

Building Better Emails

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Email Marketing Basics

HTML Email	Plain Text Email
<ul style="list-style-type: none">• Formatted text (ie. Bold, italic)• Colors• Images• Different Layout Options	<ul style="list-style-type: none">• Text only• More deliverable than HTML

Emails can be sent in several formats. The most common: HTML and Plain-Text.

HTML emails are encoded to handle things like:

- Formatted text (ie. bold, italic)
- Images
- Different text and background colors
- Different layout options

Plain-text emails : ... well... just plain ol' text. A little more boring than HTML, but they have their own benefits:

- More deliverable than HTML emails
- Spam filters prefer plain text
- Some email clients just can't support HTML
 - **Why?**
 - There is no universal way for email clients to render HTML
 - This means the exact same email can look one way in Outlook, and look completely different in Gmail. Because of this, HTML emails have to be designed in a way that makes them work with as many email clients as possible

How to Optimize HTML Emails

“Optimizing” your email means making them as deliverable as possible. These are some tips for making sure your email gets delivered to as many clients as possible:

- Design for the most common email clients. As of February of 2016, these were:
 - Gmail
 - Outlook
 - Yahoo!
 - Windows Live Mail
- Include a link in your email to view online

- Always include Alt Text with your images, because many email clients block images by default. Alt Text is text that gets displayed if the images in your email get disabled by an email client. This way, even if people can't see your images, they will still be able to understand what your email is about
 - Don't use background images with Text on top. While technically OK under some circumstances, in general it's best is to simply avoid them as they can make reading the content difficult. Background colors are usually ok, and show up just fine in most email clients
 - Also OK to use smaller Images / Thumbnails
 - DO NOT use an image as the background for whole email, or for the background of a content block inside of an email
 -

[Using OnContact to Send Email Campaigns rather than your regular email address or another external service](#)

Most marketers use software like the Email Designer in OnContact because they help simplify / automate putting together an email campaign.

OnContact does this, and provides additional benefits, like:

Saving money.

The Email Designer is already included in OnContact at no additional cost. So, there is no need to integrate with another application or pay for any additional software

Avoiding spam filters... Avoiding spam filters helps you avoid fines and reach more of your subscribers

- **OnContact:**
 - Automatically sends emails out in small "batches" to avoid having your IP address blacklisted.
 - Has tasks that run regularly in the background to check the validity of any email addresses in your database.
 - Won't email contacts who have unsubscribed, which makes it easier to manage bounce backs and opt outs

You can host and manage your contact lists from one place.

Email Designer pulls contact information right from your CRM database, so your Contact lists will always be more accurate and up to date.

There's no need to host graphics on your own server.

When you send emails with images, those images have to be "pulled" from a source somewhere. Without a tool like the Email Designer, you have to store the images on your own server. The email designer comes with an image library where you can store your images

It's easy to design emails with OnContact.

You can design emails without knowing HTML using customizable drag and drop templates instead. Also: OnContact automatically converts emails to an older version of HTML to make sure they display properly in various email clients

You can personalize content for your subscribers, even if you have a really big contact list

You have likely received emails that address you by your first name, right? You can do the same thing using what's called **Dynamic Content**. Dynamic Content automates the process of personalizing emails with names, titles, contact information and so on by automatically pulling it from your database.

Track and analyze your campaign results.

This lets you see right away how successful your email campaign was.

Avoid Creating Spam

In 2004, a law was signed into effect called the CAN-SPAM Act:

- This law heavily penalizes anyone who sends spam
- Violators can be fined up to \$11,000 *per email address*

It's safe to say no one really *enjoys* getting spam...and you are probably not trying to do so. But did you know you can spam people *without even meaning to?!* It's true.

Here are some tips to help you avoid spamming people by accident:

Don't use any misleading headers, reply to addresses, subject lines etc.

Basically: play fair, don't try to trick anyone into opening your email. The goal is always to get your subscribers to WANT to open your email

Always include an unsubscribe link

Yes, even if you don't WANT them to unsubscribe, include a link for them to opt out. This is usually located at the footer of your email. Make sure it's easy for readers to find. If you use the footer blocks in OnContact, this is already built in.

Always include your physical address

Usually at the footer of your email. Again, this is already built into the footer blocks in OnContact.

Only send emails that contain information that is relevant, exclusive, interesting, or important to your subscribers.

For example: An exclusive offer that is only available to your subscribers

Don't overload your subscribers with emails.

If you can, try to send emails out once a week or less. The vast majority of people prefer to receive emails weekly or less. Very few people want daily emails, so definitely avoid that

It's usually pretty helpful to just think about your own email habits.

Pay attention to what kinds of emails you are opening. And when you open an email, what links are you clicking on? Try to take note for a couple weeks and see if you notice any patterns.

Creating a Successful Email Campaign

Identify Targets

Obviously, the first thing you need to do is make sure you actually have someone to send your email to. Focus on building your own contact lists for emails vs. purchasing or renting one. You'll see much better results.

You should only send emails to people who have subscribed to receive emails from you.

If you need to build up your list of subscribers, here are some ideas:

Add an email sign-up link on important pages of your website. Leads can be collected *automatically* from your website form using OnContact.

Offer visitors to your website a coupon in exchange for their email.

Use social media. Encourage subscribers to share content or emails with friends on social media. You can also promote an online contest which users can enter with their emails.

Give people options when they subscribe.

Maybe they only want to receive an email from you once a month, or maybe they only want to receive your newsletter, but not your sales offers. People will be much more likely to trust you with their email if they know they can sign up for exactly what they're interested in and nothing more. They'll be much more willing to trust you with their email.

Create a Strategy

Like any other type of marketing, email marketing works best when you plan ahead. Creating a strategy is pretty easy. These are some good questions ask yourself to help figure out what your strategy should be:

- What is the goal of your email campaign?
If you don't have a specific answer to this question, we recommend NOT sending the email. You should always know WHY you're sending an email and what you hope to gain from it. For example: generate more sales, or increase email signups for an event, or to reactivate former customers

- Who is your audience?
Once you decide your goal, decide which types of contacts are best suited to fulfill that goal. Segment this group into their own contact list(s). Good email marketing relies on organizing contacts into multiple lists according to what kind of information they want to receive. This way, you will only send emails that are actually relevant to the people receiving them. You can easily do this using the **List** or **Interest** field in OnContact.
- What should your content be?
Think about why this group of people signed up for your emails in the first place. Then, focus on delivering that to them. Remember: Emails with compelling, useful content are much more likely to keep your contacts interested in what you have to say.
- When should you schedule your email?
A good rule of thumb is to schedule them midmorning during the work week. But if possible, use information about your audience to figure out the best time for your email to get noticed. In OnContact, you can schedule emails using Communication Lists.

The fun part – designing your emails!

A few things to keep in mind:

- Having good content is more important than having a cool graphics and layout. This is the #1 most important thing for any email campaign!
- Your message should be clear and effective, even if you don't use any images at all.
- Design emails in a way that keeps them getting flagged as spam.
- Never use any misleading information (this includes headers, reply to addresses, and subject lines).
- Remember to include an unsubscribe link
- Always include your company's physical address (usually in the footer of emails)
- Keep your email width under 600px. This is because many email clients have a very narrow preview window, and this helps ensure they can see the whole email right away
- Try to keep your design as simple and straightforward as possible. Single column layouts usually work best – they are the most versatile, and they are easier to view on mobile devices.
- Don't use too many fonts. In general, we recommend only using one font for headlines, and one font for body copy. That's all you need.
- Use system fonts, not web fonts. This is because web fonts won't show up. You probably won't have to worry about this one though, because the email designer already comes with web-safe fonts built in
- Stay away from CSS and other modern coding techniques. Instead, use tables and columns to adjust your layout. OnContact automatically converts your emails into a very compatible form of HTML, so you probably won't need to worry about this one either

- Try not to use too many images, because images tend to slow down how quickly your email can load.

Optimize for Mobile

This is actually an optional step, but it's still pretty important to know about. Most people access emails from their phones at least some of the time. If you want to make sure people can still open your email on their mobile devices, you want to make sure that:

- Your emails' width is no bigger than 320 px
- That is the width of a phone screen in portrait orientation
- Make sure your font sizes are big enough to read on a smartphone
- I recommend a font size of at least 16 points
- Make sure your buttons are big enough to easily select
- For this, I recommend a size of at least 46x46 pixels
- Don't group your links too close together.
- This makes clicking on specific links much harder if you're using a smartphone

Note: *Mobile optimized* email is not the same thing as *Responsive Email*. Responsive emails adjust their layout and font sizes based on what device they're displayed on.

Test Your Emails

Before you send your email, make sure you test it first to make sure everything displays correctly, and to make sure your email is viewable in multiple email clients.

One way to do this:

- Send test emails to a couple friends and colleagues
- This works really well if they happen to use a few different email clients
- You can also set up email accounts specifically for testing
- Many popular email clients will let you sign up for free
- Otherwise, you can use a service like Litmus
- That will allow you to see how your emails will look in a variety of email clients and devices

If you want to be really thorough, you can perform an **AB Test**. An AB Test is when you send the same email to two different groups to compare their responses to specific criteria, like differing...

- Subject lines
- delivery times
- headline
- call to action

Your results will help you determine which criteria perform best. We recommend testing the headline or call to action first.

For the first AB test, your goal might just be to get more people to open your email. If so, you would look at your historical open rate and then decide how much improvement you want to see. If you don't see improvement after the first set of AB Tests, run another test with two more versions. Repeat this process until you figure out what gets the best results.

Here are a few best practices for running an email A/B test:

- Only test one variable at a time
- Use the biggest test sample as you can. The larger your test sample is, the more accurate your results are going to be.
- Remember to split your list randomly to avoid skewing your results.
- Always test simultaneously. That means, always send to List A and List B at the same time. That's going to reduce the chance that your results will be skewed by any time-based factors.

[Analyze Your Results](#)

The last step in any email campaign is analyzing your results. This is when you get to find out how successful your campaign was.

Some important results to pay attention are...

- Your open rate
- Your Click through results
- Your Unsubscribe rate
- And any Email bounce backs

This data is going to help you see what works and what doesn't. And it will help you figure out how you can improve your campaign next time.

Email Designer

So first, a little bit about the Email Designer...it uses a combination of **Layouts** and **Content Blocks** to simplify the process of creating and sending email campaigns. That means you don't need to use HTML to build an email from scratch. Instead, you can drag and drop content into an email layout, and then customize it with your own images and text! You can even automatically personalize content for your subscribers using **Dynamic Content**. You can also track data in your campaigns and analyze the results later in OnContact.

My Company Settings

First, one of the easiest things you can do to save yourself some time is to set your **Company Defaults**. You can set company information in OnContact, like...

- Company Name
- Logo
- Website
- Mailing address
- Social media accounts

Once you've set those up, the information is automatically populated into your emails. That way, you won't need to fill in this information each time you create a new email.

These settings can be found in Setup-System-My Company Settings.

Dynamic Content

Another easy way to save time is by adding Dynamic Content to your emails. You have likely received emails that address you by your first name, right? You can do the same thing using **Dynamic Content**.

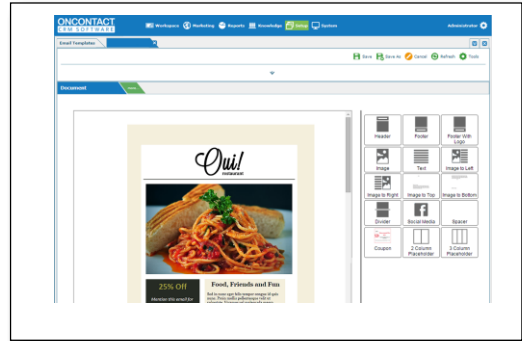
- Usually used in the body of your email
- Automates the process of personalizing emails with information such as names, titles, contact information by automatically pulling it from your database. That means you don't have to manually do the same thing. This makes it much easier to personalize content for your subscribers, even if you have a really large contact list.

Creating and Editing Email Templates

In OnContact, you can either...

- Create a brand new email from scratch
- Create a new email using a pre-made email layout that you can edit with your own text and images
- Edit an existing email to send again

When prepping a campaign, assign targets to your campaign for the best tracking. You have the option to send emails without creating a campaign – but if you do, you can't see analytics (like click-throughs, bounces etc.) afterwards.

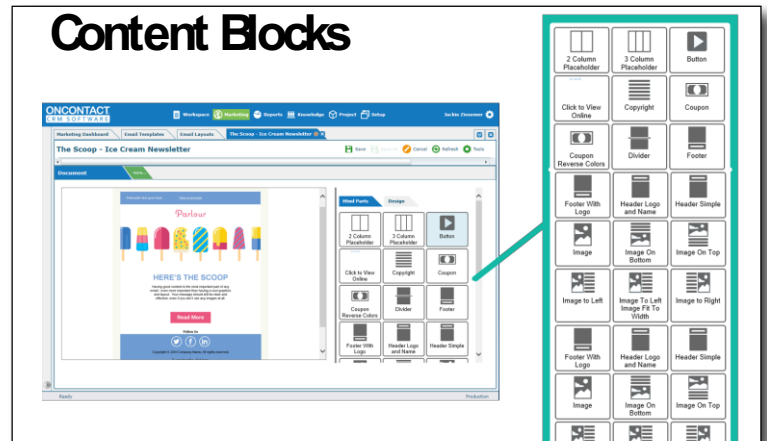


Content Blocks

You can think of Content Blocks as being kind of like puzzle pieces that you put together to form a complete email. You drag and Drop any block into your Email Template. Then, customize with your own images and text.

You can add Content Blocks to...

- Add columns to your layout
- Add Spacers and dividers in between sections
- Insert Coupons and Buttons



You'll probably also use the **Image Block** a lot...

- This is how you add images to your template
- Images are saved to the Image Library
- When you send your email, images are pulled from the Image Library so your subscribers can see them
- Also nice because this way you don't have to host images on your own server

Commonly Used Content Blocks





Header Blocks

- located at the top of the email
- Usually contains a logo w/ a link to your website

Footer Blocks

- Located at the bottom of your email
- Includes link to Unsubscribe
- Mailing address
- Company Contact Info

Header / Footer Blocks

 Header Simple	 Header Logo and Name	 Footer	 Footer With Logo
Header Blocks Logo and company information. Edit block to apply your own branding.		Footer Blocks Company contact information and an unsubscribe link.	

Social Media Block

- Contain links to your social media profile
- Can be linked to your My Company Settings data.

 Social Media	Social Media Block Links to your company's social media accounts, such as Facebook, Twitter, LinkedIn, Pinterest, and more.
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Tab Block

- Create hyperlinked menus in your emails
- Great if you have lots of related links that you want subscribers to follow
- Put them in a menu-like format, which looks much cleaner and nicer

 Tab - Simple	Tab Block Easily create a linked menu in your email.
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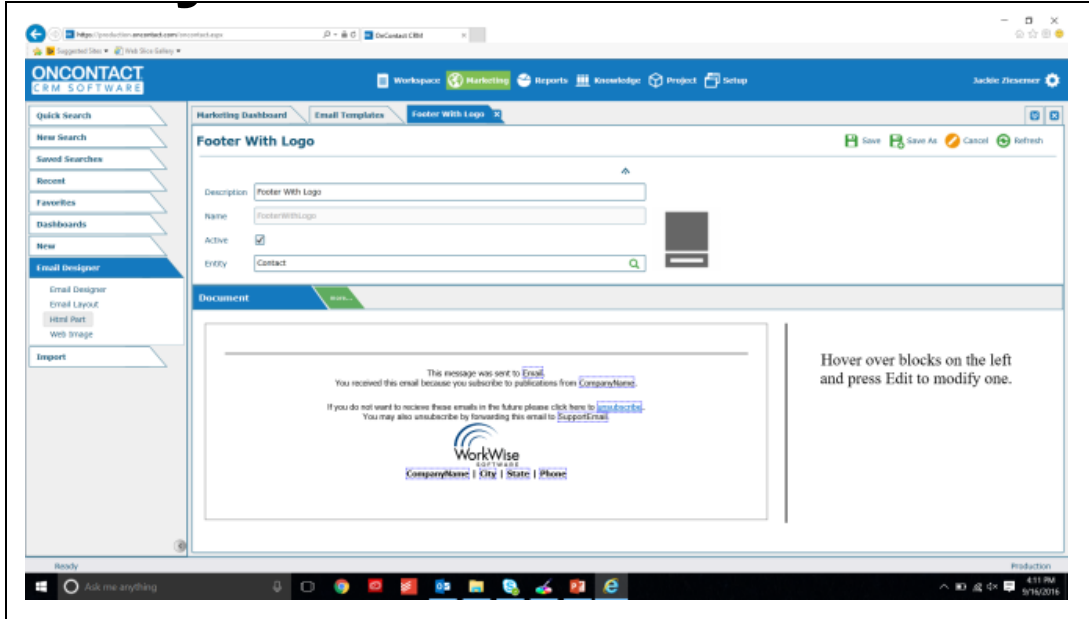


Click to View Online Block

Easily create a linked menu in your email.

You can also edit existing Content Blocks however you like:

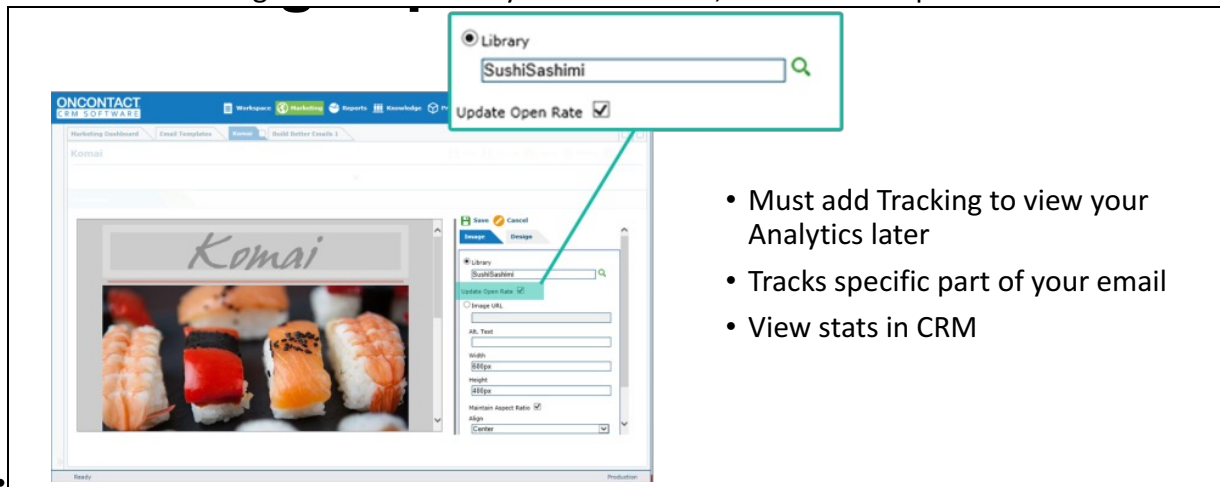
- Saves changes to the “Master Version” of whatever block you’re customizing
- So the layout of that block stays the same each time you use it



You can even create your own custom Content Blocks!

If you want to be able to view the **Analytics** for your email after you’ve sent it, you need to add **Tracking**

- This tracks a specific part of your email, like an image or a hyperlink
- Once an image is downloaded by an email client, the stats are updated in CRM

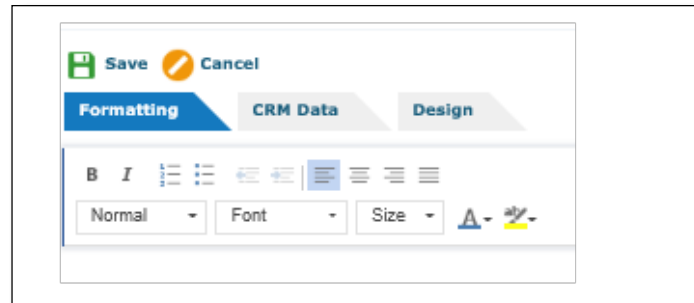


Tracking allows you to know things like how many people opened your email or who clicked on a link.

Formatting Tab - Text

You can edit paragraphs and text in the Email Designer just like you can in something like Word. On the Formatting tab you can adjust:

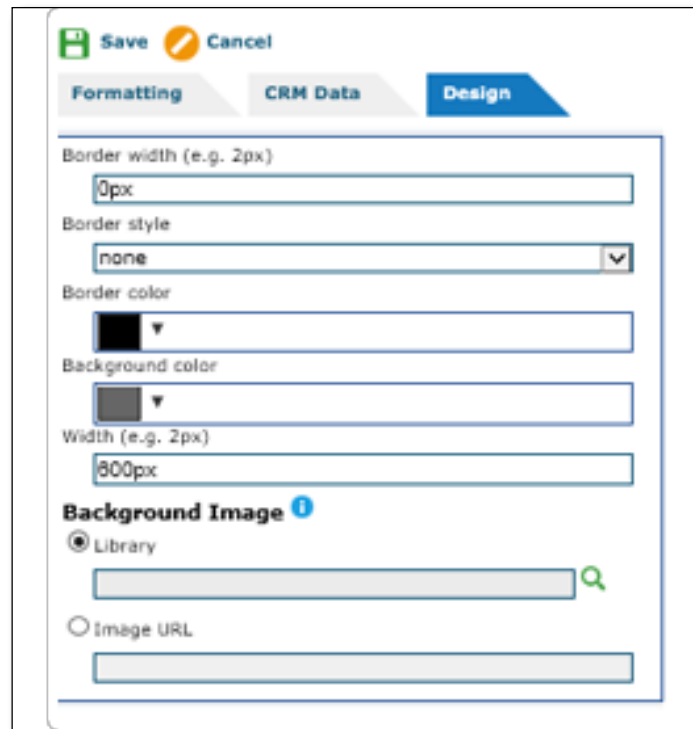
- Font size
- Font color
- Font style
- Paragraph format
- Paragraph alignment
- Bullets
- Highlights



Design Tab - Borders and Width

You can edit the appearance of Content Blocks by adding things like Borders or Background colors.

You can also change the width of your email. You may want to change this if you want to Optimize your Email for Mobile.



Before You Send

Before you send out your email campaign, make sure you remember to **include these items**:

- Link to view online
- Alt-Text: add to all images

- Unsubscribe link
- Physical address
- Email width: between 350 – 600px
- Update Open Rate box: check for linked images
- Include any click-through workflows
- Make sure links have Absolute Paths
 - Absolute Link: http://www.site.com/page
 - Relative Link: /page

Do NOT include the following:

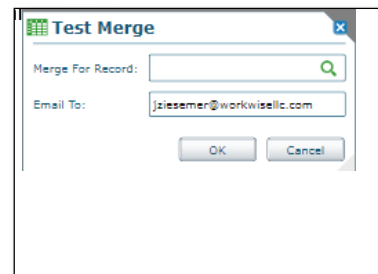
- No misleading headers, names, reply to addresses, or subject lines.
- No CSS. Instead, use tables and columns (1-2 columns)
- Cool it with the fonts. A good general rule is to use one font for headlines and another for body copy.
- No web fonts – they won't show up. Use system fonts.
 - Some web-safe fonts: Arial, Helvetica, Tahoma, Times Roman, Georgia
- Minimize your use of images. Images make emails load more slowly, and you can be flagged for spam if you use too many images / really big images.

Testing your Email

Always test your email before you send it to your subscribers. You may want to make sure your email is visible in different email clients. To do this, you can set up email accounts with multiple clients and send test emails to each one. Or you can use a service like [Litmus](#) to see how your email will look in various email clients all at once.

Use Test Merge to send a test email:

- Select the Tools option in the upper right hand corner.
- Enter the email you want to send your test to.
- Click Ok.



Sending Your Email

When you're ready to send your email:

- Search for the contacts you want to send your mailing to - select them, and click Email.
- Select the email template you want to send.
- Click Next
- Enter a Subject Line for your email, and the name you want displayed in the 'email from'
- Click Next to send your mailing

Tracking and Analytics

Assign Targets

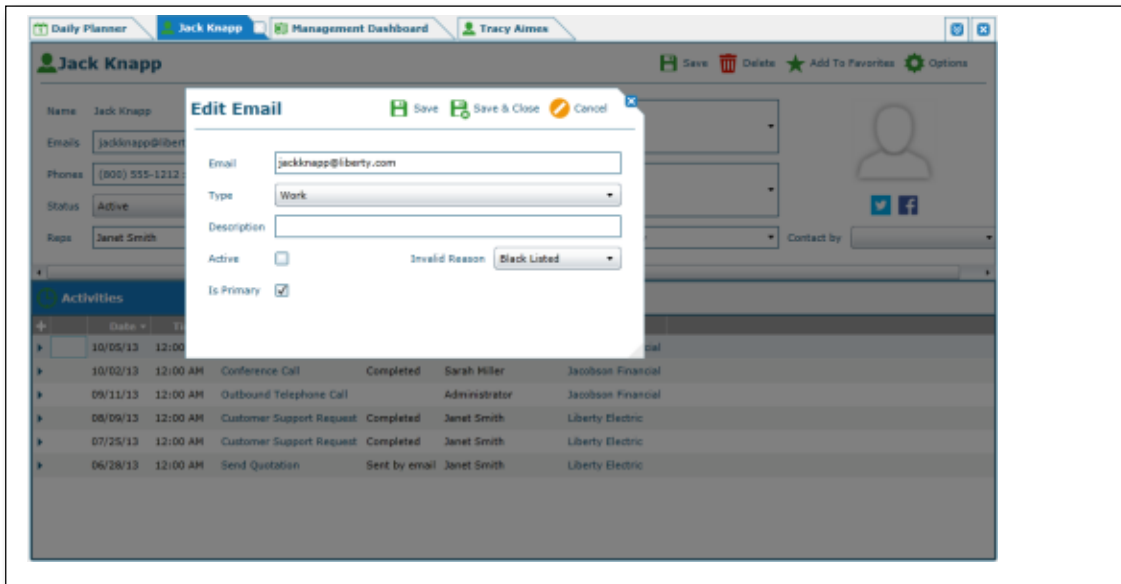
There are a few different ways to Assign Targets:

- From the Marketing icon at the top of the screen, use the Targets tab, click new and search for the Company you want to add.
- From the Workspace icon at the top of the screen, search for a set of Companies or Contacts using the Company or Contact Search. Once you have a set of search results displayed, click to Select All (lower-right corner). Then click the Workflow button and choose Assign Campaign.
- After importing Contacts or Companies, you can open a list page to display the newly imported records, then click to Select All (lower-right corner). Then click the Workflow button and choose Assign Campaign.

Email Bounce-Back Processing

Email bounce-back processing helps to clean out invalid email addresses from your CRM database. Invalid emails are any failed emails sent through Amazon's Simple Email Service (SES). Examples of events for email failures include nonexistent email address and a full mailbox.

A CRM task routinely reviews emails that have been returned.



Invalid Email addresses are made inactive and updated with a code to indicate why it was invalid. Activities created to track the sending of emails are also closed with a result code that indicates that the email failed to be delivered, along with a related event that includes further details of why it failed.

By deactivating invalid email addresses, future emails to these accounts will no longer be processed.