

Email Marketing - Getting Started

At first the entire process of sending an email marketing campaign may seem a little daunting however if you break it down into a few steps, you'll find that it is a really simple process.

Step 1 - The Database

First thing that you need in order to send an email campaign is a list of people and their email addresses. Assuming that you are using ACT!, you will need to do some planning before you start sending. Are you going to send an email to anyone in your database with an email address? What about those contacts that don't have an address or those that changed address so you get a "bounce"? Have you thought about the spamming laws?

To manage your mail list, we suggest creating a field in ACT! called "Email Status" with a drop down containing options such as Active, Inactive, Opt-Out, Bounce and Details Required. By using this field, you will have flexibility when determining the recipients your emails.

We define these options as:

Active: Contacts who have given you their permission to send to them. Permission can be given via an Opt-In form on your website, email request or verbal.

Inactive: Contacts who have not yet given permission. When dealing with a contact with Inactive in the Email Status field, you may like to ask them if they'd like to go on your mail list to receive your newsletters and/or special promotions etc. While you have their attention, you can explain the benefits of your information.

Opt-Out: When a recipient "opt's-out" of your mail list, you must update the Email Status field accordingly. Services like Swiftpage provide you with this list and prevent you from sending to them again even if you accidentally include them in your mail list. Other people simply reply to your email and ask to be removed. If you send to them again...they are going to get cranky!

Bounce: If someone changes their email address, there is no point in sending emails to them unless you update it with the new address. They may have simply forgotten to update you and are missing out on your valuable information. Do a lookup on "Bounce" in the Email Status field and call each person to update their details.

Details Required: Use this option if the contact does not have an email address. Again, you could look up all the Details Required contacts and give them a call to get their email address and their permission.

Now you have your contacts sorted, to obtain your email list, simply perform a lookup on the Email Status field with a value that equals Active!

Step 2 - The Tools

To do the job properly, you need the right tools. There are a few third party email marketing addons that work with ACT! and they each have their own benefits (view the Email Addons Feature Chart to understand the differences of each addon). We recommend Swiftpage for ACT!.

Swiftpage allows you to create templates through its own online editor program however if you would like to get really creative and have more flexibility with your templates, you will need a HTML editor program such as Adobe Dreamweaver or Microsoft Frontpage.

Another tool that can be a real time saver is a merge tool such as MergeAdmin (approx \$350) or it.Import.Net (from \$199) to import and merge a list. These tools enable you to import and update contact information such changing their Email Status to Unsubscribe.

Step 3 - The Template

The most important part of your email strategy is your template as this is the part that your recipients are going to see. Not only do you want it to look professional, you need to make sure that you are doing everything you can to make sure your message gets through. Our Email Marketing Tips outline some areas that you should consider when creating your template.

As mentioned above, programs like Dreamweaver and Frontpage allow you to be as creative as your skills allow when designing your templates. We find that most people are too busy doing the job they do best to learn new skills designing HTML so we have a few alternate choices.

You can get a graphic designer to create the templates for you. From there, you can simply update the text and some graphics with each different send, or get the designer to provide you with the template in full each time.

Another option is to purchase some customisable templates. High Impact eMail from TemplateZone offers over 1100 professional looking templates to help you get started. It also comes with an editor so even a novice can produce professional looking emails in no time. High Impact eMail is around \$100 - a small investment to get you started.

If you decide to use Swiftpage as your email service, you get access to the Swiftpage Online Editor which allows you to create, edit and share your templates. The Online Editor is simple to use and comes with over 65 pre built-in templates to get you started. The Swiftpage University is a fantastic resource that provides Quick Start Guides on every topic, video demos. You can even chat online with a Swiftpage Representative.

If it all seems to hard, Act Today offers a service where we can create templates for you..or just help you along the way. Please contact us if you would like more information on this service or any of the above mentioned products.

Step 4 - The Send

Check First

Before you send your email out to thousands of people, always send it to yourself first...and perhaps around the office. Check for spelling mistakes, that all your links work and go to where they are intended, the images are correct and that it generally looks great! Getting at least one other person to check is a good idea as you tend to start overlooking mistakes if you have stared at the template for too long.

Swiftpage have a Spam Check Service where they evaluate your email message for possible spam infractions and then send back a response to your email address. A score based on the possible spam infractions along with a description of each spam infraction will be assigned to your email. By understanding what content may be marked as spam, and replacing it with safe content, you will have a better chance of achieving a high delivery rate.

Create Your List

According to current SPAM laws, you are not allowed to send unsolicited emails. It's explained in detail on their website if you'd like to read all about it. Basically, it means any bulk electronic mail-outs must only include email addresses where the recipient of the email has knowingly requested the information that you are sending. This is why we suggest using an "Active" option in your database.

To create your list of people to send to can be as easy as looking up everyone in your database that has an Email Status of "Active" however it is worthwhile considering if everyone on that list really needs to see your email. If you continually send emails that are not applicable to the recipient, chances are they will get sick of you and Opt-Out from your mail list. Then if you do have something of value to send to them, they are not going to receive it. It all comes back to building trust and loyalty with your mail list recipients. If they only receive information that is of value to them, they may forgive you if you occasionally send something that doesn't interest them.

So if you have different products/services that you want to send information on, ask the person what they would like to receive, then you create tick boxes (or a drop down field) in ACT! to record this information. When you create your send list for special on Products A and B, you can lookup all contacts that are "Active" and have a tick in Product A and/or B.

When you get this list, view it in the Contact List view. Customise the view so that you can see the following fields: Email Address, Salutation or First Name and any other merge fields that you may have included.

Sort by each of the above fields to tidy up your list. For example, if you sort by the email address field, it is highly likely that there will be someone in there that doesn't have an email address. No point sending to them! Change their Email Status to "Details Required".

If you have included their First Name so that the email says "Hi John" (assuming their name is John), sort by the First Name field to make sure everyone has a First Name.

You get the idea?

Sending the Email

When you are happy with the template, happy with your list, its time to send the email. You need to think about this too though. Don't send it at 4:30pm on a Friday afternoon as most people are thinking about the weekend. For hints on when to send, see our Email Marketing Tips.

Most third party email marketing solutions that work with ACT! will allow you to create history after a send. Although this may be important in some cases, it can take awhile to record a history item for thousands of contacts so determine if it is really important before asking to create history.

Step 5 - The Analysis

If you are using Swiftpage, then you have the added bonus of being able to analyse your email campaign. This is really powerful as you have just spent precious time creating your template, so you want to make sure your efforts are worth it.

Swiftpage can report on who opened your email, what they clicked on and even create a call list dependent on who is your "hottest" lead.

To help you update your database, you can also obtain reports on who didn't receive your email, which email addressed "bounced" and who has opted out of your list. You can use these reports to update your database manually (i.e. one by one), or use an merge tool such as MergeAdmin or it.Import.Net to import and merge a list.

Act Today provides services to assist you with any of the above steps or the entire process. Please call us on 1300 362 046 or email act@acttoday.com.au for assistance or information on any of the products mentioned.