



# The Complete Guide to B2B Email Marketing

Create more effective B2B email campaigns with these six steps.



## INTRODUCTION

# Email marketing is changing.

With all of the changes in today's marketing world, one thing remains certain: email marketing isn't going away anytime soon. In fact, according to a 2015 study conducted by Salesforce, 73% of marketers believe email marketing is core to their business.

Still, email marketing is changing. Today's marketing tools can make your email efforts smarter, more efficient, and more targeted than ever before. The Complete Guide to B2B Email Marketing will walk you through the entire process of creating effective, targeted emails — from planning and designing to sending and optimizing — in six straightforward steps:

Step 1: Authentication & Deliverability

Step 2: Template Design

Step 3: Email Content

Step 4: Testing & Optimization

Step 5: Sending Best Practices

Step 6: Tracking & Reporting

## A FEW TERMS TO KNOW

**List email:** A widespread electronic blanketing of your customer or prospect database

**Senderscore:** a score (out of 100) of your overall reputation in the email sending space. It is important to keep this score as high as possible.

**IP address:** a number assigned to each device participating in a computer network

**ESP:** Email Service Provider

**Blacklist:** A list of email addresses that are deemed unwanted and blocked from inboxes

**CAN-Spam:** Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003; enforces tighter regulations on mass email

**Spamtraps:** an email address created to lure spam and identify spammers

## CHAPTER ONE

# Authentication and Deliverability

If you're just getting started with email marketing, it can be tempting to jump right in and begin building the perfect campaign. But there are a few things that need to be considered before you even think about composing your first message, and one of these things is deliverability. Few aspects of email marketing are as important as deliverability. After all, even a perfectly crafted email is rendered worthless if it never reaches its mark. Taking measures to protect your Senderscore before you start emailing can keep you from accidentally triggering spam filters — or worse, landing your IP address on an email blacklist and thwarting your email marketing efforts before you even get started.

Let's take a look at a few ways to make sure you're optimizing deliverability right from the start: by setting up email authentication, warming up your IP address, and compiling good lists.

## SETTING UP AUTHENTICATION

Setting up email authentication is the single most important step you can take to avoid spam filters and ensure that your message is delivered. This step is sometimes ignored by marketers since it's not required to send emails and can often require the assistance of your IT department. But because such measures are a reflection of a company's integrity, the price for ignoring authentication is really too high for marketers to bear.

## AUTHENTICATION STANDARDS

Email authentication involves equipping automated emails with enough information so that recipient mail servers can recognize the nature of each incoming message. This differs from content filtering, whereby an email is blocked or allowed based on an analysis of its content rather than its source (this aspect of deliverability will be discussed under step three).

Authentication standards attempt to separate the unethical “black hats” (spammers and phishers) from “white hat” marketers who operate legitimately. There are no universal authentication guidelines, but there are some widely adopted standards used by a growing number of ISPs and other mail servers.

The most commonly accepted standards are SPF, DomainKeys, and DKIM. Let’s take a quick look at each:

## AUTHENTICATION STANDARDS

**Sender Policy Framework (SPF)** authentication allows network administrators to specify which internet hosts can send emails claiming to originate from that domain by adding a specific SPF record to the public DNS record. Mail exchangers can then verify the sender’s identity against the list published by the email administrator.

**Deliverability should be a consideration at every stage of your email marketing efforts, starting with the initial set-up of your system.**

**DomainKeys** is a Pretty Good Privacy (PGP) protocol for authenticating email that employs a public and private key. Senders publish a public key for their domain, and all outgoing email is signed using the corresponding private key. The advantage of DomainKeys is that it protects the integrity of the sender and the message. This method not only verifies the validity of the sender, but it also allows third parties to relay or forward the message without breaking the authentication.

**DomainKeys Identified Mail (DKIM)** is Yahoo!’s and Cisco’s combined attempt to enhance the DomainKeys standard. This protocol bases acceptance of messages on the sender’s overall reputation and trustworthiness. DKIM uses the cryptographic validation technique of DomainKeys to evaluate whether to accept email from the sender’s domain. The major ISPs and many corporate spam filters check for one or more of these types of authentication when deciding whether or not to allow emails into a recipient’s inbox. A solution like marketing automation, which allows you to send emails from your actual domain and automatically authenticates using these three commonly accepted standards, will go a long way in ensuring that more of your emails get delivered.

## WARMING UP YOUR IP ADDRESS

All IP addresses start out “cold,” and need to be warmed up by gradually increasing sending volume, usually over the course of two to six weeks. This is an extremely important step in your email strategy: if you send out an email to every prospect in your database right off the bat, you’re going to raise some major red flags for spam monitors.

The key here is a gradual and steady ramp-up to final sending volumes. Start off with only your best lists to build up your reputation, and try to keep it under 5,000 emails a day for the first week. Starting out at this rate allows you to monitor for issues that arise from initial sends on cold IPs without having all your emails bounce. From here, form a plan for slowly increasing sending volumes until you reach your goal.

## COMPILING GOOD LISTS

It may sound like common sense, but before you start sending out email communications, make sure your recipients want to be contacted. After all, you’re not doing yourself any favors by sending messages to people who don’t want receive them, and you’re placing your email reputation on the line. Here are a few ways to make sure you’re compiling the best lists possible.

**Don’t buy lists.** First and foremost, if you’re buying lists, stop. Even if the lists aren’t chock-full of invalid or spam trap addresses, they’re likely to result in Spam complaints and put you on the fast track for being blacklisted.

**Use active opt-ins or confirmed opt-ins.** When it comes to obtaining permission, it’s a good idea to go beyond CAN-Spam laws — meaning passive opt-in doesn’t cut it. Whenever you’re collecting information for the purpose of sending email, include a check box and clearly outline what type of communication can be expected. To thoroughly cover your bases, consider using a confirmed opt-in process (also known as double opt-in), where recipients confirm the opt-in via email after the initial form submission or contact. Confirmed opt-ins confirm that email addresses are valid, keeping bounce rates low and safeguarding against spam traps being added to your permanent lists.

**Make opt-outs easy and fast.** This is one of the best ways to ensure that you don’t get reported as spam. Remember that an opt-out won’t hurt your reputation but being reported as spam will. With many marketing automation platforms, a recipient who opts out will automatically be removed from your list. If you are not using a system that does this automatically, make sure you are regularly updating and quickly getting opt-outs off of your lists.

An opt-out won’t hurt your email reputation, **but being reported as Spam will.**

# WORKSHEET ONE



## IP Address Warm-Up

To get started, write down your eventual sending volume goal in the box to the right. Then use the boxes below to work out a plan for ramp-up, an essential process for protecting the reputation and functionality of your domain name. An average ramp-up should take about 2-6 weeks, and a safe start rate is 5,000 emails per day. Keep track of bounce rates and spam complaints in the appropriate boxes.

My eventual sending goal is \_\_\_\_\_ emails per day.

### WEEK ONE

List Email: \_\_\_\_\_

Monday: \_\_\_\_\_

Tuesday: \_\_\_\_\_

Wednesday: \_\_\_\_\_

Thursday: \_\_\_\_\_

Friday: \_\_\_\_\_

List: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Volume: \_\_\_\_\_

Bounce Rate: \_\_\_\_\_

Spam Complaints: \_\_\_\_\_

### WEEK TWO

List Email: \_\_\_\_\_

Monday: \_\_\_\_\_

Tuesday: \_\_\_\_\_

Wednesday: \_\_\_\_\_

Thursday: \_\_\_\_\_

Friday: \_\_\_\_\_

List: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Volume: \_\_\_\_\_

Bounce Rate: \_\_\_\_\_

Spam Complaints: \_\_\_\_\_

### WEEK THREE

List Email: \_\_\_\_\_

Monday: \_\_\_\_\_

Tuesday: \_\_\_\_\_

Wednesday: \_\_\_\_\_

Thursday: \_\_\_\_\_

Friday: \_\_\_\_\_

List: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Volume: \_\_\_\_\_

Bounce Rate: \_\_\_\_\_

Spam Complaints: \_\_\_\_\_

## CHAPTER TWO

# Template Design

The foundation of any good email campaign always lies in the design of the template itself. Spending sufficient time laying the groundwork for an effective email template will pay off later in the form of greater response rates, better branding, and stronger customer relationships.

### PLANNING OUT YOUR TEMPLATE

When it comes to designing email templates for the B2B audience, it can be tough to know where to start — especially when you consider all of the factors that go into planning: deciding what types of email you'd like to send (drip emails, autoresponders, webinar blasts, etc), which images to use, whether to use HTML or plain text, and more. Having a marketing automation platform with a WYSIWYG email editor can make the process considerably less tedious and time-intensive while also enabling the customization, or tailoring, of email campaigns for more personal, customer-friendly messages — all without requiring any knowledge of HTML. But even with the most powerful tools available, there are still a lot of factors to consider before hitting that “send” button. Let's take a look.

### ABOUT THE WYSIWYG EDITOR

Marketing automation platforms with a “what you see is what you get” (WYSIWYG) editor make it easy to design and author professional-looking HTML emails. The WYSIWYG editor:

- Provides a user-friendly editing interface that resembles familiar word processing applications
- Approximates how the page will actually be displayed in a web browser
- Eliminates the need to learn HTML and allows for fast editing of content that can be tailored to your desired messaging.
- Facilitates the easy insertion of images like headers or logos, as well as custom HTML code for further tailoring to your brand

**79% of marketers consider email content and design to be absolutely critical to email effectiveness.**

*-2015 State of Marketing, Salesforce Marketing Cloud*

## SIX QUESTIONS TO GET STARTED

An appealing, easy-to-read email template can make the difference between your email being read, skimmed, or deleted. If you're looking for some guidelines for email template design, like where to place your call to action or what elements you need to include, start by consulting the following six questions.

### 1. Is HTML or plain text better suited for your email?

Many emails like newsletters and event invitations lend themselves more to HTML, while drip emails and webinar follow-ups might be more effective as simple plain text emails. Still not sure which format will be more appropriate for your email? Consult the chart to the right to compare the benefits of each.

Remember: If you do choose to create an HTML email, it's good practice to create an alternate, plain text version as well, so that readers have options if the email isn't rendering properly for them.

### 2. Does your email have an obvious call to action that's set apart from the rest of your email?

If your call to action isn't distinguished by color, placement, or text treatment, it will be hard for your readers to understand the purpose of your email. Even more importantly, it will make it that much more difficult for them to act on it.

## PLAIN TEXT EMAIL

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### **Universal readability.**

Every email client can render plain text emails, so using this format means that you never have to worry about your formatting being a stumbling block to deliverability.

### **Higher deliverability rates.**

Plain text messages generally achieve a slightly higher deliverability rate, since they're smaller and require less bandwidth to deliver than HTML emails.

### **Consistently accurate rendering.**

Some ESPs routinely strip out HTML elements from incoming emails to protect against viruses, causing such emails to display improperly.

## HTML EMAIL

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### **Better click-through rates.**

The click-through rates of HTML emails are close to twice that of plain text emails, largely due to the visual appeal of HTML over plain text.

### **Tracking codes.**

HTML offers the ability to place tracking codes in links to help you determine the effectiveness of email offers, as well as track email open rates.

### **Enhanced aesthetics.**

Your message's attractiveness and readability can be appreciably improved with color, graphics, and font choices.

### **3. Have you broken your email up into smaller sections and used bulleted text as much as possible?**

Today's consumers are pressed for time, meaning that they have a tendency to scan emails for any important points that pertain specifically to them. Use bulleted text and short paragraphs as much as possible to cater to these preferences.

### **4. Have you taken advantage of using images wherever possible?**

Including visuals in your emails can break up the monotony of text (especially if there is a lot of it). Just make sure to have a reasonable image-to-text ratio; far more images than text could serve as a red flag to spam filters.

### **5. Did you include contact information, social sharing buttons, and unsubscribe links?**

You'll want your email recipients to be able to share your content, or communicate with you should they have any concerns or wish to unsubscribe.

### **6. Is your email template clean and uncluttered?**

This is perhaps one of the most important things to pay attention to when designing your email templates. Information in your email should be as easy to read and digest as possible.

## DESIGN CONSIDERATIONS

The components that you choose to emphasize in your email, along with the format, will largely depend on the type of email that you're sending — such as a newsletter, webinar follow-up, event promotion, drip email, or training email. Use the chart on the following page as a guide to some important best practices for each type of email template that you create.

If you'd like to see a collection of example email templates that cover everything from newsletters to event follow-ups, download our full Email Design Lookbook, which features 10 stellar email templates provided by Pardot clients.



TYPE OF EMAIL	DESIGN CONSIDERATIONS
<b>New Feature Launch</b>	Include only the essentials in the copy to provide recipients with exactly what they need to know, quickly. Consider including simple visuals and/or a video link to increase engagement.
<b>Plain Text</b>	These emails won't require much design work, but make sure plain-text emails are short, conversational, and include a personalized signature to enhance the impression that the email is coming directly from a sales rep or manager.
<b>Training and Events</b>	With this type of email, readers should be able to find the information they need (most likely a schedule or calendar) at a glance, so make sure your template is simple, appealing, and easy to scan. Also feature a prominently placed CTA.
<b>Newsletter</b>	Newsletters often have poor open rates compared to other types of email content, so you want to make your template as fun and appealing as possible. But it's even more important to make sure it's organized logically and includes plenty of options for recipients to click through to additional content on your site.
<b>Event Follow-Up</b>	Many people enjoy seeing pictures from an event they attended, so this is an opportunity to create a highly visual template. Also be sure any links are prominently featured and immediately grab the reader's attention.
<b>Holiday</b>	Sending out a holiday ecard to clients is a great way to show appreciation and establish a sense of community. Even if you're just sending an email about your company's holiday hours, don't miss the chance to show off your brand's personality and culture with a fun, visual layout and pictures.

## WORKSHEET TWO

# Email Template Checklist



There's a lot to think about when you start designing a new email template. Use this checklist to make sure you're not skipping any vital steps.

**Decide between Plain Text and HTML.** Drip emails and webinar follow-ups work well as plain text, while other emails are great for HTML.

**Break text into bullets and small paragraphs.** Make your emails easier for readers to scan at a glance.

**Add social sharing buttons.** Allow readers to distribute your message across their networks with the click of a button.

**Create a clean template design.** The information in your email should be uncluttered and easy read.

**Craft your CTA.** Set your call to action apart using colors, a button, or text treatments so that readers will know what action is expected of them.

**Include contact information.** In case readers have questions, include contact info in the header or the footer.

**Add some color.** Including a few splashes of color can really help your email stand out from the crowd.

**Leverage the use of images.** You can often cut down on text if you have an image that can say the same thing.

**Don't forget unsubscribe links.** Your emails need to be CAN-Spam compliant, so make sure your unsubscribe links are easy to find.

## CHAPTER THREE

# Email Content

The copy of your email is critical to how it will be perceived by its recipients, so from your subject line to your email signature, put careful consideration into both what you say and how you say it. Make sure that your messages are informational and conversational, and avoid blatant sales pitches whenever possible.

### CONTENT BEST PRACTICES

To get the best results, your emails must distinguish themselves from the typical generic sales pitch, and with today's overcrowded inboxes, this task is more challenging than ever. Let's look at a few ways that you can make your email content more persuasive.

**Know your audience.** This is the cardinal rule in any marketing initiative: know your audience thoroughly, from their needs and wants to the kind of language they use. What are their pain points? How can you help address them? Consider using dynamic content to create separate emails for different segments of your list (see more on dynamic content on the following page). This extra effort shows your reader that you've taken the time to really get to know your readers and their needs.

**Consider the buyer's journey.** Different content is appropriate at different stages of the sales cycle. With the lead nurturing capabilities of marketing automation, you can build a nurturing track and gradually and automatically send content over time — ensuring that readers not only get the right content, but get it at the right time.

**Avoid meaningless superlatives and sales buzzwords.** Savvy consumers can see right through overblown hype, and will interpret outrageous claims and over-the-top testimonials as overcompensation for an insubstantial product. Adopt a conversational tone, not a promotional one — flowery language and pretentious jargon isn't just a turn off, it can hurt your company's credibility.

**Keep it simple and get to the point.** You certainly don't want to patronize your recipients or dumb down your message, but prospects don't want long-winded emails that seem to have an ulterior motive. Keeping your messages simple and straightforward will make them seem more genuine, and including elements of your brand's culture and personality through your tone, style, and graphics can make your company seem more human and trustworthy.

**Carefully choose your wording.** From your subject line to your call to action, wording matters. First and foremost, avoid using words and phrases that can be interpreted by spam filters as “spammy,” especially those related to money, discounts, or free offers. Make sure that your subject lines are informational and compelling, and that your calls to action are persuasive and optimized for conversions. For help crafting the perfect call to action, use the worksheet on the next page.

**Back up your claims.** The cardinal rule of persuasive writing is being able to back up your argument with evidence. A successful marketer should be able to provide concrete examples or hard data to support the claims they make. Remember that ultimately, you want your emails to prospects to be persuasive enough to lead to a conversion, and the best way to persuade these readers is to give them the proof they’re looking for.

## PERSONALIZING EMAIL CONTENT

If the least effective email marketing campaign is the generic, widespread e-blast, then it stands to reason that the most effective campaign would be a personalized one-to-one message sent thoughtfully to each of your prospects. It may not always be possible to achieve true one-to-one messaging, but marketing automation tools make it easier than ever to customize your content to make emails more upfront and personal.

## Dynamic Content

There’s no better way to impress your prospects than by catering specifically to their needs and creating a personalized sales experience with your email marketing.

Dynamic content is messaging that can be changed based on preconditions you determine. The dynamic content made possible through marketing automation allows you to further tailor customized prospect messages and cater to individualized needs. This functionality can be set up to perform a variety of customizations, such as displaying unique content to different demographics or market verticals.

## Personalized Signatures

These days it’s not so much the “To” variable of an email message that gets our attention, but the “From” line. In a constantly flooded inbox, a generic email address is likely to be ignored, but an email from a specific name (and particularly a recognizable name) has a far better chance of being opened. This is why the ability to tailor reply addresses can have a powerful impact on open rates — rather than seeing an email from marketing@yourcompany.com, your recipients will see an email from a sales rep with whom they’ve already been working. Since B2B marketing is about building relationships, this seemingly personal contact can make all the difference.

## WORKSHEET THREE



# The Call-to-Action Tip Sheet

Creating the right CTA can be tough, and there's no set formula that will guarantee success. Here are a few general guidelines you can follow to keep yourself on the right track.



**Keep it short.** Calls to action should be short and concise. Keep them as to-the-point as possible.



**Make them obvious.** Set your CTAs apart. They should be easy to find in your email, so consider differentiating via color or buttons.



**Don't be bossy.** Use commands, not demands. You want your CTAs to encourage an action without sounding demanding.



**Indicate urgency.** Your users will be more swayed by offers they perceive to be available for a limited time only.



**Convey value.** Tell users what they're going to get, not what they need to do.



**Test, test, test.** Use A/B testing to decide which CTAs perform the best, then optimize accordingly.

## CHAPTER FOUR

# Testing & Optimization

Once you've crafted the perfect email, you'll want to make sure that all your hard work will render perfectly for your recipients, and that your content is optimized to avoid spam filters. Monitor your campaign's look and feel by testing it in several different email providers. It's important to see how your email will look, not only in different readers like Yahoo!, Gmail, and Outlook, but also in mobile environments like iPhone and Android.

### USING CAMPAIGN PREVIEW

Although some marketers have numerous email accounts set up for testing purposes, the easiest way to view any email in the 50+ email clients available today is through a campaign preview feature offered by many marketing automation platforms. This integrated rendering and email Spam analysis engine allows users to quickly and easily view how their emails will look across the leading email clients and browsers, ensuring that emails render exactly as intended.

### GETTING TO THE INBOX

The best marketing automation platforms also allow you to test each email against the top spam filters to make sure your emails will get through to the inbox.

This testing technique will also help you detect whether the problems are with links, poorly formatted HTML, or a high concentration of "spammy" words and phrases. Spam filters are always changing, so it can sometimes be difficult for marketers to get legitimate messages delivered to prospects and clients. If you find that your test emails are getting sent to the "Junk" folder, follow these steps to remedy the issue:

**Test a text-only version of your message.** This will help you diagnose if the issue is content-related or code-related. If the text version gets through to your inbox but the multi-part version does not, the issue may be with your images or the source code for the HTML. Make sure you're not using external Cascading Style Sheets (CSS) links. All styling should be inline.

**Check your image-to-text ratio.** Too many images or images that are too large in comparison to the amount of text in an HTML email can be considered spammy. Adding more text or reducing the number and size of images may help. Also, make sure that your images include alt attributes that contain the alternate text that should be displayed if the images don't load.

**Check your text styling.** Excessive use of all-caps text, too many different font colors (especially red, green or blue), or smaller- or larger-than-average font sizes (10-12 point fonts are standard) can all be interpreted by filters as spammy.

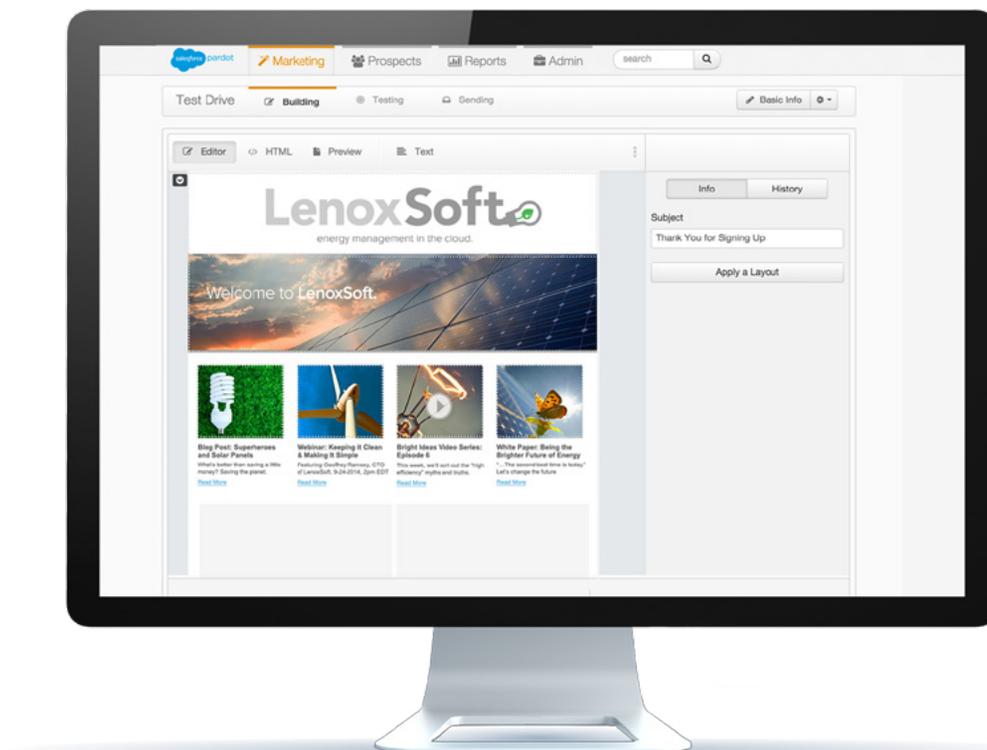
**Make sure your content does not include styling from Microsoft Word.** If you are pasting in content from MS Word, use the “Paste from Word” button (if available) in the WYSIWYG editor to avoid having extra styling tags pulled in, which can make the HTML spammy.

**Check for SPF and DomainKeys records.** As a final precaution, verify that you’ve added SPF and DomainKeys records to your Domain Name System (DNS), as discussed on page 4.

## OPTIMIZING FOR MOBILE

According to IDG Global Solutions, 92% of B2B executives use a smartphone for business, and 72% use their phones to conduct product research for work — so, as a B2B marketer, you can’t run the risk of not having your emails display properly on a mobile device.

Luckily, some simple design choices can help ensure that your emails are mobile-friendly. By sticking to a one-column format, making text stand out as much as possible, and making sure images and buttons are large and visible, you can greatly increase the odds that your mobile-oriented readers will be able to read and navigate your email.



## WORKSHEET FOUR

# The Pre-Flight Email Checklist



Use this worksheet as a final check-through before sending off your email, to both organize your efforts and ensure that your email is optimized for content, deliverability, and rendering.

SUBJECT LINE:

LIST:  TYPE:

CTA COPY:  PLAIN TEXT OR HTML?

DOES YOUR EMAIL HAVE ALL OF THE FOLLOWING?

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> BULLETED TEXT    | <input type="checkbox"/> UNSUBSCRIBE LINKS    | <input type="checkbox"/> CONTACT INFORMATION |
| <input type="checkbox"/> IMAGES AND COLOR | <input type="checkbox"/> SOCIAL SHARE BUTTONS | <input type="checkbox"/> OBVIOUS SECTIONS    |

## CHAPTER FIVE

# Sending Best Practices

You're almost there! Now that you've walked through the entire process of putting together the perfect email campaign, it's time to make sure that sending it goes off without a hitch. Let's take a look at a few last minute considerations.

### CLEAN LISTS

As we mentioned earlier, deliverability should be a consideration at every stage of the email marketing process, and choosing a list to send your emails to is no exception. High bounce rates caused by invalid or misspelled email addresses can hurt your email reputation, so make sure you're regularly maintaining your lists and cleaning out email addresses that aren't valid.

### TIMING

It's a question as old as email marketing: what is the best time to send emails to prospects? And the answer is simple (if somewhat frustrating): it depends. For instance, if you're a B2C marketer, nights and weekends are a far better time to reach out, when your readers won't be distracted by work emails. For a B2B marketer, these hours probably couldn't be a worse time to communicate about a business-related product or service.

There are always exceptions, but in most cases B2B marketers should follow these general rules of thumb about timing, in order to increase the chances that their messages get the attention they deserve:

**Don't send emails over the weekend or on Mondays.**

Prospects will already be dealing with a stack of weekend email; you don't want your best efforts to get lost in the shuffle.

**Avoid sending emails over major holidays or typical vacation times.**

Email tends to pile up during these periods, so be sure to time your message so that it doesn't get overlooked.

**Don't send emails first thing in the morning.**

You'll be competing with the usual barrage of early-morning email. What makes you think your message will stand out?

**Don't send emails at the end of the day.** They might get brushed aside as your prospects knock off work and go home for the day. Then you're back to square one, and your email must compete with the next day's inevitable early-morning deluge.

To figure out your optimal sending time, use the worksheet on the next page.

## FREQUENCY

One final aspect of timing marketers should consider is the frequency of your contact with prospects via email. You should be sending emails frequently enough to stay top of mind with prospects, but not so often that you become an annoyance. Three emails per year is probably not enough; three per day is definitely too many.

**Find your sweet spot.** The nature of your product or service and the campaign tracking data you gather will help you find the sweet spot between too often and not enough. Marketing automation tools help you strike this happy medium by automating campaign actions based on decisions you've made ahead of time regarding timing and other variables such as prospect behavior.

A marketing automation solution offers considerable time and labor savings by allowing you to create emails and schedule them for future deployments, ensuring that your campaign is timed right while requiring minimal investment from you.

**Be consistent.** This may seem like common sense, but don't go two weeks without sending an email and then send three in one day. If possible, let your recipients know upon signing up what you will be sending them and when (better yet, let them choose how often they receive your emails), and stick to this schedule. Not only does this make your business seem more organized and credible, it makes it far less likely that a recipient will get fed up with an inbox clogged with your emails and hit the "Report as spam" button.

The nature of your product and the campaign tracking data you gather will help you find the sweet spot between sending emails too often and not sending them often enough.

## WORKSHEET FIVE



# Find Your Perfect Send Time

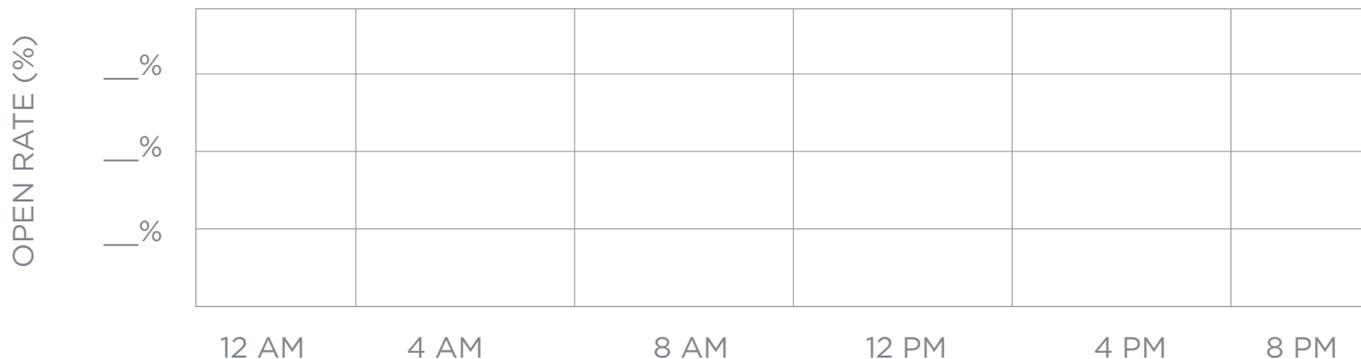
### STEP ONE: DAY OF THE WEEK

Analyze send times and open rates from the email campaigns you've sent over the past six months and create a quick scatter plot to find the day of the week where your emails have historically seen the best open rates. Use the graph below.



### STEP TWO: TIME OF DAY

Now that you've found your optimal day of the week to send emails, use this same data to find the best time of day by creating a scatter plot of open rates vs. time-of-send.



### STEP THREE: SEGMENT

Now, try segmenting your lists by time-of-open (e.g., opened between 10:00 a.m. and 1:00 p.m. vs. opened between 1:00 p.m. and 3:00 p.m.), and you'll be surprised at how easy it is to determine the best send-time for each grouping.

## CHAPTER SIX

# Tracking and Reporting

Don't rest easy once you've put together a great email campaign. Today's marketing world is all about measurement and improvement, so figure out how to track and measure your email marketing success and determine what's working and what's not, then adjust and optimize your efforts to truly get the most out of your campaigns.

### TRACKING METHODS

Email tracking helps you learn whether an email reached its intended recipient and whether it was opened or not. Most tracking tools record when the email was received as well as when it was opened. Tracking tools also note the recipient's IP address and let you see which links the prospect clicked on after opening the email.

Email success can be tracked through web bugs. A web bug is a piece of code that is embedded in an email or web page to track user behavior. Also called web beacons or pixel tags, web bugs are invisible to the user because they arrive as small, transparent GIF files. Web bugs can track the IP address of the computer and the type of browser, as well as the time it was viewed, the URL of the web bug or the page on which it was located, and a previously set cookie value. Most marketing automation solutions include built-

in tracking features that measure things like open and click-through rates, as well as bounced (not received) messages and unsubscribed messages.

### REPORTING: WHAT TO MEASURE

Email tracking yields a number of helpful metrics that can be analyzed to measure the success of a marketing campaign or web page, but how do you know what to measure? Here are a few important metrics to keep an eye on.

Many marketing automation platforms offer features that help users maintain bounce rates and catch both soft and hard bounces. For example, some platforms automatically scrub an invalid email from your list after the first hard bounce occurs, or after a certain number of consecutive soft bounces.

**Click-throughs.** Click-through rate (CTR) is most commonly calculated by dividing the total number of clicks by the total number of impressions. For example, if an email offer was delivered 100 times (total impressions), and its included link was clicked only once, this would result in a 1% CTR.

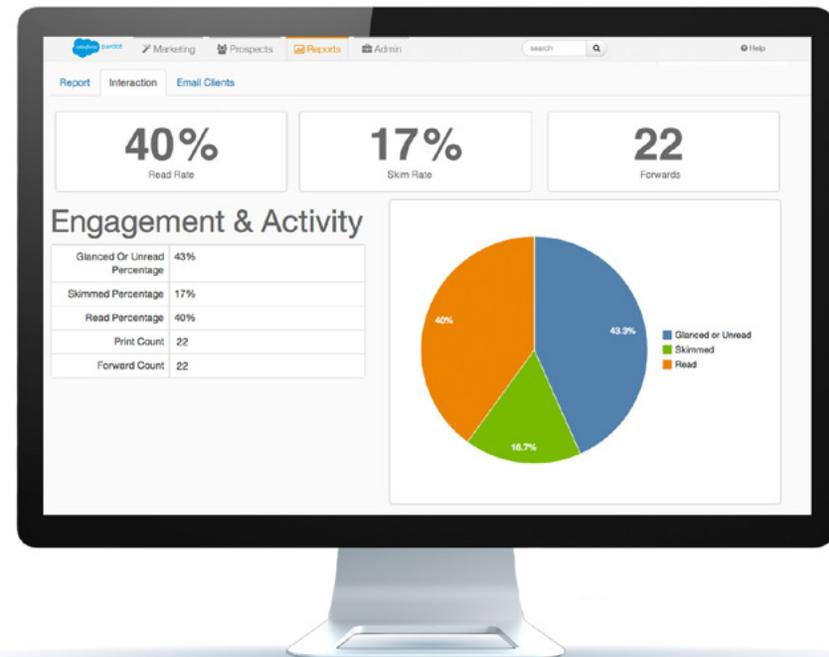
**Email clients and devices.** Use advanced email reporting to see which email clients, browsers, and devices your recipients are using to open your emails. This is important information for marketers, designers, and developers alike, since it will allow you to optimize your email templates based on your audiences' preferences — so your emails are always rendering flawlessly.

**Engagement statistics.** You want to know more than how many recipients opened your email — you want to know how many recipients are engaging with your marketing message. With some marketing automation solutions, you can delve even deeper into email reporting to see a breakdown of the following:

- **Glanced or Unread Percentage.** This is the percentage of people who did not open your email or had it open for less than two seconds.
- **Skimmed Percentage.** This percentage indicates how many people opened your email for between two and ten seconds.
- **Read Percentage.** Use this percentage to see how many people opened your email for longer than ten seconds.
- **Forward and Print Count.** See how many of your emails are being printed or forwarded.

**Bounces.** Bounces can be either hard (permanent) or soft (transient). In the case of a hard bounce, you likely have a bad or invalid email address that needs to be scrubbed from your lists. A soft bounce, on the other hand, may indicate that a mailbox is full or that you're sending a file that's too large.

Many marketing automation platforms offer features that help users maintain bounce rates and catch both soft and hard bounces. For example, some platforms automatically scrub an invalid email from your list after the first hard bounce occurs, or after a certain number of consecutive soft bounces.



## WORKSHEET SIX

# Email Reporting



Marketing automation makes reporting easy, but if you haven't yet invested in a platform, you still need to keep an eye on your email marketing success. The following worksheet can help you organize your data. Take a sampling of email campaigns over a given period of time & record hard bounces, soft bounces, opens, clicks, and click-through rates, keeping an eye out for interesting patterns.

### MONTH ONE

Email: \_\_\_\_\_

Sent: \_\_\_\_\_

Hard Bounce: \_\_\_\_\_

Soft Bounce: \_\_\_\_\_

Opens: \_\_\_\_\_

Clicks: \_\_\_\_\_

Click-Through-Rate: \_\_\_\_\_

### MONTH TWO

Email: \_\_\_\_\_

Sent: \_\_\_\_\_

Hard Bounce: \_\_\_\_\_

Soft Bounce: \_\_\_\_\_

Opens: \_\_\_\_\_

Clicks: \_\_\_\_\_

Click-Through-Rate: \_\_\_\_\_

### MONTH THREE

Email: \_\_\_\_\_

Sent: \_\_\_\_\_

Hard Bounce: \_\_\_\_\_

Soft Bounce: \_\_\_\_\_

Opens: \_\_\_\_\_

Clicks: \_\_\_\_\_

Click-Through-Rate: \_\_\_\_\_



WANT MORE INFORMATION?

Pardot is B2B marketing automation by Salesforce.

Your customers are smarter, more capable, and better-informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

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