



## 'Cheat Sheet' for email marketing optimization

**Authentication** (SPF record) – [www.dnsreport.com](http://www.dnsreport.com) then [www.openspf.org](http://www.openspf.org)

**Reputation** - <https://senderscore.org> and/or [www.senderbase.org](http://www.senderbase.org)

**Delivery Engine** – compare several against each other and against your internal mail system, measuring opens/clicks/conversions/bounces/forwards; measure 'deliverability to the inbox' by using a 3<sup>rd</sup> party delivery scoring platform (ReturnPath, Pivotal Veracity, Habeas, etc...)

### Content

**Ensure receipt** – request that your audience add your From Address to their safe-sender list/address book, and provide an instruction link as to how to do it

**FTF** – forward to a friend functionality; great way to grow your list at no cost, encourage viral marketing

**CTA** (call to action) – should be in your content at least 3-5 times, have a prominent placement 'above the fold' (on first screen)

**Design for image blocking** – by default, most email clients block images; have alt tags and/or text descriptors under images, never send images only

**Do NOT rely** on a website designer/agency to produce your html email content, html for email MUST be coded differently than for viewing in a browser. Find an expert.

**Do NOT:** use Javascripts in an email; use non-standard ascii characters; embed forms or surveys within an email; cut/paste into the subject line (type it out or use Notepad)

**Score content** – for spaminess, make edits appropriately

**Use** "follow this link" instead of "click here"

### Attributes

**Subject lines** – should be 7 words (35 characters) or less

**From Label** – make it relevant

**From Address** – make it static/consistent, this is what dictates being on a safe-sender or address book list (don't list just the name of the person, unless it is "Joe Jones – SFMOMA")

**Reply Address** – make certain that it routes to a 'live' inbox

**View Online** – include a link that lets a recipient view the message via a browser

**MPA** (multi-part alternative) – include a text and an html version of content/payload

**Preferences Page** – let a recipient indicate if they want html or text; and allow them to opt-out of some messages they don't want; provide a universal opt-out, but don't require them to opt-out of everything just because they want to opt-out of something

**Relevance - Smart money (what the clever ones are doing) – advanced emarketing strategies and applications include:**

"**click-stream**" (post-clickthru analytics), access to data that integrates email campaigns with resulting website traffic (via weblogs from a web-analytics program), and pulls the navigation path of the site visit back to the history associated with the email address (so the email audience member demonstrates behaviorally on your

website what they are interested in, and you can then communicate with them based on their interests)

**Trigger-based messaging** – website or email activity that automatically generates a relevant message (i.e. someone fills out a form on a website, they automatically get a coupon emailed to them on submission; someone clicks on a link in an email, and they get a promotional email 2 days later)

**Drip marketing** – use of recurring messages that are programmed to drop at pre-designated time (i.e. a new signup gets message A 1 day after sign up, message B 3 days later, message C 14 days later, etc...)

**Dynamic Content** – recipients get content specific to what their interests are, based on a template that populates the message from accessing a content library ‘on the fly’ (i.e. an SFMOMA patron gets a different version of the eNewsletter vs an SFMOMA member – but without having to load separate broadcasts for each segment of your list)

**API** – automating the data flow between your system(s) and an ESP

## Other Best Practices

**Website** – provide small amount of real estate on EVERY page of your site to allow a visitor to sign up (ask for first, last, email – you can get more data later)

**Website** – use DOI (double opt-in) to confirm new address entries

**Website** – send a welcome letter, it is your first/best chance to make a favorable first impression, you can set expectations as to frequency, content, options, and provide ‘special offer for having just signed up’

**Sign up** – for ‘feedback loops’ and abuse monitoring (then the ISP’s can contact you if your messages are reported as unwelcome and you start approaching the threshold of being blocked), before you get blacklisted (blocked from delivery into a domain – i.e. yahoo.com)

**Sign up** – to be whitelisted with the largest ISPs (Yahoo!, MSN/Hotmail/Live, etc...)

## Compliance:

**CAN-SPAM** is applicable toward SOME non-profit marketing messages (consult your legal counsel) – if you are selling memberships, or using email to generate a transaction, CAN-SPAM likely will apply to you.

### Some aspects:

- must include physical address in content/body of message (PO Box is a grey area)
- must have opt-out capabilities (i.e. click or reply to remove)
- must honor opt-outs within 10 business days
- must not have a misleading subject line

## Great online marketing resources:

[www.clickz.com](http://www.clickz.com)   [www.marketingsherpa.com](http://www.marketingsherpa.com)   [www.dmnews.com](http://www.dmnews.com)

## Online Marketing Fact:

**Industry standard – 80% of the visitors to your site are 1<sup>st</sup> time visitors. 70% of them will not come back. You can make it easier for them.**