

How to: Conduct an Email Audit



MarketingSherpa's How to Conduct an Email Audit

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Email Audit Tutorial

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SECTION 1: TUTORIAL

Wondering about your email strategies? Not sure if your message is effective? Or if your email is even reaching its intended recipients?

Maybe you need to put your email through an audit.

An audit can be a valuable tool in improving your company's email marketing campaign.

Email audit is a broad term that can mean a variety of specific tasks. The common thread, though, is the assessment of your email marketing process (or other email communications). Simply put, it's putting your company's email under a microscope to figure out what works ... and what doesn't.

WHY CONDUCT AN AUDIT?

An audit may be performed for several different purposes, but it's usually done to evaluate one or more of these issues:

- Security
- Reputation
- Deliverability
- Effectiveness
- Content quality

Often, the audit will focus on more than one – with the goal of pinpointing specific problem areas and ways to solve them. Ideally, it will reveal areas where your company is getting email right and using it as an effective marketing tool.

COMMON FINDINGS

Common problems revealed by an audit:

- Bounced emails
- Low clickthrough rates
- High percentage of unopened messages
- List acquisition/management problems (especially if the list was obtained from an outside source or not asking recipients to opt in – or giving them an easy way to opt out)
- Loose or inconsistent privacy policies
- Messages or policies that are inconsistent or uncoordinated companywide

THE CONCERNS

Since an audit is usually done to address one or more of five primary email-related concerns, let's take a closer look at those concerns and why they're important.

#1. Security

Security is a major concern for email marketers, and rightly so. Everyone is worried about viruses and other nasty email-transmitted headaches. If your email looks the slightest bit "off" or sets off a security-related red flag, you can be sure it'll be sent straight to the trash bin. Worse, it might earn you a spot on the spam list.

When conducting your email audit, you want to make sure your company is taking all necessary precautions to keep its email safe and secure.

Some questions to keep in mind:

- Are safeguards in place to ensure that any sensitive information transmitted to you is kept private?
- If clients enter any personal/confidential information (either in reply to your email or in any Web pages linked within), is it properly encrypted?
- Is the mailing list itself secure? Do you share its information with other sources? If not, can an outside party access it fairly easily?

For more information on how security issues can affect your email campaign, check out these two MarketingSherpa articles:

1. Case Study: Security Logos in Email Lifts Average Order Value 28.3%
<http://www.marketingsherpa.com/article.php?ident=30183>
2. Do Security Icons Really Increase Conversions? A/B Test Results From PETCO.com:
<https://www.marketingsherpa.com/barrier.html?ident=2742>

#2. Deliverability

When it comes to deliverability, you must be concerned. As many as one in five campaigns gets junked, blocked or bounced, according to data from MarketingSherpa's Email Marketing Benchmark Guide 2008.

Here are some tips – compiled from Case Studies – that are virtually guaranteed to boost your deliverability rates:

- Set hard rules for bounces. Continuing to send email to addresses with previous bounces can make you look like a potential spammer. Take a hard stance against bouncing. To be completely safe, make your policy "one bounce and you're out."
- Cut the spam-like copy. Avoid words like "free" and "act now!" – especially in your subject line and header.
- Find out email providers' rules and policies – and stick to them. Research the policies of the most common email providers on your contact list. Some may have a process in which you can get certified as "safe" or be approved as a preferred sender.

NOTE: To help evaluate deliverability, someone on your team should open an account with all of the major online mail services (AOL, Hotmail, Gmail, etc.) and – if at all possible – you should have access to several different mail programs (Outlook, Eudora, etc.). By sending trial messages to all of them, you will be able to see any problems which may only occur in specific situations. You never know which setup your recipients will be using, so you need to make sure your message is user-friendly to everyone.

Also, security and deliverability go hand in hand. If your security safeguards aren't up to par, this will have a major effect on your deliverability rate.

#3. Reputation

Your reputation plays an important role in the success of your email campaign. We'll examine the issue of reputation – and how you can evaluate yours and clean it up, if necessary – later in Step #4 of the audit process.

#4. Effectiveness

OK, let's assume you've been conscientious in avoiding or addressing issues with security and deliverability. Your email is now much more likely to be received and opened by its intended recipient.

Unfortunately, that's only half the battle. Sure, it's great that your recipient has opened your email. It's not so great if they immediately delete it or simply ignore it.

It's pretty simple to determine your email's effectiveness. The proof is usually obvious (which may or may not be good news). By monitoring your email and site stats – clickthrough and bounce rates, sales figures resulting from email links, etc. – you'll be able to see exactly how effective your campaign is.

Your ROI is also a clear-cut indicator of effectiveness. Check out your sales figures (ideally, you can pinpoint sales directly resulting from email, perhaps by a unique link or order page). If your sales figures aren't where you would like them to be, you need to consider ways to make your email more effective.

Specific questions to ask:

- Are recipients acting on the email's call to action?
- Does the email convey what you intended to say, in the most appealing and efficient way?
- Is the email effective from a viral marketing standpoint? (Do recipients seem eager to forward it to friends/colleagues?)

#5. Content Quality

Your email message is only as good as its content. Content quality is closely linked to effectiveness; it is nearly impossible to have a successful email campaign if your content isn't up to snuff.

If you think your copy could use some help, see our how-to guides later in this Tutorial for tips on improving your content.

TECHNICAL STUFF

Yes, there are a few technical things you'll probably need to know to do an email audit, so let's get that out of the way right now. (The good news: your IT people and/or vendors will most likely be handling some – or all – of the audit, and they're already familiar with this stuff.) Here's a timeline to help in your planning:
www.marketingsherpa.com/tk/AuditTimeline.pdf

Web Analytics

The crux of an email audit is data – specifically in the form of email/Web stats. Fortunately, these are usually easy to find. Most ISPs and other vendors track your stats for you, often on an easily accessible (for authorized users) page where you can see a range of stats in various formats.

Here are some of the stats you'll deal with in an audit:

- Clickthrough and conversion rates
- Bounceback rates
- Opt-in numbers
- Unsubscribe/Opt-out rates
- Open rates
- List retention figures

Clickthrough Rates

Clickthrough rates are very important. They provide clear proof of how effective your campaign is, which is why you should pay careful attention to clickthrough rates while doing your audit.

Here's something that might surprise you:

MarketingSherpa data shows that only 16% of business-to-business marketers get clickthrough rates of 21% or more for email newsletters sent to house lists.

Surely you can do better than that, right? Maybe – but you may never know until you perform an audit and study the findings.

'Reply to' Responses Versus Clickthroughs

A certain percentage of people who receive your email will simply hit "reply to" instead of clicking on the links. Some of these people will want to take advantage of the offer (or get more information) while others may have an unrelated question or concern. Either way, it's important that they receive prompt attention.

To find out exactly what kind of experience these "reply to" customers have, conduct your own experiment. Send a note to the "reply to" address (preferably from a personal email address, so it's not obvious that you're

from the company). See how long it takes for a reply and whether it is helpful.

If your inquiry is gloriously and swiftly handled, give your customer service team very public kudos at the next interdepartmental meeting. If it's not, start a research program of your own to find out:

- What percent of campaign sends get reply-tos?
- How do the replies break down into topics by percent?
- How long does your email program or ESP take to sort these and get them back to your company for handling? (It can be as long as two days.) What would it take to speed this up?
- Who at your company receives them now and what training and tools has marketing given them?
- What about reply-tos for rented lists, affiliate campaigns or other partnered sends?

Your goal is to estimate how many possible conversions you're leaving on the table because of slowly answered or unconvincingly answered replies. And how much would it cost you to fix the problem.

COST

How much will it cost to do an audit? Maybe nothing. Many companies find that it's possible to perform an audit in-house. So, you really won't incur any costs (besides the salaries you're already paying your staff, of course). For more details on costs, see our cost calculator section: <http://www.marketingsherpa.com/article.php?ident=30326>

In-house or Outsourced?

You may decide you need to enlist outside help, though. Here are some instances when it might be a good idea to outsource your audit (or portions of it):

- Your mailing list is very large, or is divided into many individual targeted lists.
- Your record-keeping has been lax, and you have limited data/stats, so you need someone who can conduct an audit from scratch.
- Your email process is complicated, with lots of moving parts and manpower involved, and you want a vendor who is experienced at handling big projects.
- You have specific areas of concern that you want to address quickly.

Vendor Costs

The cost of hiring a vendor to do your audit can vary widely. A lot depends on whether you need the vendor to handle the entire process, or just specific parts of it. Obviously, the more you can do in-house, the cheaper it will be.

As an example of typical costs, EmailLabs charges \$1,250 for a creative review (which looks at factors such as call-to-action effectiveness).

Reminder: Many audit-related tasks may be available at no extra charge from vendors you already use. (In fact, the data is often ready and waiting – you simply need to know where to look.) For example, MailerMailer, an email list management service, provides broadcast history records and tracking reports to its customer at no extra cost.

THE AUDIT PROCESS

Step #1. Interview

First, you need to do some detective work. Talk to your staff – including anyone who is involved with the email marketing process in any way, from content creation to technical execution, and anywhere in between. Quiz them on what exactly they do and how they do it. Ask what works and what doesn't. What problems have they encountered? How have these problems been fixed, if they have?

Other questions to ask:

- What kind of feedback have you gotten from clients and other email contacts?
- Have you received complaints or compliments on any specific aspects of the email campaign?
- Is there anything you think needs to be changed, added or eliminated?

While speaking to the staff, you should also try and find out exactly how much they know about issues (within their part of the process) that can set off red flags in an audit. For example, do the copywriters know how to avoid subject lines that might set off spam filters?

Note: You don't want to appear as if you're stepping on anyone's toes or trying to tell them how to do their job. Emphasize that you want to work together as a team to produce positive audit results. Stress that you aren't attacking anyone's work or creative vision. Even the most talented writer in the world might find themselves under scrutiny in an audit if their subject lines are too long or their headlines resemble spam.

Gather Feedback from Your Client/Contact List

Don't overlook the "other half" while gathering information from the internal side of the process. You really need to hear from the people on the receiving end of your campaign – the contacts who are getting (and hopefully reading) your email messages.

If you have any kind of feedback link within your email or in a prominent location on your site, you may already have this information. If not – or if you want to gauge opinions on specific aspects of your email campaign – you'll want to invite feedback via a survey, poll, questionnaire or similar means.

Outside Vendors

To get the full picture, you should also chat with any outside vendors involved in your email campaign – such as email providers, list management firms, distribution services, anyone else. You want to find out exactly how it is they do what they do.

Specifically, you want to know what items on your checklist – see our sample checklist here <http://www.marketingsherpa.com/tk/AuditChecklist.pdf> – they are already doing and what else they should add to their to-do list.

In addition, they may be able to provide you with some valuable data, which will eliminate some of the legwork for you. Most likely, they've been keeping stats/records related to their part of the process. For example, your distribution service probably tracks bounceback rates – and perhaps other stats like the number of opened messages, clickthrough rates, etc.

Step #2. Analyze the Process

Make a list of exactly how the email campaign evolves – from initial concept to delivery of the finished product. A flow chart or timeline may be helpful in illustrating this and ensuring you don't overlook any steps.

Your exact list may vary, but here are examples of what it will likely include:

- Concept creation
- Subject line and headers
- Content: text and format
- Message design (art, style, etc.)
- List management and monitoring (including subscription options, opt-out process, etc.)
- Delivery
- Testing/evaluation of deliverability

Compile details on how your company handles each of the tasks involved. Then research the standard method – or the latest and/or most popular approach – to see how your technique stacks up.

Remember to Delegate

An email audit can be a big job, especially if your company and/or mailing list is large. Make things easier by dividing it up into smaller tasks, which you would then assign to the best person/team. For example, someone in the creative department would probably be a good choice to evaluate the copy and design elements.

Consistency and Coordination

When conducting your audit, take note of how the different parts of your company are working together to present an efficient unified message.

Make sure that your email policies and strategies are consistent throughout your company and that different segments of the business are working in a coordinated way. For example, if your company has retail locations where customer info is collected, be sure the permission/opt-out policy at these locations is the same as the one online.

If possible, coordinate your email campaign with in-store advertising. Likewise, try to tailor your email messages to promote the brick-and-mortar locations – by including the address and business hours of the store closest to the recipient.

Step #3. Study Samples, Gather Historic Data and Track Trends

How do you evaluate your company's email? By looking at it, of course.

Gather up a bunch of your current and recent email campaigns and look at them – really look at them – with a critical eye. Pay close attention to things like subject line length and wording, headers and footers, formatting quirks, fancy elements that might hamper deliverability, etc.

Once you've looked at the email itself, your next step is to check out the data connected to your email campaigns. Ideally, you've saved as much data as possible involving past campaigns, allowing you to spot trends and identify what did or didn't work. Your ISP, email service provider or other vendors may be able to provide data – or show you how to interpret data already available to you.

If you haven't kept great records – or if you've been lax in recording or studying your data and tracking trends – this is the time to change your ways.

Step #4. Check Your Reputation (and Clean It Up, If Necessary)

Everyone knows the importance of a good reputation. But when it comes to email marketing, it's not just your company's rep that matters – it's also the reputation of your email.

A bad email rep can earn you a spot on the direct train to the spam list. This can do major damage to your deliverability rate. When it comes to email, sometimes you earn a bad rep even though you don't deserve it – and often don't find out until it's too late.

That's why it's important to constantly monitor your email reputation and take immediate steps to clean it up at the first sign of trouble.

Checking Your Rep

It's not very difficult to find out what kind of email rep your company has. Here are several places to start:

- Feedback loops. ISPs can put together lists of subscribers who complained by hitting the “report spam” button. Among the ISPs offering feedback loops: Yahoo!, Hotmail, AOL, United Online, Road Runner and USA.net.
- Microsoft’s Smart Network Data Services. This service provides a summary of how each of your IP addresses looks to Hotmail.
- Filtering company reputation sites, such as Ironport’s Senderbase and CIPHERTRUST’s Trusted Source service.
- Companies like Return Path, Pivotal Veracity and others offer services that rate reputation with a score or a number indicating how “spammy” the email stream looks to receivers.

Protecting Your Good Reputation

If you have a good reputation, do everything in your power to protect it. Seven tips:

Tip #1. Avoid changing your IP address. Brand-new IP addresses with no volume history are subject to limits, or throttling, and more stringent reputation thresholds.

Tip #2. Regularly review your reputation data across a broad set of sources. Here are the types of data you should keep an eye on:

- Complaint rates (how often recipients identify your email as spam)
- Unknown user rates (how many bad email addresses you attempt to send to)
- Spam trap hits (how often your email is sent to an address set up to catch unrequested mail)
- Infrastructure issues (how your system is configured to send email)

Tip #3. Do limited test runs. Before making any significant changes to your program – particularly to the type of content sent or the frequency of sending – test the changes with a small portion of the list and measure your complaint rate. If the new emails draw more complaints than usual for your program, rethink your strategy. Something as simple as changing a “From” address can cause a spike in complaints.

Tip #4. Quarantine data. You can isolate email sent to newly acquired addresses from a separate server until you can determine its quality. If the data shows higher than average hard bounces, draws a lot of spam complaints or generates spam-trap hits, get rid of it or, at the very least, don’t move it over to your “good” server.

Tip #5. Be vigilant about your unsubscribe process. Getting opt-outs off the list as quickly as possible is key to minimizing complaints. Test your process on a regular basis (ideally, before each send) to ensure that it works. Also, be sure to process feedback loop complaints and remove them from your list before every send.

Tip #6. Zap complainers, fast. Once you’ve signed up for the feedback loops, pull complainers – those who hit the “report spam button” – off your list right away.

Tip #7. It’s important to manage unknown users. Take regular looks at the percentage of messages sent that could not be delivered at receiving mail servers because the user doesn’t exist. If there’s a problem, you can address it in two ways:

- Make sure you are removing unknown users from your list (NOTE: Rules for when you should pull these users off your list vary some by ISP).
- Give users as many chances as possible to provide an up-to-date address. For users with “bad” addresses, include website messaging, such as “Hey, give us your new email address!”

Fixing a Bad Rep

Yes, you can fix a reputation that’s gone bad. Here are eight strategies:

Strategy #1. If the data shows an unknown-user problem, clean your list. Make sure that your bounce classification rules can find unknown users and pull them.

Strategy #2. If the data shows you’re getting caught up in spam traps, here are three solutions:

- I. The quick, easy fix: Immediately stop mailing “inactives”

One quick fix for spam traps is to find “inactive” parts of your list that have little economic value. Stop mailing those parts of the database and check [your] data sources to see if you are still hitting spam traps.

- II. The prudent fix: Localize spam traps

This takes more time and IT work, but localizing spam traps is altogether necessary for some emailers. Segment your list by several dimensions (data source, click/open activity level and vintage are the dimensions that seem to work best). Send each combination of these dimensions – starting with inactive addresses first – through a unique IP address to see which ones hit spam traps (by reviewing some of the data sources above).

- III. The painful fix: Re-permission your list

We know. Ugh. But one method that always works in eliminating spam traps is to re-permission your list – send a message that says: “If you want to keep receiving these messages, click this link.” Then, mail only those subscribers who click. While this foolproof method eliminates spam traps, it also will most likely result in a loss of subscribers, so it’s best used as a last resort.

Strategy #3. Look at your program from the subscriber point of view. The likeliest cause of a bad reputation is a high complaint rate. This may be because subscribers feel your email seems to promise one thing and deliver

another (or fail to deliver much of anything at all). Inspect your email program, end to end, to see where you might be setting poor expectations. For one thing, make your offers clear. As an example, subscribers sometimes don't understand what they are signing up for. Or they think they are signing up for one type of email (like a newsletter) but get something different (like weekly sales announcements). Then they tend to complain.

Strategy #4. Make the unsubscribe process quick and easy. For example, don't make subscribers sign in to unsubscribe. Also, give them multiple options to opt out: email, on site and phone. The easier you make the process, the less likely you are to generate complaints related to subscribers feeling like they have no other choice but to get off your list.

Strategy #5. Allow recipients to opt out – quickly! The CAN-SPAM Act gives you 10 days to take addresses off your list; subscribers will be far less understanding.

Strategy #6. If you are getting blacklisted (or “blocklisted”), it can also be because of *identity* issues that you can repair. Here are some things that can cause your identity to go bad:

- Incorrect records
- Sender authentication configuration issues
- Basic DNS setup problems

Strategy #7. Keep an updated action plan. For instance, make sure your automated repairs are at the top of the list; IT problems can be addressed quickly in comparison to changes in people's perceptions. This plan will also help manage your cross-organization functions that may be contributing to and suffering from the reputation problem.

Strategy #8. Remember to set up your instrumentation properly so you can see exactly what's going on. Few things are more frustrating than finding out you have a reputation problem, working long hours to fix it and then wondering if it is resolved. You should establish your baselines and measurement criteria before you do anything.

Step #5. Consider a Vendor (or Evaluate the Ones You Already Have)

Even if you have been doing all or most of the email process in-house, it may be worthwhile to at least do a little research and gather up prices from outside vendors. Run the numbers – you might discover that a vendor would be a wise economic move, especially if it frees up valuable in-house employees to do other work that can't be outsourced.

There are countless email vendors out there, so chances are good you'll find one that can meet your needs and your budget. Some vendors handle the whole kit and caboodle – even producing ghostwriters to handle content. But that may be overkill if your in-house team can easily carry part of the load. If you mainly need help in

specific areas – say, list management – look for a vendor that can quote a fee just for that.

Whatever tasks you have the vendor(s) handle, be sure they keep detailed records. They should provide you with comprehensive stats and data, which will help you track trends and evaluate results. For example, a vendor who handles your email distribution should be able to provide stats on deliverability. A vendor who handles your Web stats can provide clickthrough rates.

Tip: There are numerous vendors who specialize in handling email audits. They can do the entire process (or at least most of it) for you, thus sparing you the time and effort of doing the legwork yourself. Prices and exact services vary widely, though, so be sure to get all the details and do some comparison shopping before putting your audit in someone else's hands.

Check out our list of vendors (below) to get an idea of what they can offer and how much it will cost:
<http://www.marketingsherpa.com/article.php?ident=30328>

Even if you decide to have a vendor do your audit, it's still a good idea to familiarize yourself with the process. This will help you communicate with the vendor and evaluate their performance.

Step #6. Compile Current Delivery Data

After you know how the process works, put that knowledge to use immediately. Pay close attention to your next email campaign. Monitor each of the steps identified in your timeline. Watch for any pitfalls or trouble spots.

Important types of data include:

- Open, bounce and clickthrough rates (ideally, broken down by recipient mail server such as AOL, Hotmail, etc.)
- Ratio of text-only mail vs. HTML
- Opt-out figures

Step #7. Make Necessary Adjustments – and Keep Testing

After you have the information you need and have had a chance to analyze it, you will probably need to make some adjustments. See our how-to guide later in this Tutorial for more detailed guidance in that area.

This is also a point where you'd plan to do some experimentation. After all, getting the data is only half the battle. You also want to see what might change the data. The goal, of course, is to change the data in a positive way.

Review new (and previous) data for any trends. Use that as your benchmark. Then, tweak individual aspects of your campaign and monitor the results, comparing them to your established data. For example, try changing the day of week on which you send your messages. How does this affect your results, if at all?

Step #8. Keep Your Audit on Auto-Pilot

An effective audit is never truly finished – and that’s a good thing. Even after you’ve completed your formal audit, you should always be on alert for any problems. By keeping your evaluation and testing protocol and safeguards in place, you’ll always know exactly how your email machine is running.

SECTION 2: HOW TO: CREATE BODY TEXT THAT WILL SURVIVE AN AUDIT

Pick the right words to spread your message

START WITH THE SUBJECT LINE

Here’s an eye-opening stat: 50% or more of all subject lines arrive appearing different from how they were intended – in some cases, barely decipherable. That was among the findings of a recent Pivotal Veracity study.

We’ve all received emails where the subject lines look a little bit strange. In some cases, they may be virtually unreadable with gaps and spaces where they don’t belong, foreign-looking characters and symbols, missing words or letters. Specific quirks may vary, but the end result is the same: the message catches your eye, but not in a good way.

Most likely, you become annoyed – and possibly alarmed – thinking you have received spam or maybe a virus-laced note. Either way, you probably hit the delete button immediately.

Sure, the message inside may have contained the most amazing sales pitch you’ve ever seen – but you’ll never know. And the poor sap who spent countless hours laboring over each word in that message? His efforts are all wasted, thanks to a broken subject line.

The worst part? Unless his company does an email audit (or otherwise monitors their outgoing messages and how they appear to recipients) he may never even have a clue.

Not only is the problem common, it happens very easily. It’s generally because of a formatting problem – often the result of cutting and pasting text from a Word document. Two tips:

- Don’t cut and paste. It’s that simple. Type your message directly into your email program.
- Use caution with symbols or unusual characters. These can often cause formatting problems. If you decide to use anything out of the ordinary, make sure your tech folks know how to format them properly.

Read the entire Pivotal Veracity study here:

<http://www.marketingsherpa.com/cs/pivotalveracity/study.html>

TRY CREATIVE NEW APPROACHES

The best way to figure out which types of content works best for your specific targets? Test lots of different things.

If your old methods haven’t been working as well as you would like, you might need to take a radical new approach. If the boring, wordy white paper types of articles have been a dud, maybe you need to try using short and snappy snippets of content, maybe with some humor thrown in.

Experiment with a bunch of different approaches, and then track the results to see which ones got the best response rates.

When the marketing team at CareerBuilder.com wanted to increase their low clickthrough rate, they started experimenting with different types of text and headlines. Instead of sending only “buy now” messages, they began alternating that with informational email newsletters. Still, they didn’t really see any big jump in clickthroughs – until they also spruced up the content within the email. Instead of focusing solely on business stories and company news, CareerBuilder.com shook things up by adding some humor, along with other new approaches.

The results? Contacts really seemed to love the new approach. One humor-based newsletter got an 11% clickthrough rate compared to the previous average rate of around 1.5%.

CareerBuilder.com found that the most popular types of content included humor, top 10 lists and controversial topics. Including a number in the headline – such as “Five Traits of Great Leaders” – also proved effective.

You can see the CareerBuilder.com Case Study (including samples) here:

<http://www.marketingsherpa.com/article.php?ident=29682>

SECTION 3: HOW TO: AUDIT FOR CREATIVE CONTENT

Analyze how your words and graphics appeal to the eye

It’s not just what you say, it’s how you say it. What do your words (and any accompanying art/graphics) look like when they actually appear on the screen in the recipients’ inbox?

Results will vary and there is no one cardinal rule on what works. (This is why we always advise doing your own tests to see what works best for your specific situation).

However, there are some general rules of thumb, based on Sherpa's own case studies and research:

- No long and boring articles. Your contacts are busy and probably have short attention spans. Don't ramble. Cut to the chase and tell them exactly how you can make their lives easier.
- Tools and interactive elements are popular. Calculators, worksheets, checklists – even templates of documents, forms or other materials which recipients can download – will probably be a big hit.
- Make it visually appealing. Nothing is worse than a long, solid block of uninterrupted text. Break things up. Use bullet points, sidebars, charts, etc. A colorful graph or pie chart can be an attention-getter.
- Use art (wisely). Pictures and other images can make your email more exciting. On the downside, they also increase the odds that your recipient won't be able to view the message properly. Again, this is why it's so important to do test runs (using a variety of different email programs) so you can spot potential problems.
- Headlines and click buttons are valuable real estate. Choose your words carefully. Headlines should be short and snappy. Click buttons should be fun and action-oriented: Try something like: "Get it now!" or "Show me!"

SECTION 4: HOW TO: ENERGIZE EMAIL BASED ON YOUR AUDIT

So, now what?

You've done the email audit. Congratulations! Now you've got all this handy data and a bunch of assorted feedback, along with input from internal (staff) and external (clients) sources.

What do you do next? Relax! The audit was the hard part. Digging up figures, interrogating your staff, researching the entire process – that was the exhausting legwork. Getting to the heart of your email campaign process, and pinpointing any weak points within it – that's the toughest part. You know where you stand now. You can formulate a strategy for where to go from here.

The good news? We've seen it all before.

Seriously, it would be a bit shocking if your audit revealed a problem that MarketingSherpa hasn't seen, and probably solved (with the help of a network of generous sources). Do a search of the Sherpa archives, and it's likely you

will find some articles addressing the very issue you're confronting. You'll probably also find some Case Studies showing how other real-life companies with the same problem figured out a solution.

Prioritize

Before diving in and trying to make tons of sweeping changes based on your audit results, it's a good idea to get your priorities in order. You can't tackle everything at once. Figure out which changes are most important.

Are you a stickler for security? You may want to start your overhaul by cleaning up your reputation and closing any security gaps in your system.

Is deliverability your biggest concern? Study your relevant stats (bounceback rate, number of messages caught by spam traps, etc.) and formulate a plan for addressing those issues.

As always, you will want to test any changes with a limited – and closely monitored – mailing list. Then you can gauge the results and make the necessary adjustments.

Two more tips:

- Consider hiring a full-time analytics staff member (even if your organization is fairly small). No matter how good an analytics package you have, a human being is better at deciding what to do with the information.
- Pick one quick actionable idea to start moving on immediately. Analytics packages offer tons of reports. To keep from getting overwhelmed, start small by picking out a few actionable items you can test or address right away.

SECTION 5: HOW TO: TRACK AND MANAGE YOUR CLICKTHROUGH AND BOUNCE RATES

Analytics (the term for statistics related to your email and website) play an important role in your email audit and subsequent changes you decide to make.

While it's helpful to study all of your analytics, two specific pieces of data can be very valuable to you in this process:

- Your bounce rate
- Your clickthrough rate

Clickthrough rate is the number of people who arrive at your site by clicking on a link. Right now, we're focusing on visitors who click on the link from an email, but this can also refer to links found in online newsletters, search engines, ads or on other sites.

Bouncing can mean two different things, neither of them very good.

With email, bounces are messages that cannot be delivered to the intended recipient – at least not without sending up some kind of red flag. This is often a sign that your mailing list is outdated. Bounces can be subdivided into “hard bounces” and “soft bounces.” (See glossary for definitions: <http://www.marketingsherpa.com/article.php?ident=30325>)

Referring to a website, a “bounce” is what happens when a visitor who lands at an entry page leaves without checking out anything else on the site.

Getting Your Stats

The good news: It’s relatively easy to track your stats. Most likely, you already have access to that information already, whether you’re aware of it or not. In fact, you may be tracking your stats via several different avenues.

Your ISP or Web hosting company may already keep track of these stats. Contact them and ask. Also, if you use a list management/distribution company, they likely track your stats, although the type and quality of info can vary widely. Be sure to clarify what stats your analytics program/vendor records, and how. This can vary. For example, some programs count hard and soft bounces equally.

Some other sources of stats:

- Analytics software
- Online services such as Google Analytics
- Vendors who specialize in tracking email/online stats

What Does It All Mean?

Getting your stats is only half the battle. You also need to understand them, which can be the more challenging part of this process. Interpreting analytics can be tricky, especially if you simply get a jumble of numbers and graphs. Odds are they all look Greek to you.

Many programs and vendors like to impress you with their ability to track every stat known to mankind. To keep from getting overwhelmed, see if you can tailor the analytics reports so you only get the metrics that matter to you at this time.

Not so confident about your metric comprehension skills? Look for a program/vendor that specializes in providing easy-to-understand reports and/or one that provides accessible help to guide you through the data.

Now What?

Now that you have your stats and are reasonably comfortable interpreting them, where do you go from here? Up, hopefully.

Meaning: You take those metrics, use them as your starting point and set out to improve upon them.

After your audit (or perhaps even while the audit is in progress), you’ll spot some places where your email techniques may not quite be the best they can be. By making changes and monitoring their impact on your stats (making sure to change one thing at a time, so you can zero in on what’s causing the change in stats), you can see immediately what works and what doesn’t.

Recording and monitoring your bounce and clickthrough rates can be a good way to measure the effects of any changes you may make to the content of your email and/or your site. Send the email with your new changes to a limited control group, and then watch the resulting impact on your stats.

Maybe a new subject line increases your deliverability by 10%, or your improved content leads to a dramatic rise in clickthrough rates. Keep testing and tweaking, letting your stats serve as the barometer of what your recipients like – and hate.

Tips:

If you’ve created special tracking links to embed in your email newsletter, it will be easy at a glance to evaluate your related stats.

One reason for site bouncing is that your site doesn’t deliver what people expect. This may be due to unclear or misleading content in your email. If people click the link expecting one thing, but find something totally different, they will often leave the site quickly.

Study your site stats and take note of the search terms leading people to your site. If the site doesn’t deliver sufficient material related to those terms, people may become frustrated (and perhaps feel misled).

SECTION 6: HOW TO: DO A MINI-AUDIT

This toolkit is designed to help you perform a comprehensive audit – meaning, one in which you look at the whole package, your entire email process from start to finish.

This is a process that can take quite a bit of time, energy and legwork. Want more immediate results? You can do a mini-audit, focusing on a single specific email to see how it stacks up against your ideal standards.

Think of this as a pop quiz while you’re awaiting the results from your final exam.

To do a mini-audit, you examine every part of the email, paying attention to common pitfalls and trouble spots.

The Email Analysis

OK, let's get started. Pull up a copy of your latest email (or one you are getting ready to send).

Here is what you need to look at:

Security/Deliverability

Do you have:

- Bounce-removal process?
- Privacy policies in place?
- Easy (and easily visibly) unsubscribe/opt-out instructions?

Format

If you haven't given recipients the opportunity to select their preferred format, use a "sniffer."

Subject line

- No cutting and pasting
- Special characters kept to a minimum (or eliminated completely)
- Free of spam-like words
- Action-oriented

Header

- Name of newsletter/organization
- Company URL
- Tagline
- Date

Content

- No boring articles (be creative!)
- Art/images
- Personalized
- Calls to action

Footer

- Key contacts
- Unsubscribe information
- Encourage recipient to forward message

Making Quick Changes

Elsewhere in this toolkit, we show you how to do a major overhaul of your email techniques. For now, though, you can enact some quick changes during your mini-audit.

Here are a few quick strategies to give your email a makeover:

- Make the subject line short and snappy
- Add a quiz or "Top 10" list to your newsletter content
- Throw in a little humor, if appropriate
- Make unsubscribe/opt-out instructions more prominent

- Put your company/newsletter name in the "from" line (or that of a company figurehead, if recognizable)

Note: if you spot serious issues/concerns during your mini-audit (a lack of privacy controls, for example, or formatting that isn't easy to read), you may want to put the email on hold until you resolve these problems.

SECTION 7: USER/LEGAL AGREEMENT

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Email Audit Timeline

A Planning Schedule

NOTE: This timeline is presented to complete an email audit in eight weeks, but you can adjust the tasks to do it faster or slower. That's entirely up to you and your schedule.

