



*Strategic Email Marketing*  
**in Five Simple Steps**

create. connect. convert.



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## Strategic Email Marketing – in five simple steps

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You may have read any number of studies that sing the praises of email marketing. Amongst its many charms email has the highest return on investment (ROI) for every dollar spent, making it one of the most cost effective marketing mediums around. Despite this, many businesses both large and small, are getting the basics of email marketing wrong.

This whitepaper is a helpful and practical guide to creating and implementing an email marketing strategy. Furthermore, our 'In Action' case study on pages 12-15 provides an example of how these steps can be put into practice effectively.

There are five 'keys' to email marketing success which, when implemented correctly, can deliver outstanding results for your business. These are represented as a cycle and are examined in detail overleaf.

## Planning

### Important Planning Considerations

#### What are you sending?

The content is just as important as the design of the email. Is what you are sending of real interest and value to your audience?

#### Why are you sending the email?

Have a clear and defined purpose. For example, are you simply keeping your clients up to date via a newsletter; seeking to expand your contact list via a send-to-a-friend initiative; or are you prompting your clients to perform a specific action? If you are using an Email Service Provider (ESP) consider the features included in your package beyond simple “email sending”. Newsletter subscription forms and automated responses can be massive time savers as well as ensuring a better experience for your contacts.

#### When do you plan to send the email?

Consider when it makes most sense for your recipients to receive the email, not when it is most convenient for you to send the email. Don't keep email marketing isolated within your overall marketing strategy; plan for it to integrate with your other ongoing marketing activities.

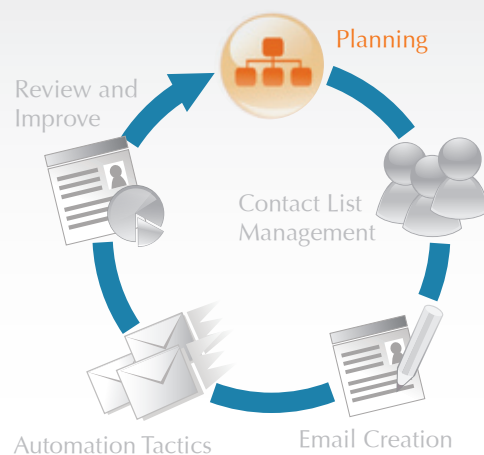
#### Who are you sending to?

Who is your target audience and how does this influence your email in terms of colours, layout font sizes etc? Is there an opportunity to segment your contact list to make the message more specific and targeted?

#### How are you going to get the email out the door?

Who is responsible for design and copy? Do you have the resources to implement and track an email marketing campaign? Have you decided how to test your email thoroughly before sending it to clients?

### For Example:



The words ‘quick’ and ‘easy’ are often associated with email and whilst these virtues are beneficial in the correct context, they should not devalue the importance of investing sufficient time and resources in the planning process. The damage a badly planned campaign can do far outweighs the cost of investing time upfront to plan an effective email marketing strategy.

Unlike many less targeted media such as TV, radio and print which are consumed ‘on mass’ by a diverse range of audiences, email marketing is usually sent to prospects or customers who have already established a relationship with your brand. It makes good business sense to ensure email marketing that talks directly to your prospects and customers is appropriately planned and resourced.

## Contact List Management

### *Build your contact list*

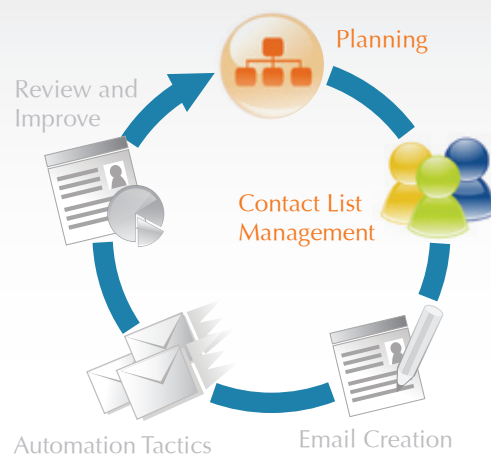
#### **Populate with existing contacts**

In many cases you will have an existing contact list that you want to use. Even if you do not have information for all the fields you desire, this can be built up over time. Start with the contacts you have, as they will be key to helping you grow your list.

#### **Structure your contact list**

When structuring your contact list, it can be tempting to try and capture every possible detail. This can be both an impractical and unpleasant experience for both you and the contact. You can spend countless hours wading through irrelevant information and the client can become frustrated with exhaustive forms. Unless you actually intend to use all of the information collected – it should not be considered a necessity. It may be a good idea to remember the age old adage “if in doubt, leave it out” as you can always use email marketing tools to gather more information at a later date.

### For Example:



Your contact list is the backbone of your email marketing strategy. There is no point using a large contact list full of inaccurate details or people who do not want to receive communications from you.

To manage your contact list there are three key phases to consider:

- Building
- Growing
- Maintaining



## Contact List Management

### *Grow your contact list*

#### **Expanding your contact list**

Once you have set up your contact list, consider the various ways you can collect details to grow your contact list, such as: an email newsletter sign-up form, capturing contacts at the point of purchase, sales calls, competitions and 'send to a friend' campaigns.

#### **Increasing detailed client information**

Whilst in the beginning you might only have names and emails, you might consider running a campaign aimed at acquiring further information about your contacts, such as date of birth and gender. Any additional data you collect should be for a valid reason. For example, only collect a date of birth if you are going to send out a birthday messages each year.

#### **A very important note**

Whilst it is easy to become enthusiastic about building and growing your contract list, your growth strategies should comply with current privacy and anti-spam legislation. Under the Australian Spam Act 2003, in order to send a commercial electronic message you must have direct or inferred consent from the recipient. For more information about the Spam Act visit: [www.acma.gov.au/spam](http://www.acma.gov.au/spam).

### *Maintain your contact list*

#### **Update your contacts details**

Periodically ask your contacts if their details are correct. If you produce several email newsletters, ask your contacts if their (topic/subject/product) preferences have changed. This can be managed easily and automatically by including an 'Update Profile' form as a link on your emails.

#### **Contact list spring cleaning**

If you are using an Email Service Provider (ESP), you should have access to a number of tools to help to manage bounces and clean your contact list of any duplicate email addresses, incorrect addresses or addresses that are no longer valid (perhaps due to staff turnover). Doing this regularly ensures that your contact list does not become a home for redundant contacts.

#### **Do not be afraid of list churn**

Whilst it is important to keep growing your contact list, it is just as important to 'let go' of the people who no longer want to hear from you or who are no longer interested in your product or service. This is where an Email Service Provider (ESP) can be very helpful, as many providers will incorporate sophisticated unsubscribe options which ensure you never accidentally contact an unsubsubscriber.

## Email Creation

### Design and Construction

#### Email Header

It is tempting to make your email header large and grand. However, avoid making headers higher than 120 pixels (approximately 2-3cm).

If a recipient has images switched off in their email inbox software (such as Microsoft Outlook) they won't see any text because there is a large white space where the image is located. For this reason, it is also important to include a 'view email online' link.

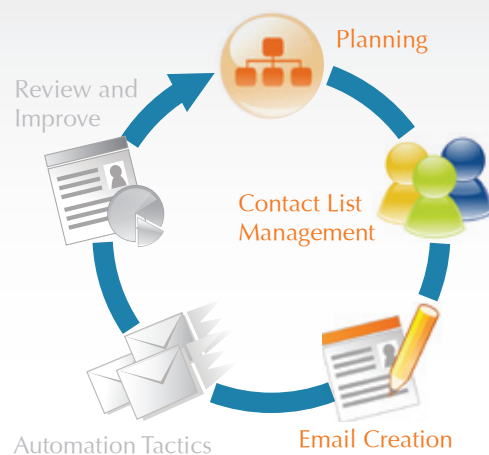
#### Branding

Ideally, you should place your company logo/branding in the top left hand corner of the email header. This will allow for easier company/brand recognition.

#### Personalisation

This can be as simple as including the recipient's name in the email body or tailoring content to cater for peoples preferences or interests. Emails should also be written in engaging one-to-one dialogue.

### For Example:



When you are thinking about creating a new email, there are a number of factors that should be considered to ensure an email is: designed to appeal to the audience, actually delivered to the intended recipient and ultimately leads the reader to the desired outcome.

A more detailed guide on some of the key considerations when creating an email are covered in the "The A-Z of Email Design" Whitepaper.



## Email Creation

### Images

Tabloid newspapers are popular because they use graphics to complement a story. Transfer this approach to your email for a similar effect. However, keep in mind that it is best practice to have no more than a 50:50 ratio of text and images. This ensures that if the client is unable to view images they will still be able to understand the content.

### Calls to action

Ensure you place 'calls to action' throughout the email so the reader can easily act upon your message. This may include a combination of graphic and text links that prompt a particular action, such as "book now," "register for more information" or "visit the website."

### More links

Use "more" links under snippets of information in the email and link through to more detailed landing pages. This will reduce the overall length of the email, allow you to track the reader's interests and tailor content for future email sends. Don't waste time writing content that nobody reads!

## Completion, Testing and Sending

### Finishing Touches

- **From name/address**  
Choose a regular 'from' address and 'from' name to use for your emails; this will usually be your name and/or that of your organisation.
- **Subject line**  
The purpose of a subject line is to achieve an open, so it is essential to consider your subject line carefully. You have about 45 characters (seven words absolute maximum) to capture a reader's attention.

### Test the following elements thoroughly

- **Relevance**  
Assess whether the final email meets the objectives initially set out in the planning phase.
- **Message**  
Ask someone else to read the email and check for spelling, grammatical and link errors.
- **Testing**  
Have a test contact list that includes Yahoo, Hotmail, Gmail, Outlook 07, Outlook Express and any other programs you can access to ensure your message displays correctly. The Australian Email Marketing Metrics Report (<http://www.vision6.com.au/emailreport.html>) contains information on the most commonly used email programs and domains.





## Automation Tactics

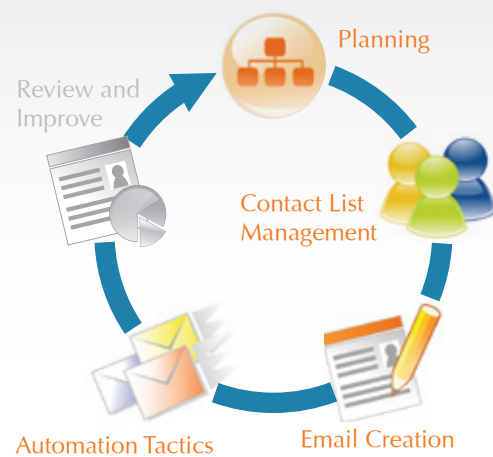
### Identify your Concept

**What is your goal:** What are you trying to achieve with your campaign?

**Who is your audience:** Ensure relevancy and cater for different target groups.

**How will it work:** Consider the mechanics behind automation.

### For Example:



Automation saves you time, removes risk of human error in managing the steps in your email marketing program and perhaps most importantly, provides a better experience for the contact.

For more information on Automation check out the Vision<sup>6</sup> whitepaper “Planning Automated Campaigns - The Marketers Guide.”



## Automation Tactics

### *Map out the Process*

Visualise the campaign as a whole and think of all the possible scenarios. When referring to automated campaigns, an “Event” is when something triggers an action. For example, a campaign in which emails are sent to clients automatically in response to an action by the client – such as completing a form or submitting a resume.

The first step in mapping out the process of your campaign, is to identify the various events that form your campaign. Once you know this, you can start to visualise the campaign as a whole.

To help identify what the events are, it helps to classify them. For example, a “Database Event” (subscribing to a database, updating a profile, a specific date field E.g. birthday), or a “Message Event” (an email being opened, a link being clicked or an email bouncing).

Given that most automated campaigns contain multiple events, ideal to draw a basic process map (flow chart). Creating a process map for how your campaign will work saves time when you’re building the mechanics for automation.

It provides a visual concept for each step and serves as the reference point when you are testing.

While the automation process can be the most tricky part of setting up a campaign, it can also be the most rewarding in terms of saving time and keeping your contacts engaged. To see an automated process in action please see the example on page 12.

### *Build the Campaign*

The way you build a new campaign will depend on the email platform you are using; however, the principles are largely the same. When it comes to building your campaign, it is easiest to first plan each individual campaign step/ event.

### *Testing – Some Practical Tips*

- If your campaign does not work as planned, refer back to your process map and work out where the problem occurs.
- If possible, include yourself in the live campaign and monitor the automated steps as they occur.

Always test every possible action before going live. Make sure you check that all links, events and forms are fully functional and that the email displays correctly on a range of computers, email programs and internet browsers.

## Review & Improve

Your Email Service Provider (ESP) can provide you with an extensive range of statistics. Some of the most important metrics to consider include:

- **Unique Open Rate**  
The first time an email (or link) is opened by a recipient as a percentage of the total number of emails sent. This will indicate how many people opened your email.
- **Click Through Rate**  
The first time an email (or link) is clicked by a recipient as a percentage of the total number of emails opened. This will indicate which links were more successful than others.
- **Bounce Rates**  
The number of emails from your total send that were not delivered to their destination. Bounce rates are generally classified as either temporary (e.g. full mailbox) or permanent (e.g. incorrect email address). Your bounce rate will indicate the quality of your contact list and general spam compliance.
- **Unsubscribe Rates**  
To comply with the Australian Spam Act (2003), you must provide an unsubscribe link for people to opt out of your mailing list on every single email. The unsubscribe rate measures the number of people opting out of each send.

Once you have an understanding of how your initial email fared, take the time to return to your initial plan and review your overall objectives. It is easy to become so enthralled in the details of a campaign that the initial objectives are lost along the way.

### For Example:



One of the biggest advantages that email marketing has over traditional direct marketing is the statistics that are generated after the email is sent.

This information provides a very powerful insight into what has and has not worked in your campaign, so you may identify areas that need to be improved for future campaigns.

## Conclusion

It does not need to be difficult to design and manage a well rounded email marketing campaign. By addressing each of the five key steps outlined in this paper you will be on your way to strategic email marketing success.

*Best of luck!*



## Email Marketing in Action - A sample case study

Fleur owns Flower Recruitment, an agency which recruits suitable university graduates for roles in the horticulture industry.

Fleur has a lot of careers fairs lined up this year and would like to reduce the amount of administration involved in collecting potential candidate information.

Fleur would also like to streamline her recruitment process.

### Planning

#### What/Content

The content must set out to achieve Fleur's ultimate goal. In this case, the newsletter will provide contacts with:

- information about writing and submitting job applications to reduce the number of poor quality applications;
- current job opportunities and encouragement to apply; and
- reminders to submit applications to Flower Recruitment before the closing date for graduate applications.

#### Why/Purpose

Fleur must have a clear idea of what she is setting out to achieve. In this case, she wants to encourage graduates to apply for graduate jobs through Flower Recruitment and streamline the recruitment process.

#### When

Communications need to be sent periodically so that the graduates know when to expect new job opportunities. Automatic reminders will also be useful in prompting graduates to submit applications.

### Case Study

Flower Recruitment	
What	Careers Information Job Ad's Reminders
Why	Increase candidates applying for graduate positions.
When	Fortnightly Newsletter Closing date reminders.
Who	University students studying horticulture or biology.
How	Update e-newsletter with new positions Schedule sends
No more manually entering information or doing expensive mail outs! Hooray!!	



## Email Marketing in Action - A sample case study

### Who

Fleur needs to define her target audience and any segments that may exist. Flower Recruitment has two key audiences that are interested in applying for different types of jobs (biology Vs horticulture). Constructing two different emails will ensure the content is relevant. It is also important to acknowledge any audience characteristics which may affect how they interact with e-communications. In this instance, the target audience is technologically savvy and therefore comfortable with submitting applications online.

### How

Flower Recruitment has the resources to perform an email marketing campaign as it is less costly and less time consuming than producing the current printed recruitment newsletter and manually administering the recruitment/ application process.

### Contact List Management

As the Flower Recruitment office was destroyed in a fire, Fleur has no existing contact lists. To streamline the contact gathering process, she will create a web form which will be displayed on a laptop at each career fair – as well as on the Flower Recruitment website, so that students can sign-up for the e-newsletter on the spot or online. Fleur will also setup an auto-responder email that welcomes recipients who sign up for the newsletter.

The first e-newsletter will also feature a form where students can refer three friends and receive a 'buy one get one free' coffee voucher from Bouncy Beans Coffee Shop in return.

To maintain her contact list, Fleur will create an 'update your details' option on the newsletter and send out a graduate survey at the end of each year so she can remove contacts who obtain graduate positions.



## Email Creation

When creating the Flower Recruitment email template, Fleur chose a colour scheme that was bright and modern to appeal to her audience (graduates). She also used headings and images to identify and differentiate the various sections/ articles.

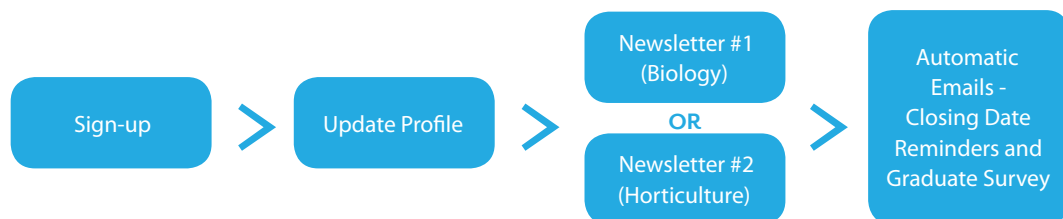
She will also include a small 'teaser' paragraph to entice readers to click a link to view the complete article, thus collecting valuable readership statistics.

Fleur also chose to make the menu item 'REGISTER' more prominent than the others, as this is her 'call to action.'





## Automation Tactics



To build her list of contacts, Fleur will include a sign-up form on the Flower Recruitment website. She will also offer incentives to boost sign-ups sporadically.

Fleur won't overwhelm clients with long sign-up forms. She will collect the essential details and include an 'update profile' option on all emails.

Fleur will strategically segment her clients. She will produce one newsletter for each of her two main target audiences so that they receive only relevant job opportunities.

To reduce time spent on administration, Fleur will setup a series of automatic emails for things like reminders, thank you's and surveys.

## Review & Improve

After the first newsletter is sent Fleur will be able to use the metrics (such as click through rates) to further tailor and refine both her email content and her email marketing strategy.





## About Vision<sup>6</sup>

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Vision<sup>6</sup> is an Australian owned and run company. We were founded in 2001 by friends and colleagues Evan Fortune and Mathew Myers.

Together they identified that marketing professionals needed an easier way to create, send and track email messages; and to integrate e-messaging into the marketing mix. As a result the duo formed Vision<sup>6</sup>.

From two guys in a tin-shed (well Mat's living room - close enough) we've grown to become a team of more than 30 developers and professionals.

Today, we are passionate about all things e-messaging. We empower thousands of businesses to achieve great marketing results. And we are always on the lookout for new ways to make our clients happy.

We also contribute to the marketing community by writing whitepapers, providing free training, producing the Email Marketing Metrics Report and organising Australia's only email marketing summit (EMSA).

## Contact Vision<sup>6</sup> for a **FREE 30 DAY TRIAL**

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