

messageREACH

Best Practices



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Best Practices Summary

Introduction

This manual is designed to help Xpedite customers make the most of Xpedite's messageREACH service. We have included tips and how-to information, along with explanations of why certain practices exist within the world of permission email.

Permission-based email marketing means that your organization (not a third party) has asked a prospect/customer whether it's OK to use commercial email to communicate with them. If the prospect/customer opts-in (says yes), then you have permission to contact him or her via email. It's the difference between a message that your recipient will welcome and a message that will be considered spam. (learn more about spam in the last chapter).

There is a lot of advice available for anyone looking to maximize permission email campaigns. There are many web sites, magazines, newsletters and books that dissect every element of permission email in great detail. We've taken the best information and compiled an overview of what you need to know to develop and launch beneficial, results-oriented email communication programs and campaigns that your customers will look forward to receiving.

Feedback encouraged

As you use messageREACH, we want to know what's working for you and what's not. Send us email, call us, or write. Our team of messageREACH professionals are dedicated to helping you get the most out permission email. Send email to webmaster@messageREACH.com, or contact your Account Representative.

Success Stories Rewarded

Do you have a success story involving messageREACH? How have you used permission email to personalize relationships with your customers, increase sales, or drive traffic to your website? Let us know. messageREACH offers special incentives for stories we publish.

Email: the New Great Communicator

You've invested in messageREACH, so you already know that email is a great way to communicate with thousands of people in a personalized manner. Permission email, as an application, goes a long way to foster loyalty, and ultimately sales. Still, the reasons why email is the great new communicator today are worth repeating.

What Industry Analysts Say

According to analyst firm eMarketer, email marketing spending will grow to \$4.5 billion by year-end 2003 and U.S. permission email-related volume will grow from 64 billion messages in 2000 to 227 billion messages in 2003. This growth is fueled by the proven benefits of permission email over more traditional marketing tactics:

Higher Success Rates Over “Snail Mail”: According to a recent study by the META Group, email response rates can reach upwards of 15 percent compared to 1 to 3 percent for direct mail.

Economical Production and Delivery: With no production, paper, or postage costs, permission email makes sense. eMarketer's comparison of the average cost per message is \$.20 for opt-in email vs \$.75 to \$2 for direct mail, and \$1 to \$3 for telemarketing.

Shorter Time Cycle: Jupiter Research states 80 percent of email marketing messages receive response within 48 hours compared to 6 to 8 weeks for direct mail.

Who's Using It, and for What?

Types of organizations using permission email campaigns include:

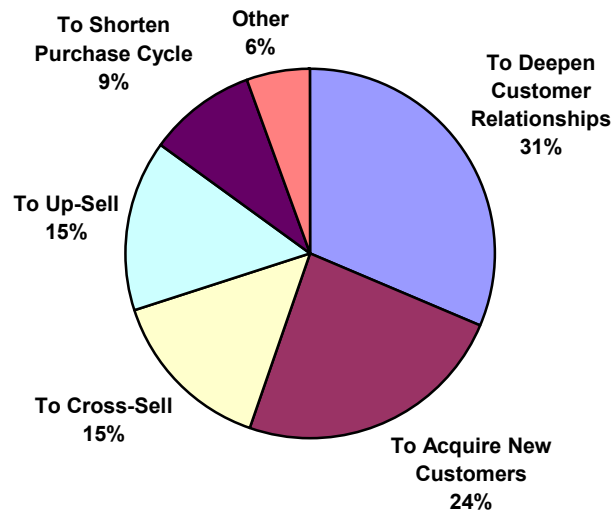
- **Retailers** – to increase repeat business and brand loyalty by targeting customers with product promotions and sending order confirmations. Sending a shipping or order confirmation automatically eliminates many customer inquiries, allowing staff to focus on other tasks.
- **Publishers** - to electronically sign up subscribers and customize free email newsletters with content based on a reader's specified interests and needs. The result is an increase in brand awareness and goodwill for organizations that freely share their expertise.
- **Manufacturing firms** – to instantaneously notify customers of product recalls and new model incentives.
- **Political Groups and Associations**- Candidates in the last Presidential election sent out election notices, and associations regularly use email to notify members of items of interest.
- **Travel** – Airlines and travel consolidators use email to send notifications of special fares and travel opportunities.
- **Law Firms** –Many larger law firms now use email marketing techniques to offer new services.

- **Sports Teams** – Major (and minor) sports organizations use email to promote special events and special offers to season ticket holders and fans.
- **Arts Organizations** – As for sports organizations, theater, dance and music organizations keep in touch with their audience and season ticket holders with email

Other organizations that use messageREACH transaction messaging services have begun to use permission email as an adjunct to their other email:

- **Brokerage firms** – In addition to the transactional and personalized trade confirmations, these companies are sending marketing newsletters to clients according to their market preferences.
- **Financial Institutions** – Along with daily customized cash management statements, banks are sending marketing information on new services to customers.
- **Utilities** – Email billing is growing, along with permission-based utility newsletters.
- **Corporations** – Investor Relations departments send Investor Reports and industry alerts, and are beginning to market themselves through electronic newsletters.

Companies are quickly realizing that email communication can greatly enhance customer loyalty and reduce the chances of losing customers to the competition. The graph below shows the top reasons companies are choosing email as their method of information delivery:



Source: 2000 Jupiter Communications

Planning Your Campaign

Now that you've decided to reach your audience through permission email, and that you will determine how to do it in a way your audience will welcome, there are general planning steps that need to take place. This chapter outlines things you need to think about before you can create your email and send it:

- What do you want to achieve?
- Who is your target market?
- What is your call to action?
- What is your privacy and anti-spam policy?
- How will you obtain your list?
- What format will your message be sent in?
- What will your message say?
- How will you send your message?
- Where will your customers land?
- How will you track and handle responses?
- What kinds of tests will you conduct?

What Do You Want To Achieve?

Do you have any quantifiable goals for your campaign? The ultimate goal is an increase in your revenue, but for the purpose of your campaign, isolate its immediate goals. You may know that you want people to sign up for your newsletter, but do you know how many you want to sign up? Create metrics for evaluating the success of your campaign. Project customer numbers, dollar amounts spent, dollar amounts expected to be gained, etc.

You may find that you far exceed your goals, but you may also uncover unexpected results. For instance, you may find that although you want people to sign up for your newsletter, many are going to your website and downloading a product demo. You may need to tweak future newsletters to appeal to your audience.

What Is Your Target Market?

Knowing your audience is a significant factor in the success of the campaign. Your ability to identify who you're trying to reach impacts nearly every aspect of your campaign: the type of message you send, your call to action, the list segments you choose, and at the end of the day, the success of your campaign. Is your target market new customers, existing customers, customers in California?

What Is Your Call To Action?

What do you want recipients of your email to do? Do you want them to:

- Buy something?
- Download a white paper?
- Register on your site?
- Sign up for a newsletter?
- Visit a specific web page?

Email is a great way to help you build a loyal relationship with your recipients. Identify your call to action early because, like your target market, it will affect the ultimate outcome of your campaign.

What Is Your Privacy and Anti-Spam Policy?

It is best to clearly reference your Privacy and Spam policies. The people with whom you want to forge a loyal one-to-one relationship with will be much more responsive if:

- You are clear about how you got their address and how you will be using it
- They can unsubscribe easily
- You explain your privacy policy immediately and clearly

Please refer to the messageREACH Spam Policy at:

<https://www.messagereach.com/MessageReach/Policies.html>. Here you will find how messageREACH requires all of your lists to be permission-based, and also, information for your recipients on messageREACH policies.. Instructions on how they remove themselves from your list is included as well.

What Message Format?

messageREACH supports the following message formats:

- Plain text
- HTML
- HTML-Lite
- Multipart/alternative, the combination of plain text and/or HTML and HTML-Lite

The message format that you choose will greatly affect your response rate. Not only are recipients very particular about the types of information they receive via email, they are just as particular about the format in which they receive it. They may prefer certain formats based on the technology that their email software supports, their company policy (some companies don't allow certain message formats through their firewall), or because they tend to read their mail while offline.

Plain text is readable by all recipients, while HTML has more eye-appeal but may be read by less. It's important to consider what it is you're communicating to your audience, and what their viewing capabilities are. Here's a brief overview of the message formats supported by messageREACH:

Type	Description	Pros	Cons
Plain Text	Plain text messages contain ASCII characters, and do not contain formatting codes such as bold and italics. <i>"Think of Grandpa's typewriter..."</i>	<ul style="list-style-type: none"> • A very good vehicle for publishing content. • Virtually all recipients' email systems support plain text. 	<ul style="list-style-type: none"> • It's plain text. No color, fancy formats, or graphics allowed • Unable to track open-rate via plain text.
HTML (Hyper Text Markup Language)	HTML is the authoring language used to create pages on the web. It can be used to write email that contains the same formatting as web pages.	<ul style="list-style-type: none"> • Allows you to create graphically media rich email. • Jupiter Communications reports that HTML messages receive twice the response rate of plain text. • HTML lets you track your open-rate and click-throughs. 	<ul style="list-style-type: none"> • Only about 60% of email users use email clients that can read HTML documents. • If a recipient tends to read messages offline or has a slow Internet connection, chances are, they prefer plain text. • If downloaded and read off-line, graphics will be lost.
Multipart/alternative	You can transmit both HTML and plain text content within the same email, and the format your recipient can read will be displayed	The recipient's email client automatically determines which version of the message to show, based on the user's settings.	Multipart messages are more complicated to create as both text and HTML
HTML-Lite	AOL users of version 5.0 and lower can read this subset of HTML	Relatively easy to create	No bulleted or number lists, tables or graphics supported

What Will Your Message Say?

Be creative, but keep your copy as tight as possible. Make sure your call to action is clear, that you get to your point quickly, and that what you're offering is relevant to your audience.

Personalization is very important in establishing a one-to-one relationship. Refer to your customer by name, and most importantly, gain an understanding of who they are and what they like. Refer to the chapter "Content Development" for in-depth guidance on building a message that works.

How Will You Send Your Message?

You can use the messageREACH IntelliSEND Wizard to create HTML messages, and send them. You should, also, become familiar with the messageREACH User Guide, and messageREACH's other 24/7 support resources to help you get the most out of your messageREACH Solutions service.

Where Will Your Customers Land?

The landing page is where recipients of your email will go to after they open the Click-To's in your message. Below are tips and guidelines to help keep your recipients interested:

- **Use similar design** – If you send HTML messages, create a message that uses elements similar to the landing page.
- **Reinforce** – your landing page is an extension of your offer and message of the email. Use similar language, repeat the headline when appropriate, and use the same copy techniques.
- **Control their experience** – In cases where you must include more text than can be shown on one page, create a micro-site (a mini web site that provides more information and detail about the product or service you are offering). By creating a micro-site that links only to “submit” or “order now,” you can include the extra information without losing them to other options or offers presented on your main site.
- **Reduce the clicks** – The nature of the web encourages the reader to be easily distracted. If you're signing people up for a newsletter, take them directly to the sign-up form; avoid sending them to a page that lists all of your products and services, as tempting as this sounds. It's too easy to lose someone along the way if you make him or her click through too many layers.
- **Give them what they came for** – If you're selling a product, take them to where they can find detailed product information on what it is you're selling. Your site navigation should provide options if they want to surf later.
- **Capture only what you absolutely need** – Your chances of losing someone increase tremendously if you make them fill out a long, time-consuming form. Collect only the bare essential information, eliminating required fields as often as possible.

How Will You Track and Handle Responses?

Before your message leaves your computer, plan how you will track and manage responses. messageREACH provides comprehensive response statistics, tailored to your organization's needs. Identify what you want to track while you are in your goal setting and call to action stage. See your messageREACH User Guide for specific metrics that can be tracked.

Unsubscribes and bounces are important considerations. Refer to the chapter titled “Bounce Handling” for details.

What Kinds of Tests Will You Conduct?

It's important to test, otherwise you may find you've wasted time and money on a campaign that didn't work. Areas to test include:

- Offers - Segment your list and test different offers;
- Readability – Test that your message can be read by a variety of browsers and clients, outside of your network
- Spelling, grammar and other typos
- Coding errors or broken links

- Landing page
- Testing the message on numerous platforms and systems

Those few extra minutes taken for testing could offset any potential problems, and will make the difference in a recipient's perception of your organization. If everything about your message works well, you look good.

Practice the Four, No Make that Five, P's of Marketing

Your overall marketing strategy should be built around **Product, Place, Price, Promotion – and People**. The "Four P's" of the marketing mix have proven their value over time, because they label the factors over which you have control. In email marketing, where the goal is to establish loyal one-to-one relationships, a fifth P has been added: People.

You decide what your **product** will be — or if it will be a service or some assortment of products and services. You decide how **place** will function in your business; in this case, your web site. You decide what **price** you will charge, based on internal cost factors and external perceptions of value. You choose how you will handle **promotions**--your email campaigns. You decide what types of **people** are the best targets for your campaigns, and the best way to reach them.

Each of the "five P's" of the marketing mix contributes to your ability to outshine your competitors. And each demands your attention.

Summary – Planning Your Campaign

What do you want to achieve?

The ultimate goal is an increase in your revenue, but for the purpose of your campaign, isolate its immediate goals.

What is your target market?

Knowing your audience is a significant factor in the success of your campaign.

What is your call to action?

What do you want recipients of your email to do?

What is your privacy and anti-spam policy?

It is best to clearly reference your Privacy and Spam policies.

What message format?

The message format you choose for your message will greatly affect your response rate.

What will your message say?

Be creative, but keep your copy as tight as possible.

How will you send your message?

Use messageREACH to help you get the most out of your campaign.

Where will your customers land?

The landing page is where recipients of your email will go to after they open the Click-TO's in your message.

How will you track and handle responses?

Before your message leaves your computer, plan how you will track and manage responses.

What kinds of tests will you conduct?

It's important to test, otherwise you may find you've wasted time and money on a campaign that doesn't work.

Practice the Five P's of Marketing

Your overall marketing strategy should be built around Product, Place, Price, Promotion, and People.

Content Development

This section deals with the various components of an email and how to get the most out of each section. A key strategy to apply throughout your email is personalization. By talking to your readers one-to-one, they will feel like individuals, and in the long run your efforts will be more successful. Another important aspect is relevancy. Content that is interesting and relevant will keep them from unsubscribing. The components of an email have been broken down as follows:

The Envelope

- **From**
- **Date:**
- **To:**
- **Subject:**

The Body

- **Header**
- **Greeting**
- **Offer**
- **Trailer**

The Remove Block

- **Opt-out/Privacy Policy**
- **Preferences**

The Envelope

On a daily basis, your customers' email boxes will fill up with perhaps 50 new emails or more. In an instant, they must decide what stays, and what goes. The text contained on the envelope plays an important role in whether the email gets opened or deleted.

Many of us have mistakenly deleted important messages because the Subject Line on the envelope didn't catch our eye. Here are some pointers to get your readers to open your mail and actually read what you have to say:

From

You'll have a much better chance of gaining instant legitimacy if you include your company name in this section. You may opt to send your email from an actual person. If you do, make sure that your company name appears in the "Subject" header.

Date

Think about your offer and when you would like your recipient to read your offer. For instance, the best time to get your email opened and read is late afternoon, avoiding the morning rush. If your email is business to business, the best days to send it are Tuesday through Thursday. If you are sending directly to consumers, the best days are Saturday or Sunday. messageREACH offers you the ability to schedule your message to be delivered at its optimum time.

To

By capturing a person's name when they opt-in, you'll be able to personalize your message right away.

Subject

The subject line is critical, and so often an after-thought for people conducting permission email campaigns. Additional attention should be paid to the “Subject.” Here are some guidelines for developing a compelling subject line:

Refer to a recipient by name. Addressing a recipient by his or her name is a building block to forming a one to one relationship.

Consider these two subject lines: “*Join us for a free financial webinar.*” The other: “*Chris, join us for a free financial webinar.*” Addressing someone by name makes him or her more likely to click to see what’s inside. One caveat: in the “Don’t lie” section below, we point out not to mislead a reader with just “hi” – implying an existing friendship. Use a person’s name to personalize, not to trick someone into opening your message.

Keep it short and to the point. For the most part, subject lines that offer value and are benefit-oriented, witty and personalized generate greater open rates. Don’t be afraid to reference an established brand or product in your subject line. Customers are more likely to open messages from the brands they know and trust. Also make sure the subject line is not much more than 40 characters long. This way, the entire subject can be seen in the mailbox before it’s opened.

Be Honest. Adhere to the basic “truth in advertising” doctrine. Make sure your subject line doesn’t look like spam, and that it never intentionally includes fraudulent information, or employs tactics intended to mislead your audience about the content. You can use certain verbiage to entice your audience to open your message, but be careful. Here are things to consider:

- **RE: or FW:** - Don’t use these in the subject to make the reader think the message is connected to a previous communication with another party;
- **“Hi”**- It’s good to personalize your email, but avoid phrases intended to convey a previous friendship or relationship when none exists;
- **Avoid other spam buzzwords** – especially “100% Confidential,” “Act Now,” “Satisfaction Guaranteed,” “debt,” “easy,” “discount,” “cash”. Even the most novice email users know to delete, or at least be very suspicious of messages containing these words and phrases.
- **“Free”** – There’s a fine line to walk. It’s ok to invite someone to a free seminar, but overuse will get your message deleted as spam.

Don’t Shout. Words in all caps SHOUT AND SCREAM at your audience.

The Body

The details of your email reside in the body, and include the headline, greeting, and offer. The key is to make it easy to read, with short paragraphs containing links to your website for more information. Inserting links lets you analyze the effectiveness of your campaign via messageREACH’s Click-To Tracking features.

The text in your body, kept short and concise, should elicit a desire to know more about your products, services, or that webinar you’re conducting. Give your readers an opportunity to “cut to the chase” when skimming your message, but give them enough detail.

Personalized Greeting

We recommend that you normally personalize your messages. Create the sense that you know who you’re talking to by addressing someone “Dear (name).” Again, this helps

to further a one-to-one relationship. Use names to personalize, not email addresses. “Dear Susan” has a far bigger impact than “Dear sjones@nuco.com”. messageREACH offers you up to 999 personalization fields per message, so you can add as much, or as little, personalization as you wish, if you have the data.

Headline

Once your recipient has gotten past the envelope and decided to open your email, a benefit-driven headline in your message is what will keep them reading. It’s important here to avoid multiple benefits that will confuse the reader, and lessen the impact of your message. Think back to the chapter titled Planning your Campaign. If you’ve answered the questions: “What do you want to achieve, who is your target market, and what is your call to action?” thoroughly, the single benefit-oriented headline should be easy to develop.

Offer

If you are making an offer, be sure to place it at the top of the email and also in the subject line. Be sure to create a Click-To to your website for your offer so that you can analyze its effectiveness, and determine if, or how much, your email contributed to its success. messageREACH will provide you response rates on how many of your recipients clicked on the Click-To’s and how often.

Your Identity

messageREACH requires a leader (at the beginning of the message) or a trailer (at the end of the message, prior to the Remove Block), a block of text that clearly identifies you, the sender. The text, stored on the messageREACH system, must include at a minimum your name or company name, and a phone number. You can customize this block of text with anything that would be appropriate – your company logo, slogan, URLs to company information web pages, etc.

The Remove Block

Opt-out

messageREACH requires all messages to contain a “Remove Block” of text that clearly offers recipients the option to remove themselves from your lists. You have the choice of the system default Remove Block (see the messageREACH User Guide), or create your own text for messageREACH to apply to each message. Here are suggestions for the contents of the remove block:

1. **Include the recipient’s email address** – most people have more than one email address. Use messageREACH’s personalization feature in the Remove Block to put in their e-mail address to let them see which one you’re sending to.
2. **Remind the recipient how they opted-in.** Some people may not remember how they got on your list, but it’s easy for you to store this information on your database and send it to them.
3. **Provide multiple ways for opting-out.** Provide a link to unsubscribe via your website as well as an email address to which people can unsubscribe in your messages and on your website.

Preferences

Let your customers tell you how often they want to receive content and offers from you. Let your customers tell you what message formats they want. You may have asked these questions when you signed them up, but their situation may have changed, and they want to hear from you more --or less -- often. They also may now want to receive

HTML messages from you. Ask them to let you know in the trailer of your message, or the Remove Block, or put the option at the beginning of your message.

Tips on Viral Marketing

Viral marketing, also known as “referral” or “refer-a-friend” marketing, works by encouraging recipients of promotional email to forward their messages to friends. The practice has had both positive and negative reviews from consumers, privacy advocates, and industry pundits. messageREACH offers a feature called Send-a-Friend, which puts in a unique link at the bottom of your messages to allow recipients to go to another web site to address your message to up to five others. You will receive a report on which and how many of your recipients forwarded the message (but not to whom), and it is a good way of determining which of your messages can engender “word of mouth” marketing.

There’s a risk of viral marketing efforts being perceived as spam, so it’s important to follow these guidelines:

Offer a capped incentive. Individuals are more likely to forward an email to a friend if there’s something tangible and of value to them. You might want to offer 20% off referrers’ next purchase if they forward the message the first time to 5 friends, and the messages were delivered. (Your Send-a-Friend delivery report will indicate successful deliveries) Avoid open-ended incentives like a \$10 credit for every 5 friends referred because you open your program up to being hijacked by spammers and can run into severe customer service, financial, and privacy-related problems.

Referrals do not constitute opt-in permission. Just because you have received a name and email address from a friend doesn’t mean you have permission to send to it. messageREACH will not provide to you the email addresses of the messages that were forwarded, in accordance with its spam policy. You can, however, include a message with the Send-a-Friend link asking if the person would like to receive future mailings, allowing them to opt in if they wish.

Personalize the referral email. Response rates soar when users can see that a message is coming from a recognizable source like a friend or relative. messageREACH requires recipients to add their name to the forwarding address list, and each forwarded message will be personalized with the name of your recipient.

Track and analyze. Important metrics to analyze include: pass-along, click-through rates, and conversion rates. You should separate the click-through and conversion rates by original customers from referrals and evaluate their respective performances. This information will alert you to which offers and customers drive the highest ROI.

Make a habit of promoting friendly referrals. To encourage your opt-in list to forward your message onto their friends, place a viral marketing offer in every relevant message. Viral marketing makes for a great one-time campaign, but it also can be a good tool for continuing to broaden your reach over time.

messageREACH encourages you to send multipart/alternative messages if you use the Send-a-Friend feature. This will insure that every forwarded message will arrive in the format that these secondary recipients can read, and not detract from your message’s effectiveness.

Testing and Proofreading

Remember the ad slogan “You never get a second chance to make a first impression?” That especially holds true in the land of permission email. There’s too much competition for customers’ attention and dollars to send bad email.

Common But Costly Mistakes

- Misspelled words – especially a recipient’s name!
- Incorrect or poor grammar usage
- Instructions that are not logical or well thought through
- Links that don’t work

Bad Grammar and Misspelled Words: When you plan your content, decide if you will write the copy in-house or if you will outsource it to a professional. Even the professionals may misuse grammar and misspell words, so it’s necessary to proof your copy multiple times, and then do it one more time. Do you have someone in your organization who can catch spelling errors not caught by your spell check? If so, build their time into your review process.

Confusing Instructions: Make sure any instructions you are sending to recipients make sense. They may make sense to YOU, since the campaign may be your brainchild, but they may be missing some important steps that you have overlooked.

The simpler, the better. Make instructions short and easy to follow. Form a test group with 10 very different people who may comprehend things differently. Also, be sure to check any phone numbers and email addresses you may post within your email.

Links that Don’t Work: This is one of the most frustrating and potentially deal-breaking errors that can be avoided. If you ask a customer to click on a link and it takes them to an error page, there’s a very good chance that you will not have a second chance to win them over. Test all links, repeatedly. Use the same test group that tests your instructions to verify that all links do what they’re supposed to do.

Test, Proof, Test, Proof: You really cannot test and proof your email enough. Once you think it’s ready to go, test it one more time!

Summary – Content Development

The Envelope

The text on the envelope plays an important role in whether the mail gets opened or deleted.

From: You'll have a much better chance of gaining instant legitimacy if you include your company name in this section.

Date: Think about your offer and when you would like your recipient to receive it.

To: By capturing a person's name when they opt-in, you'll be able to personalize your message right away.

Subject: The subject line is critical. Refer to a recipient by name, keep it short and to the point, be honest, and don't shout.

The Body

The key is to make it easy to read.

Personalized Greeting: We recommend that you normally personalize your messages.

Headline: A benefit-driven headline in your message is what will keep them reading.

Offer: If you are making an offer, be sure to put it at the top of the email and in the subject line.

Your Identity: messageREACH helps you make it clear who you are.

The Remove Block

messageREACH requires all messages contain a "Remove Block" that offers recipients the option to remove themselves from your list. Remind recipients how they opted in, provide multiple opt-outs, and let your customers decide when they want to receive your messages.

Tips on Viral Marketing

The type of marketing works by encouraging recipients of promotional email to forward these messages to their friends. To prevent this type of marketing from being perceived as spam, here are some guidelines:

- Offer a capped incentive
- Referrals do not constitute opt-in permission
- Personalize the referral email
- Track and analyze
- Make a habit of promoting friendly referrals

Testing and Proofreading

There's too much competition for customer's attention and dollars to send bad email. Test and check for:

- Bad grammar and misspelled words
- Confusing instructions
- Links that don't work

Lists

Permission-based email marketing means that your organization (not a third party) has asked a prospect/customer whether it's OK to use commercial email to communicate with them. If the prospect/customer opts-in (says yes), then you have permission to contact him or her via email. It's the difference between a message that your recipient will welcome and a message that will be considered spam. (learn more about spam in the last chapter).

Building your in-house list based on strict permission, or opt-in principles, will result in an incredibly powerful marketing tool. The list will be built by you, and will be made up of only people who want to hear from you. And because it's your list, you can get to know their likes and dislikes. You have a tremendous opportunity to form that lasting bond—that one-to one relationship. There is no question that an in-house list will take longer to build. However, its value to you will far outweigh the cost in time spent building it.

Understanding Permission Email

Note that gaining permission pertains not just to prospects, but also to existing customers and others with whom you may have a business relationship. From a legal point of view, the email laws that exist now in about half the states in the U.S. do not require additional permission when a prior business relationship exists, but as a messageREACH customer, you are contractually bound to practice true Permission Email. That means gaining permission even from current customers if you have not yet communicated with them via email. *Translation: just because you have someone's email address doesn't mean you can send him or her anything. You must first gain permission.* This chapter on Lists will clearly define how to get such permission.

How Will You Obtain Your List?

You may already have a good many email addresses of your customers. messageREACH requires that address lists **must** be your own, never purchased or rented. Rented lists are frequently **not** opt-in lists at all, are unreliable as to accuracy, and are what engender spam complaints.

Rented lists are not permitted, and there are a lot of good reasons for this:

They are not permission lists – No matter what the list seller/broker indicates, the recipients have not opted-in to receive mail from *you*.
You can become a spammer. There is a very high probability that your messages will be perceived as spam because the recipient does not know who you are.
They are generally not current. Depending on how the lists were created, they are most likely full of old, invalid email addresses, which will waste your resources
They may have been “harvested” from web pages and newsgroups on the Internet. This means they may be email addresses of webmasters, info@ addresses, customer service addresses, and addresses of people who have no interest in your products or services. Usage of such lists will almost guarantee that you will be sending what the recipients believe to be spam.

Lists that can be rented are frequently sold as “opt-in”, consisting of addresses of people who have indicated they would like to receive email on certain topics. But that does not mean they have specifically given permission to receive email from you! If you obtain such a list, sold as a list of people who indicated they are interested in the kind of products or services you provide, you may encounter some recipients who either did not opt-in to that list or did not remember doing so, and may generate spam complaints about you beyond merely asking to be removed from your list. These complaints could cause your mail to be blocked by recipients, Internet

Service Providers (ISP's), and possibly getting you on a spammer's Black List, which is not good for you or your business. Recipients of email on such rented lists are not, by design, the targeted market such as would be on the opt-in lists you create. It is most likely a waste of resources to rent/purchase these lists, create messages, and send them to these lists. Your return on investment could even dip into the negative for such a campaign.

The next section will offer insight into developing and maintaining your house lists.

Opt-In Principles

Opt-in occurs when a person grants specific permission, or actively checks a box on the sign-up screen of a website or paper form, agreeing to receive further communications. Opt-in is the minimum level of permission required by your messageREACH Terms and Conditions.

Any form of opting in, whether it's for a newsletter, future mailings, product notices, membership registration, etc., involves an exchange of value. Your company gets something it wants from its prospects (usually contact or marketing information), and your prospects get something from you that they want. You'll apply the same principles when building your opt-in house list (see List chapter).

1. **Make it easy to opt-in.** Put a sign-up box on your web Home Page, or provide an incentive to sign up for email in other, traditional direct mailings.
2. **Keep it simple.** Don't ask for any more information than you absolutely need. The more they have to fill out, the more likely it is that they'll opt-out altogether.
3. **Always make your web site opt-in a customer action.** They check a box, or click something, or take some other positive action. Do not let your web site default to opt-in, or present anything that requires a potential customer to *uncheck* something to opt-out. It doesn't take much for busy consumers to overlook, or forget to uncheck a box that says "Yes, I would love to receive special offers from other companies. To the poor consumer, your message will soon appear to be spam.
4. **Provide immediate confirmation** that the opt-in (or opt-out) procedure was completed successfully.
5. **Send a thank you**, also known as a Confirmed Opt-in. Send a timely follow-up email that confirms what the customer subscribed to or requested. Be sure to include multiple ways for them to contact you if they confirmed in error, or have questions.
6. **Always provide multiple ways to unsubscribe** to whatever it is you're sending them, and make the unsubscribe process fast and easy.
7. **Adhere to a privacy policy** stating that you will not divulge customer information in any way. And, post it in a visible place.
8. **Send only what they expect.** If a prospect signs up for a newsletter from you, don't flood them with other email unless you have their permission.
9. **Maintain detailed records of opt-ins.** Sometimes a complaint will arise and a recipient will deny ever opting-in. To protect yourself, keep a record of each opt-in. messageREACH may ask you to provide proof of opt-ins should a dispute occur.
10. **Test, test, test.** Make sure opt-in and opt-out procedures actually work the way they're supposed to.

Opt-in terminology to be familiar with:

Confirmed Opt-in – See #5 above. Note that no reply is necessary when sending a Confirmed Opt-in.

Double Opt-in – Double opt-in requires that a person respond within a short time to the confirmation message. If the person doesn't respond, their name isn't added to the list. This is the preferred method in the email-marketing arena.

Double opt-in can also serve as a safety latch. By asking someone to respond to a confirmation message, it keeps people from opting-in other people without their knowledge.

Opt-Out – Opt-out typically refers to two things, one positive, and one negative. The positive definition refers to ensuring that your message includes offering the ability to stop receiving your message. (See below for more information on opt-out handling via messageREACH.) The negative definition of opt-out messaging refers to the method of sending messages to a non-permission-based list (e.g. a rented list) – and continuing to send until the user opts out. This type of marketing is outside of Xpedite’s policy.

What Information Should I Gather?

No matter how much or how little customer information you gather, always make it very clear what you are going to do with the information. Then, stick to your policy. You want your customers to be loyal, so you need to keep your word with them.

At a minimum, along with an email address, get the person’s name. This allows you to personalize all messages you send, which has a far greater impact than a message addressed to “Dear Customer”. Depending on how deeply targeted you want your email campaigns to be, you might also consider asking for information such as:

- A zipcode. There are a lot of good demographics available for zip codes.
- Gender
- Type of profession
- Level of education
- Preferences related to your product or service (If you make ice cream, you might want to ask what the person’s favorite flavor is, for example.)

Let your customer, or potential customer, decide how much information he or she wants to give to you. Don’t make anything mandatory information – except the email address.

The Do’s and Don’ts of List Building

A short review:

DO

- Provide an incentive or offer to those who sign up
- Be up front. Let people know who you are and what you will be doing with their email address
- Respect your customer’s privacy. Never, ever violate their trust by selling their email address
- Allow recipients to opt-out of every single message, and provide multiple ways to do it
- Send a thank you, also known as a Confirmed Opt-in. Send a timely follow-up email that confirms what the customer subscribed to or requested. Be sure to include multiple ways for them to contact you if they confirmed in error, or have questions. Also note where they opted-in.
- Test. Make sure your opt-in procedures actually work the way they’re supposed to.

DON’T

- Put people on your list who don’t know you or have not given permission
- Ever put people on your list who didn’t ask to be on your list (see above bullet)
- Send them anything other than what they’ve signed up for

Building Your House List

Here are some great ways to build a successful permission email list:

Website: Your website should be a source of email addresses (it also plays a huge role in the success of your email campaign). There are many creative ways to drive people to your site, and once they get there, let them know that you can send them information on sales, new products, services, training, etc. If they're interested, they'll opt-in! The dedicated team at messageREACH Solutions can help you automate your list sign-ups, and our Automated Subscribe feature can add names to your list from a simple web form.

Physically Collect Them: Collect names and email addresses manually, particularly if you are a retail organization. Any time you collect personal data, ensure that an email address is included. Ask customers at the point of sale for their email address, or after a successful customer service call. Some people prefer to shop anonymously, but your best customers will want to hear about any specials or exclusives. Just be sure that you prominently spell out what you will be doing with their email address.

Direct Mail: Give people an offer or incentive that encourages them to opt-in to your email list. It could be a free email newsletter, white paper, or a contest. The cost of the incentive doesn't have to be expensive, but make sure it's relevant—something of value to the customer. And make sure here, too, that customers will know exactly what you will be doing with their email address.

Advertise: Almost any form of advertisement can drive people to your site where they can opt-in and sign-up to receive email from you. Sponsor an email newsletter, or buy website banners where people who would be interested in your product might see it.

Tradeshows and Conferences: Again, give people a reason to give you permission. Offer a newsletter or something else of value. You may simply offer to stay in touch with them after the show is over, but if you are scanning cards at a show, just because you have their email address does not mean you have permission. Email them a thank-you for visiting your booth, and ask if you can put them on your mailing list.

Display Your Email and Web Address Everywhere: Every brochure, advertisement, product announcement, press release, direct mailer and fax document. Every piece of material that a customer might see should have your email address and website listed on it. Make it easy for customers and prospects to get to you, not your competitor.

Appending Your List

A definition of a list append is when you take an existing postal mail or phone list and add email addresses. It is not a dynamic list-building process, in that you are not providing an on-going method for opting-in to your list, such as a sign-up box on your web site. An address list created in this method is **not** a true permission-based list. Asking an existing customer for an email address is OK, but you must also *ask permission* if you want to send that customer something via email.

The only time you can use an appended list with messageREACH is:

You contacted your customers on your list by mail or phone and asked them for their email address **and** asked permission to send them your materials by email. You must be specific in your description of what you want to send to them. Do not ask for permission to send them

product alerts, then also send them product promotions. You will be labeled a deceptive spammer faster than you can click on “Send”.

Remember, even though you have a list of your customers, you still must ask their permission to send them email. Make getting their email addresses for your list an opportunity to re-establish communication with them, and perhaps offer them an incentive in exchange for their email address and their permission to send them email.

If you do decide to try appending email addresses to your list of customers, keep in mind you will not enjoy steady growth of your opt-in list if you use this as your only on-going acquisition strategy. You must be constantly employing the other strategies listed in the How to Get Permission section; otherwise, a list built on appends alone will begin to erode through bounces, opt-outs, and customer turnover.

List Append Services

There are numerous companies that will take a list, for instance your customer database, and fill in the missing email addresses. While this option sounds extremely attractive, and these are already your customers, using a list append service can cause problems. The resulting list will not be permission-based, and messageREACH will refuse to send traffic to such a list. And:

- The match rate is very low, averaging below 25 percent.
- The e-mail addresses that the system is matching on is typically the recipient’s “secondary” or “spam” e-mail address that the recipient may not check frequently. In other words, even if the e-mail address is active, the recipient may never read the message as it’s an extra address that people often create and then abandon.
- Although the service may say they’re matching your customer database against people who have opted-in to receive certain promotional email, that permission is not transferable.
- The people on the list are your customers, and they may perceive email messages you send as spam because they didn’t specifically give you permission. Hence, you risk losing them for good.
- List append services are very expensive. Your marketing dollars are better spent on building a good, solid, documented permission list on your own.

Managing Your House List

Once your initial list is built, the work is by no means done. Keeping your list clean and current will ensure a higher success rate and reduce chances of your messages being labeled as spam.

Handle Bounces Diligently

messageREACH will provide you a Bad Address report after any broadcast. These are addresses with permanent errors, addresses that have been blocked, and addresses to which you can never deliver because either the address no longer exists, or the mail domain no longer exists, or it has been returned for some other unrecoverable problem. Please be sure to take these addresses off your list.

Streamline and Simplify the Email Sign-up Process

You don’t want to lose people when they’re trying to sign up! Email sign ups, especially those for free newsletters, should stand out on your home page and be a regular part of your site’s navigation bar. You have invested in getting customers to your site; now make sure it’s easy for them to stay connected.

Test Your Sign-up Processes Regularly

Check the details of your sign-up process yourself, on a regular basis. Make sure that:

- The correct welcome message is sent.
- The welcome message clearly states what your visitor signed up to receive.
- The subscriber's address actually makes it into your list and is sent what he or she has requested.
- Your IT staff and Webmaster create checks in the email address entry point on your website to try to catch typos and random characters when they are keyed in. In addition, messageREACH lets you write a simple script to validate basic email structure, xyz@zyx.com. This makes it easy to ensure there is an "@" symbol, and that there are no keyboard wingdings, indications that your captured email address is incorrect.
- Add text to a sign-up page that lets customers know that you'll be sending them a confirmation or welcome message, and when they can expect to get it. This might help them come back to your site if the message does not arrive.

Monitor All Emails That Arrive Regarding Subscriber Issues

Sometimes, a subscriber will send a manual, not automated, email notifying you of an address change. Also, an auto reply message may be generated notifying you of special circumstances of a recipient, i.e. if they left the organization. You may also find that you receive quite a few unsubscribe requests from recipients who simply reply to your message. Keeping on top of these messages reduces your chance of being labeled a spammer.

Understand Your Customer

After you've created your house list, go back and decide if the information captured helps you really understand their preferences, and purchasing patterns. Maintaining historical data of past purchases is one easy way to target and profile your customers for future programs. Consider other information that you could capture that would enhance your one-to-one marketing efforts.

Treat Your Best Customers Well

You can gain a very accurate picture of who your best customers are, and what products and services will trigger a repeat purchase by segmenting them by their purchasing patterns. Understand what differentiates good customers from the bad and target them with incentives to purchase again.

Be Disciplined in your Campaign Efforts

Success depends on your ability to be disciplined in your email communications. Fine-tuning the frequency of messages will give you greater brand awareness, preference, and sales. Unfocused and infrequent efforts will not get the job done, whereas, too frequent communications can become an annoyance and cause customers to opt-out. Make sure that your product and services are clear and focused on customer benefit.

Opt-Out Handling

Any message that you send should include a method for your recipient to stop receiving your message or change the information being received. When a recipient wants to be taken off your list, his or her respect for you will increase as their request is promptly honored. It doesn't necessarily mean you have lost a customer, as there are many, many reasons a person wants to be removed from an email address list.

The Best Ways to Offer Opt-out Options

Legitimate use of opt-out is an important part of permission email. For a variety of reasons, customers/recipients will want to unsubscribe from your list. messageREACH requires that there is a "Remove Block" in every message, and offers you a choice of the opt-out methods which are listed below. Make it easy for recipients to do so by giving them multiple methods.

Click to remove – Clicking on the URL provided in the Remove Block will take the recipient to a web page where they can request removal from the sender's lists. A confirmation of the remove will be sent to the recipient almost immediately, and the remove will be processed within 24 hours.

Mailto - This simple form of response is another option for recipients to remove themselves from the sender's lists by clicking on a link that will automatically open a pre-addressed email message to send.

Reply to an email address – All the recipient needs to do is click "Reply", then type "Remove" into the Subject line, and send. messageREACH will remove their address from the sender's lists and send an email confirmation back within 24 hours.

Your customers/prospects will have much more respect and loyalty for you if you are honest in presenting your policies and giving them various, legitimate options to remove themselves from your mailing lists. Your goal should always be to build customer loyalty and forge long-lasting, profitable relationships – something that will not happen when people feel they have somehow been deceived.

messageREACH System Opt-Out Options

The choices you can give to your recipients for opting out of your lists are explained above. These are choices designed for the Remove Block that your recipient sees, and are clearly designed to make your recipient feel in control of the email he or she chooses to receive, and that you are a responsible sender.

There is another level of address blocking/opt-out control that messageREACH offers, and it should be carefully considered when you set up your messageREACH account. It is the ability of messageREACH to block addresses at an individual user level, or at the account level, across users within the same account.

This means that if you set up a messageREACH account, and within that account several people are set up with messageREACH ID's and user privileges, address blocking can work two ways:

- If you choose to set up the account with **customer account level blocking**, anytime one of the users in the account sends an email that a recipient of which requests to be removed from the list, that recipient is **removed/blocked from all users' lists** in the account.

- If you choose to set up the account with **user level blocking**, this means that if a user sends an email and a recipient requests removal from the list, that **removal request is for mail sent from that individual user only**. Any other messageREACH user in that account will not have that other user's recipient's remove request affect his or her lists, even if the recipient is also on other users' lists.

There are good reasons for choosing one method rather than the other, most having to do with the kind of email you and other users in the account are sending. While messageREACH insists that all of the lists any customer uses are opt-in, to recipients, email doesn't come from different senders in a company, it comes from the company. Email from the marketing department may not be distinguished from email sent by the customer satisfaction department. To the recipient, it's email from the same company, and if this recipient requested to be removed from the marketing department list, it could appear that their remove request was ignored if they receive email from someone else at the same company, and you perhaps could be labeled as a spammer.

You would choose a customer level block if:

- Any users in the account are sending marketing and promotional materials
- Any users are sending marketing surveys
- Users in the account share lists

You would choose user level blocking if:

- There is only one user in the account
- The users in the account send fee-based subscription newsletters or other fee-based materials
- The users in the account send business transactions – order confirmations, reports, etc.

Your Account Representative will assist you in determining the best level of address blocking for you. messageREACH recommends, in an effort to cover all contingencies that could be mistaken for spamming, that you use the customer level blocking. When you build an opt-in list of good, targeted recipients, spam complaints and subsequent address blocking will not preempt your email campaigns. However, in the interests of being a good "netizen" (an Internet user who is trying to be responsible), and to be in full compliance with the messageREACH anti-spam policy, customer-level blocking is the strongest stand.

Summary - Lists

Permission-based email marketing means everyone on your address list has agreed to receive your messages. Building your in-house list based on strict permission, or opt-in principles, will result in an incredibly powerful marketing tool.

Understanding Permission Email

Just because you have someone's email address doesn't mean you can send him or her anything. You must first gain permission.

How will you obtain your list?

Rented lists are not permitted. You must develop and maintain your own house lists.

Opt-In Principles

Opt-in is the minimum level of permission required by messageREACH. Some principles to follow when building an opt-in address list:

Make it easy to opt-in	Keep it simple
Provide immediate confirmation	Send a thank you
Always provide multiple ways to unsubscribe	Adhere to your privacy policy
Send only what recipients expect	Maintain detailed records of opt-ins
Always make your web site opt-in a customer action	Test, test, test

What Information Should I Gather

Always make it clear what you are going to do with information you collect. At a minimum, along with the email address, get the person's name.

Building Your House List

- Use your website
- Physically collect addresses
- Use direct mail
- Advertise
- Collect addresses at tradeshow and conferences
- Display your email and web address everywhere

Appending Your List

Without additionally asking for permission, an address list created by appending a customer list with email addresses is **not** a true permission-based list.

Managing Your House List

Once your list is built, your work is not done. You should: handle bounces diligently, streamline and simplify the email sign-up process, test your sign-up processes regularly, monitor all emails that arrive regarding subscriber issues, understand your customer, treat your best customers well, and be disciplined in your campaign efforts

Opt-Out

It's the other side of opt-in, and just as important. The best ways to offer opt-out options, from messageREACH, are: click to Remove (goes to a messageREACH web page), mailto, response, and a reply to an email address.

messageREACH System Opt-out Options

messageREACH can block addresses on a per user basis (user level blocking), or across a customer's account (customer level blocking) for all users in that account.

Bounce Handling

Bounced email, or email that for a number of reasons does not make it to the intended recipient, is the modern day version of “Return to Sender,” or “Address Unknown.” Understanding why it happens and how bounced email can be managed is important because every customer or prospect you fail to reach is a sale you fail to make. Efficient handling of bounced email will also prevent you from appearing to be a spammer.

Top Reasons for Bounced Email

The number one reason is probably “list decay.” Email addresses go bad. People change jobs, change ISPs, etc. When they go, their email addresses rarely follow them, and most forget to update all their subscriptions. Another key reason addresses go bad is users run out of space. Yahoo and Hotmail accounts only allow users 2 megabytes of storage space, which fills up fast. A bounced message that includes the warning “User over quota,” translates to a full mailbox.

Hard Versus Soft Bounces

There are two types of bounces: hard and soft. A hard bounce is indicative of a permanent problem, meaning that there will never be a delivery to that address. A soft bounce signals a temporary condition or problem.

Hard Bounce: An invalid email address causes a hard bounce. Either the domain (the part to the right of the @ symbol) is wrong, in which case the email cannot be delivered, and you will know of the failure immediately. Or, the mailbox (the part to the left of the @ symbol), does not exist on that domain, in which case the message may be delivered to the mail domain, but a bounce message will notify you later that the mailbox could not be located.

Soft Bounce: Soft bounces occur when a mailhost is down or busy, or when a recipient’s mailbox is full. The email address is good, but conditions prevent the message from being delivered. Keep the address on your list and try again later.

Interestingly, messageREACH’s ability to report on the success or failure of a delivery attempt as well as why the message did not get delivered is often a function of the recipient’s e-mail system. There is no standard method to report back to senders whether a recipient’s ISP or server accepted and delivered the message. Some servers will report soft bounces as hard bounces while some will not report anything at all. Still, it is worth taking the data you have – in particular the hard bounces – and updating your lists appropriately.

How to Deal With It

messageREACH gives you the option of receiving bounced message notifications via reports, or by delivering the bounced messages directly to you.

Reports: Bounces are listed on your Completion Report, or on a separate Bad Address report. The Completion Report is generated as soon as the messages are delivered which could be a minimum of three days or a maximum of fourteen. It shows hard bounces where the domain was bad, and soft bounces where the server was busy or unreachable at the time. The Bad Address report contains only addresses that were hard bounces, addresses, which can never receive deliveries.

Direct Receipt: The messageREACH service can automatically process bounced messages which is typically what Xpedite recommends you do. If you choose to have the receipts sent directly to you, realize that this could potentially create a large number of bounces and cause headaches. Consider that if only 0.1% of 100,000 sent bounce, you'll get 100 bounced messages in your email box. messageREACH reports aggregate the bounces to ease the process of cleaning your lists.

Keep Your Lists Updated: By keeping your lists updated, removing bad addresses, you'll avoid a situation where a system administrator decides you've been bouncing too many users for too long, and eliminates your ability to reach anybody on his/her network! If that's not enough, consider that a non-updated, or "dirty" list will have a lower response rate. Bad addresses do not read newsletters, buy products, or respond to campaigns.

Refer to the **Lists** chapter of this manual for tips on building a good house list, and for step-by-step instructions on how-to, refer to your messageREACH User Guide.

Summary – Bounce Handling

Top Reasons for Bounced Email

The number one reason is probably “list decay.” Email addresses go bad.

Hard Versus Soft Bounces

A hard bounce is the result of an invalid email address. It can never result in a delivery, and the address should be taken off your list. A soft bounce occurs when a mail system is down, or too busy, or when a recipient’s mailbox is full. Keep this address and try again later.

How to Deal with Bounced Mail

Reports – bounces are listed on your Completion Report, or on a separate Bad Address Report.

Direct Receipt – messageREACH can forward on to you all bounced messages, but collecting and managing a large number of bounces could be difficult.

Keep your lists updated – Remove bad addresses promptly

Test, Track, Measure, Analyze and Refine

Testing the various parts of your email campaign is important to the overall success of your efforts. It provides insight into the types of offers that your recipients will respond to as well as the types of messages that get their attention. Testing helps you understand what is needed to convert and keep customers, or retain readership.

What Parts of the Message Should be Tested?

Everything should be tested. Below are some samples of how:

Email Design

The design of your email can have a tremendous impact on your response. Test the design of the following elements of your message:

- **The Envelope**
 - **'To' line** – Compare your response using a recipient's real name versus just their email address
 - **'From' line** – Do more people read the message if you list an individual's name or if you place your company or publication name in the from line?
 - **'Subject' line** – Do you get a better response when you place your offer in the subject line? How does the wording of your subject line influence your open, response, and conversion rates?
- **Copy** – Try different styles of writing. You may find that different styles appeal to different demographic types.
- **Layout** – Experiment with different layout formats to see what gets the best results. For instance, place a graphic in your ad instead of a text link to an offer, or move your offer to the top right instead of the top center of an HTML message.
- **Personalization** – In an earlier chapter, we discussed how personalization in general increases your response. Now, experiment with different types to see what gets your reader's attention. For instance, try a personalized greeting such as "Dear Chris" on some, and personalized content on others: "How are you enjoying your DVD player that you purchased last week? We think you might enjoy the following DVD movies that we're offering at a discount of 30%..."

Strategy

- **List Segmentation** – Test your copy on various segments of your list based on:
 - Customer history
 - Buying behavior
 - Interest categories
 - Demographics
- **Message Frequency** – How much is too much or too little? Try staggering the time between your messages to find the optimal frequency that lets you stay in touch with

your recipients, but not bombard them with too many messages that can make them opt-out.

- **Timing** – What time of day do you send your messages? Consider what it is that you want your recipients to do, and experiment with the timing of your message delivery to optimize responses.

Landing Page

This is an important area to test. The effectiveness of this page has a direct effect on conversions of leads to sales. Test for things such as cross-sells, or ways to increase average order size. For tips on the structure of your landing page, please refer to the chapter titled Building your Campaign.

Offer

Your “call to action” can vary depending on the segmentation that you choose. For example, you might want to test different discount structures. You may find that a 20% discount is required to get people who live in the Midwest to purchase, whereas a 10% discount is all that is needed when pitching to people on the East Coast.

Track

Track what you test. There are many ways to do this, but the easiest is to simply maintain a spreadsheet that lists your offers, list segments, message formats, date/time sent, and key codes and other variables for each mailing. By testing at least one variable within each message, you will have reliable evidence of the success of your testing. After each mailing, you can add data to your spreadsheet that reflects Click-To rates, open rates, unsubscribe rates, conversion rates, etc., for each test case.

Measure Your Response Rates

By measuring the response to your permission email campaigns, you will be able to better understand your audience, and the types of articles, offers, and subject lines that work with them. The basic definition of a response rate is the number of people that responded to your email. You should keep track of any type of response to your message including:

- How many leads did you receive?
- How many people requested more information?
- How many people purchased something?
- How many people opted-out/in?
- How many people complained?
- Was there a certain type of demographic that responded to certain things?

Statistics to Measure:

- **Open (View) Rate:** An open rate, or view rate tells you the number of recipients who opened your message. The only way to measure this is through HTML messages. This is how it works: any image in your message can be stored on the messageREACH system during the life of the message, for tracking purposes. This feature, called HTML Open Tracking, watches the number of times this unique image is accessed, which is what indicates the number of “opens” you have had. The drawback is this statistic cannot guarantee that the recipient actually chooses to open and read your message. If your HTML file includes no graphic images, messageREACH will insert a transparent graphic into your message for tracking purposes. For more information on how to employ open rate tracking in your campaign, refer to your messageREACH User Guide.

- **Click-TO Rate (CTR):** By assigning a unique URL to each of the links in your message, you can determine the number of click-throughs for each. There are two types of Click-To rates (CTRs) that you can track: an individual CTR, which tells you the number of times your recipients “clicked” on a unique URL in your message to be guided to a promotion page on your web site, and an overall CTR, which tells you the number of clicks in relation to the total number of messages sent. messageREACH delivery reports will do the calculations for you. For example: if you sent 150,000 messages and recorded 30,000 clicks, your overall CTR would be 20%.
- **Conversion Rate:** Conversion refers to a number of things, but for an email campaign, it refers to the success of your call to action. For instance, if your call to action was to get recipients to view an article, your conversion rate becomes the number of people who clicked through to read your article by the number of messages sent.
- **Bounce Rate:** How many of the names on your list were bad? How many were hard or soft bounces. This statistic can tell you the quality of your list, and lets you know when you need to spend time on list management. messageREACH provides robust bounce handling features, and your Completion Reports will provide relational statistics on bounce rates.
- **Unsubscribe Rate:** Do more people unsubscribe when you don't offer an original article in your email? When you offer 5% off instead of 15%? Measuring unsubscribe rates in correlation with your testing efforts can help you refine your message and frequency, and can help to reduce the number of unsubscribes you receive after each mailing.

Analyze and Determine the Value of Your Efforts

After determining the various response rates you will be able to tell a tremendous amount about your customers, as well as the effectiveness of your permission email efforts. Below are some basic calculations that you can use when analyzing performance:

ROI (Return on Investment) --This is the net profit for your campaign divided by the total cost of the campaign.

Cost Per Sale -- Divide the total cost of your campaign by the number of sales that resulted from that campaign.

Cost Per Response -- Similar to the cost per sale, divide the total cost of your campaign by the number of responses that your campaign generated.

Cost per Message -- How much did it cost to create and send each message? Divide the total cost of the campaign by the number of messages you sent.

Total Revenue Generated by Your Campaign -- Take the number of customers and multiply by the dollar amount of sales per customer.

RFM – Recency, Frequency, and Monetary Value -- RFM helps to determine which customers are most likely to purchase on your site, based on their activities in the past. This can also tip you off to the types of market segments that are less likely to respond to your message as well.

Proponents say that customers who have purchased from you in the past are more likely to buy from you in the future. Recipients are given a score based on the weight given to each variable. Customers are analyzed and placed into cells based on their RFM score and then their responses are judged on different marketing messages that are sent to them.

Three factors influence RFM:

1. Frequent buyers are more likely to respond than less frequent;
2. Big spenders respond better than low spenders; and
3. Recent buyers are more likely to respond than buyers farther in the past.

According to the RFM model, most of your responses will come from customers with a high RFM value. You need to decide which of the factors – R, F, or M are most important to your organization, and mold your targeting efforts to them.

Testing, tracking, measuring, analyzing, and refining will take time. Fortunately, the features built into messageREACH can help you streamline and organize this critical aspect of permission email that can play a huge role in helping you forge lucrative, and mutually beneficial relationships with your customers.

Summary – Test, Track, Analyze and Refine

What Parts of the Message/Campaign Should be Tested?

Everything. Then, track what you have been testing:

Email Design: The envelope (To: line, From: line, and Subject), the copy, the layout, the personalization

Strategy: The list segmentation, message frequency, and message timing

The Landing Page: Has it been effective?

The Offer: How has the response been?

Measure Your Response Rates

By measuring the response to your permission email campaign, you will be better able to understand your audience.

Statistics to Measure:

- Open (view) Rate
- Click-TO Rate
- Conversion Rate
- Bounce Rate
- Unsubscribe Rate

Analyze and Determine the Value of your Efforts

Calculating the following will tell you a lot about the effectiveness of your campaign and your customers:

- ROI (Return on Investment)
- Cost per Sale
- Cost per Response
- Cost per Message
- Total Revenue Generated by Your Campaign
- RFM – Recency, Frequency and Monetary Value

Spam Prevention

Unsolicited Commercial email (UCE), known by its more common name, spam, has become the bane of the Internet. Permission is the difference between a message readers will welcome, and spam. If you don't have permission, you're probably going to be labeled a spammer, and failure to adhere to ethical email practices can put you in direct violation of the anti-spam laws in place in many states and countries. There's plenty of pending legislation to prevent spam, too, which is great for legitimate businesses such as yours.

Complaints that spam, or junk email, has increased exponentially since the beginning of 2002 are causing legislators to move swiftly to curb the overwhelming flood. According to a Wall Street Journal article dated June 19, 2002, Brightmail, Inc, a provider of spam-filtering software to ISPs and others, recently counted 4.7 million mass mailings of spam messages in May 2002. This figure is up from approximately 930,000 during the same period in 2001. 27% of the 1.7 billion messages the company screened in May 2002 were identified as spam.

To stay on top of legislative efforts, or to get involved, visit www.cauce.org, The Coalition Against Unwanted Commercial Email. Following is an explanation of why UCE is a threat to the viability of Internet email and a danger to Internet commerce.

Why is Spam Such a Huge Problem?

Fraud

Spammers **know** that in survey after survey, the overwhelming majority of recipients don't want to receive their messages. As a result, many junk emailers use tricks to get their messages read. For instance, they make the mail "subject" look like it is anything other than an advertisement (more about how to develop compelling subject headers and avoid looking like spam in a later section).

Many ISPs and consumers have set up "filters" to help dispose of the crush of UCE, messageREACH included, but spammers know this. When they see that mail is being blocked or filtered, they use tricks that help disguise the origin of their messages.

Some of these spammers forge the Internet "header", or address and information part of an email that you do not usually see, to make it look like the message originated from a legitimate organization, real or otherwise. This practice, also known as "spoofing", is clearly misleading.

Another tactic is to use a third party's mail server as a relay, which makes the messages look like they are coming from a legitimate source. The server used as a relay is first deluged with all of the spam going out, and usually later deluged with complaints from the spam recipients, using and the good name of the innocent third party. While there are safeguards that can be built into mail systems to prevent spammers from using them as relays, spammers can "crawl" around the web with special software to find mail systems not yet barring such relays.

Waste of Others' Resources

When a spammer sends an email message to a million people, even if the spammer did not use a third party to relay the messages first, it is carried by numerous other systems en route to its destination, shifting cost away from the originator. The carriers in between are suddenly bearing the burden of carrying advertisements for the spammer. The number of spam messages sent out each day is truly remarkable, and *each one* must be handled by other systems, possibly yours. There is no justification for forcing third parties to bear the load of unsolicited advertising.

The methods used by spammers to avoid being held responsible for their actions are very often fraudulent and tortuous. Numerous court cases are underway between spammers and innocent victims who have been subjected to and harmed by such email.

Spam is advertising, spurious at best, the cost of which is borne by the recipients.

Displacement of Normal Email

Email, without a doubt, has become a critical business tool. Spam can and will overwhelm your electronic mail box if it isn't soon controlled. Over time, unless the growth of it is stopped, spam may destroy the usefulness and effectiveness of email as a communication tool.

Annoyance Factor

Your email address and your customers' email addresses are **not** in the public domain! Individuals should have control over what their address is used for and what they receive. If you or someone else wishes to receive unsolicited advertisements, you should be able to. But no one should be *forced* to receive spam. This is the heart of the "Opt In" approach supported by messageREACH.

But what is it about spam that makes it so annoying? In part, it's because accessing email for many people can sometimes be difficult. Slow connections, line contention and other technical problems can reduce the process of accessing email to a crawl. Also, at times spam email would appear to be an invasion of one's personal property, their email mailbox, as the spam arrives in their computer, right at their desk or in their home.

Ethics

Spam is theft of services, fraud and deceit, as well as cost-shifting to the recipient—all big concerns for messageREACH, and they should be for you as well. The great prevalence of products and services marketed by spammers are of dubious legality. Any business that depends on stealing from its customers, preying on the innocent, and abusing the open standards of the Internet is -- and should be -- doomed to failure.

The Consequences of Spam

Mailbox Blocking

Most email software today includes built-in provisions for managing unwanted email. Some email software determines what is spam by looking for keywords in the message, which will block most offensive spam messages. Other software allows you to identify messages by sender.

AOL automatically filters recipient email, asking that users identify messages as "People I Know", "Bulk", or "Unknown". Each time a message arrives that is from a new address, AOL software will ask the user how to classify the message. Every time a message arrives in HTML format, with a picture or attachment, AOL will warn the recipient to be cautious in opening it if the sender is unknown to the recipient.

In every case, the spam blocking allows the recipient to easily choose not to open messages perceived to be spam, even to delete them automatically.

You do not want your messages to be classified as spam, as recipients can ignore or delete them.

ISP Blocking

Internet Services Providers may block Spam before it even reaches the addressee's mail server.

ISP's, inundated with spam complaints from their own customers, have instituted blocking procedures to prevent spam from being delivered to mail servers in their customer base. There are several methods to do this, and ISP's may employ just one or all of the techniques:

- Blocking by volume --- while thresholds vary, an ISP can associate excessive volume with a spam influx, and block it. The excessive volume may be outgoing or incoming.
- Blocking from excessive bounces – Again thresholds vary, but if bounce rates exceed the ISP tolerance level, the ISP can block the incoming mail.
- Customer Selection – AOL users who identify messages as spam and complain to AOL are ‘voting’ for the sender to be blocked. When spam complaints for a sender exceed the AOL threshold, the sender is blocked from delivering messages to AOL users.

You do not want your messages to be classified as spam, as they may not even reach your recipients' mailboxes.

Black Listing

This is the ultimate punishment, apart from legal proceedings, that a spammer can suffer at the hands of Internet Service Providers and email administrators.

Black Listing is identifying the spam by its IP address, and blocking any mail from that system, regardless of user. An IP (Internet Protocol) address is the network and local address of the computer that is sending mail to the Internet for delivery, and every piece of email includes such an address in its message header.

Often spam messages have forged message headers that give an IP address that is either non-existent or is someone else's. This causes innocent parties to be blocked unintentionally. Other spammers use innocent third parties to relay mail, dumping it into a third party's mail server which then tries to send it out. These third parties frequently end up blacklisted until they fix the relay vulnerability.

Legitimate companies who use email for marketing purposes may experience their mail servers or their email providers' servers, being blacklisted, usually because the companies are not sending permission email, but using rented or purchased lists of addresses. The recipients complain to their company's mail administrators, or ISP's, or blacklist providers, all of who may institute blacklisting procedures.

The organizations that provide universal blacklists to ISPs and corporate mail administrators base the lists on recipient complaints and unresponsive senders. However, there is no guarantee the sender of the perceived spam will be contacted before being blacklisted. Blacklisting, while useful to many, can also be quite a subjective maneuver, and it is best to do everything possible to avoid getting on the black list, as its ramifications are deep. It is the blocking of an entire mail system, not just an individual mail sender. It is meant to punish the system management that is perceived as supporting spam, as well as the spammer.

Getting off a blacklist requires showing that indeed the message sender is not a spammer because: the mail was truly opt-in, and a legitimate remove vehicle was provided.

“I'm Being Blocked, What Should I Do?”

First, double-check that indeed your messages are being blocked to specific recipients. A place to start is your completion report. If the recipient's messages are shown as not delivered, there is

probably an easily resolvable solution – check the address, and the reason for the non-delivery, and you should be able to fix the problem.

However, if the messages to the recipient are shown as delivered but do not arrive in the recipient's mailbox, it is probable that the recipient's mail system is blocking your messages, either based on your address, or per a black list managed by the recipient's mail system or ISP. Blocked mail is usually not bounced back to the sender, it is merely discarded.

Send a message to the recipient from your own email system. If it arrives, it would appear that your message REACH messages have been blocked and do not reach the recipient's mailbox. To correct this, the recipient's mail administrator must adjust the mechanism that discards your messages.

The best way to begin to resolve this is to ask your recipient to approach the mail administrator in his or her company. The validity of your recipient's request for assistance from his or her own mail administrator is undeniable, and to assist, we have provided a message you can adapt for your recipient as needed. In addition, we have included a sample message that your recipient can then adapt to give to his or her mail administrator.

Sample Message To Send To Recipient

Dear [Recipient's Name];

Thank you for letting us know you are not able to receive our messages. We have checked our delivery records, and they do indicate that mail sent to [customer email address] is being delivered to your mail system.

However, since the messages are not being delivered to your mailbox, it means that the problem is occurring within your company or your company's Internet Service Provider (ISP). Most likely your mail system is using software designed to filter unsolicited commercial email, and that this software is incorrectly identifying our messages and deleting them.

To correct the problem, your mail administrator must adjust the email filter so that you can receive our messages. The mail administrator will need some specific information to do this, so to assist you and your mail administrator, we have attached a sample message explaining the problem and including the required data. We respectfully request that you contact your mail administrator directly, as your influence within your own organization is far more immediate and substantial than ours, as a third party, can ever be.

If you or your mail administrator needs further assistance or information, please contact us at [Your contact information].

Here is the message your customer may adapt as needed for his or her mail administrator. The section showing the messageREACH IP addresses must not be changed.

Sample Message To Send To Mail Administrator

Dear [Mail Administrator's name];

I am not able to receive permission-based email messages from [Your Name/Company]. I have contacted them about this, and they have determined that the messages are being delivered to our mail system, but not to my mailbox. They indicate that spam filters may be preventing delivery of these messages to me.

These messages are information I have requested, and are not unsolicited commercial email. Following is data provided by [Your Company] to help you adjust any spam filtering so that the messages can be delivered to me.

Thank you for your help with this.

The messages are from: [Name in the From: field]

The messages are addressed to: [Name and email of the recipient]

The messages are being delivered by the messageREACH system. All mail from messageREACH is from the xmr3.com mail domain, and the mail servers IP address range is:

205.183.255.192 through 205.183.255.255, inclusive.

messageREACH is a business-to-business electronic document delivery company with strict anti-spam policies, and [Your Company] did request and receive my permission to send me email. If you would like to review the messageREACH anti-spam policy, you will find a link to it from their Home Page at <http://www.messageREACH.com>.

Please inform me when the blocking has been removed.

Thank you for your assistance, and please let me know if you need any more information.

You can also contact messageREACH support personnel at mrtech@xpedite.com to work with you and your customer in resolving the blocking problem, and to help get your emails delivered.

Is blacklisting only a messageREACH problem? No. The definition of spam and methods to stop it vary greatly, so every email provider must always deal with some measure of email blocking. It is not reasonably possible to guarantee a 100% message delivery rate in the constantly-changing realm of the Internet. Xpedite's objective is to maximize the percentage of successfully delivered email by insisting that our customers use permission-based address lists.

Prevention is Far Better Than the Cure.

It is certainly much easier to make an effort to prevent becoming labeled as a spammer than it is to recover from being so labeled. We've laid the groundwork in this document for your successful email campaign, and to have any of your messages quarantined or discarded as spam is certainly not part of your plan. To review, memorize and follow these rules, encourage everyone involved to memorize these rules, then quiz them on the rules:

1. Always ask permission before you send email. While your address lists may be smaller, initially, than you would like, your recipients will be the ones *interested* in hearing from you. Email is a great tool for customer retention, if the customer wants it.
2. Fix problems immediately. Get a Bad Address report for every broadcast, and fix any problems with incorrect addresses right away. If a person wanted to be on your list, he or she wants to receive your mailings. A non-delivered message could mean lost revenue
3. Take uncorrectable addresses off your list. If you exceed the bounced message threshold for any ISP or mail server, you may be branded as a spammer.

Summary – Spam Prevention

Unsolicited Commercial email, (UCE), known by its more common name, spam, has become the bane of the Internet. If you don't have permission from your addressees to send them messages, you're probably going to be labeled a spammer, and you will lose your messageREACH account.

Why is Spam Such a Huge Problem?

Fraud: Since most recipients don't want the messages, many junk emailers use tricks to get their messages read. Others use a third party's mail server as a relay, which makes the messages look like they are coming from a legitimate source.

Waste of Other's Resources: This is a form of solicitation that requires the carriers and the recipients to pay for it, not the sender.

Displacement of Normal Email: Spam crowds the legitimate mail in your mailbox.

Annoyance Factor: Spam is forced on recipients, and when accessing email is slow, or difficult, it is extremely untenable.

Ethics: Spam is theft of services, fraud, and deceitful, as well as cost-shifting to the recipient.

The Consequences of Spam

Mailbox Blocking: Mail can be automatically blocked from entering a mailbox, by recipients in many cases. It could happen that your messages could be wrongly blocked.

ISP Blocking: A recipient's Internet Service Provider (ISP) may take action to block messages before they even reach the recipient's mailbox, using a variety of techniques. Legitimate mail could be blocked at this level.

Black Listing: This is blocking all messages from any mail server that has been identified or accused of sending spam. There is no official process for this, and while the intent is positive, legitimate systems may get blacklisted, especially if their users employ rented or appended mailing lists.

"I'm Being Blocked, What Should I Do?"

If your messages are shown as delivered, this means the recipient's mail system is getting them. But if the recipient complains that he or she is not getting your message, your mail may be blocked by the recipient's system. messageREACH will work with you to resolve the issue with the recipient's mail administrators.

A sample message to send to your recipient, asking for their help in working with their mail administrator, is included in this chapter, as is a message that your recipient can use to send to his or her mail administrator. This message, for the recipient's mail administrator, includes messageREACH machine addresses that can be identified and taken off the recipient's system's black list.

Prevention of Far Better Than the Cure

It is easier to prevent becoming a spammer than overcoming being labeled as one:

- Always ask permission before you send email
- Fix problems immediately
- Take uncorrectable addresses of your list immediately

Best Practices Summary

The best results from an email campaign come from a campaign that has been planned and organized from the very beginning. This means that you have a clear privacy policy and a strong anti-spam policy. It means that you identify your objectives first, know what you want to say in your message, and have a plan in place to handle responses. It means that every step of the way you test, test, and test again, to make sure what your recipients are receiving is what you intended to send, and that every link to every web page or pull file in your message works. When you create your message, your planning and knowledge of your goals will show in what your message says and how it looks.

At the same time, you build your address list based on permission – the people on your list have agreed to receive mail from you, and you alone. Never add an email address to your list if the owner of the address has not explicitly agreed to be on your list. Spam, or unsolicited commercial email, is a growing problem, and email sent to someone who has not agreed to receive it will most likely be considered spam.

After you have planned, created, tested and implemented your campaign via messageREACH, continue to use messageREACH to handle returned mail for you, supplying you with a list of addresses (Bad Address Report) that will never be delivered (Hard bounces). Included on your Detail or Exception delivery reports are addresses that do not result in delivery because of a temporary problem (Soft bounces). All other replies will be forwarded directly.

With good planning, testing, and a permission-based address list, you have the best chance of running a successful campaign. Remember that different email systems have different standards for judging what is unsolicited mail and what is not, and that some of your messages may become entangled in this lack of standards, causing your messages to be considered spam and therefore blocked by mail administrators. Permission-based email can be “unblocked”, and Xpedite will work directly with you to help ensure the maximum number of your messages are successfully delivered. We also provide letters that you or your recipients can use to remove blocking. These letters include the information needed for their administrators to unblock your mail at the recipient’s location.

Work with your messageREACH account representative from the very beginning of your campaign planning, and he or she will gladly provide the advice and information you need. As you proceed to subsequent campaigns, your knowledge of the process – and your customers – will grow, as will your business.

We look forward to working with you.