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Introduction

Despite the emergence of new communication channels such as social and mobile, e-mail remains a powerful and important means of connecting with customers. You can use it to deliver highly targeted and personalized communications that reinforce your brand and build lasting relationships with customers. Better still, you can use it to gain the attention of a large number of customers at a very low cost.

E-mail marketing, however, is not without its challenges. One of these is getting your e-mail into the right inboxes. Spam detection remains an imperfect science—which means your commercial e-mail efforts are likely to be identified as spam if you don’t meet certain key criteria. This document identifies those criteria and provides best practices for meeting them.

It’s not enough, however, to just get your messages into customers’ e-mail inboxes. You need to engage readers with those messages and prompt them to take action. The best practices outlined in this document should help you do so—enabling you to customize and personalize your communications so that each message achieves maximum impact and helps you build lasting customer relationships.
Ensuring E-Mail Marketing Success Through Best Practices

By adopting the best practices outlined in the following sections, you can ensure that your e-mail marketing efforts pay off—reaching the right customers at the right moments with the right messages.

1. Design Processes to Facilitate Your Marketing Efforts

By adopting a systematic approach to e-mail marketing, you can stay organized and produce consistently high-quality communications. The extra time you spend thinking through your efforts and designing a repeatable approach will decrease the time you spend on future efforts and improve your customers' overall experience.

**Best Practice 1.1.** Agree on a review process for new mailings.

**Benefit.** A review process ensures high-quality communications by making sure that the proper stakeholders are involved along the way.

![Review Process Diagram](image)

Figure 1. This simple review process can help ensure high-quality communications.

**Best Practice 1.2.** Ensure that other departments are aware of your communication efforts.

**Benefit.** This ensures that customer-facing employees have all the information they need to respond to customer inquiries about your campaigns.

<table>
<thead>
<tr>
<th>DEPARTMENT</th>
<th>REASON THEY SHOULD BE AWARE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support</td>
<td>May need to increase staffing to handle increased inquiries.</td>
</tr>
<tr>
<td>Frontline employees</td>
<td>Need to have informed communications with the customer in general.</td>
</tr>
<tr>
<td>Sales</td>
<td>Will want to know about opportunities to increase sales transactions or identify cross-sell and up-sell potential.</td>
</tr>
<tr>
<td>Brand expert</td>
<td>Ensure that overall communication is in line with the strategic brand proposition.</td>
</tr>
<tr>
<td>Marketing program manager</td>
<td>Should be closely involved in all communications regarding their marketing efforts or products.</td>
</tr>
</tbody>
</table>
Best Practice 1.3. Organize and maintain your content.

Benefit. Properly organized content ensures that your communications are consistent and will enable you to efficiently produce new messages.

Figure 2. Use snippets as templates to ensure that all mailings employ a similar design (left), and organize mailings and campaign folders by year and month (and possibly type) to simplify your work.

Best Practice 1.4. Ensure that relevant reporting tools are in place to track the success of your mailings.

Benefit. Feedback from reporting tools will allow you to establish a baseline of customer behavior and thus determine the overall impact of your marketing effort.

Figure 3. This sample report from Oracle RightNow CX Cloud Service shows some response metrics that could be used to track mailing success.

Best Practice 1.5. Pick a mailing schedule and stick with it.

Benefit. Regardless of the interval you choose for mailings (for example, daily, weekly, or monthly), you should establish a consistent mailing schedule and then adjust it to minimize unsubscribes and also to maximize response levels. Campaign results will improve as recipients learn when to expect your mailings.
2. Build Your Mailing Lists the Right Way

Although it may be tempting to send your messages to the broadest range of recipients, it’s more effective to restrict them to a targeted list. For this reason, you should avoid purchasing bulk mailing lists. Not only do they contain recipients who are a poor match for your business, but they also contain recipients who have not requested your communications—meaning that your messages are likely to be labeled spam. Instead, we recommend that you pay careful attention to your subscriber base and remain on the lookout for appropriate opportunities to recruit new subscribers.

**Best Practice 2.1.** Organically grow your subscriber base by asking customers to opt in to your mailing list.

![Figure 4](image.png)

**Figure 4.** Always provide your customers with the courtesy of global opt-in and an external suppression list. You should also consider limiting the frequency of your communications to help reduce the unsubscribe rate due to over-mailing.

**Benefit.** By asking customers’ permission to communicate, you increase trust, brand loyalty, and response rates.
Best Practices for E-Mail Marketing

Best Practice 2.2. Offer extra value to your subscribers.

Benefit. By providing special offers, priority care, and other discounts, you can increase your opt-in rate and decrease the likelihood that customers will unsubscribe (opt out) over time.

Best Practice 2.3. Do not send unsolicited e-mail or buy e-mail lists.

Benefit. Sending unsolicited e-mail results in low response rates, poor customer experiences, a decrease in the sender score, and diminished brand reputation. Unsolicited mailings also increase the likelihood that service providers will block your other messages.
Best Practices for E-Mail Marketing

Best Practice 2.4. Periodically cleanse your subscriber base.

Benefit. A high-quality subscriber base ensures that only those customers who want to receive your messages do receive your messages. This not only decreases the likelihood of your messages being classified as spam, it’s also required by U.S. law.

Figure 7. It rarely makes sense to purchase e-mail lists; even seemingly trustworthy ones are not as effective as cultivating your own subscribers.

Best Practice 2.5. Set expectations by sending an opt-in confirmation e-mail.

Benefit. By sending this e-mail, you confirm that the recipient wants to receive your e-mail messages, and that the messages will be delivered to the specified account.

3. Comply with International Spam Regulations

The federal CAN-SPAM Act establishes guidelines for all commercial e-mail messages sent through servers in the United States. If you want to communicate with U.S. servers (for example, aol.com, gmail.com, hotmail.com, and yahoo.com), you must comply with CAN-SPAM—even if you aren’t located in the United States.

You should also be aware that there are many laws and regulations for sending commercial e-mail through servers in various countries. Although foreign regulations vary, we recommend following CAN-SPAM at a minimum, and conducting further investigation of the laws for any nation where you have a customer base.
Best Practice 3.1. Understand the commercial e-mail regulations that apply to your audience.

**The United States CAN-SPAM act**

1. Don’t use false or misleading header information.
2. Don’t use deceptive subject lines.
3. Identify the message as an advertisement.
4. Tell recipients where you are located.
5. Tell recipients how to opt out of receiving future email from you.
6. Honor opt-out requests promptly.
7. Monitor what others are doing on your behalf.


Figure 9. Each violation of these guidelines can result in penalties of up to US$16,000.

**Benefit.** By complying with CAN-SPAM, you ensure that you can send commercial e-mail through servers that reside in the United States. Spam laws vary by country, so make sure to check them before sending messages to a particular nation.

4. Make Sure Your E-Mail Reaches Your Customers' Inboxes

Even if your message is legally compliant, other factors can affect its deliverability. You must consider these factors if you are to ensure that your messages reach their intended recipients.

**Best Practice 4.1.** Use a dedicated IP address if you send more than 65,000 mailings per month.

**Benefit.** Shared IP addresses let low-volume senders share in the reputation of other senders using Oracle RightNow CX Cloud Service, thus increasing the likelihood that their e-mails will be delivered. If you’re a high-volume sender, a dedicated IP address is more appropriate because it allows you to maximize your own reputation and achieve the highest deliverability.
Best Practice 4.2. Use the sender score to determine your sender reputation.

**Benefit.** Determining your sender score will help you detect whether any special action is needed to increase your score and ensure high deliverability.

![Figure 11. This sample output from senderscore.org shows a low-scoring sender that would benefit from better e-mail marketing practices to improve its reputation (and thus deliverability).](image)

Best Practice 4.3. Use a branded domain name in the From field.

**Benefit.** A customized From field that contains your official domain name will allow you to leverage your brand equity to engage with customers as well as ensure that reply messages are routed properly.
Best Practices for E-Mail Marketing

Figure 12. The Reply-To headers can be customized so that messages appear to have come from your own site.

**Best Practice 4.4.** Avoid common spam trigger words. (See Figure 14.)

**Benefit.** By avoiding using these words, you improve the likelihood that your messages will pass through any antispam algorithms that may be in place.

Figure 13. Using words like those above may trigger spam filters and prevent your message from being delivered.

**Best Practice 4.5.** Use rate limiting to mitigate traffic spikes to your contact center.

**Benefit.** Rate limiting can help flatten the sudden traffic spikes to your Website or contact center that can result from a high-volume mailing.
Best Practice 4.6. Use cloud links to foster participation on social sites.

Benefit. Cloud links encourage recipients to like, follow, or subscribe to your social pages and spread your message through their social media interactions. Cloud links can also provide visibility into how your social media advocates engage with their friend networks.

![Cloud Link](image1.png)

Figure 14. On any image or text, a cloud link can be added to send the recipient to the desired social Web page.

5. Make Each Mailing an Excellent Customer Experience

Reaching the inbox is not enough; to be effective, your e-mail marketing message must also be engaging. When sorting through their inboxes, users make quick decisions about which messages to delete and which messages to read. The more time you take to craft and test communications so that they achieve a high level of engagement, the more effective your efforts will be.

Best Practice 5.1. Use the Market Testing feature to test calls to action and value propositions.

Benefit. Known as split-testing or A/B testing, market testing allows you to determine which types of communication are most effective with your recipients, providing a powerful way to increase the effectiveness of your marketing messages.

![Survey Results](image2.png)

Figure 15. To determine which message would produce the highest click-through rate, this survey was sent to the target audience using six different invitation messages.
Best Practice 5.2. Personalize your communications.

Benefit. Personalized communications are more engaging and provide a better customer experience.

![First Name, I want your feedback!](image)

Figure 16. Even simple personalization such as addressing customers in the first person and including their names in communications makes your messages more engaging.

Best Practice 5.3. Provide different communications based on the customer.

Benefit. Taking into account the customer’s history enables you to further personalize the communications you send, building customer trust and loyalty.

![Smart](image)

Figure 17. This e-mail uses dynamic content to merge the customer’s purchased products into the mailing as well as to display a cross-sell opportunity specific to the product(s) they own.
Best Practice 5.4. Always include both plain-text and HTML versions of your messages.

**Benefit.** Many customers prefer to receive plain-text messages and have thus configured their e-mail clients accordingly—meaning they’ll only accept plain-text messages. Users with special needs also often prefer plain-text communications because they may be using special software to output your communications as audio messages.

![Image of HTML and plain-text versions of an email message]

Figure 18. Be sure to include both HTML and plain-text versions of every email you send. Only in this way can you ensure that all recipients will be able to view your message.

Best Practice 5.5. Customize your Forward to a Friend, Unsubscribe, and default survey Thank You pages.

**Benefit.** By making these pages look and feel like the rest of your Website, you reassure customers that they’ve reached the right page.

![Image of custom-branded Forward to a Friend, Unsubscribe, and default survey Thank You pages]

Figure 19. Use the File Manager to add custom branding to these Web pages.

Conclusion

Once you’ve familiarized yourself with the e-mail marketing best practices detailed here, take an assessment of your current performance and identify areas for improvement. Keep in mind that the practices described here are rules of thumb. If your customer research or usability testing suggests a different approach, your data should supersede these recommendations.