

18

Direct marketing: email and mobile

In this chapter, you will learn:

- » The basics of email strategy
- » How to structure and design an effective marketing email
- » How to plan and execute a successful direct marketing campaign using email
- » Techniques for measuring and optimising your email campaigns
- » How mobile can tie into and enhance your direct marketing campaigns.

18.1 Introduction

Direct marketing is all about communicating directly to customers rather than indirectly, via ads or billboards. Direct marketing via digital generally involves email and, to some extent, mobile channels.

At its core, email marketing is a tool for customer relationship management (CRM). Used effectively, this extension of permission-based marketing can deliver one of the highest returns on investment (ROI) of any digital marketing activity (the principles covered in this chapter can apply to any kind of permission marketing). Simply put, email marketing is a form of direct marketing that uses electronic means to deliver commercial messages to an audience. It is one of the oldest and yet most powerful of all digital marketing tactics. The power comes from the fact that it is:

- Extremely cost effective due to a low cost per contact
- Highly targeted
- Customisable on a mass scale
- Completely measurable.

Furthermore, email marketing's main strength is that it takes advantage of a customer's most prolific touchpoint with the Internet, their inbox.

In January of 2015, the number of emails opened on mobile phones overtook the number of emails opened via desktop. A large number of users first read their emails on mobile, according to Litmus, Desktop represents 19% of email opens, webmail represents 26% and mobile represents 55% [eMailMonday, 2016]. Depending on the market you're targeting and lower-end markets are fast catching up, if you send an email, it will at some point be opened on a mobile phone.

In other words, you cannot think about email without thinking about mobile at the same time.

Like mobile-specific channels, email marketing is a tool for building relationships with both existing and potential customers. It should maximise the retention and value of these customers, which should ultimately lead to a greater return on investment.

Some people consider email marketing to be old fashioned, arguments about its demise have been going on for years, but it can be one of the most powerful tools in your digital arsenal.

18.2 Key terms and concepts

Term	Definition
Alt Text	The 'alt' attribute for the IMG HTML tag. It is used in HTML to attribute a text field to an image on a web page, normally with a descriptive function, telling a user what an image is about and displaying the text in instances where the image is unable to load. Also called alt tag.
Business-to-business (B2B)	When businesses sell products or services to other businesses and not to consumers.

Business-to-consumers (B2C)	When businesses sell products or services to consumers.
Call to action (CTA)	A phrase written to motivate the reader to take action such as sign up for our newsletter or book car hire today.
Clickthrough rate	The total clicks on a link divided by the number of times that link was shown, expressed as a percentage.
Customer relationship management (CRM)	A strategy for managing a company's interactions with clients and potential clients. It often makes use of technology to automate the sales, marketing, customer service and technical processes of an organisation.
Database	In email marketing, the database is the list of prospects to which emails are sent. It also contains additional information pertinent to the prospects.
Domain name system (DNS)	DNS converts a domain name into an IP address. DomainKeys, an email authentication system designed to verify the DNS domain of an email sender and the message integrity.
Double opt-in	The act of getting subscribers to confirm their initial subscription via a follow-up email asking them to validate their address and hence opt-in again.
Email service provider (ESP)	A service that helps you design and send emails.
Hard bounce	The failed delivery of email communication due to an undeviating reason like a non-existent address.
Internet Protocol (IP) Address	An exclusive number that is used to represent every single computer in a network.
Internet service provider (ISP)	The company providing you access to the Internet, for example, MWEB, AOL and Yahoo!.
Open rate	The percentage of emails determined as opened out of the total number of emails sent.
Opt-in	Giving permission for emails to be sent to you.
Opt-out	Also known as unsubscribe. The act of removing oneself from a list or lists so that specified information is no longer received via email.
Return on investment (ROI)	The ratio of profit to cost
Sender ID	A method used by major ISPs to confirm that an email does originate from the domain that it claims to have been sent from.
Soft bounce	The failed delivery of an email due to a deviating reason like an overloaded email inbox or a server failure.
Spam	Email sent to someone who has not requested or given authorisation to receive it – EVIL!

Unique forwarders	This refers to the number of individuals who forwarded a specific email on.
White list	A list of accepted email addresses that an ISP, a subscriber or other email service provider allows to deliver messages regardless of spam filter settings.

Table 1.

18.3 Direct marketing strategy and planning

The first part of any digital direct marketing campaign should involve planning for the goals you need to achieve. Email and mobile marketing can be used as a tool to help you achieve your business and website goals. As with all tactics, direct marketing should be considered in line with your overall business, marketing and digital strategy.

You need to decide on the key performance indicators (KPIs) for your particular campaign. KPIs are the metrics that indicate how well you are performing.

NOTE

Read more about this in the **Conversion optimisation** and **Data analytics** chapters.

You have a few options for digital direct marketing:

- Promotional emails
- Newsletters
- Transactional emails
- SMS marketing.

Promotional emails will usually have an immediate goal:

- Users make a purchase
- Users download some content
- Users request further information.

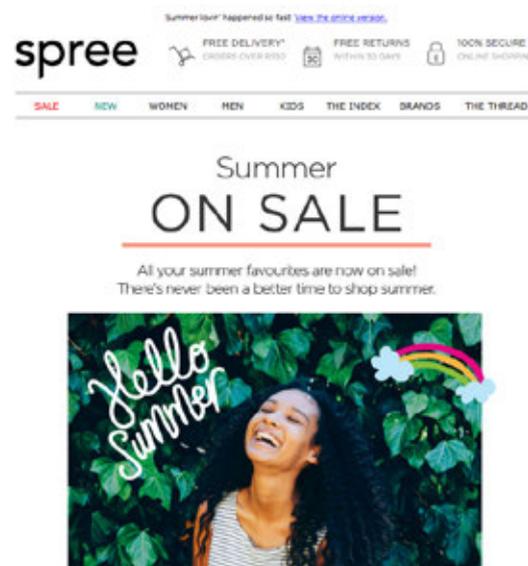


Figure 1. . An example of a promotional mail from Spree.

Newsletters tend to focus on longer-term goals and are usually geared at creating and retaining a long-term relationship with the reader so your KPIs are more important here.

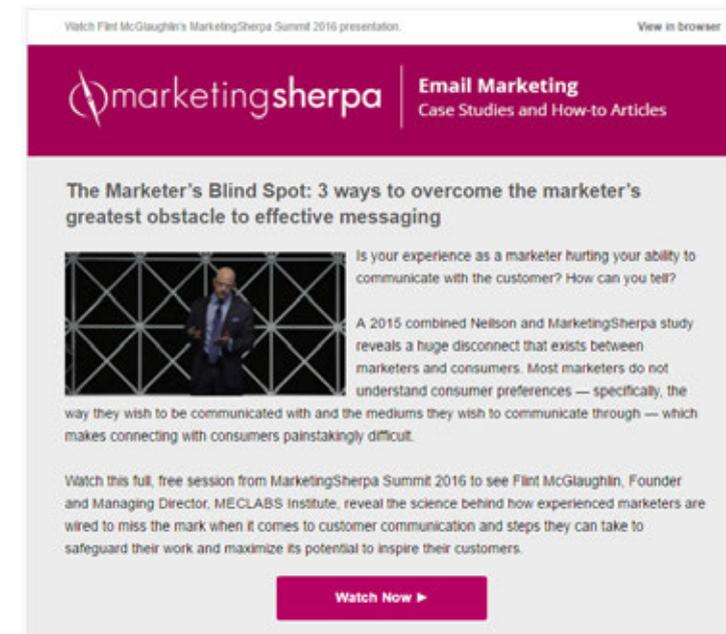


Figure 2. An example of a retention-based newsletter from MarketingSherpa.

Transactional emails are generally automated emails that inform customers of payments, subscriptions, or changes to their account. This category can also include confirmation email or reminders.

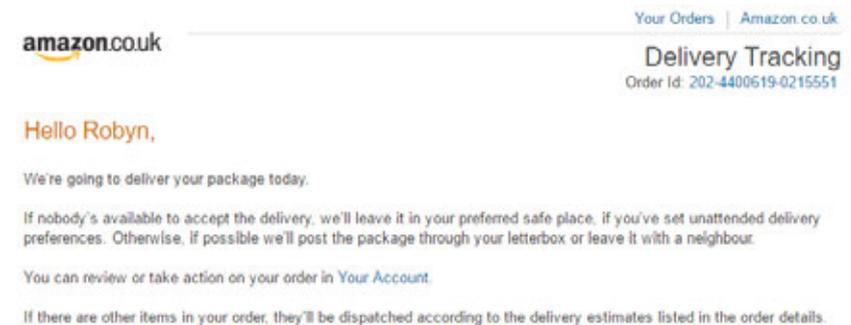


Figure 3. An example of a transactional email from Amazon UK.

An SMS can be used in much the same way as a promotional or transactional email; to let the customer know about products or specials, deliver coupons, or send transactional reminders.

NOTE

Read more about SMS in the **Mobile channels and apps** chapter.

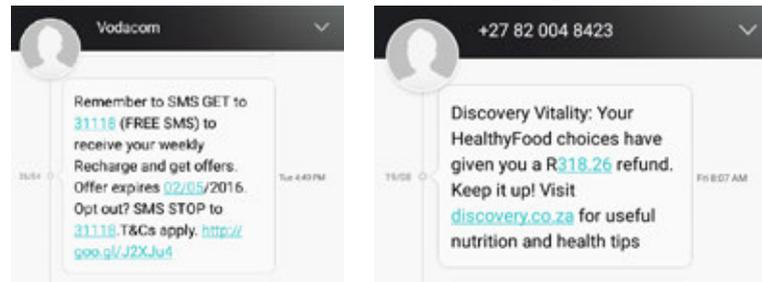


Figure 4. Left: A promotional SMS from Vodacom. Right: A transactional SMS from Discovery.

18.3.1 Email service providers

An email service provider (ESP) is a partner who can help manage your email design and send. For bigger organisations, it often makes sense to purchase your own software and server, or partner with an ESP. This is especially true if you are sending more than 50 emails at a time. Most ESPs are do-it-yourself services that do not manage or strategise your campaign, but give you the tools you need to manage it yourself.

There are some important questions to ask when choosing an email service provider:

- How easy is it to use? This is important if you are managing the campaigns yourself.
- Can you upload and migrate the contact list? It's important that you own your lists.
- Is the process self-service or managed?
- How does the reporting work?
- What is their deliverability like?
- Are they endorsed by email and deliverability authorities, such as Return Path or Trust-e?
- Do they adhere to best practices for direct marketing?
- How is the data stored, processed and secured? Who owns it?

18.3.2 Using mobile for direct marketing

You will remember from the **Mobile channels and apps** chapter that users see their mobile as a personal device and can resent intrusions on it. This means that there are certain principles you'll need to keep in mind if you plan to use mobile for direct marketing purposes.

Privacy and permission

One of the most important principles for mobile is privacy. Users see their mobile as a very personal device; they do not respond well to unsolicited marketing messages invading that privacy. The location-based nature of mobile also presents some challenges to user privacy. No one wants their location published without their permission and users need to be able to control notifications.

For a business to avoid damaging its brand by coming across as invasive, marketers using mobile need to use permission marketing and make it clear that they will value and respect users' privacy. Users need to opt in to marketing messages and should be able to opt out at will. A strong database of preference profiles and constant maintenance of consent can drastically reduce the risks and make users feel more in control of their marketing experience.

Take a look at how Hindustan Unilever targeted low-income consumers to build a permission database in an area with vast basic mobile penetration but relatively little smartphone presence: www.digitaltrainingacademy.com/casestudies/2016/03/mobile_case_study_coffee_giant_wins_loyalty_with_mobile_airtime_rewards.php#more

NOTE

Remember that many countries have legislation governing the collection, storage and use of personal data. Make sure that you follow the laws of your country!

Value and reciprocity

The best way to avoid coming across as invasive and intrusive for mobile users is to ensure that every message you send them on this personal device is valuable to them. Push notifications from apps, for example, have a high engagement rate, but users won't opt in unless you are offering clear value and have taken the time to build up some trust. Digital consumers have far too many distractions vying for their attention to pay attention to an unsolicited marketing message that gives them nothing.

Offering value to mobile users does two things: It helps to build up relationships and, as a result, loyalty and, it uses the principle of reciprocity. If you give consumers something, they are more likely to be willing to give something back.

For this reason, any messages you send directly to users should be helpful and set the customer up to remember you in a positive light. For example, a hotel could send a confirmation SMS, a reminder or a way to shorten the check-in process, or a query about whether the guest needs anything upon arrival. None of these would be seen as intrusive.

Offering real value to your consumer won't amount to much if they're not reading the messages you send, which they won't if they don't trust you. To build up that trust, you need to consistently invest in a value exchange; their attention for your message.

Relationships

If you practice permission marketing and offer value to your mobile audience, you will ultimately build a stronger relationship with your customers. These relationships can result in a higher customer lifetime value as well as positive sentiment, which can be spread by your audience and result in more converts to your brand.

Because mobile's ability to connect you to your customer at their moment of need is unparalleled, so is its ability to help you build a connection with your brand's followers. When used well, mobile devices offer an effective way to build strong relationships and those relationships should be your primary focus.

18.3.3 Choosing an SMS/MMS service provider

There are some important factors to consider when choosing an SMS/MMS provider. Here are some key questions to ask about any potential service provider:

- Can you pre-check cell numbers with networks and carriers to find out which numbers are MMS-enabled?

NOTE

We have listed some ESPs in the **Tools of the trade**, section 18.6, at the end of this chapter.

- How does the reporting work? What can you measure?
- Do they optimise the MMS for the screen size of the phone?
- How good are their creative services? Make sure you see some examples of previous work to assess their skills.
- Do they provide and manage an opt-out service?
- What are the personalisation options?

18.3.4 Email on mobile

You now know that most email is opened first on a mobile device. Users expect an engaging, attractive experience across devices, so an email that isn't formatted for a mobile device isn't going to get a good response and many users will simply delete the email or even opt out rather than opening it again on desktop.

This presents a challenge for email design. The mobile screen is obviously much smaller than a desktop screen, so the way an email is displayed differs as well. Not only that, but different mobile devices have different screen sizes and they make use of different mobile operating systems. This means that each one has different standards and default settings and renders emails in a unique way.

To make things even more difficult, very few users view an email on only one device. They may switch from their smartphone to their laptop to their tablet and back to their mobile phone during the course of a day. This means that, although sending two versions of your email is an option, one for mobile, one for desktop; it's probably not the best solution. You want an email that displays well across as many different clients and operating systems as possible. One way to achieve this is through responsive email design.

NOTE

Read more about this in the **Web development and design** chapter.



Figure 5. The Marketing Charts email template responds to the screen size of the device on which it is viewed.

Some smartphones do render HTML emails and can auto-fit them to fit the mobile screen, but this can still affect the way the email displays.

The most important things to keep in mind when designing an email for mobile are:

- The screen is a lot smaller
- Inputs can vary, with touchscreens being the most common.

So, your content must be easy to skim, with clear calls to action.

Here are some common best practices to follow when designing your emails, to ensure optimal rendering on mobile devices:

- Generally, most emails are designed to be 600px wide to display well in an email preview pane and this scales well on typical mobile screen sizes. On a 320px screen, an email can be zoomed out to 50% and display perfectly; similarly, on a 480px screen it can display at 75%.
- Host your email newsletters online and link to them from your preheader. That way, anyone who opens your email on a mobile can click straight through to an HTML version of your newsletter.
- Design your email in a grid system. This means your content needs to be laid out in vertically and horizontally aligned blocks, with gaps in between. Doing this will make it easier for various operating systems and email clients to scale your email down to fit a mobile screen. This is not a guarantee that the email will display properly in mobile, but it should solve the problem for most mobile devices, such as iPhone and BlackBerry, which auto-fit HTML emails.
- Make sure that you include alt text for your images! Your email needs to convey its message with or without images.
- Mobile devices that don't automatically scale your email down will display the content on the left of your email first. Make sure that your most important content is placed here.
- Button links need to be at least 44px to render well on mobile phones. *Smashing Magazine* recommends 72px so that users can easily tap buttons with their thumbs and see visual feedback that the button has been pushed.

Something important to remember: design for touch.

Many mobile devices have touchscreens. This means that, instead of clicking on your links with a mouse, users will be tapping your links with their fingers. If your links are placed too close together, it will be difficult for users to click on one link without accidentally also tapping the other. To make the user experience easier, make sure your links are placed in a 30–45px area, with a margin of at least 15px around them. By spacing links like this, it will be easier for touchscreen users to follow through on your call to action.

18.3.5 Rules and regulations

There are a number of laws across the world to protect users from unsolicited emails and SMSs and stop businesses from abusing these communication channels. While they vary in severity according to the country and we recommend that you do some research into your local legislation, it's important to acknowledge two very important rules.

First, you cannot send communications to someone without their permission. Second, if someone requests to be unsubscribed from your communication, you have to meet their request or face penalties in many jurisdictions. This means including an unsubscribe option for emails and an "SMS 'stop' to opt out" option for SMS.

NOTE

Don't worry if some of this sounds a bit too technical. Your web developer will understand and be able to advise you.

18.4 Step-by-step direct marketing process

18.4.1 Growing a database

Running a successful direct marketing campaign requires a business to have a genuine opt-in database. This database, or, list of subscribers who have agreed to allow a company to send them emails or SMSs with marketing messages, is the most valuable asset of a direct marketing campaign.

Permission must be explicitly given by all users to whom messages are sent. Companies that abuse this can put their reputation in jeopardy and in many countries, legal action can be taken against companies that send unsolicited bulk messages also known as spam.

It is important to track the permissions that are generated for each user. A time stamp is a key part of the data capture and opt-in process and helps to protect you against spam complaints and potential legal action.

Spam is unsolicited bulk email or SMS messages. It means that the recipient has not given permission to be sent that message. While estimates of spam differ, Statista (2016) shows that the amount of email spam has dropped from over 70% in 2014 to around 55% in 2016. SMS Promotions (2016) indicates that the amount of SMS spam differs according to region, from around 1% of total messages in North America to around 30% in Asia.

Growing this database while keeping it targeted is a key factor in any direct marketing campaign. The database need have only one entry, the prospect's email or phone number, but the following should also be considered:

- Name, surname and title
- Date permission granted
- Source of permission
- Gender
- Country
- Date of birth
- Phone number or email (depending on which you already have)
- Frequency (how often they'd like to hear from you).

Fields such as name, surname and title should be separated in your database. You should also gather date of birth as opposed to a prospect's age as it ensures that your database can stay up to date.

NOTE

As always, the best long-term strategy for growing your database is to create valuable, shareable content that users want to read.

Don't be tempted to ask for more information than required. The more information a marketer can gather, the better he or she can customise marketing messages. However, the more information a prospect is required to give, the less likely they are to sign up. Further information can be requested over time.

There are many ways to attract prospects to opt in to a database. An email sign up form on a company website is vital. Visitors to a website have already expressed an interest in a company by clicking through and this is an opportunity to develop that interest further. Following the same principle, any other properties where newsletter or SMS sign up can be promoted should be taken advantage of.

Consider having a sign-up form on your company blog, email signatures, Facebook page and mobi site, or perhaps mention it during presentations you deliver. And don't forget other offline marketing channels that you're already using, such as flyers, posters or in-store displays. Many brands use competitions to encourage opt-ins as well. Remember, users are more likely to opt in with an email address than a mobile phone number on most channels.

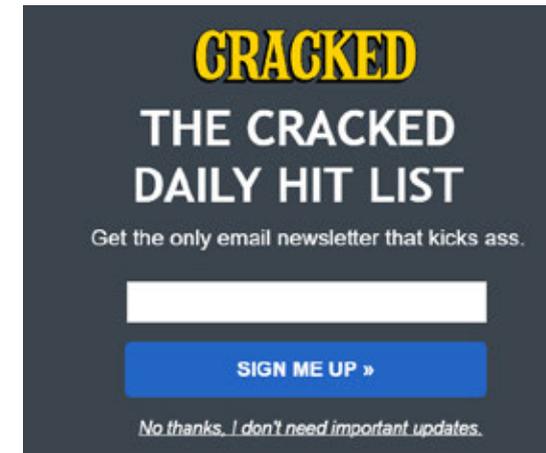


Figure 6. An email newsletter sign-up call to action.

Here are some best practice tips for sign-up forms:

- Put the sign-up form where it can be seen, above the fold and on every page.
- State your anti-spam stance explicitly and be clear that you value subscribers' privacy.
- Clearly state what the subscriber's information will be used for.
- Use a clear call to action.
- Include a benefit statement. Tell subscribers what they will get and how often they will get it.
- Ensure the email address or phone number is correct by checking the syntax.
- Test to see what works best!

Every interaction can be used to ask permission to send marketing material, though some work better for email than mobile.

- Offer something valuable (i.e. white paper, gift voucher, music track) and ask them to sign up to your email newsletter at the same time.
- Add a newsletter subscribe box to the checkout process of your retail site.
- Use interactions at trade shows to ask for email addresses and possibly phone numbers.
- Ask for email addresses or phone numbers in-store.
- Call out your email campaign on your social networks and link through to your subscription form.
- Users will often submit their phone number and email address to enter a competition.

18.4.2 Designing an email

Emails should be created and viewed as HTML for desktop and most mobile devices. Simpler phones require basic text emails. Be sure to check your audience's preferred devices carefully, as cheaper smartphones are becoming available, which increases their penetration into lower-income areas.

Text emails are the small, plain ones; text only, as the name suggests. If you use a Windows Operating System and you open Notepad and type there, you will be creating a text file. As these are text only, the copy really counts here.

HTML emails are the emails with more complex design. These emails can contain images, different fonts and hyperlinks. They're probably what you've had in mind throughout this chapter when we referred to email marketing.

NOTE

Refer to the images of the full newsletter later in this chapter to see how these elements look in context.

Parts of an email

Sender information

This includes the 'to', 'from' and 'reply to' fields. These are opportunities to build a relationship through creating a perception of familiarity. In other words, the reader needs to perceive that the newsletter is somewhat unique and sent personally by the publisher. Using a personalised company email address, for example, trevor@company.com, for the 'reply' field creates familiarity and builds trust with the reader provided the name is recognisable. Otherwise, using the brand name is fine. The 'from' address should also include the organisation's name. A meaningless 'from' address that the reader cannot identify serves only to confuse the origin of the newsletter.

NOTE

You could also try personalising the subject line with the recipient's name or location to make your email stand out.

Subject line

The subject line may be the most important part of an email! Subject lines help the reader to identify the email and entice them to open it. The subject line is also scrutinised by spam filters, so you should avoid using unusual characters, for example, '#2\$%^&^^%###' or '!!!!'. Emojis such as smiley faces or hearts can sometimes work, you'd need to test to see what works for you.

Consistent subject lines using the name of the company and the newsletter edition can build familiarity and help readers to sort their inbox. Subject lines should also reflect the content of the email. As with everything online, testing different subject lines will lead marketers to the formula that works for them. Some brands have found that using emojis can improve open rates, while others have had no success with them, for example.



Figure 7. Sender information and a subject line on an email.

Preheader

The preheader is a line or two of text displayed above your email header. Most commonly, it's the line of text that will redirect you to 'View online'. Where possible,

try including your call to action in the preheader. This could be difficult, given the limited space but it does ensure that every recipient, even those who don't necessarily open the email, but who view only the preheader within the preview pane or inbox, will still be exposed to it.

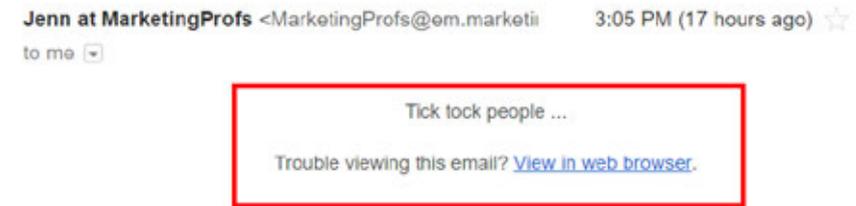


Figure 8. An email preheader.

Header

The header is the colourful banner or image that is included in many emails. This often contains the logo, which is important for branding, as well as a CTA or image to catch the recipient's attention. Not every email will have a header, but these do provide added impact.



Figure 9. An email header.

Personalised greeting

With a database that has the capability to store readers' names, it is possible to personalise the greeting of the email. "Hi, Kim Morgan" can elicit far better responses than "Dear Valued Customer", but it is possible to create a greeting with personality without personalising it. Occasionally, the subject line can be personalised as well to boost responses.



Figure 10. A personalised email greeting.

Body

This is where the content of the email goes. Don't be tempted to use too many images; they can increase the size of the email and obscure text when images do not load. Be sure that text can be read without an image being loaded. The structure must allow readers to scan and navigate the email easily. Short paragraphs, emphasis through bolding and colours, as well as sectioning information with bullets and borders all contribute to a well-structured email.

Footer

A standard footer for emails helps to build consistency and is the customary place to keep the contact details of the company sending the email. At the very least, this should include the name, physical address and contact email of the company. It can also include the privacy policy of the sender or even extra copy to reinforce branding. One way to grow the email list is to add a 'forward to a friend' link in the footer or, more commonly, social media buttons. The most important part of the footer is a clear unsubscribe link.

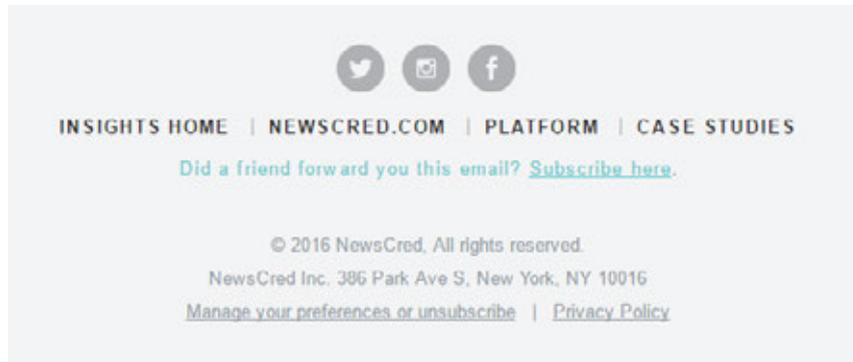


Figure 11. An email footer with an unsubscribe link and social sharing buttons.

Unsubscribe link

In many countries, it is mandatory to have an unsubscribe link on all commercial emails. In best practice terms, you should also include a link for managing subscription preferences – this lets the receiver decide exactly which emails they receive from you, rather than opting them out from all of your email marketing.

NOTE

Read more about this in the **User experience (UX) design** chapter.

Working with templates

An email template is a predesigned structure you can use for each email you send; you just need to slot content into the appropriate sections. Some email service providers offer ready-made templates for you to use. As with website templates, paid-for email templates come with some benefits and disadvantages. While they are often cheaper than commissioning a custom template, they can be inflexible and generic, meaning that they will not uniquely represent your brand. If you are choosing a template to buy, consider picking the plainest one, so that you can adapt it to your brand as needed.

NOTE

Take a look here for some free email templates as a place to get started: www.campaignmonitor.com/email-templates

A custom-designed email template will allow you to plan your own content structure and ensure it displays well across many email readers and devices.

When having your template designed, it's important to test it with a number of email readers, browsers and mobile devices so that you can ensure that it displays correctly. This can become challenging as some users still use preview panes to read their email.

Design considerations

How an email looks is integral to how well it is received by your database. Design also refers to how it is built, which can impact whether the email is delivered and how likely users are to interact with it. Some design considerations are included below. A few of these are a little more technical, so make sure that your email partner has these covered for you.

The look and feel

Studies have found that users read or scan emails following an F-shape (Nielsen, 2006). A follow-up study by the German Research Center for Artificial Intelligence looked at how users read text on smartphones, testing different layouts and paragraph lengths and found that the F-shape still applies (Biedert, Dengel, Buscher and Vartan, 2012). So, plan your important information to follow this flow.



Figure 12. Online, users tend to read in an F-shape.

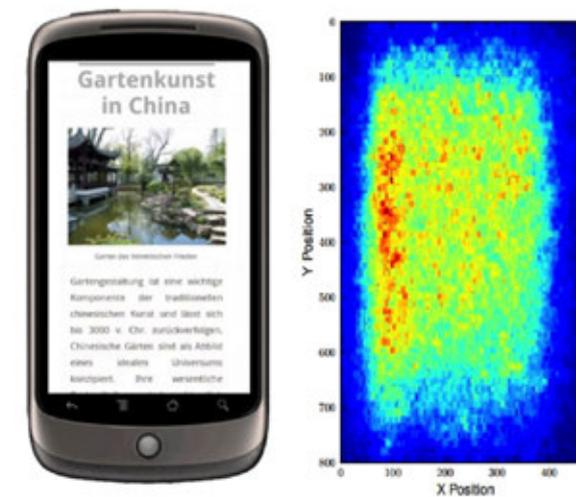


Figure 13. The F-shape still applies on smartphones, with the left-hand side of the screen dominating patterns.

Cluttered inboxes and busy subscribers mean an email that's lengthy and difficult to get through probably won't be read. Help your subscribers by structuring your email content into segments, making use of borders or colour blocks to accentuate and divide content. It's important to balance image and text in your emails. Make a point of placing images next to the relevant text.

NOTE

Read more about this in the **Web development and design** chapter.

General design guidelines

HTML and CSS design principles differ for web and email. Here are a few things to keep in mind when designing your email:

- Don't make use of external or embedded style sheets and avoid unnecessary embedded rows and columns.
- Make use of table nesting as far as possible, as this is generally considered to render the best results with difficult email clients. Email designers tend to make use of tables to design their email layout, using inline styles within these tables.
- Set a fixed width for your email by specifying the width and spacing of each cell rather than the entire table. When these specifics are not declared, email clients tend to render the email according to their own defaults and can break the design.
- If you are using a block background colour, be sure to include a 100% width table to cover the entire email.
- Keep fonts in your email design larger than 16px. Anything below that becomes difficult to view in mobile. Also bear in mind that, while coloured text (or light-on-dark text) may look visually impressive, it can be difficult to read an entire email like this and may strain your subscribers' eyes. Rather limit such visual tricks to smaller sections of your email, or to emails that contain less written content.
- Make use of inline CSS. Some email clients strip the CSS from the head and body of the email.
- Test your emails in a variety of email clients before you send.
- Use responsive design!

NOTE

Naturally, your email design should echo your overall corporate identity and personality.

Designing for the preview pane

Many email users still use desktop clients to manage their email. Given the number of emails users receive on a daily basis, many still prefer to view emails in their preview panes rather than opening them. This has added another challenge for designers who want to ensure that their emails display properly.

Images and layout should consider the preview pane and be tested for rendering. Preview panes can be vertical or horizontal.

Tips for designing for the preview pane:

- There is no set width and we reiterate that testing is the way to go. A width of 600px works best for preview pane display (HubSpot, 2016).
- Ensure that plain, email-friendly fonts are used toward the top of your email in order to ensure that the first text encountered is properly displayed.
- Consider carefully what images you display in the top section of your email and test displays accordingly.
- Placing your logo prominently in the top left of your email can ensure optimal brand recognition and exposure.

- Try to include your call to action in the area displayed in the preview pane. That way, even if subscribers choose not to read your email, they'll still see your primary message.
- Some successful email templates use the area likely to be seen in the preview pane to provide a table of contents for the email. Users know what they can look forward to when opening the email.

Email and images

Avoid using images to convey important content. Make sure that there is alt text for all images used in the email. This ensures that the message of the image will still be communicated even if the image itself is not seen. Even though most email clients display images by default, some users may still not see them. Your email should make sense whether or not the user can see images.

Tips for using images in email design:

- In the past, background images did not render well in emails, but this is changing. A block background colour tends to display well across most email clients. Some email clients, like Outlook, still do not display background images.
- When including images in your HTML, be sure to declare the height and width for each image to ensure consistent rendering across most email clients.

Emails that make sense without images and render correctly across all platforms are more likely to persuade a reader to open the email and click through to the website.

NOTE

The images you use in the email should support the overall message, rather than convey it directly. If the image doesn't appear, the message should still be clear.



Figure 14. Good use of clear image alt tags in an email newsletter.

The call to action

Email design should support the calls to action. For your campaign to be effective, your goals and KPIs should be supported by the email layout and design. Calls to action can be hyperlinked text (also called text links), or can be images which look like buttons. Don't forget though, that if images are blocked, your buttons will be blocked too.

Generally, both text links and CTA buttons are effective for generating clickthroughs, though some studies find that buttons perform better. While you should use buttons for links that support your CTA, for example, 'make a booking', 'check availability', your email shouldn't be littered with them and hyperlinks should be used for additional links. You should test them to see what kinds of CTAs perform best for you.

The copy of the CTA is exceptionally important: a well-crafted and enticingly written CTA makes a big difference to the performance of your campaign. Again, test variations to determine what drives the highest clickthrough and conversion rates on your campaigns.

Testing

The design should be tested to ensure that it renders clearly in as many clients as possible. Make sure that images line up, that copy is clear and that all the links work.

18.4.3 SMS best practice

Structuring an SMS involves considerably fewer considerations than writing an email. Keep in mind:

- The core concern for SMS writing is that they are limited to 160 characters, which means the hardest part of writing one is finding a way to convey your core message with very limited space.
- Part of your SMS needs to be dedicated to offering an opt-out option so that users feel in control of the communications.
- Because the mobile phone is so personal, sending relevant, targeted SMS messages is imperative. Make sure that your mobile opt-in database is very carefully segmented; 200 subscribers who actually want to hear from you are far more valuable than 2 000 who feel annoyed or harassed by your messages.
- Think about when you send your messages, are they being sent at a time that is relevant to your customer? If you are sending a sales promotion message, are you sending it at 6 a.m. in the middle of the month, or at 10 a.m. on a weekend after payday?
- Make sure that if your SMS includes a next step such as clicking through to a website, the landing page is mobile-optimised.

SMS is often best used for customer relationship management, but you can also use it to send promotions targeted to a time of day when your customers are likely to be out shopping or aimed at specific demographics or geographic areas. Just remember, as with all direct marketing, these messages need to be relevant and valuable to your customer.

18.4.4 Creating content

Content that is relevant and valuable to readers is vital to ensuring the success of a direct marketing campaign. Valuable content is informative and should address the problems and needs of readers. It is important to realise that the reader determines the value of the content, not the publisher. Newsletters can offer:

- Humour
- Research
- Information
- Promotions
- Exclusive content.

SMS messages can offer:

- Special offers and discounts
- Information
- Time-dependent discounts
- Celebrations
- Contests
- Trivia or voting
- Reminders.

Determining the content of your direct marketing messages is an important element of your overall brand content strategy.

Any copy written for your brand should follow a predetermined brand voice guide. Consistency is important and will dictate how your customers trust and build a relationship with your brand.

The principles of writing good online copy apply. You should start with the most important information first and make sure that your language is scannable, meaning that it makes use of the appropriate formatting, such as bolding and bulleted lists.

It may be helpful to review the **Digital copywriting** chapter at this stage, but there are two elements that are important to highlight now with respect to writing for direct marketing.

1. The first is in-message links. It's important to consider that any links you include in your email copy will lead readers away from your email. You'll want to keep these to a minimum and include a link only when it is a call to action, a legal requirement or a service feature. Links in SMS messages should be shortened with a URL shortener like Bitly and should lead to a mobile-optimised page.
2. The second element is, for email, the all-important subject line. Many users decide whether or not to open an email based on their first point of contact: the subject line.

For an email newsletter, it's useful to put together a recurring content structure. The example shown here depicts a consistent content structure with repeating elements.

NOTE

Check out this article for examples of good email CTAs. www.campaignmonitor.com/blog/email-marketing/2016/03/75-call-to-actions-to-use-in-email-marketing-campaigns

NOTE

Read more about this in the **Content marketing strategy** chapter.

NOTE

Read more about this in the **Digital copywriting** chapter.

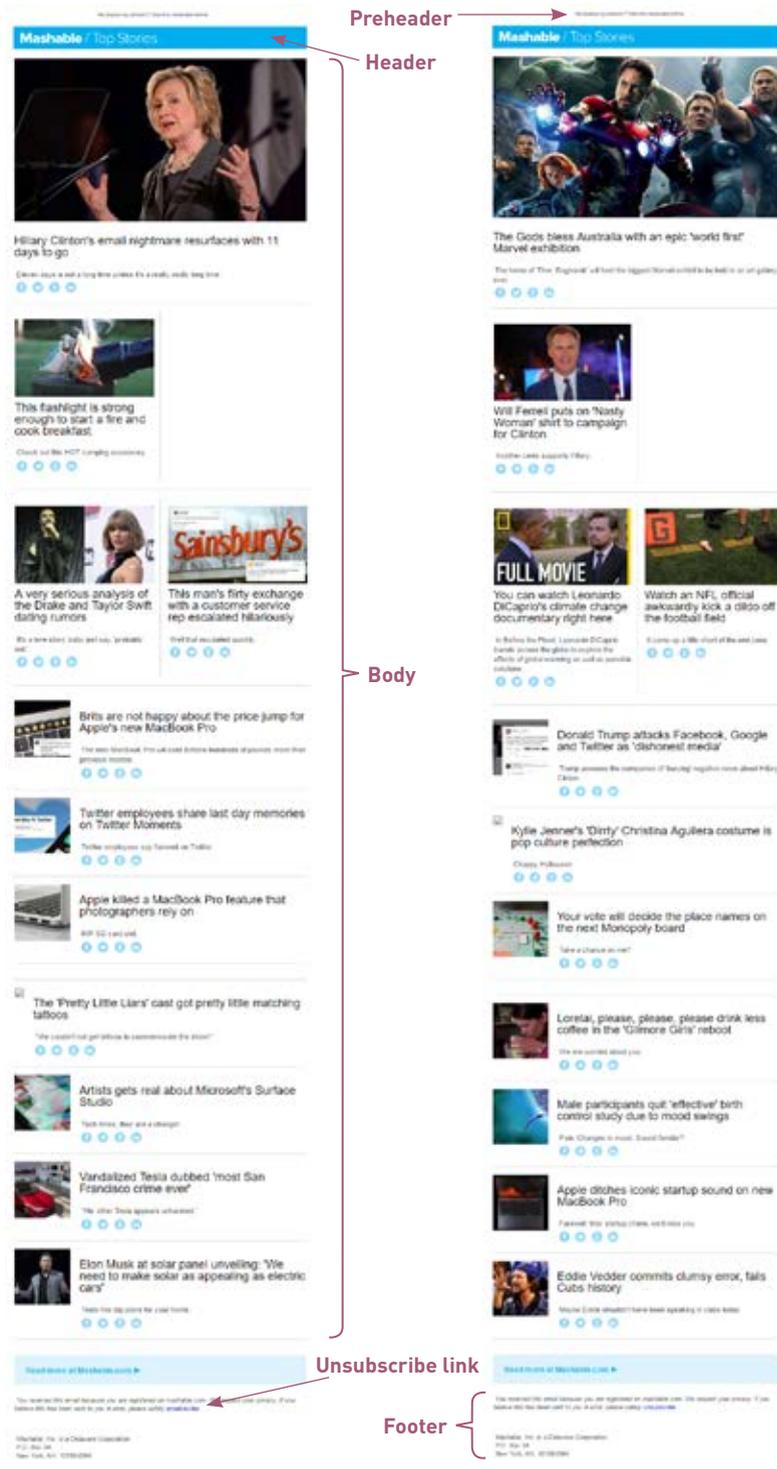


Figure 15. Two editions of a newsletter, showing a similar structure.

NOTE

Note how the same elements recur for every newsletter, creating consistency and delivering on reader expectations.

If your newsletter contains a lot of content, you can use enticing snippets with a link to the full article displayed elsewhere, such as in your company blog. Sending out too much long content in your newsletter can be daunting for time-starved readers and they may not make it all the way through your newsletter.

However, if your newsletter consists of only one article, it may help to publish it in full.

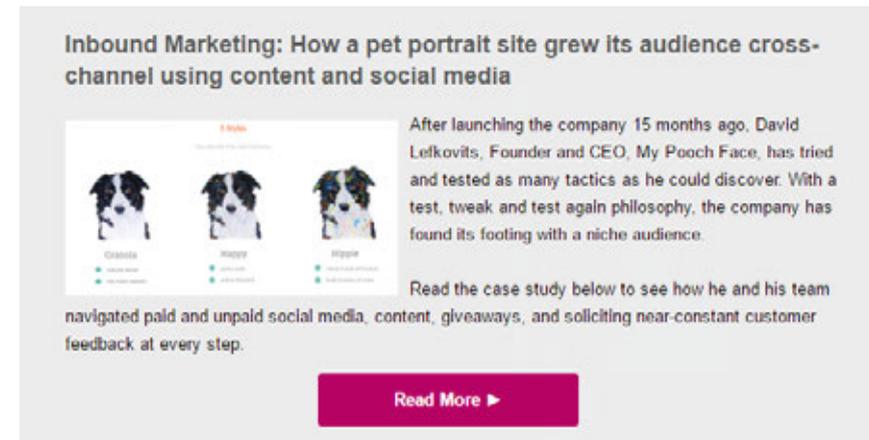


Figure 16. An article snippet in an email newsletter.

Content in an SMS obviously needs to be more concise. You should get to the point as fast as possible, which can mean including price points so that users know immediately if they are interested. Remember to include an opt-out option.

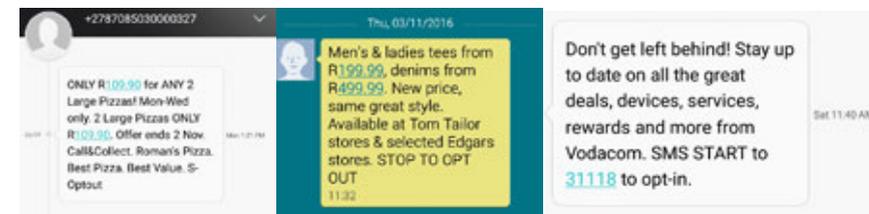


Figure 17. SMS marketing examples.

18.4.5 Segmenting your database

The technology of direct marketing allows for mass customisation; it is one-to-one marketing on a macro scale. Even simple personalisation can see improved results.

Customisation covers everything from using the recipient's name, to sending the correct email version to their device, to sophisticated measurement of a recipient's preferences and tailoring content to suit them. This is even more important for SMS marketing, where content that doesn't interest the reader can actively damage their relationship with your brand.

Segmenting a database can allow for customisation across demographics or purchase history. For example, you may choose to divide your database according to gender or age. A political campaign may benefit from targeting slightly different messages to different demographics. A pet store may find it useful to segment their list according

NOTE

Other options include segmenting by location, user behaviour on site, or position in the sales funnel, for example, potential or existing customers.

to the different kinds of pets their customers own. In this way, it is possible to send messages that are slightly different and tweaked to different target groups.

18.4.6 Deploying

By creating valuable content, establishing the correct frequency and testing your messages for display and deliverability, an email marketer should be able to ensure an excellent delivery rate. Consistency in deploying newsletters also aids in fostering trust and fulfilling expectations.

When should you send emails? Common sense tells you not on Monday morning or Friday afternoon, but this varies by audience. Testing will guide you. Generally speaking, the best days of the week to send emails are between Tuesday and Thursday.

SMS messages need to be timed even better, given that they will be delivered immediately to a device the consumer is carrying with them. Best times for delivery will vary depending on type, according to SMS Global (2016).

- General marketing messages should be sent between 10:30 and 11:30 a.m or 2:30-3:30 p.m.
- Appointment reminders should be sent 24 hours and/or directly after the appointment is made.
- Weekend sales and special events reminders should be sent on Thursdays or on the morning of the event.

As always, of course, you need to test send times to check which works best for your customers.

Sender reputation

Email reputation is a score given to you depending on how well your emails are regarded by Internet Service Providers (ISPs) and your subscribers. If the sender's score falls within the ISP's thresholds, a sender's messages will be delivered. If not, the sender's emails may arrive in the bulk or spam folder, be quarantined, or be bounced back to the sender.

How it works: There are various authentication systems that can impact your reputation score. One of these is the Domain Keys Identified Mail (DKIM) and Domain Name System (DNS). DKIM associates domain names with individual email addresses, ensuring that each organisation has to take responsibility for emails sent that are associated with their domain. Basically, DKIM signs out any outbound emails.

The DKIM signature is added to the email header and includes an encrypted code. The receiving mail server will then take that DKIM signature and verify it with the DNS system to find the matching DKIM public key. Once it has this key, it can use it to unlock the encrypted code. If the code hasn't been changed, the email hasn't been tampered with, which means it can be authenticated and passed into the receiving mail server.

Becoming an effective email marketer requires constant list cleansing and hygiene. In fact, most lists shrink by about 22% each year as a result of subscribers changing email addresses (HubSpot, n.d.). Build a preference centre and send out an email

once a year asking subscribers to update their details. Make sure you are diligent about maintaining a current opt-in list to achieve maximum deliverability via reputation.

Tips to help your reputation score:

- ISPs offer various authentication standards such as Sender ID, sender policy framework (SPF) and DomainKeys. We highly recommend the use of these standards.
- Remember that a huge but inaccurate and outdated database is far less useful to an email marketer than a tightly maintained, smaller database. Strive to boost your database, but don't forget to clean as you go.
- Ensure that email broadcast rates are not too high.
- Respond to complaints and unsubscribe requests, if someone requests to be unsubscribed, do so. If you don't, there's a good chance you'll face stiff penalties.
- Educate users about white lists.

An email's reputation score can be checked at www.senderscore.org.

If the recipient has given permission to be sent marketing messages by email, then it is not spam. Users give permission when they tick a box that says, "Yes, please send me offers from your company by email/phone". The email address can be provided to another company only if the user ticks a box that says, "Yes, please send me offers by email from third parties selected by you".

Permission for any kind of direct marketing must be explicitly given to the company. Trying to gain permission in a sneaky way is illegal and should never be done.

An email's spam score can be checked at spamassassin.apache.org.

SMS credibility

Reputation via SMS is just as important; consumers are becoming increasingly suspicious of marketing messages in general, so reputation is important to convince the customer even to take your message seriously.

To make sure your SMS is credible, you'll need to pay attention to how it's written, the message itself, the words you use and so on. Time of delivery is also important, as is branding the message so that your customer knows who it's from. Remember the key: send users only what they want, when they want it and you'll be trusted.

18.5 Measuring success

As with all things digital marketing, tracking, analysing and optimising are key to growth and success. Most direct messaging tracking systems produce statistics in a user-friendly manner.

Key measurables for understanding the performance of direct marketing campaigns include:

- Number of emails or SMSs delivered (delivery rate)
- Number of bounces (this should be separated into hard bounces and soft bounces)
- Number of unique opens: a message can be delivered, but not opened

NOTE

The success of your direct marketing relies on users explicitly indicating that they want to hear from you. Don't break your customer's trust.

- Unsubscribes: significant or consistent loss in subscribers is a key indication you are not meeting the needs of your subscribers.
- Pass-on rate: a high pass-on rate (forwards) indicates that your customers value the content enough to share it constantly with others. Adding a sign-up link to forwarded emails will organically grow the opt-in list.
- Clickthrough rates and conversion: these measure the effectiveness of a message via the links placed in the content. When a reader clicks through to a web page, these can be easily measured as a percentage against the number of delivered, opened or sent emails. It reveals which content or promotion was the most enticing for the reader.

Some metrics are more useful than others. A good example of this is the open rate. Emails are tracked using a tiny, transparent image that gets downloaded, but some email desktop clients block the downloading of images. If the tracking image doesn't load, the email won't register as opened. However, this can be factored in to some extent and open rates give you an idea of how well your subject lines resonate.

What you should be interested in is what activity takes place based on a message. This means you'll need to track leads or actions. You can do this through link tagging, meaning appending tracking parameters to a URL in your newsletter or SMS. These parameters are then identified by the Google Analytics of your website, registering that the user has come to the site through your email or SMS. Google Analytics will then take the information in the tag and store it in a cookie, from which it can track the user's interactions with the site after they arrived at the landing page.

Here is a link to the Mobile Marketing Watch website as it may appear in a Mobile Marketing Watch email campaign:

mobilemarketingwatch.com/urban-airships-industry-first-platform-services-fine-tune-personalized-interactive-notifications-69570/?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+MobileMarketingWatch+%28Mobile+Marketing+Watch%29

The tracking parameters are:

?utm_source=feedburner&utm_medium=email&utm_campaign=Feed%3A+MobileMarketingWatch+%28Mobile+Marketing+Watch%29

These can then be used to report on traffic from that message using Google Analytics.

Generic direct messaging benchmarks can be used as a guide to see how well your campaigns are performing, but the best way to monitor performance is to benchmark your own campaign.

Smaller lists tend to have a higher open rate, but this is probably because they're more targeted. The overall average email open rate is 27.4%, though this varies by industry, while the average clickthrough rate is 4.5%. Overall rates are quite low because far too many ignorant or lazy email marketers bring down the average. It's best to look at the average open rate for your industry, rather than the overall rates. You can do this by checking the Email Stat Centre website (EmailStatCenter, n.d.).

The overall SMS open rate is harder to determine. Many reports put it at between 82% and 98%, but this is difficult to ascertain. The average clickthrough rate varies by source but is generally far higher than for email, at anywhere between 6% and 19% with overall response rates at above 30% (Tatango, 2016; Apifonica, 2016).

Once the reports have been generated, it is time to work out what the numbers are revealing and then use this information to improve the next message sent out.

To make sure that your email marketing efforts are continually improving, it's important to test your campaigns. The most common form of direct marketing testing is to conduct an A/B split test. This is a test that involves sending one version of your newsletter or SMS to a specified percentage of your database, while sending a modified version to the remainder of your database. Some factors to test include:

- Open and response rates across different subject lines, calls to action and delivery times
- Optimal number of links in an email for clickthrough rates and conversions.
- Different copy styles and copy length
- The effect of video on delivery rates, open rates and conversions for email and MMS
- Balance of text and image ratio.

By monitoring the results of each send, you can determine which version yielded the desired results. You can, for instance, test variations of your call to action to determine which is more effective in persuading subscribers to click through.

Examples of what to test:

- Subject lines (for email)
- Send times
- Best day to send
- Layout
- Text vs. button links
- Database segmentation
- Call to Action
- Copy differences (for SMS).

Testing and monitoring your send statistics go hand in hand. It's important to analyse your results after sending to ensure you're implementing the most effective strategies for your database.

Useful KPIs include:

- Open rate
- Clickthrough rate
- Number of emails forwarded
- ROI
- Number of social shares
- Database growth
- Conversion rate (activity on your site generated by the email)
- Delivery or bounce rate.

18.6 Tools of the trade

There are many good ESPs available. MailChimp (www.mailchimp.com) is one example of an email service provider that can manage the email send for you from start to finish. It provides tracking, support, subscriber list management and email templates.

More advanced ESPs that offer a range of message and campaign management facilities, as well as broader data management and delivery value, include Salesforce Marketing Cloud (www.marketingcloud.com), Silverpop (www.silverpop.com), Hubbion (hubbion.com) and Oracle Responsys (www.oracle.com/marketingcloud/products/cross-channel-orchestration/index.html), which offer mobile and email solutions, among others.

All emails need to be tested for email client compatibility as well as for any potential spam problems.

- For email client compatibility, as well as mobile rendering, you can test your email at Litmus: litmus.com/email-testing or at PutsMail: putsmail.com
- An email's spam score can be checked at: spamassassin.apache.org
- An email's reputation score can be checked at: www.senderscore.org.

Once a message has been sent, results need to be analysed to pinpoint areas for growth for the next campaign. Use your ESP's built-in analytics feature and correlate this with your Google Analytics data.

18.7 Advantages and challenges

Permission-based direct marketing can give the highest return on investment of any marketing activities. Technology allows mass customisation, allowing personalisation across a large list of subscribers. When used to foster relationships with a customer base, direct marketing can go a long way to increasing the lifetime value of that customer.

Direct marketing is highly measurable and databases are able to be easily and thoroughly segmented. However, with the increasing numbers of companies and individuals using email and SMS marketing, many consumers are fatigued. It requires ingenuity, focus and dedication to maintain a direct marketing database and consistently deliver useful quality messages that will be read.

18.8 Case study: GlobalGiving

18.8.1 One-line summary

GlobalGiving website increased engagement by 10x using personalised email.

18.8.2 The challenge

GlobalGiving is a charity crowdfunding website that provides social entrepreneurs and non-profits the chance to raise money for community causes worldwide.

GlobalGiving sends more than 3.5 million emails per year, but they were getting decreasing marginal returns from each send, finding it more and more difficult to catch the attention of donors due to email fatigue. (Marketing Sherpa, 2016).

18.8.3 The solution

The brand decided to personalise and customise content and make sure it was getting to the right people.

They worked with an ESP to make sure their emails were certified and created an entirely opt-in email list. Using tracking, they identified a handful of domains and sub-segments of donors that were reporting abnormally high spam rates, which they decided was due to regional differences - their campaigns worked well in the United States, but not in each of the 180 countries to which they send emails. For example, non-English-speaking countries reported higher spam rates. They suppressed these domains from their list and automatically unsubscribed anyone who reported an email as spam.

Next, they created a personalised recommendation email using a recommendation engine similar to Netflix, but which looks at users' past giving habits rather than their watching habits and used that along with a matching offer and a time-bound appeal for users to donate by a certain deadline.

Figure 18. GlobalGiving personalised email.

They followed this with constant A/B split testing to ensure that their recommendation engine was working. They also tested subject lines, content, appeals and more.

18.8.4 The results

The team saw a tenfold increase in engagement from email.

- Their recommendation emails dramatically outperformed the emails that sent random projects to donors.
- When factoring in the donor's giving history, using projects they had supported in the past, they saw a 20% boost in engagement as well.

They also created an email program that is carefully set up to improve the brand's reputation in the long term.

18.9 The bigger picture

While direct marketing can operate as a stand-alone marketing campaign, integrating it with other channels, both online and offline will serve to reinforce the brand's message and increase responses.

There should never be a disparity between the content, tone or design of an email or SMS when compared to the rest of a company's offerings. In-store promotions can be reinforced and promoted to a direct marketing database, or website information can be summarised for email or SMS.

Custom landing pages, if required, should be created for any promotions being communicated by email. For the most part, marketing messages should aim to get the customer to the site; landing pages are therefore essential. They need to be optimised to close the call to action. So the message gets the subscriber onto the page and the landing page gets them to sign up, buy, or engage. The idea is to create a flow between the two that brings the 'selling' process full circle, whether it's actually buying something or just reading through the content to engage them with the brand.

Direct marketing and social media work very well together for cross-channel promotion. Where email and SMS can create a one-on-one feel between a brand and an individual, social media can move that attention towards a sense of community and keep your consumer involved in a dialogue.

18.10 Summary

Direct marketing can deliver the best ROI of any digital marketing tactic. It is:

- Highly targeted and customisable
- Cost effective
- Easy to set up, test and track.

Gaining explicit permission to send marketing messages to a person is an essential prerequisite for successful direct marketing. Once you have this permission, all messages sent by an organisation and the individuals in that organisation can be seen as marketing opportunities.

Successful direct marketing requires careful planning and testing. HTML emails need to be tested across a range of email clients and should be tested for a spam score before being deployed. All messages sent to a list of subscribers needs to provide an easy and accessible unsubscribe option. Make sure you adhere to your local regulations for direct marketing.

18.11 Case study questions

1. Which elements of GlobalGiving's email marketing constitute best practice?
2. What role did the database play in this example? Why was it so important?
3. Explain how personalisation played a role in the campaign.

18.12 Chapter questions

1. What is meant by 'mass customisation' and why is this so beneficial?
2. What are the key differences between direct marketing by email or SMS and direct marketing by post?
3. Why is it important for permission to be gained before marketing by email or mobile to a prospect?
4. Emails that are expected and recognised are more likely to be read. How can a marketer use this knowledge to increase the readership of emails?

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