

Email Marketing Best Practices

1. **Make sure you clearly communicate your policy regarding email addresses.** Customers may not share their email if they think there is any chance you will sell it. If this is not your policy, make sure they know their emails are sacred. If this is your policy, then be aware that you will have fewer opt-ins and lower customer loyalty.
2. **Only send relevant emails specifically for a customer or customer segment.** Too many emails lead to customer opt outs; irrelevant emails will quickly lessen the open rate. Define a maximum number of emails for each customer, per month, and determine what content should be sent to which customers.
3. **Create customer segments and triggered emails based on products purchased or viewed, profile information, etc. Send each segment emails with relevant content.** Segmentation tied to specific emails, promotions or new products will yield the highest open rate and conversions. Don't forget to incorporate relevant content, videos and how-to-guides into email campaigns based on audience segments.
4. **Tie all emails to trackable campaigns, analyze results.** Analyze each email campaign and determine the ROI, click-through rates, unsubscribe rates, why it worked or didn't work and what can be done to improve it. At the end of the campaign, you should know which links converted best for which customers.
5. **Send professional emails that represent your site and brand.** Unprofessional, untargeted, or confusing emails will quickly undermine your business.
6. **Don't write the subject line as an afterthought.** As a key driver to open rates, it has to be of interest to the recipients and convince them to open the email. It also cannot be deceiving or a "bait and switch". Your credibility (and click-through rates) will plummet.
7. **Most customers will view your message through a preview panel, with images blocked, or on a mobile device.** Design the layout accordingly. Top-load additional information to further improve your click-through rates and use HTML colors and text at the top, instead of an image.
8. **The primary goal of most emails is not to convert a transaction from the email.** The goal is to funnel traffic to your website or for conversion there. Therefore, offer many different links within one email, for different reasons (e.g., links to features and benefits, articles, demos, product categories).
9. **If you succeed in getting readers to click, make sure you send them to a place that makes it easy to convert.** Dropping them to the home page will be a waste. The page they land on needs to be an extension of the message in the email, and relevant to the link they clicked.
10. **Track everything and tie it all together.** Every link on every email you send should be tied to a campaign, tracked through analytics, account data, wish lists, orders, etc. Optimizing campaigns is much more powerful once you have full visibility into all of this information.
11. **Abide by CAN-SPAM laws.** For more info- <http://1.usa.gov/YqrzFP>
12. **Test, test and re-test.** Beyond testing subject lines, testing day/time of the send, and your email format will all prove fruitful. Remember to only test one variable at a time, unless you are using a multivariate tool.

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eCommerce Diligence™ Checklist

Email Marketing Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many domestic current clients are using your email system? How many have you lost, why and primarily to which competitor?
3. What size or types of clients fall into your “sweet spot”?
4. What peripheral or support services do you offer (e.g., design, surveys, analytics, forms)?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?
If perpetual license:
 - a. What are the hosting requirements?
 - b. What should I expect regarding upgrades (cadence, timing and pain)?
 - c. Do you and/or third parties provide customization/implementation services?**If SAAS/ASP:**
 - a. Do all tiers include maintenance and support?
 - b. How often are new features introduced?
 - c. What can I do if I need a feature you don't have?
2. Is your solution optimized for enterprise level business or small to mid-sized business?
3. What ROI should I expect from implementing your solution?
4. What skills does my organization (or hired third party) need to implement this platform?
5. What technical support services are available? Do you have a support knowledge base, community forum, or applications that are shared by customers?
6. Which eCommerce platform providers have you worked with in the past?
7. How do I ensure I own and control my data in the event I need to change platforms?
8. How do I import past data to ensure continuity when I launch your platform?

Features

1. What key features are included in your solution?
 - a. What features are currently missing?
 - b. What features are on your roadmap?
 - c. What features does management love?
2. What is your product's competitive advantage over other email campaign packages? Audience segmentation?
3. What key features are geared toward big businesses? What about small and mid-sized businesses (SMB's)?
4. Please describe how your solution complies with Can-Spam and other email regulations?
5. How do you work with ISPs to follow all the techniques to ensure high delivery rates?
6. How does your solution track email responses, invalid email addresses and issues with delivery of emails? How does it try to improve these for the next campaign?
7. Does your solution provide an HTML editor for creating new or modifying email templates and optimize for both desktop and mobile versions?
8. Are your templates easily customized in both the editor and code views?
9. How do you support personalization of email as provided by other third-party providers?
10. Does your solution support any customer segmentation? Does it need a third-party tool to identify segments? Can it use a third-party tool?
11. Can your solution support multiple languages? For the same email?
12. How do you integrate into ecommerce sites? Sync with CRM data? Analytics? Loyalty programs? Other?
13. Please provide a list of CRM, analytics, financial systems, etc., for which you have standard integrations.
14. Do you support APIs for integration with other systems not currently supported by your standard integrations?
15. Please describe your customer data, types, what can be included on templates, and how this can be integrated or managed on your solution.
16. Please provide a list of standard reports, tracking and analytics tools included. In what timeframe do you provide reporting? Batch, real time, what latency? What type of creative and segment testing and versioning can your product support?

Pricing

1. How is your solution priced? Number of emails sent? Size of lists? Number of domains, users?
2. Do you have overage costs? Are you penalized for the next tier or is the overage at the same cost?
3. Do you have contract timeframe commitments?
4. How do you charge for annual support? What about maintenance?
5. Are there any additional fees (e.g., integration and onboarding, image hosting, size of lists, monthly overages)?

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