPS, dollar signs, or multiple exclamation points. They all smell like spam. Spammy phrases in subject lines and page content will get you bounced by spam filters. And remember, spam filters recognize words, not necessarily the context in which they're used. So for example, words like sex, free, win, and save can show up in seemingly innocuous phrases like "Free Yourself and Save Time by Delegating Tasks" and "Doesn't Matter What Sex You Are…" or "Win Over Customers with these Sales Secrets" and could just as easily get you bounced. If you want to use words or phrases like these, consider placing such words within images, which can't be "read" by spam filters.

Comply with CAN-SPAM

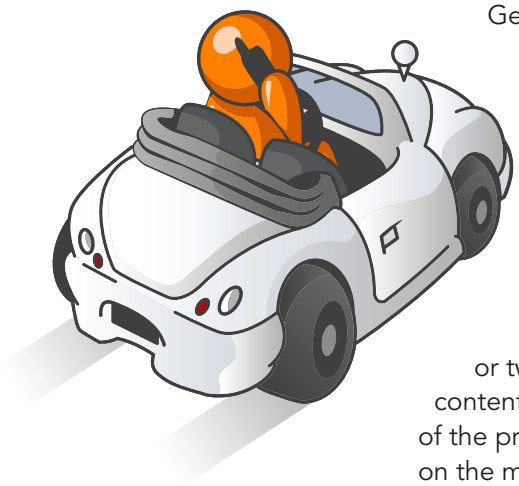
Briefly, the U.S. Federal Trade Commission's CAN-SPAM Act defines and regulates commercial email marketing, making a distinction between commercial email and transactional or relationship email. While they regulate commercial email marketing, many of the regulations are just good business practices, regardless of whether your email is defined as commercial. Some of the regulations include:

- Accurate "subject" lines
- Display of a physical postal address in the email
- A visible and operable unsubscribe mechanism
- Subscriber opt-out requests honored within 10 calendar days
- Senders are prohibited from requiring any personal information other than an email address to opt out
- Senders are prohibited from requiring subscribers to do anything other than send an email reply or visit a single website to opt-out

The full CAN-SPAM Act is posted on the Federal Trade Commission's spam website.

Content continued

Create a Mobile Version



In addition to a text version, you should think about creating a mobile version. B2B decision-makers are heavy users of mobile devices. Generally, they use mobile devices to triage the inbox. That is, they skim through their email, deleting unimportant emails while keeping others for later review at their desktop. Because of this, your email needs to be able to be reviewed very quickly.

To create the mobile version, start with the html version. Then, strip it down to its most basic components. Shorten the text. Reduce the number and size of any images. Keep scrolling to a minimum. If you have multiple articles in your email, use headlines and a single sentence instead of a paragraph or two of copy for each article. Include only the most important content. Lastly, make sure you put a link to the mobile version at the top of the pre-header in your normal html version. That way, it will show up first on the mobile device.

Use A/B Testing

Every company's audience is unique. That's also quite possibly true for each of your segments. Testing your content will give you insights into better serving your subscribers and segments. Consider testing designs, format, messages, and other content with A/B versions to a split audience. Proper A/B testing evaluates the results of changes to a single variable. Use your analytics to evaluate metrics such as bounce rates, open rates, and click-through. Compare response data and learn what works best for you. Remember to choose random samples for your testing.

Consider Multivariate Testing

Multivariate testing allows you to concurrently test multiple page variables, and each variable can have more than two variations. Such testing allows you to find what works much more quickly and easily than A/B testing. However, the sample size you'll need for accurate results increases exponentially as you increase the number of variables and variations. Make sure you have big enough sample sizes to yield statistically significant results.

Design

Ensure Brand Continuity

Your email should look like your other brand assets. Color palette, font styles, treatment of corporate identity, overall image. Make sure your email is easily recognized as a sister to your other marketing communications, not a third cousin twice removed. If it doesn't look like your other stuff, recipients won't recognize it as yours. They may questions its authenticity or dismiss and delete it as foreign and unwanted. Also, make sure any landing pages associated with your email are consistent with your email's design. If your landing pages don't look like your email, your subscribers may wonder whether your email is part of a phishing scheme.

Remember the Hot Spot

Eye tracking studies show the upper left quadrant of the preview pane is the first spot we look. Depending on email clients and user preferences, the preview pane may be horizontally oriented (less height) or vertically oriented (less width). While more than 60 percent of computer users run screen resolutions of 1024 x 768 or higher, one-third of computer users still run screen resolutions *at* that resolution. That means there's really only about 350 pixels by 350 pixels that you can really count on showing in the preview pane. That's not much real estate. Use it wisely.

Place Highest Value Content "Above the Fold"

Dedicate "above the fold" space—the area the subscriber sees first in preview pane and when opening the email—to the content you expect will generate the highest interest. Prominent placement of high-value content will generate more click-through.

Preview Content Near the Top

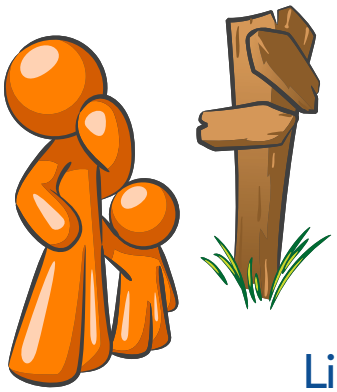
If your email requires the user to scroll, be sure to include headlines of lower content at the top of the email. Most recipients will not scroll down your email, even if they open it. Placing a summary of the various content at the top of the email provides recipients with a quick way to scan and get to content that may be below the fold. This is also very important for mobile users, who are even less likely to scroll.

Design continued

Design for Scan-Ability

Email content is reviewed in seconds, not minutes. First they're going to review the "From" line, then the "Subject" line. If you survive, you'll have about 5-7 seconds in the preview pane to plead your case. That's all you've got.

Make sure they can take in the most important messages in that time. Message placement is important. Eyes start in the upper left quadrant of the preview pane. Put your most important content there. Remember, text is likely all you have; images haven't been loaded. Use relative scaling and treatment of fonts to create a hierarchy of messages and lead readers' eyes where you want them to go.

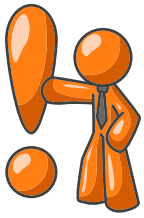


Use Graphics to Direct the Eyes

Use visuals to draw readers' eyes to engagement areas, places where you want them to take action. Carefully chosen images work well, but so do graphical treatments, such as buttons, sections with a colored backgrounds, or colored text.

Link to your Call-to-Action More than Once

Make sure you have more than one way for subscribers to take the desired action. If you have only one way to take action, people might miss it. People look for different things. Some looks for text links; others look for buttons. Make sure you have at least two ways to take action, and place them apart from each other.



Keep Images Light

Include images to support content, but don't allow images to dominate and overpower the page. The appropriate image to text ratio offers visual appeal. Also, it leaves more space for diverse email marketing content, creating more opportunity to appeal to varied interests and engage more subscribers. Content diversity is important because multiple people with different roles influence B2B purchase decisions. For example, content that appeals to user-buyers may not appeal to economic buyers.

Design continued

Use ALT Tags for Images

Most email clients don't display images when the email loads in the preview pane. Design your email templates with image-blocking in mind. Make sure email content makes sense without images. Well-written, relevant ALT tags help describe page content before images are loaded.

However, not every image in your email needs an ALT tag. Too many ALT tags can create clutter. For those images not requiring ALT tag text, you may want to consider an ALT tag comprised of a period or an ellipsis. This will actually reduce visual clutter by replacing the standard box with a red "X" through it with a simple, unobtrusive character.

It's surprising, however, how many companies don't specify ALT tags in html emails. Unfortunately, that practice (or lack thereof) also occurs when those same images are posted on the web page where an email article continues. The lack of ALT tags for images on the website, however, isn't an issue for the user (i.e., whether the image loads); it's an issue of search engine optimization. ALT tags on your site should be a sentence or two that describes the image and contains keywords aligned with the keyword strategy of the respective web page.

Incidentally, for a given image, you will likely not want the same ALT tag in both the email and on the page on your site where the story continues. The ALT tag in your email should be used to induce people to open or load your email; the ALT tag on your site is primarily for search engines.

Consider Using Captions in Addition to ALT tags

ALT tags are a smart way to display information to recipients if images don't automatically load in the preview pane of their email clients. Some email clients, however, won't even display the ALT tags in the preview pane. If you're using images in your email, you should consider using text-based captions where appropriate. Well-written captions not only convey information in the preview pane, they may also be the reason the recipient downloads the images and opens your email.

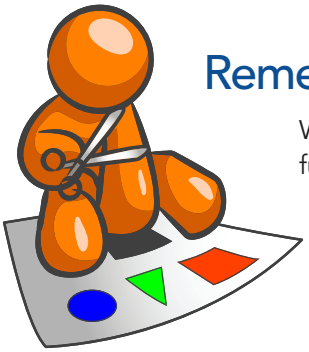
Design continued

Don't Slice Up your Images

Image slicing is a web tactic used to speed load times of images. While this may be appropriate on the web, it's typically not a good practice for email marketing. Each slice of the image creates another box with its own image warning. It simply creates more distraction.

Don't Send Image-Only Emails

A picture may be worth a thousand words, but not in the case of email marketing. Many email clients don't automatically download images. Including text ensures that key messaging gets through with the opportunity for the subscriber to click-through without loading images. One large image may also be interpreted as spam by some spam filters.



Remember HTML Design Fundamentals

While there is no authoritative design manual, there are some basic design fundamentals to remember:

- Good pixel width is in the 600-650 pixel range
- Use web-safe fonts
- Use standard ASCII charters
- Use internal or in-line CSS. Don't link to your CSS
- Optimize the size of images for quick loading
- No Flash
- No JavaScript
- Don't put forms in your email. If you want them to fill out information, provide a link to get to a form.

Test Your Formatting

Your layout may look perfect on your own email client, but not on others. Make sure you test your email formatting on a variety of desktop email clients (e.g., Outlook, Entourage, Apple Mail) and web-based email clients (e.g., Gmail, Yahoo). If you have the budget, you can also consider using a service that does the testing for you, such as Campaign Monitor, Litmus, and Pivotal Veracity.

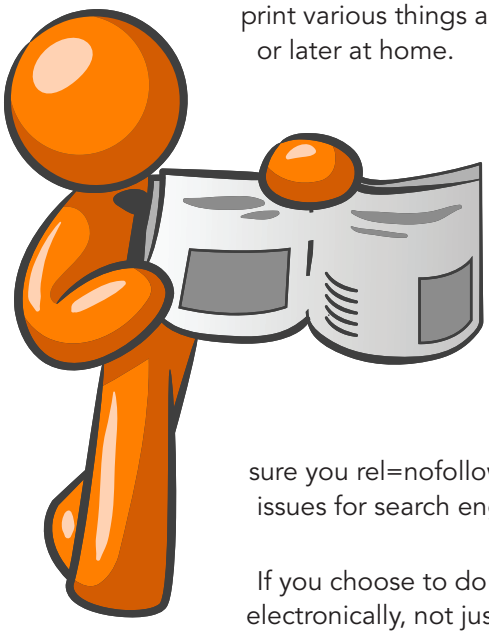
Design continued

Test Loaded and Unloaded Formats

In addition to testing your formats in different email clients, make sure you check how it looks in each of these clients both without images loaded and when images are loaded in the preview pane.

Consider a Printer-Friendly Version

Consider creating a link to a printer-friendly version of your email's content. There are still plenty of people who don't have the time to delve through a lot of information online. These same busy people, however, will often print various things and toss them in their briefcase to read while travelling or later at home.



Obviously, if your email is comprised of article abstracts that link to multiple places on your site for the continuance of these articles, make sure the printer-friendly version of your email contains the full content from all articles and information contained in your email, not just the abstracts. You can create the printer-friendly version either as html or a pdf. However, if you have also have links on your site to either the pdf or the html printer-friendly version, make sure you rel=nofollow those links so you don't create duplicate content issues for search engines.

If you choose to do a pdf version, remember it may also be used electronically, not just for print. Make sure you embed in the pdf any hyperlinks that exist in your html content. Also, remember to tag your links in the pdf so your web analytics will accurately capture the source of traffic coming from the pdf.

The In Box

Brand the "From" Line

The "from" line is the first thing recipients evaluate to determine whether to even look at the email. If recipients don't recognize or trust the sender, the email will likely be deleted.

A recognizable identity in the "from" line can help improve open rates. Ideally, you want a branded "from" line, whether your brand is a company, a person, or a product. For most B2B marketers, the "from" line will be the company name.

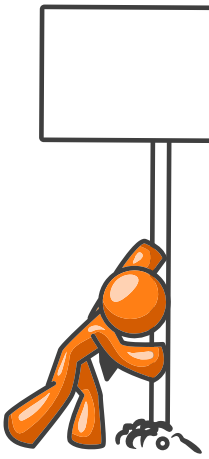
Don't Change your "From" Address

Establish a "from" address—and don't change it without a really good reason. The key reason for a consistent "from" address is white-listing. White-listing can occur either at the domain level or at the address level. If subscribers white-listed your domain, you'll be okay if you change the "from" address. However, if they white-listed your address, your new "from" address may not make it through the filters.

Brand the Subject Line

The subject line is the second piece of information recipients are going to evaluate. Write subject lines that are different—and familiar. It sounds like a contradiction, but best practices today suggest you keep the front end of the line consistent and the rest of the line fresh. A consistent open, such as your company name, brand name, the publication name, or some variant will become familiar and trusted. In essence, you brand your email through repetition. Follow it with fresh content, presenting a benefit, tips, offer, call to action, or relevant reference to your best content in this issue.

Length of your subject line will obviously vary, but the shorter the better. Most inbox subject lines are 50 characters or less. Always keep the subject line relevant to content. Although it's a CAN-SPAM requirement for commercial email, it's obviously also a good way to build trust in the sender-subscriber relationship.



Pre-Header

Left Justify Text in the Pre-Header

The pre-header is a text-only section located before the graphical header or masthead of your email. This text will show in the preview pane before images are loaded. Given that our eyes tend to start in the upper left quadrant of the preview pane, the pre-header is one of the most important areas in your email. Make sure you left-justify any pre-header text. If it's centered, it will easily get missed.

Preview Content in the Pre-Header

Use the pre-header to convey key content of the email and entice the subscriber to open it. Where appropriate, include a call to action (e.g., Register Now) or something that creates urgency (e.g., Early registration rates expire in 3 days). For mobile users, the pre-header is the first thing they'll see on the screen. Make it count.

Link to the Web Version in the Pre-Header

The diversity of email clients make proper email rendering a big challenge. Always include a link that allows recipients to view the email as a web page. Put it in the pre-header so it's one of the first things people see.

Link to the Mobile Version in the Pre-Header

People involved in B2B purchase decisions tend to be heavy users of mobile devices. Because the pre-header is the first thing mobile users see, one of the first things in the pre-header should be a link to a mobile version. The mobile version doesn't have to be the text version. In fact, it's probably better if it isn't. The text version may still be too heavy for mobile users, and the text version won't have tracking. Consider creating a highly stripped-down html version of your email content.

Consider Using Shortened URLs in the Pre-Header

Apart from the newest smart phones, not much gets displayed on the tiny screens of mobile devices. Since even character space is at a premium, consider using shortened URLs for any non-anchor-text links in the pre-header. This will give you more room to preview the email's content.

Analytics

Tag your URLs

Let's say you have a link to your site within in your email. If someone clicks on that link, your ESP's analytics will tell you that the link was clicked, but your website analytics will show the visit as a direct visit, not a referral from your email. If you want to fully track results of your email marketing, it's best to tag the links in your email. That way you'll be able to isolate and analyze the behaviors of people who click through to your site as a result of your email marketing efforts.

Tagging of URLs is done by appending information to the URL. If you're using Google Analytics, you can use Google's URL Builder to help you tag URLs to be included in your email. Some email service providers note that an excessive amount of tagged links in an email may trigger it to be classified as spam. We haven't found this to be the case yet, but there probably is a threshold at some point. Just be smart and judicious about tagging.

Tag your Links by Type

It may be helpful to know what types of links your audience clicks on. Do they tend to click on images, headlines, body copy links, or some other type of link? You can use tagging to determine this. Sure, there may be other factors that play into what type of links get clicked, but over time you'll learn what works best for your various audiences.

Analytics continued

Use Different Tags for the Same URL

Some email service providers offer heatmaps, a way to visually see what gets clicked on in your email. However, not all of these heatmaps work well. For instance, let's say you have three links in your email that all go to the same destination—one is in body copy, one is an image, and one is in a sidebar. If these links are not tagged differently, your email analytics may treat them all the same. If you look at the heatmap for these links, you might see that 18.4 percent of people clicked on the link in the body copy. However, if you look at the heatmap for the image and the side bar, you'll also see that 18.4 percent of people clicked on the image and 18.4 percent clicked on the sidebar link, too. Well, really that's not true. The heatmap, however, is giving the same value to any links that share the same destination.

If you really want to understand where users click, make sure links with the same destination URL are tagged differently. In doing so, you might find that 11 percent clicked on the image, 5 percent clicked on the sidebar, and 2.4 percent click on the link in the body copy. That sort of information can help you optimize your email design.

Tag your Shortened URLs

If you're going to put a URL link in your email (versus an anchor-text link), you might want to consider using a short URL. It keeps things neat and avoids those run-on URLs. However, be sure you tag your shortened URLs. Otherwise, clicks on those shortened links will show up in your analytics as direct visits instead of referrals from your email. To tag your shortened URL, first tag the regular URL. Then shorten it using a shortening service like bit.ly.

Choose Your URL Shortening Service Carefully

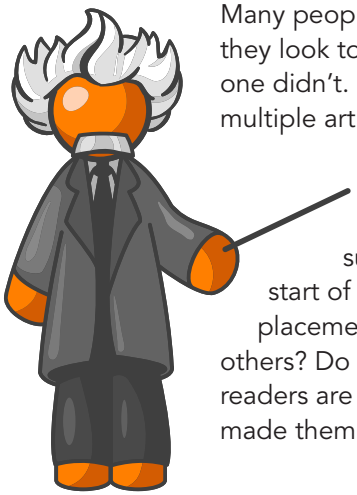
There are many URL shortening services out there, but each of these services offers different features. For instance, not all URL shortening services use permanent redirects, also called 301 redirects. You want to use one that does. These shortening services also offer different analytics to help you track the performance of these URLs. There is a lot to think about when choosing a URL shortening service, far more than we can get into here. For in-depth information, see Danny Sullivan's article exploring the relevant issues of URL shorteners.

Analytics continued

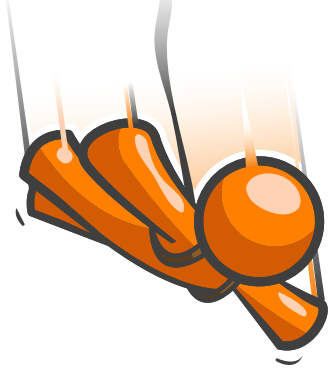
Define your Metrics

As part of developing your email strategy, you should have defined the metrics you wanted to track and analyze. What's important here is that you identify those metrics, and track and analyze them consistently. Each one of your emails should be evaluated using the same standards. If you later add another measurement, make sure you go back to previous emails and apply the same measurement. By using a consistent set of metrics—one that's been mutually agreed upon by all stakeholders—you'll be able to impartially evaluate individual emails and identify meaningful trends over time.

Learn What Earns Click-Through



Many people look at their email analytics on a per-email basis. That is, they look to the success of individual emails, i.e., this one did great; this one didn't. However, if you're sending content-based email marketing with multiple articles, you need to look at individual stories. Go back through historical emails and analyze what articles had the most click-through. What created further conversion? Are there common elements that made these successful? Was it the subject matter? The style of headline? The way you set up the start of the article in your email? The type of images you used? Layout placement? What made certain landing pages more successful than others? Do your readers like podcasts better than white papers? Your readers are telling you what they like, what piques their interest, what made them take further actions. Listen to them. Learn from them.



Landing Pages

Have an Email Sign-up on your Landing Pages

If your email marketing content continues on your site, be sure to include a way for people to sign up for the newsletter. Perhaps your email got forwarded to someone else who happened to click through to your site. That person isn't a subscriber. Make sure you have an easy way for her to become one.

Also, if your email's landing pages are linked into your site's navigation or can be otherwise crawled by search engines, people will find these landing pages, either via your navigation or though search engine referrals. Ideally, you'd like to make sure these people understand the content is part of your email marketing, and that they can also easily subscribe.

Integrate General Site Navigation on Landing Pages

If the goal of your email is not a single, focused conversion action, make sure your site's general navigation is accessible on your email's landing pages. While the goal of B2B pay-per-click landing pages may be to remove options and distractions in the conversion funnel, that's not necessarily the case in B2B email marketing. Many times, B2B email marketing is about lead nurturing, getting subscribers more acquainted with your company and its offerings. In most B2B cases, you want subscribers to continue to explore what you have to offer, not only the product or service you're trying to sell, but your company as well. That's because one of the key factors influencing B2B purchasing decisions is perceived risk. In providing general site navigation on your landing pages, you allow subscribers to dive deeper into other areas of interest or concern they may have.

Link to Other Content on Your Site

Many email marketers make the mistake of treating click-through to an article as the goal. While that's a good starting goal, you should be thinking about easy ways to let the reader jump deeper into related content on your site. While readers may be able to jump to other areas of your site through your site's general navigation, it's far better if your content contains occasional text links in the article's body copy that point to other highly relevant pages on your site. Also, make sure your landing pages promote other relevant content marketing vehicles available for download, like white papers, podcasts, or case studies.

On Your Site

Remember SEO

Most email marketing newsletters carry abstracts or snippets of the stories. Readers then click through to a website to continue reading. If you've got good email marketing content you're going to post on a public part of your site—content for which you'd like to get found via organic search—optimize your content for the search engines. Make sure your email copywriters understand SEO. All the best practices for website SEO apply here—keyword-rich content, title tags, alt tags, headings, meta descriptions, URLs, etc.

Specify an Appropriate URL for Each Page

Don't let your web team choose some abstract URL. Ideally, copywriters of your email content understand SEO and the keyword strategy for the article/page, and can specify a keyword-rich URL consistent with that strategy.

Don't Post All of Your Content to a Single Page

Every once and a while, we'll get an email in which all of the articles link to a single web page containing all of the email's content. Keep page content focused. If you have multiple articles in your email, put them on individual pages on your site. This will help with SEO.

Link to the Content of Your Email

If you've got good email content that continues on your site and you want that content publicly accessible, make sure you link to that content from other areas on your site. If you don't link to that content from elsewhere on your site, site visitors and search engines aren't going to find it.

Also, intra-site linking is important. It's not too hard to remember to link out from the body copy of your content to other pages on your site. It's a lot harder to remember to review body copy on other site pages and insert links with good anchor text that point visitors to new content on your site.

On Your Site continued

Remove Tagging from the Web Version

If you offer an html version of your email on your site, make sure you remove any tagging related to subscribers. Also remove links to your profile center, forward-to-a-friend, and other similar links.

Create an RSS Feed of your Email Newsletter

If you post an html version of your email on your site, consider having an RSS feed for the section where you post these versions. Savvy people who may not be ready to or may not want to subscribe could still get notified. Sure, anonymous people, including competitors, could get a feed of your email-marketing newsletter. But assuming you're not uptight about requiring an email address and more interested in getting your message out, then there's no reason not to do this.

Consider Onsite Sub-Nav of your Email Content

If your email has several pieces of content that continue at different URLs on your site, subscribers click through to various pages on the website. Each is a destination. The problem is, once they're on your site at a given article, subscribers can't navigate to other content in the email without going back to the email.

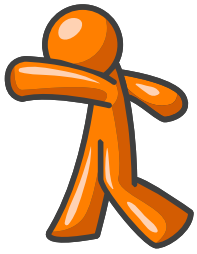
An onsite sub-navigation menu, on the other hand, provides links to the other articles. Think of it as a mini table of contents in a sidebar on every page. Subscribers can easily click to the next article of interest without returning to the original email. It's not only a convenient and user-friendly format, it promotes and encourages more click-through to other content of interest.

On Your Site continued

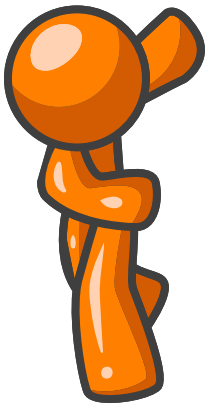
Promote Email Sign Up on your Website

There are lots of ways to promote sign-up on your site. What you choose to do depends on what real estate is available within page layouts, the content on your site, the nature of your industry and prospects, and the overall roll and importance of email marketing.

One option is to put sign-ups on every page. You never know which page someone will land on (especially via search engine referrals), and you may miss a sign up opportunity if they don't they continue deeper into your site. Some may think this is overkill. You know your customers, prospects, and industry and what makes the most sense. Perhaps limit sign ups to the pages relevant to the pages most likely visited by those in various stages of the purchase cycle. Certainly, the home page and news pages, and also pages with educational and information content.



Forwarding



Forward-to-a-Friend with Opt-in Capability

Provide a forward-to-a-friend option. Make it prominent and easy to find. When subscribers forward content to friends, it increases your visibility and reach. Make sure the people to whom the email is forwarded can opt-in (subscribe). It's a great way to grow your subscriber base—and the functionality is critical to reaching and engaging all parties potentially influencing the B2B buying process.

Be sure to tell your subscribers when the secondary recipient's information becomes available to you. Subscribers will be more likely to forward your email if they know the secondary recipient's contact information only becomes available to you if they opt in.

Brand Your Forward-to-a-Friend and Profile Pages

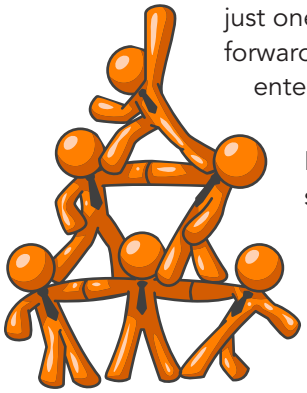
You want people to keep their profile information up to date, and you want them to forward your emails. So be sure to brand your Profile Center, Forward-to-a-Friend, and other "account" pages. At least put your logo on these pages. Generally, these pages have long URLs that don't contain your company name—and if your identity isn't clearly shown on these pages, your subscribers may have second thoughts about providing personal information. By branding these pages, you give people assurance that they're sending information to you, not some unknown third party or shared service.

Encourage Forward-to-a-Friend, Not Forwarding

If subscribers' simply forward your email to another person rather than using a forward-to-a-friend feature, the links in that email are still tagged for the original subscriber. The secondary recipient (friend) can click on the "profile center" link, altering the contact information and profile settings of the primary recipient (subscriber). Let your subscribers know the forward-to-a-friend feature is the best way to forward content to others. Also tell them if the secondary recipient's email address is disclosed to you when they forward content or only if and when secondary recipients opt-in and subscribe.

Forwarding continued

Allow Forwarding to Multiple Friends



A surprising number of email service providers allow subscribers to input just one friend's email address, requiring you to repeat the process to forward to another friend. Other ESPs have just one field, but allow you to enter multiple addresses separated by commas.

If you have a choice, use a forward-to-a-friend feature that has separate fields for each friend's address. If you provide a single field, they're more likely to provide only a single friend. The presence of several blank fields on the forward-to-a-friend interface will prompt subscribers to consider whether they have more than one friend who should receive the email, an especially important consideration if you're trying to influence multiple parties involved in the purchase decision.

Include a Forward-to-a-Friend Comment Box

Consider the option of a comment box for subscribers to offer a brief message or commentary regarding the materials they're forwarding to friends. They'll often add a short, personal endorsement of the content they're forwarding. You may also consider a pre-written personalized comment that the sender can either chose to use or alter, such as, "(Senders Name) thought you may find the attached article from (Your Company Name or Newsletter Name) interesting."

Leveraging Social Media

Promote your Email Newsletter on your Blog

Feature your email newsletter on your blog and provide a way for your blog readers to subscribe to it. Promote it in the sidebar of your blog near the top of each page. Be sure to include a link to a sample issue.

Link to your Blog

Somewhere in your email—either in the sidebar, header, or footer—promote a link to your blog. Have options for them to subscribe to the blog, either through RSS or via email. That way you can gain people as both email and blog subscribers. Not only does this give you two media through which you can reach your contacts, but it provides a back-up conduit, in case people for some reason unsubscribe from your email or your email is later blocked (e.g., change in recipient's spam filtering).

Link to your Social Media Profiles

Put links to your social media profiles in your email marketing. Email marketing goes out whenever you send it. But you're not going to send it every day. Perhaps only once a month. But if you promote links to your social media profiles, email recipients can connect with you on LinkedIn or Facebook, or discover and follow you on Twitter, where you can have additional and more frequent touchpoints.

Leveraging Social Media continued

Post Email Content to Your LinkedIn Groups

LinkedIn is one of the most popular social media sites for people in the B2B realm. Assuming your email marketing content continues on your site, you should promote that content in the LinkedIn groups to which you belong. Members of LinkedIn groups choose to get either a daily or weekly digest of activity within the group. That activity includes members' postings of news, discussions, and other information. If you have good content that continues on your site, you should submit that content and its URL as a news or discussion item within relevant groups.

In posting to LinkedIn groups, you can link to either the web version of your newsletter or to individual stories within it. Either way, however, you want readers to understand that the content came from an email newsletter and they can subscribe to it. For that reason, it may be best to link to the web version of the email. Just make sure the web version has a clear and obvious button that allows readers to subscribe. Also, if you're trying to point people to, let's say, the third story in the web version of your email newsletter, be sure to insert named anchors in the web version and use URLs with named anchors as links to that content. That way, people who click through won't have to figure out which of the four articles in your newsletter you're trying to reference.

In posting to LinkedIn groups, however, remember to also post and cite others' content. It's good social media etiquette. If all you do is promote your own content, you're really not contributing to the group. You're simply using it as a sales platform. People can easily see the difference.

Post Great Content to Forums & Bookmarking Sites

If you have really good content, be sure to submit that content to relevant forums in which you participate and to relevant social bookmarking sites. Don't submit marginal content that will disappoint those who click through to it. Again, as noted in the previous tip, make sure those who do click through understand the content came from an email, and they can subscribe to it.

Provide Social Bookmarking Options

Give your subscribers an easy way to submit your content to social bookmarking sites, like Digg, Del.icio.us, StumbleUpon, Reddit, Mixx, Yahoo Buzz, and Propeller. These are general bookmarking sites, but there may also be some B2B sites specific to your industry. Include social bookmarking icons at the bottom of your content that continues on your site. If your content comes from your blog, an easy way to provide these options is through plug-ins, such as Sociable for WordPress.

Tweet your Newsletter to your Followers

If you post a publicly accessible html version of your email newsletter on your site, be sure to tweet new editions to your followers on Twitter. Be sure to tag the shortened URL you tweet so you properly attribute the source of traffic to that page. Many Twitter clients don't pass along the referrer string. Unless you tag the shortened URL, any click-through from Twitter clients like TweetDeck will show as direct load instead of visits referred from your email.

Tweet with Hashtags

If you tweet editions of your email newsletter on Twitter, be sure to use hashtags when appropriate. Hashtags are a way of tagging your tweets so others can follow tweets relating to a particular topic. For instance, in TweetDeck, you may want to set up a column to track all the tweets with the #b2b hashtag. In doing so, you can track all tweets that include #b2b within the 140-character tweet, regardless of whether you follow those users.

WeFollow.com lets you search for hashtags and lets you see how many people have indicated on WeFollow.com that they follow a particular hashtag. You can also see how many followers are following those people. For instance, we went to WeFollow.com and searched for the hashtag #b2b. As of the day we are writing this, there are 117 Twitter users who have signed up as following #b2b. (There are likely many more, but this is the number registered at WeFollow.) It also shows that these 117 Twitter users have, in total, more than 60,000 users following them. Note: There certainly is some duplication of followers, so the cumulative number of unique followers will be less than that 60,000, but it's still a big number.

Well, you can do the math. You tweet something that includes the link to the web version of your newsletter and a relevant hashtag. Five people following that hashtag retweet your tweet. Those five people have 200 people that follow them. And so on. As people click through to your site, they have an option to sign up for your email newsletter—and they may also follow you on Twitter.

All this, however, is predicated on having great content that someone wants to read and retweet.

A few things to remember. Make sure the hashtags you use are relevant to your content. Tweet different content to different hashtag followers when appropriate. Sometimes you might tweet the same content to different hashtag followers and adjust your tweet for relevancy to that audience. Lastly, don't load up a tweet with four or five hashtags. It looks spammy.

Let Subscribers Easily Tweet your Content

Provide recipients with a way to easily tweet your newsletter or any article within it simply by clicking a button. The easier it is to do, the more likely they are to tweet it. Plus, the mere presence of a button will spur them to think about tweeting your content when they otherwise may not have considered it.

Sending

Send Frequently

Make sure you actually send email frequently enough. For many B2B companies, the problem is not sending too often, but keeping the commitment to create meaningful valuable content you can send. If subscribers only see an email from you once per quarter or twice a year, you're likely not going to be top of mind. If sending is unscheduled and sporadic, people will likely wonder whether you have the ability to consistently deliver on the products and services you offer.

The overarching rule on frequency is to send email marketing only when you've got something valuable and worthy of recipients' time. However, inundating subscribers with too many emails may prompt them to opt-out. Weekly, bi-weekly, and monthly are typical, depending on content. Shorter reads are often preferred. Consider less content per issue in favor of increased frequency. Whatever you decide, make sure you've got good content and adhere to a schedule consistent with subscriber expectations.

Don't Wait too Long to Send

Don't let too much time lapse between sign up and the first send to new subscribers. You and your message may lose relevance. Too much time and they may not remember subscribing in the first place, perhaps thinking your email is spam. A timely sent message creates positive perceptions about your firm and conveys you've got your act together.

Sending continued

Know the Best Times to Send

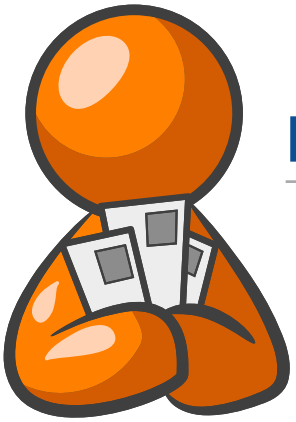
There are lots of presumptions made about ideal send days and times. Not so fast! The reality is, the more you know about your subscribers and their behaviors, the more likely you'll know the best time to send.

With that said, here are some things to think about. Tuesdays through Thursdays are generally regarded as the best days for B2B email marketing. Essentially, subscribers are thought to be preoccupied with workweek start up and planning on Mondays, and wrap up and getting out of Dodge on Fridays. The start of the day for longer emails and right after lunch for shorter ones are often preferred send times as subscribers settle in. That may be well and good for nine-to-fivers but there are likely plenty more exceptions. For example, what if your subscribers are mostly road warriors? Evenings when they're in their hotel rooms or Fridays when they're back at their desks may be better. One study suggests 55% of businesspeople check their work emails from home on nights and weekends, when they have more time to read things.

Most inboxes are set on "Newest at the Top" so it's best to time your send when they're most likely to check email. Finally, don't forget time zones. Your analytics will provide helpful data to determine best days and times to send.

Create a Pre-Send Checklist

It seems that invariably after you hit the send button you'll find something you wished you could change. The best way to guard against this is to create a pre-send checklist of all the issues you need to review. And while you can use that checklist as you put together your templates or individual emails, make sure that you go through the entire checklist again once you think everything is done and you're ready to send. You'll still find things you wished you changed after you send the email, but at least you won't be repeating the same old stupid mistakes.



Replies

Have an Active Reply Address

While CAN-SPAM requires an active reply address for commercial email, it's a good idea to have an active reply address, even if you think your email isn't classified as commercial. Make sure people can communicate with you simply by hitting "reply" to your email. Don't send email if you're not also willing to receive it.

Funnel your Replies

Assign the responsibility of monitoring subscribers' email replies to a single person and route replies to that individual's regular email box. Make sure the person is either qualified to provide appropriate responses or understands where and, more specifically, who to channel replies and inquiries to in order to ensure timely and appropriate responses. Empower the person to follow up with everyone—including those in the C suite—to ensure replies are timely. It's especially easy for busy managers and executives to flag this a low priority and forget.

Review your Replies

Make sure you actually read and absorb what people are writing. Listen to their messages. Learn from what they're saying. And share the feedback—positive and negative—with all others stakeholders in your organization. Celebrate your successes. Learn from your mistakes.

Reach Out to your Respondents

They took the time to write. Take the time to write back. Be thoughtful. Be appreciative. And do it in a timely fashion—the same day if possible. Recognize their thoughts and contributions to the discussion of the issues. If worthy and appropriate, mention it in a blog post or in content of a subsequent marketing email. Encourage dialogue. Promote engagement.

Sign-Up

Keep Sign-Ups Simple

Don't scare them way before you even have them signed up. Make the subscription process quick, easy and painless. A time-consuming process or asking for more information than they care to share discourages subscription. You'll have more opportunities to gather information as the relationship builds and a greater level of trust is established.

Show a Sample of Your Newsletter

Be sure to show a sample your email. Business purchasers are inherently risk-averse. They won't give you something as valuable as a business email address without knowing what they'll be getting in return. Show them a sample of what they'll be getting if they subscribe. Let them decide if it's worth it. Also, the relevancy and value of what you provide, along with perceived credibility, may also determine whether you get a person's primary, corporate email, or his more "anonymous" Gmail address.

Generally, you should have a link to the sample issue. However, make sure you give some thought to how and where to include the sample email on your site. If you're having high abandonment during the sign-up process, you want to be able to track visitor activity to determine where abandonment is happening— whether it's happening based on people's review of your sample issue or based on the information you require in your sign-up forms. For example, let's say your visitor clicks through to your sign-up page. While there he can see the sign-up form and a link to the sample issue. He clicks on the sample issue, which launches a pop-up window. The visitor closes the pop-up window and then leaves your site (or that section of your site). Under this scenario, you don't know whether it was your sign-up form or your sample issue that caused them to abandon the sign-up process. It would be better to have visitors view the sample issue first, then continue to the sign-up form. That way, your analytics could help you pinpoint problems in the registration process.

Sign-Up continued

Restate Subscriber Benefits on the Sign-Up Page

With the recommendation for simpler sign ups, there's room for other content. This may be a good place to reinforce sign-ups with easy to read, bulleted content restating what benefits they'll enjoy as a subscriber to your email newsletter.

Provide HTML and Text Options at Sign-Up

Let subscribers choose the format that works best for them. In doing so, those who need or want the text version will have one less click to see your email—and that extra click may just be the impediment that causes them to delete your email or eventually unsubscribe.

Offer Something More When They Subscribe

Reward subscribers for opting in. Offer special reports, research results, white papers, case studies, books, or other valued, original content as an incentive for subscribing. While you can use this as an inducement to subscribe, you could also surprise them by giving them an unanticipated, valued "extra" when they subscribe.

Use a Double Opt-In Process

A double opt-in subscription process generates a confirmation follow up email to subscribers to ensure that a third-party has not submitted an unauthorized subscription. Double opt-in provides an added level of security prospects desire for sharing personal information. It also helps ensure you're building a clean list of subscribers.

Share:

Sign-Up continued

Send a Welcome Message

A welcome email is a great way to start the relationship. If you don't send a welcome email, the last thing they'll hear from you is, "Thanks for subscribing." It might be another month or more before they hear from you again.

Make sure your welcome message goes out within an hour of subscribing. Use the welcome email to thank people and confirm expectations of frequency and content.

In addition, you can use the welcome email to cross-promote another offering. This could be something free or an inducement to take additional action.

Finally, you could solicit more information or ask them to "complete their profile." They likely gave you limited information at sign-up. Why not use the welcome email to solicit more information regarding the subscriber's interests, role, or company. You can use this information to segment your lists and ensure the delivery of relevant content to the subscriber. However, go slow here; don't ask for too much too soon.

Add Me to Your Address Book

Prompting subscribers to add you to their address book is a great tactic for verifying authenticity for your email and bypassing spam filters. Remind them that your email address added to their address book will help ensure they don't miss valuable content they've requested to receive.

Sign-Up continued

Email by Division

If your company has more than one division, you may want to get permissions for each division during sign-up. CAN-SPAM regulations state,

> "If an entity operates through separate lines of business or divisions and holds itself out to the recipient throughout the message as that particular line of business or division rather than as the entity of which such line of business or division is a part, then the line of business of the division shall be treated as the sender of such message for purposes of this Act."

What this means for B2B marketers is that people who have opted out of Division A's email can still be sent email by Division B. Also, if someone has opted out of a division's email, the parent company can still send email to that person. However, if you're going to do this, make sure the entirety of your email's content is from and about a single division and that the "sender" of the email is identified as the division.

The advice here is to be very clear just who the "sender" of the email is. Keep your content related to the "sender" and make sure all other matters such as the physical address and opt-out processes align with that sender. If you can't keep it all straight and separate, the best advice would be to unsubscribe the recipient from the lists of the parent and all divisions.

Auto Responders

Use your Auto Responders to Cross Promote

Auto responders are those automatic emails you get when you sign up for something. You know, "Thanks for registering. Go here to get the white paper." So often these are just simple one- or two-sentence text emails. They don't have to be that way. Why not use that opportunity to promote other content on your site. Why not send them a branded html auto responder that not only gives them the link to go get the white paper, but also highlights three other related things they might be interested in (e.g., other relevant blog posts, case studies, upcoming webinars, etc.).

They're going to leave their email program and go to a browser to get what they wanted (i.e., the white paper). When they get that, they may leave your site instead of hanging around to explore further. They will eventually leave their browsers and return to their email. If you've sent them a cross-promotional auto responder, when they return from using their browser, they'll find the two or three other things you highlighted for them. Hopefully, they'll dive back into your site again.

This cross-promotional auto responder doesn't have to be html. You can do this with text-based emails as well.

Tag Links in your Auto Responders

Just as with your primary email marketing, it's important to tag links in your auto responders. If you're going to cross-promote, as noted in the previous tip, you'll want to tag your links. That way you'll know if and how well your cross-promotional efforts are working. Unless you tag the links, any click-through will show up as direct visits, not referral visits.

Subscriber Relations

Manage your Reputation with Subscribers

Manage and protect your online marketing reputation with the same diligence you place on protecting your brand—because it is part of your brand. Adherence to email marketing best practices will boost your brand reputation while bad habits, however unintentional, will harm it.

Be transparent, and keep any promises you make, including frequency, privacy, business practices, etc. Only send people what they signed up to receive. Honor and quickly process unsubscribes.

Encourage Feedback

There's no better way to hear what your subscribers think than to ask them. Doing so will help you hone your strategy and your content. However, you don't have to make them take a survey to do this. If your email content links to a blog post, there's a place for comments on the post. On other articles, you can merely solicit feedback as you draw the article to a close. Simply provide a link to launch an email or have them reply to your email. Remember to acknowledge feedback in a timely fashion and thank them.

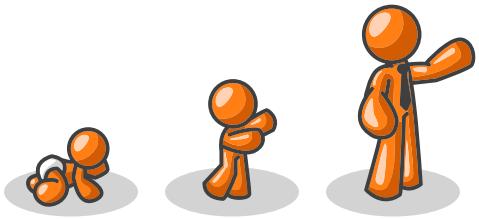
Remind Them They Subscribed

It's a good idea to remind them that they subscribed. A reminder reinforces that it's material they felt was valuable enough to subscribe to previously and helps them avoid mentally re-processing "What is this? Did I ask for this?"—especially if there has been significant time between emails or between the time they subscribe and the time they get the first email.

But be a little more creative than using the standard "You're receiving this because you subscribed to…." line. Spammers use this line (untruthfully) so often now; it has lost some credibility. Try something like "Here's your current edition of [email marketing/newsletter name]. Thanks again for subscribing." An even better approach would be to mention the time and/or manner in which the person subscribed. It's not hard to do. Just a couple more variables to capture. Try the American Express strategy: "Subscriber since November 12, 2008". Or something more straightforward like, "You subscribed to our email newsletter during a visit to our website on March 3, 2009."

Subscriber Relations continued

Go Slow at First



If you're just starting out, don't rush to publication. Take your time and do it right. It takes time to test and perfect templates. Don't promise a frequency you can't deliver. Make sure you leave time after each of the first emails to do an analysis of what went right and what you can do better. False starts and stops, irrelevant content, or inconsistent frequency conveys a lack of commitment.

Consider Marketing Automation

Nurture your leads through automated drip-marketing programs. Drip-marketing programs generate marketing emails based on either the actions or inactions of prospective customers, or on the basis of where they are in the buying process. Using prospect profile data and following cues from their on- and off-line activity, you can segment messaging by roles, actions, and interests, and help move them along the buying process at a pace consistent with their actions. Today, there are many great marketing automation providers that can make this easy to do.

Subscription Management

Have Prominent Profile Link

Most ESPs require your email to contain a link to the recipient's profile center. Be sure to make this link easy to find. If a subscriber will be changing her email address soon, you'd like her to update her contact information. If a subscriber doesn't like the frequency or nature of what they receive, you'd rather have her change her preferences than unsubscribe.

Have a Simple Unsubscribe

Make the unsubscribe process simple. There's no point in sending people through a difficult unsubscribe process, potentially alienating them from your brand. While they may not be interested in receiving your marketing emails, it doesn't necessarily mean they have an unfavorable opinion of your brand. In addition, there are very specific CAN-SPAM regulations governing the unsubscribe process for commercial email.

Have a Prominent Unsubscribe

Don't bury the unsubscribe button. To the contrary, make it prominent. Put it at the top of your email, above the fold. The fact that you're not afraid to display it exudes confidence in your content and engenders trust. If they're not interested and can't find the unsubscribe button, they're going to delete your emails anyway, or worse, designate your email as spam. Better to have fewer good contacts in your database than lots of marginal ones. The goal is quality, not quantity.

Subscription Management continued

Safely Unsubscribe

If you click "unsubscribe" on a spam email, you might actually be telling the spammer they have a real email address. This is pretty well known and has made people wary about clicking the unsubscribe button.

Include a statement that lets subscribers know that they can safely unsubscribe at any time. You can do this by just adding "safely" to your unsubscribe link. The fact that you say they can safely unsubscribe shows that you're aware of people's fears. Sure, no recipient knows what's going to actually happen when they click on the unsubscribe link—it's a matter of trust. But you'd rather have them click the unsubscribe link than note your email as spam.

Immediately Unsubscribe

While CAN-SPAM commercial email regulations dictate you must honor unsubscribe requests within 10 days, there's no reason to wait that long. Your subscribers don't know the fine details of the regulations. They know you sent them another email three days after they unsubscribed. That just makes them mad—and all the more likely to designate your email as spam.

Link to your Privacy Policy

Provide a link to your privacy policy. Assurances that lists, names, addresses, email addresses, and other personal information will be exclusively used for your communications and will not be shared or sold to other organizations add a degree of trust and confidence in the relationship. And, even if recipients never click on the link, the fact that you link to your privacy policy sends the signal you're concerned about their privacy.

Growing your Subscriber Base

The best way to grow your subscriber base is by creating great content that people want to share—either by forwarding your email or through Twitter, LinkedIn, or social bookmarking sites. There are lots of other tips and practices noted earlier. Below are a few more not previously mentioned.

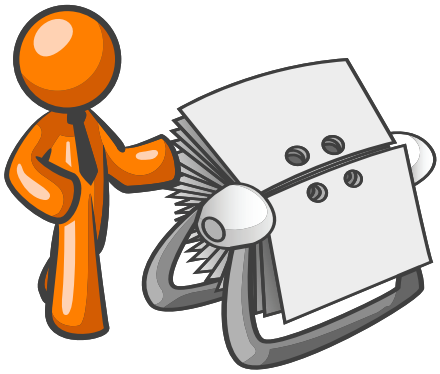
Mine your Outlook Contacts

Don't automatically import all of your Outlook contacts into your email-marketing database. Just because they're in your Outlook contacts doesn't mean you have their permission to send them email marketing.

Instead, review your Outlook contacts for potential subscribers. Then, get in touch with them to ask if you can add them as a subscriber. You can do this by phone, or you can send them a brief, personalized email making them aware of your newsletter and asking if they would like to subscribe.

While it's still a problem to send an email asking whether you can send them an email, a personalized, one-off email from your normal, individual email account is not likely to be viewed as spam. If you choose to send emails like this, don't use a third-party ESP to do so. Use your individual email account. And don't send a mass email in which you blind-copy all recipients. Send a separate email to each contact. That way recipients and ISPs are far less likely to view you as a spammer.

In addition to your email address book, be sure to mine your in-box and sent mail. They likely contain a lot of relevant contacts that aren't currently in your address book.



Compile Business Cards

Yes, this one is obvious, but hardly anyone does it. You've probably got hundreds of business cards sitting in your offices. Yet, probably only a small percentage of these contacts are in your email-marketing database. Call them to ask permission to add them to your list of recipients, or send them a personalized email as noted above.

Growing your Subscriber Base continued

Use Call Centers and Sales Calls

When you're on the phone with people as part of every day business, ask people whether you can add them as a subscriber to your email newsletter. Make sure your staff understands this is part of their job, and show them how to do it in a normal way as part of everyday conversations.

Create a web interface that your staff can use to add subscribers to the database. The first field can be the contact's email address. If the email address isn't in the database, staff members can add the rest of the contact information.

Have staff members do this while they are on the phone with the potential subscriber, or immediately after the call. Make sure your system sends an opt-in confirmation email immediately upon uploading a new contact. This way, the potential subscriber will get the confirmation request right after she has given verbal permission. If you wait two hours, a day, or a week after getting the verbal okay, the person is far less likely to confirm their subscription.

Capture Trade Show Visitors

As your staff collects business cards at trade shows, make sure they also ask whether it's okay to email them your newsletter. Have your staff put a simple, identifiable mark on the business card that indicates verbal permission was received. If you scan badges, find another way to denote permission was received. That very same day, have another staff member enter the contact information and trigger a confirmation (double opt-in) email.

Leverage Other Content Marketing

Promote subscription to your email newsletter within other content-marketing vehicles—white papers, eBooks, webinars, podcasts, video, PowerPoint, and SlideShare assets. Put links in those digital assets so people can easily get to the subscription page. Also, if someone is registering for any of these assets, ask them if they'd like to receive your newsletter, too.

Explore Co-Branding

To the extent you have outside rep firms or dealers, consider creating versions of your email marketing that are co-branded with these partners. Typically, rep firms and dealers are hungry for good content, but don't have the budgets to create that content. Done right, reps and dealers will be happy both to be featured in your email and to encourage their customers and contacts to sign up for it.

Leverage Industry Voices

Cultivate subscriptions of your industry's thought leaders and key media contacts. Make sure they're on your distribution list. They have the ability to mention and promote your content. Also, consider tapping some of your industry's thought leaders to create content only found in your email marketing, perhaps a periodic guest column. This can make your content more valuable, increasing subscriptions and forwarding.

Use On-Hold Messaging

Why not tell people about your email newsletter while they're waiting on the phone. Chances are they're sitting in front of a computer while they're waiting. Why not ask them whether they receive your newsletter. "Do you receive our monthly email on strategies and tips for your business? If you're at your computer, go to [simple URL] to see a sample issue. If you want to subscribe, simply click the button to enter your email address. Thanks for waiting, we'll be with you shortly."

Include a Subscribe Button in you Email

If you use a forward-to-a-friend feature, secondary recipients will have the ability to opt in as a subscriber. But not all email gets forwarded that way. Many recipients will pass on an email to another party simply by clicking the "forward" button in their email client. Make sure your email marketing contains a way for secondary recipients to subscribe when it gets casually passed along.

Augment Transactional Messages

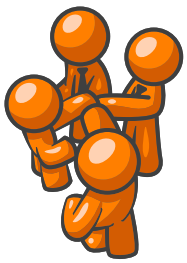
If you have an online transactional relationship with customers, you already have engaged customers. Offer sign-up opportunities on the ordering page, at order completion, or in your follow up sales confirmation email.

Use your Email Signature

Consider promoting your email newsletter in the signature section of your everyday email. Highlight the headline from a recent issue and provide a link to the web version of the issue, where they'll also see the option to sign up.

Database Management

Get Multiple Decision Makers



The B2B purchasing process usually includes multiple decision makers and influencers. It's great if you have a subscriber at one of your prospect organizations. Your goal, however, is to get all of the influencers at that organization. Find out who those people are, and turn them into subscribers—CEO, CFO, engineering guru, purchasing manager, department manager, end-user, anyone who influences the buying process—and segment messaging to their individual interests and concerns.

Segment your Lists

At first you may not know the particular interests of a subscriber, but over time, once trust has been established, you can ask them. Use that information to segment your lists. Different segments could include:

- Place in the buying cycle
- Prospective, new, or established customer
- Title or role in the organization
- Role in the purchase decision
- Industry vertical
- Stated Interests of the subscriber
- Subscriber actions or inactions

Develop content for segments as appropriate. This will help ensure your content stays relevant to each subscriber segment. It will also help you make sure you don't send irrelevant content. If a planned email isn't relevant to a particular segment, don't send it to them.

Survey to Segment

After you've had a chance to build trust and deepen the relationship, you can email subscribers a link to a brief survey. Then you can use that information to segment your subscriber lists and customize content to those segments. Here's an example of how you could start that email.

"Hi, Bill. Thanks for subscribing to our newsletter. Hopefully, we've been able to send you news and information that helps you and your business. Our goal is to deliver valuable, highly relevant content. To do that, we're

asking subscribers about their preferences on frequency, content, and what matters most to you in your current role. The survey will take less than 60 seconds to complete, but it will really help us develop great content for future issues…"

Remember not to include forms fields in the email. Most email clients will block html emails with form fields. Better to provide a link to the survey.

Watch your Bounces

Cleaning your databases is an ongoing process. Don't ignore your bounce lists. If you do, the number of bounces and likely your bounce percentage will continue to rise, potentially hurting your sender reputation. Bad addresses aren't suddenly going to turn into good ones, and some may turn into spam traps.

Hopefully, your ESP provides technology that will remove or segregate bad addresses after a certain number of hard bounces. If not, you'll have to sort things out yourself.

Follow up on your bounce lists. Sometimes you'll quickly see why an address is getting bounced. Maybe it's formatted incorrectly, or a piece of data is missing. These are obvious things that can be quickly changed.

For those with no obvious problem, a quick call could give you the correct address. If the individual is no longer with the company, you might find a new contact that should be added to your database. Another option is to send a quick email to a different contact at that company. Ask if the address is correct, whether the person is still there, or whether there is someone else you should add instead. Also, use that opportunity to ask if there is anyone else at the company who might benefit from what you send.

Perhaps you've got one contact at a given company that keeps getting bounced. Don't just delete that address because you've got four other contacts at that company in your database. Remember, you want to touch all the potential influencers involved in the buying process at that company. Make a quick call and find out.

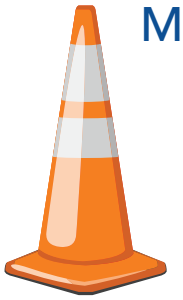
Carefully Review your Data before Uploading

If you're uploading databases to your email service provider, make sure you review database content carefully. The content may look fine at face value, but if you're not careful, you may run into problems. If you're uploading an Excel file, be sure to upload the proper format of the file. If you don't, you may also unknowingly be uploading formatting characters. This will create problems—and you may only recognize the problems after you send the email.

Retain the Source of the Contact

As your subscriber base grows, you'll have different sources of subscribers. Some will be organic, having signed-up as a result of visiting your site or having received one of your emails from a subscriber. Other contacts may come from trade shows, sales contacts, call centers, etc. Ideally, you'll want to retain the source of the data as one of the database variables in the contact record. That way, if a rash of bounces, spam traps, or unsubscribes occur, you can analyze the source of the subscribers to determine if the problem is isolated to a particular segment of your database.

ISP Reputation Management



Manage your Reputation with the ISPs

Your reputation with ISPs is based on volume history, spam complaints, spam trap hits, bounce percentages, proper authentication, and whether you're on any "blacklists". Some of the best ways to build and maintain a good reputation include: requiring double opt-in; scrubbing your lists of bounces; not buying or using third-party lists; authenticating with Sender ID, DomainKeys, and SPF; and not mailing to old or dormant addresses.

Use a Third-Party Email Service Provider

Reputable third-party ESPs provide many advantages. They're white-listed with the ISPs. They'll ensure you're sending from a Domain Keys and Sender ID compliant IP. ESPs are tied into feedback loops with the ISPs, so they'll get data on your performance and any problems. They'll help you troubleshoot issues and avoid making bad mistakes. Most have systems that help you ensure your email is CAN-SPAM compliant. Finally they're going to keep up on industry issues and technology, something you likely don't have the time or budget to do.

Use a Different but Related Domain to Send

You have two types of email—your regular email, which you use to correspond with clients, prospects, and other contacts, and your email marketing. It's just as easy for a recipient to hit the spam button as it is to hit the unsubscribe button. In fact, it's easier. If you're using the same domain for regular email and your email marketing, when a recipient blocks your email marketing, your regular email won't go through either.

Now, this isn't so bad if it's just a single recipient, but what if that recipient's designation of your email as spam also influences the corporation's spam filters. Now, perhaps no one in that company will get either your regular email or your email marketing.

Let's take it a step further. Suppose, either through ignorance or stupidity, you do something that causes lots of recipients to designate your email marketing as spam. Suddenly, you may find your domain blacklisted. Now, major ISPs are going to block all of your email coming from that domain. Many corporate spam filters will do the same thing, in case any emails get

through an ISP. Now, as far as email goes, your primary corporate domain is essentially dead.

So choose a different domain for your email marketing. Make it something similar to your primary domain so recipients see the connection (e.g., from acmecorporation.com vs. acme-corporation.com). This way, in case anything goes wrong, you won't be putting your primary domain at risk.

Don't Send Emails Through a Shared Account

You might be tempted to share an ESP account with another person or company in order to save costs. Besides likely being against the ESP's service agreement, shared accounts come with inherent risks. If you happen to share common subscribers with other marketers using the account, an unsubscribe from another's list will likely unsubscribe that recipient from your list, too. If another marketer on the account is spamming or creating the appearances of spam, spam filters may also block your emails. Finally, someone else's bad conduct on a shared account could lead to shut down of the account and damage your reputation as well.

Don't Send Emails Through a Shared IP

If you're sending email through a shared IP address, you're at risk for the actions of the others. At present, ISPs look primarily at the reputation of the IP, not the domain. To the extent others sharing the IP engage in behaviors that damage their reputation, you'll experience the effects of that damage. If the IP gets blocked by ISPs, you'll have to start over with a new IP and begin building a new reputation for that IP. The best advice is to have a dedicated IP through which you send email marketing.

Season Your IP

If you're just starting out, or if you've recently changed the IP from which you send email marketing, you'll need to develop a reputation with the ISPs. If you suddenly send out 50,000 emails in one day from a new IP, your send will likely get limited, or throttled, by ISPs. Start slowly and ramp up over time.

If your initial sends are just a couple thousand, you might not be under scrutiny from a volume perspective. However, if your bounces, spam complaints, or spam trap hits represent a high percentage of your send, you'll be injuring your reputation right out of the box. Make sure your initial sends are to very clean lists.

Use Caution with Old or Dormant Addresses

Use caution when sending to dormant segments of your database or old email addresses. If you do a single send to this type of segment, you might get a very high percentage of bounces. Also, old email addresses could become spam traps. Either could send up a flag to ISPs and damage your reputation. This may also alert your ESP, especially if they have strict opt-in regulations.

The best advice is to augment regular sends with small amounts of old or dormant addresses and watch for results. Pull back on practice if negative results are excessive. Do this only after a positive reputation has been established.

A little information about us...

About Proteus B2B

Proteus B2B is a marketing consulting firm specializing in repositioning B2B companies and their brands. We help our clients identify and migrate to positions of market leadership where their brands have few credible substitutes in the marketplace.

Our services relevant to this eBook include:

- B2B Email Marketing Audit
- B2B Email Marketing Strategy
- B2B Email Marketing Design
- B2B Email Marketing Coaching & Consulting

Named to BtoB Magazine's List of Top Agencies for 2009, Proteus B2B is located in Grand Rapids, Michigan. Our clients serve multiple industries and include small to medium size businesses as well as those in the Fortune 500.

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Galen De Young is Managing Director of Proteus B2B and Proteus SEO. Galen is a recognized expert in B2B marketing and in B2B search marketing. He's a frequent speaker at conferences, colleges and universities, and other industry events. He's also a regular columnist for Search Engine Land, and a periodic contributor to MarketingProfs.