

salesforce

50 BEST PRACTICES FOR EMAIL MARKETERS

DELIVERY WITH BRAINS & HEART



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GREAT EMAIL BLENDS INTELLIGENCE WITH HEART.

There's a reason marketers are still talking (and asking) about email. The first permission-based digital marketing channel, email remains the highest driver of ROI.¹ It's one of the earliest touchpoints to introduce your brand to customers.

But effective email doesn't just happen. It takes data-driven decisions as well as a thoughtful touch: **a perfect blend of data and emotion.**

To master this balance, we've assembled 50 tried-and-true tips to guide you. If you're just getting started with email – or if you're looking to improve what you've already built – this book will help you create email that both resonates with customers and proves its own value.

¹Data and Marketing Association (DMA).





SETTING GOALS AND MEASURES

Creating an email campaign takes time, energy, and resources – but it can be tremendously rewarding. Ensure your efforts end with a big ROI and plenty of high fives. Kick things off with some discovery to align everyone involved and get set for success.





1. GET YOUR MANTRA READY.

First things first. Your team should develop a statement to rally around – and share it with your boss. This is your succinct response anytime someone asks, “So, what are you working on?” For example: “We’re developing an email program to engage current customers, inspire new customers, and stand out in the inbox.”



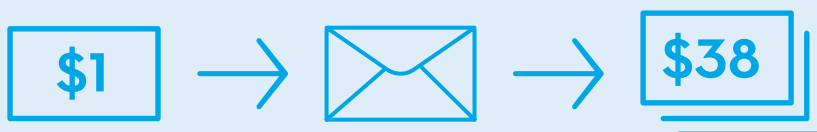
2. SET CUSTOMER-FOCUSED GOALS.

Once you understand your email program vision, establish goals focused on the customer. Define clear intentions to improve the value of your emails for customers. Perhaps you’ll aim to add the ability to reach customer service in one click within all of your digital marketing over the next 12 months. It could be anything designed to benefit that special individual opening your email.



3. GET OTHER TEAMS INVOLVED – AND INVESTED.

Share your plan for the year with executive leadership, other channel marketing teams (like social and advertising), customer service, and anyone else you’d like to include. It’s easier to address challenges with a holistic understanding of where your business is and where it needs to go. Plus, your vision could wind up inspiring other departments to change their strategies.



FUN FACT

For every \$1 spent on email marketing, the average ROI is \$38.*

*Data and Marketing Association (DMA).



4. KNOW WHAT WORKED BEFORE.

Establish a benchmark for success. Gather data on previous email programs to see what subscribers responded to before – and where there’s room for improvement. Were there periods of high engagement? Were there periods of mass unsubscribes? Understand your history.



5. ALIGN WITHIN YOUR MARKETING ORGANIZATION.

Conflicting business goals between teams can lead to challenges as your email program grows. It will be tough to scale without alignment among merchandise teams, content and creative departments, leadership, and so on. Early on, establish the expectation for cross-functional teams to agree on workflows. Collaboration should be second nature.



6. DETERMINE YOUR KPIs.

Knowing your benchmarks for success upfront will influence how you build and send email. Established KPIs (for instance, click rate by link over time) ensure you get the data feedback you need. You can even dig deeper for hard data on conversions and customer lifetime value: Set your program up to measure list growth, for example.



7. UNDERSTAND YOUR OBJECTIVES.

What targets does your email program need to hit? Is it a 5% increase in subscriber base over six months? Is it a reduction in unsubscribes or a boost in clicks to conversions? If you don't know, you could wind up over-sending emails just for the immediate conversions. Sending too many emails without established goals causes subscriber fatigue and hurts your customer file.



8. CHECK UP ON YOUR PROGRESS.

Regularly review how your emails are performing. Look high and low, at an aggregated top level, at categorical campaigns, and at individual email sends. See which ones are driving the best engagement. Add what works to other campaigns. Compare your findings to the benchmarks from step two. Share your insights with broader organization partners.



9. TURN DATA INTO ACTION.

Regularly translate your data and findings into actionable insights. An increase in open rate is terrific news: Take a bow. Then identify the steps to apply this victory to your other sends.



10. RECALIBRATE.

With the data you uncover, point out where there's room to grow. Consider which adjustments you can make to reach your objectives. Pivot toward the strategies and tactics that have worked the best. Remove or correct any that haven't met expectations. Make a tangible plan for addressing your challenges and opportunities.





BUILDING TRUST

Even the world's greatest email campaign won't do much good sitting in a spam folder. Follow these recommended steps to stay at the top of the inbox – and earn your subscribers' confidence to open every message.





11. GET THEIR PERMISSION.

Be explicit about what subscribers are opting into. Clearly ask permission to send promotional emails. Keep opt-in boxes unchecked by default, and explain how the permission will be used. Whenever you collect addresses, ensure your customers are informed before agreeing to your terms.



12. SET EXPECTATIONS.

Tell customers the benefits of opting in. Describe what you'll provide in exchange for their information. Say why it's valuable, explain how often they'll hear from you – and anything else they should know. Immediately after a subscriber opts in, send them a confirmation email reiterating the perks.



13. CHAMPION QUALITY OVER QUANTITY.

It's less important to have a lot of subscribers than it is to have quality subscribers. Do what it takes to know where they're coming from. Then confirm that each of them has given their permission to receive emails. Do not send messages to an email address if you don't know its source.



14. MAKE "GOODBYE" EASY.

Email marketers never want to hear "goodbye" – but for customers, it should be short and sweet, and easy to accomplish. Make unsubscribing possible with one click, while also giving options to control preferences like frequency and types of content. An unsubscribe is better than a spam complaint.





15. GET IN ALL THE DETAILS.

Include contact information, social sharing buttons, and unsubscribe links somewhere in your email. That way, recipients can share your content or communicate with you should they have any questions or needs.



16. LET THE UNENGAGED GO.

Stop sending unengaged subscribers the same emails as the rest of your database. If someone hasn't opened or clicked one of your emails in over 90 days, move them over to an advertising audience. Send them one or two win-back emails. Automate this process to save time and execute at scale.



17. WARM UP YOUR IP ADDRESS.

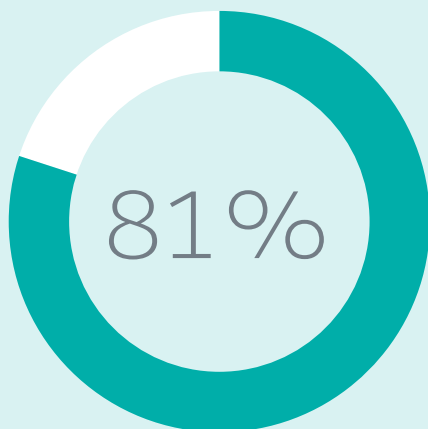
If you send an email to every prospect in your database right away, it will raise a red flag for spam monitors. Start off with your best lists to build a reputation. Keep volume proportionately low during the first week. That way, you can spot issues with initial sends before more emails bounce. Next, form a plan for increasing sending volumes until you reach your goal.



18. BE CONSISTENT.

For your overall email marketing program, consistency in volume and frequency is critical. Once you've warmed up IP addresses, internet service providers look for consistent sending from each IP.

FUN FACT



of customers say they love or like having a spam filter for email.*

* Salesforce Second Annual "State of the Connected Customer" Report



19. SET UP AUTHENTICATION.

Email authentication verifies that the email your business sends is actually from you. It protects your reputation from spammers who could pose as your organization. Your email service provider can help you set up rules that determine how your emails are sent, so fraudulent senders can't imitate you. Most mail servers use systems called SPF, DomainKeys, or DKIM to do this.



20. OWN YOUR SENDING PRACTICES.

Keep an eye on bounce rates. Review them to understand what they mean. After a while, you'll start to recognize warning signs and red flags so you can avoid common mistakes.





DESIGNING FOR MAXIMUM IMPACT

Readers are busy. They can only give your message so much time, even when it's pertinent. It's best to design your email with efficiency and readability in mind. Help audiences learn what you need them to know faster with a look that's both visually appealing and proven to be more effective. Here's how.





21. DESIGN A METHODOLOGY.

The magic behind good design goes beyond the creative department; it applies to all facets of business and technology. Collaborate with your team to develop the frameworks, workflows, and strategies that allow creativity to flow.



22. PLAN YOUR TEMPLATE.

After considering which types of messages you're sending, develop a design system for those communications. A modular framework may best turn your vision into reality. Envision a proficient layout for your content. Determine if one template with different modules will fit all your needs, or if you'll have to create templates for different communication types.



23. KEEP THE JOURNEY IN MIND.

Each email is a step in the overall customer experience. Design every message to fit in with all the other communications your subscribers could receive from your brand. Make the look and feel consistent. It should be easy to identify any newsletter, onboarding welcome, or password reset (for example) as your content.



24. ACCOUNT FOR MOBILE.

Make sure your email looks great on any device and every email client. Provide an elegant mobile experience, beginning with your initial welcome email. Include any links and webpages while you're at it. The world is increasingly mobile-first, so these things matter.





25. GIVE YOUR IMAGERY PURPOSE.

Add context and interest through photography or illustration. Use imagery to appeal to the subscriber's emotions and communicate functionality. Including visuals in your emails can break up the monotony of text, too. Note: Beware of stock photography that doesn't align directly with the message and the subscriber.



26. MAKE THE CTA SHINE.

Distinguish your call to action through color, placement, and text treatment. Readers will quickly understand the purpose of your email. More importantly, this will make it easier to act on it.



27. BREAK THINGS UP.

Consumers have a tendency to scan emails for important points that pertain specifically to them. Divide your email into bulleted text and short paragraphs for better readability.



28. BE INCLUSIVE.

Build messages for everyone in your audience. Be considerate of individuals' limitations. Think about alt tags, readability, black text on white backgrounds, and other features that make your emails accessible to all.



29. TEST IT WITHOUT IMAGES.

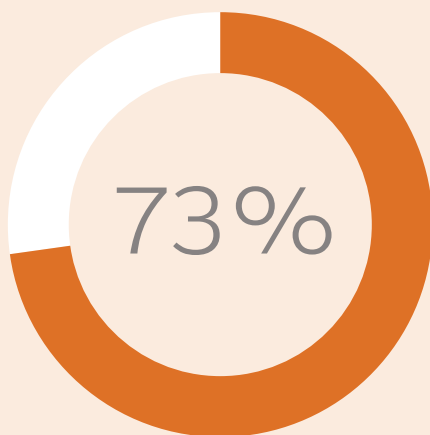
You've got five seconds to get your subscriber's attention – maybe less. Make it count. Test with images turned off to see what your email looks like with a weak connection. Is there still content to read right away? Is the call to action still apparent?



30. PREVIEW AND REVIEW.

You likely already previewed every message before hitting send. Make sure that process considers every different variable. If you include dynamic content, check the different permutations. If your message is complex, build a checklist to catch everything as you review.

FUN FACT



of customers prefer to use email when communicating with companies.*

*"State of the Connected Customer" report, second edition, Salesforce Research.



DELIVERING MEANINGFUL CONTENT

The ways to get subscribers to open your message are not kept under lock and key. They're proven, and we've collected the most effective ones here. These tried-and-true methods will encourage engagement and establish your brand as appealing, effective, trustworthy – an email that subscribers will want to click on.





31. STAY RELEVANT.

Consider your audience: Why are they receiving this message? Does it address what they're trying to do or what they want? Focus less on the sell, and think about what the customer actually needs. Let this steer your content.



32. FIND YOUR CADENCE.

You're creating a relationship with the subscriber, so set expectations and be reliable. Use your content to help them get to know your brand better. Readers should know what to expect from your messages. Maintain a look, feel, voice, and schedule.



33. SET A CONTENT HIERARCHY.

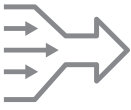
Can your subscribers answer what, why, and how after just a few seconds of looking at your email? Order your content so the most important message is visible before any scrolling. From there, ensure every piece of content directs the reader where to go next – and why.



34. TELL A STORY.

Email can make for a compelling narrative. Think about how you'd like customers to understand your core values. What is your brand's story? When drafting it, consider narratives that peek behind the scenes, address social activism, or reveal product origins – for example.





35. KEEP IT SIMPLE.

Try to focus each email on one message. When you do have to include multiple viewpoints, think of ways to streamline the presentation. You may need to send an additional message. Bring teams together to collaborate, if necessary.



36. TRIM IT BACK.

After you write and design your email, reread the copy for readability. You'll often find you can trim it down by up to half and not lose any impact. Customers move from one experience to the next at a rapid pace, so be sure they can see and understand your key message and call to action at a glance.



37. GRAB THEIR ATTENTION.

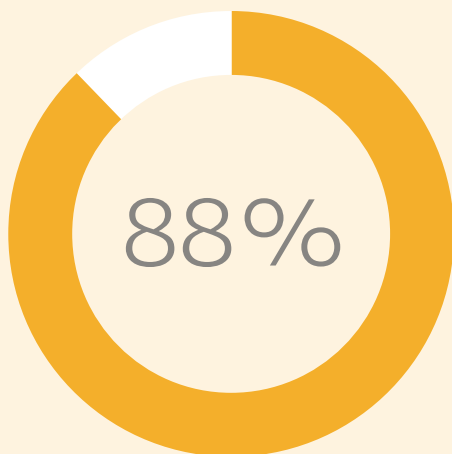
Short and medium-length subject lines have higher open rates than long ones, which ultimately affects conversion rates (the percentage of people who take action on your email). Subject lines are often truncated depending on device or service provider, so limit them to 50 characters or fewer.



38. INCLUDE A PREHEADER.

The preheader is the text that follows the subject line in an email preview. It can be as important as the subject line itself. Make it a call to action or use it as a short summary of the email content. Just make sure it supports the subject line. Limit this preheader to about 100 characters.

FUN FACT



of consumers will share relevant information about themselves for exclusive offers and discounts.*

*Salesforce Second Annual "State of the Connected Customer" Report



39. DRIVE RESULTS WITH A STRONG CTA.

Make your call to action in the email specific and relevant. Maybe it's a limited-time offer, entry to a contest, a prompt to visit your website, or an invitation to an event. Give your customers an irresistible reason to click through and take action.



40. TEST. TEST. TEST AGAIN.

Test variances in the preheader, body, and specific content blocks of an email. Try out different send days and times. Compare performance of different subject lines. This A/B testing shows how subscribers respond to important email elements, including subject lines of varying length or content personalization. Pick the winner, but never be afraid to run another test.



INTEGRATING WITH THE CUSTOMER EXPERIENCE

More than ever, brands are competing on the basis of experience. Data is the foundation for personalized customer marketing. Your email can be a powerful tool to put that data to work and tie the entire customer journey together.





41. BUILD A DATA FRAMEWORK.

Map out your data by what you have today, what you'll need tomorrow, and what you want for the future. These categories show what you can act on in the short term. Breaking your data needs down this way will begin conversations about working across departments to share data companywide.



42. KNOW YOUR AUDIENCE.

The cardinal rule for marketers is to know your audience thoroughly: their needs, their wants, their location, language, and more. Learn their pain points and address them. Use dynamic content to personalize for these different segments at scale. Show your reader you've taken the time to really get to know them.



43. MAP THE CUSTOMER LIFECYCLE.

Chart the most common customer experiences with your brand. (This has to be only as detailed as you like.) Visualize how customers engage, when they hear from you, and when they like to hear from you. Then determine which types of messages are optimal for these moments.



44. GET MORE OUT OF TRANSACTIONAL MESSAGES.

Transactional emails (like e-receipts and shipping confirmations) encourage higher engagement than other content. So apply all design and delivery best practices to your transactional sends. Use them as an opportunity to introduce services or complementary products.





45. RESPOND TO BEHAVIORAL TRIGGERS.

Be ready to react to the many behaviors of individual customers. Automate messages to bring back consumers who drop off mid-purchase. (Abandoned cart messaging is a good example of this.) Set message frequency and content based on purchase cycles, customer behavior, and other data about the subscriber.



46. EMBRACE AUTOMATION.

Perfect candidates for automated messages are lifecycle series like onboarding, re-engagement, or friendly messages on birthdays or anniversaries. These messages may be complementary to your newsletters and other sends. Use them to make your job easier.



47. MAKE IT PERSONAL.

You've got the customer data. You know your audience well. Now you can personalize anything, from simply including first names to complex messages individualized for each subscriber. Personalization doesn't have to be complicated, either way. Start simple with what you have today and build from there.



48. MAKE SENSE WITH SEGMENTATION.

Group subscribers into segments like product preference, position in the customer lifecycle, and lifetime value. You may establish segments for message types based on the intersection of your customer's needs and your brand's. Defining your segments in creative briefs and reporting will help your organization align around shared objectives.





FUN FACT

Customers are **2.1x** more likely to view personalized messaging as important.*

* Salesforce Second Annual "State of the Connected Customer" Report



49. FIND YOUR SWEET SPOT.

Your product or service type, plus your campaign tracking data, help determine what constitutes too many emails and not enough. Marketing automation tools can help you strike this balance. You can use them to set actions based on variables like timing and prospect behavior.



50. PUT THE CUSTOMER AT THE CENTER.

We're all customers. Think about how you like brands to treat you, and what makes you passionate about a product. Allow your favorite experiences to influence your marketing. Don't be afraid to put a plan into action. If one initiative isn't successful, the lessons learned from it could make the next one a big hit.



WHAT'S NEXT?

Now you've got 50 tips for creating data-guided, emotionally resonant email. That's a lot to think about. Consider choosing only a couple of tips from each chapter to implement at first.

When implementing any new practice, it's best to keep a reasonable pace so benefits can be tracked and changes can stick. Why not kick things off with some goal setting?

Use the conversation starters on these pages to determine your first steps. Work with your team to determine what happens after you close this book. In this exercise, you'll create three goals you can start working on right away.

When working through these exercises with your team, remember to ask yourself:

- Is this specific?
- Can we measure this?
- Is this feasible?
- What's our timeline?
- Can this be revised later?

Let's identify your areas of focus: what's working and what needs work.

Think about email campaigns from the last year or two. Bring in thoughts, numbers, reports, or feedback. Which performed best? Why? What could be improved?

After you have this discussion, write down the three most important themes and needs you discovered.

1. _____

2. _____

3. _____

Need a partner to bring together the tactical and the emotional in your email marketing? Salesforce is your perfect match. Visit [sfdc.co/emailmarketing](https://www.salesforce.com/emailmarketing) to learn about the #1 email marketing solution, Email Studio.*

*Direct Marketing News, Email Marketing Company, Winner
*Litmus "2018 State of Email Workflows"

GOAL 1

GOAL Write the first goal you discovered.	ACTION STEP 1 What can you start doing today to get closer to this goal?
	ACTION STEP 2 What can you do next to keep things moving?
	ACTION STEP 3 What will you need to do to consider this goal complete?
WHY IS THIS IMPORTANT?	
HOW CAN WE MEASURE SUCCESS FOR THIS GOAL?	

Post a photo or discovery from your goals worksheets with **#emailmarketing** and mention **@marketingcloud** to join the discussion.

GOAL 2

GOAL Write the second goal you discovered.	ACTION STEP 1 What can you start doing today to get closer to this goal?
	ACTION STEP 2 What can you do next to keep things moving?
	ACTION STEP 3 What will you need to do to consider this goal complete?
WHY IS THIS IMPORTANT?	
HOW CAN WE MEASURE SUCCESS FOR THIS GOAL?	

GOAL 3

GOAL Write the third goal you discovered.	ACTION STEP 1 What can you start doing today to get closer to this goal?
	ACTION STEP 2 What can you do next to keep things moving?
	ACTION STEP 3 What will you need to do to consider this goal complete?
WHY IS THIS IMPORTANT?	
HOW CAN WE MEASURE SUCCESS FOR THIS GOAL?	

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