Email Marketing How To Guide

Getting Started, Lists, Design and Testing.

Email marketing still provides one of the highest returns of any direct marketing channel but is often underestimated. Our guide will equip you with advice on how to get started, developing a contact list and the design and testing of your marketing email.

Remember, you are at the forefront of improving people's lives and of calling attention to the cause that you passionately represent. Your supporters can also become your advocates and ambassadors.

How to get started

Create an email marketing plan

Before you start sending out email campaigns, it's best to take a step back and look at the big picture of what you want to achieve. Create a strategy based on your charity's goals to ensure your email marketing is focused, consistent, engaging, informative and inspiring for supporters and donors.

Have in mind the following when you create your email marketing strategy:

1. **Agree your objectives**. Choose one or two specific goals you want to achieve and make sure to factor them into all of your email marketing campaign decisions.

2. **Agree timings.** Decide how frequently you want to send your emails. Base this on how often you are – or want to be – in touch with donors. Every six weeks or once a month is generally a good starting point, but you can always increase this if you have a lot to say. Or decrease if you don't.

3. **Identify send dates for emails.** Mark them in a master diary or calendar and stick to them. Think seasonally and don't forget to factor in the effects of holidays and your busiest times of the year to ensure your well laid out plans don't fall to the wayside.

4. **Align with fundraising campaigns.** If you have a special campaign coming up, make sure any email marketing you do supports it with consistent messages, call to actions and branding.

Find a suitable Email Service Provider (ESP)

Whether you are thinking of sending a few or many emails, you should be using an ESP to handle your email campaigns. A good ESP will give you sound advice and support when creating your email campaigns. They can also help to ensure you have the technology in place to automatically handle who subscribes and unsubscribes as well as deal with email bounces, and other deliverability issues.

Don't rush into choosing an email marketing company. We recommend developing a shortlist based on people you know or trusted recommendations, then meet them to get a feel for the one that is the best fit for your needs. The cheapest provider is not always the best choice.

Start and grow your email list

Your ESP can help you refine your database, but before you start any email campaign, you'll need a list of donors, supporters, partners and others to reach out to. Collecting valid email addresses should be a part of any outreach campaign you do. Here are some tools you can use to build up your list:

1. **Opt-in Forms.** Post email opt-in forms on your website, blog, and social networking sites such as Facebook. Most email platforms can provide you with templates to help you create sign up forms that automatically link to your contact lists.

   Keep it simple: include just a few data fields to capture the essential information you need – people are turned off by long or intrusive online forms. You can collect more in-depth information with future communications.

2. **Include a link** to your opt-in form in your tweets and social media profiles to extend your reach further and collect even more contacts.

3. **Event sign-ups.** If you're presenting or exhibiting at a conference or an event, have registration forms, or a book handy to collect email addresses for signups. A laptop or tablet is even better if you have access to one, as you can immediately enter the details into your database.

4. **Over the phone.** If you have supporters making donations or enquiring by phone, make sure your call centre workers or support staff are briefed to ask for callers' email addresses.

5. **Direct mail.** If you send direct mail, always include information on how people can help save paper by signing up to receive communications and fundraising campaigns via email instead.

If you are considering purchasing an email list, remember that these lists are generally populated with people who don't know your organisation or your mission and are more likely to unsubscribe in the first instance. You may find the lists to be less helpful than you had hoped. Do your homework and make sure you know what you're buying before you spend any money.

Send a welcome email after signing up

Whichever method you use for collecting email addresses, we recommend you set up an automated 'Welcome' or 'Thank you for subscribing' email via your ESP platform. This will confirm you have the right email address and allow you to immediately engage with new subscribers.

Don't wait to send out this email. People expect a confirmation note after signing up for a service and a timely thank you is the first step to gain trust and give a positive impression.

Create a great email design

People are bombarded with email communications, so make sure yours stands out. Create attractive email templates that match your brand and that your subscribers will look forward to opening. Good visuals can significantly boost reader engagement, but remember many email providers block images, so make sure you have compelling copy to get your audience's attention.

51% of email is now opened on a mobile device so ensure that your template is mobile-friendly. Your email communications should look good on all platforms: desktops, tablets and smart phones. Most ESPs can help you with layout and design and provide you with a variety of mobile-friendly templates.

Design for Mobile Devices

If you don't have the budget to make your email template 'mobile responsive' then you can help make your emails more mobile-friendly by:

• Using a single column template. Remember a mobile screen is much smaller.

• Limiting the number of images you use. They can crowd the space and take more time to load.

• Adhering to screen size. Your template width needs to be between 320px and 550px for non-iOS phones -- Apple devices will automatically resize the content.

• Considering larger headlines that are easier to read and use short, direct calls to action.

• Using recommended font sizes (body copy: 14-20px, headlines: 22px).

• Ensuring that links are spaced out. A minimum of 22px is advisable.

• Using touch friendly buttons. Apple's human interface guidelines state the minimum size for a click-able area should be 22x44px.

• Inserting image alt-tags so readers can view a description of an image if it doesn't download.

• Including a pre-header or 'email snippet' to help you increase your open rate. This refers to the preview text displayed underneath or next to the subject line of an email on most smartphones. Often the snippet contains text like 'Unable to read this mail? Open the web version.'

Segment your list and provide relevant content

Your subscribers will feel more appreciated -- and are more likely to engage -- if they know your emails are tailored to them. You can segment your list for different audiences, based on the content they are engaging with.

Ways to segment your mailing lists can include:

- **Email response rates:** based on people who open and click through vs. those who don't.

- **Donation history:** based on past and current donation behaviour.

- **Demographic:** based on demographics such as gender, location, age, region or other specifications you may have in your data.

- **Click through rates:** refer to 'monitor email response rates' below to learn more about this.

Integrate social media and email

Post your email content on social networks to get the word out about your organisation and rally up more followers. Most ESP platforms have integrated shared features that allow you to instantly publish your emails to Twitter, Facebook, LinkedIn and Google+.
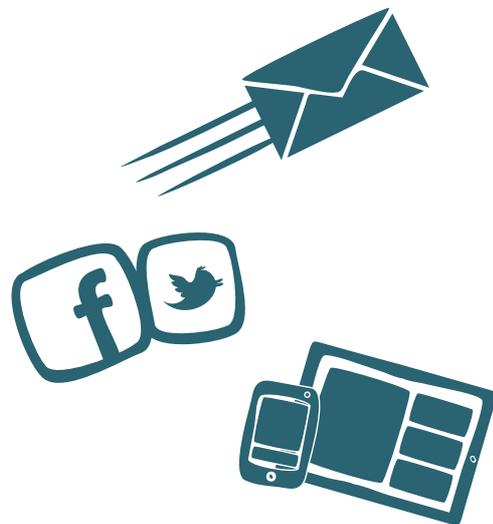
Test, test and test!

Nothing is more effective at improving your email metrics and Return on Investment (ROI) than split testing. Also known as A/B testing, this process allows you to send different versions of the same email to gauge response level and see what messages resonate the most. For example, you can split test your subject lines, 'sent from' address, 'friendly from' name, as well as any other aspect of your email design and content.

Monitor email response rates

After you send an email you need to find out who's reading it. You can -- and should -- track open and click-through rates, unsubscribes and bounces, but should also be linking this information to your website's analytics tools (Google Analytics for example) to see how readers behave once they've clicked through from an email.

Once you have this information you can create a separate list for your most active readers, and send targeted campaigns that are just for them. You can also use your click-through data to find out what type of content and topics your readers are most interested in and use this information to develop future campaigns.

All of this information may be a lot to take in, but with careful planning and scheduling you needn't feel overwhelmed. Have fun and be creative when producing content for your emails and remember that if you need a helping hand, Technology Trust is here to guide you.