



B2B EMAIL MARKETING

BEST PRACTICE GUIDE 2007

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Dear fellow B2B marketer,

So much has changed since my last B2B email marketing best practice guide. No longer can we expect a return by simply using email as a marketing channel, nor can we expect our messages to reach their intended recipient and, if they do, will they appear in the format we intended? I read a lot about this subject and it strikes me that much of what is published is too specific and detailed to make much sense to you, the busy marketer. In my opinion, you don't need to know most of it; you've so many channels to manage and other tasks to accomplish that you shouldn't have to spend the time for such in-depth explanation. That's why I wrote this guide, to give you a feel for the day-to-day points you need to be aware of.

Many of the other considerations (reputation, authentication, SPAM filters, corporate firewalls and so on) should be the responsibility of your email marketing service provider (if you have one). As you'll gather from this guide, I recommend that you find a partner with a background in email marketing excellence. Email is an incredibly efficient and effective channel, but it's not without many obstacles along the way.

A key area I have not covered in this guide is the reporting and metrics that an Email Marketing System (EMS) will provide you once a campaign is sent. Why? These days any decent EMS will have reporting functionality available (to various levels of sophistication) and I'm going to presume you are aware of these capabilities already.

I've attempted to keep this guide as simple as possible though have included a glossary of terms at the end to cover anything that you may not be familiar with.

I hope that you pick up some ideas from this guide to improve the results of your email marketing campaigns.

Kind regards,



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TABLE OF CONTENTS

Page	Topic
3	Brand control and consistency
5	Image blocking and “above the fold”
7	Different recipients: five different email formats
9	Deliverability and rendering
10	Subject line
11	Personalization and Opt-out/unsubscribe
12	Data Protection
13	Integration
14	Glossary of terms and About Concep
15	Check list

BRAND CONTROL & CONSISTENCY

Brand control and consistency should be key considerations for any professional organization looking to communicate to another. If a client or prospect is exposed to multiple touch-points of your business then they should have a consistent brand experience across every communication (email, direct mail, web and so on) that they receive. Brand language must also be consistent across all channels.

Clifford Chance LLP (www.cliffordchance.com), the world's largest law firm (see fig 1 below), has dozens of email marketers across marketing, business development and events departments. They deliver communications locally, nationally and globally across 29 offices around the world.

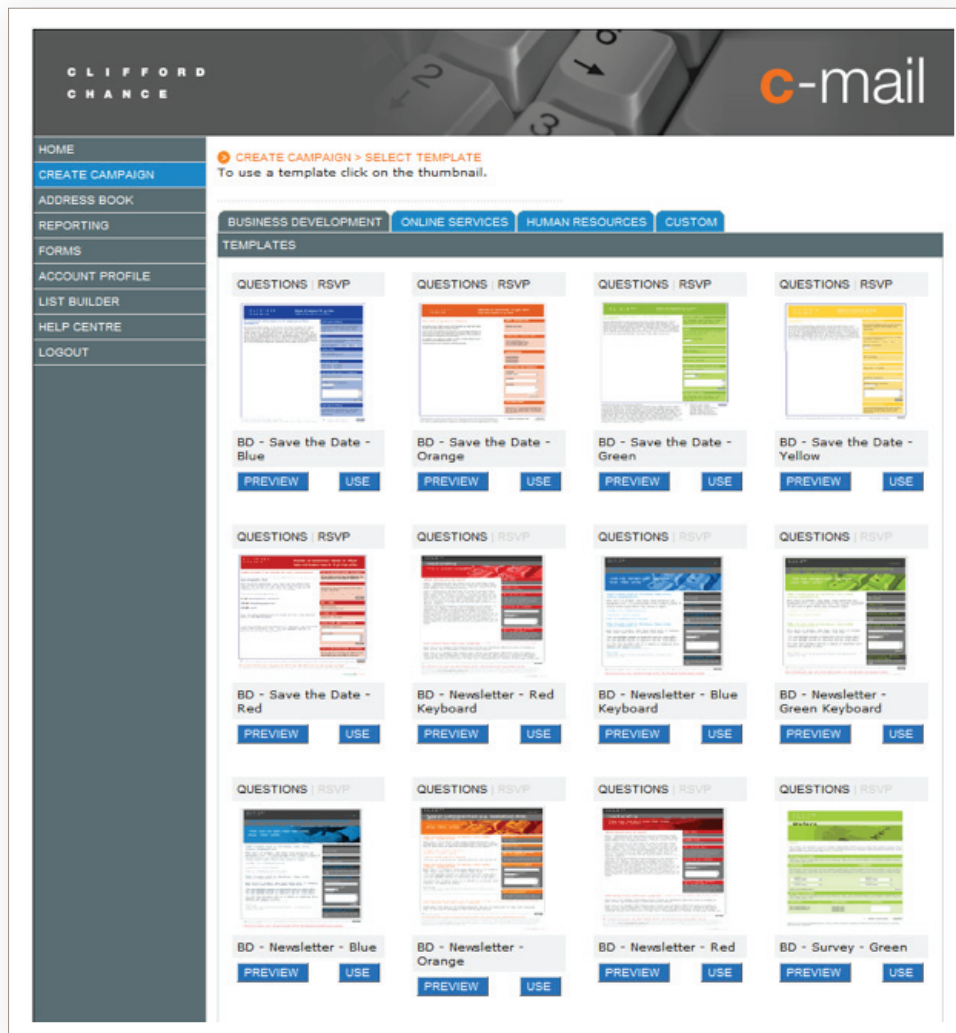


Fig. 1 – Pre-defined email templates for global marketing

These templates are designed and developed by a central marketing team in London, then distributed to users across the globe, ensuring brand consistency.

If, like Clifford Chance, your organization has multiple users, another good idea is to grant access only to the company color palette. This means that users can only access colours pre-determined by the central marketing team. See fig. 2 below.

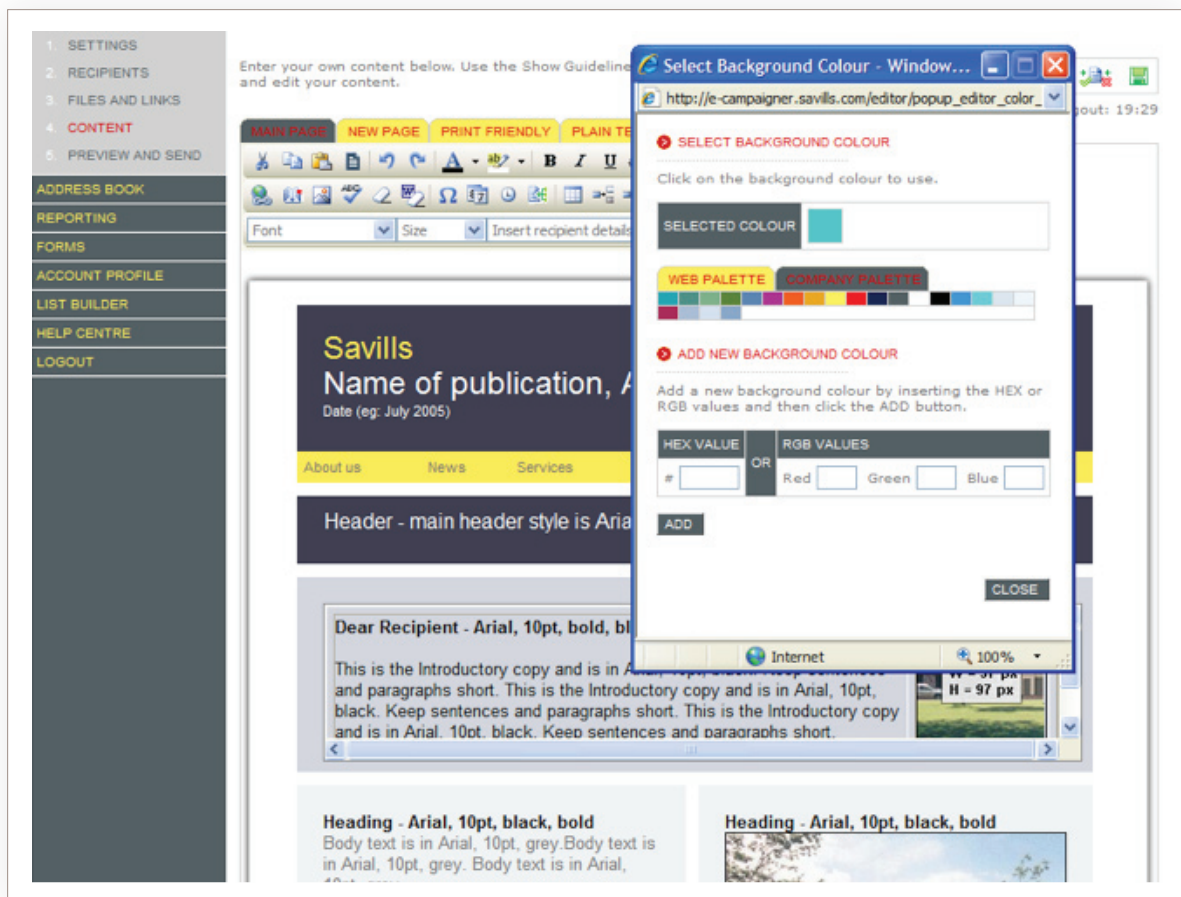


Fig. 2 – Specific company color palette is the only option

IMAGE BLOCKING & “ABOVE THE FOLD” FOR HTML

Image blocking is becoming more and more prevalent within email clients such as Outlook and many webmail services. So it's important to consider the incorporation of “above-the-fold” design - the area the recipient sees when they open the email, without scrolling down. Within this area should be key information such as date, company name in text and section links if applicable. (See figs. 3.1 and 3.2 below)

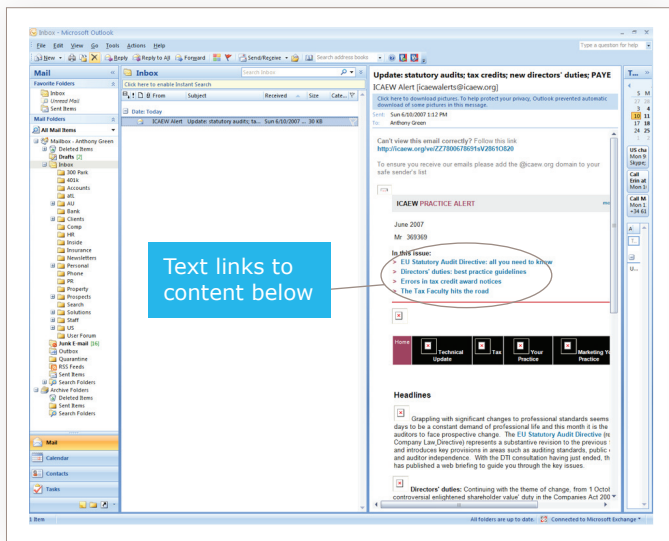


Fig. 3.1 – Preview pane with image blocking on

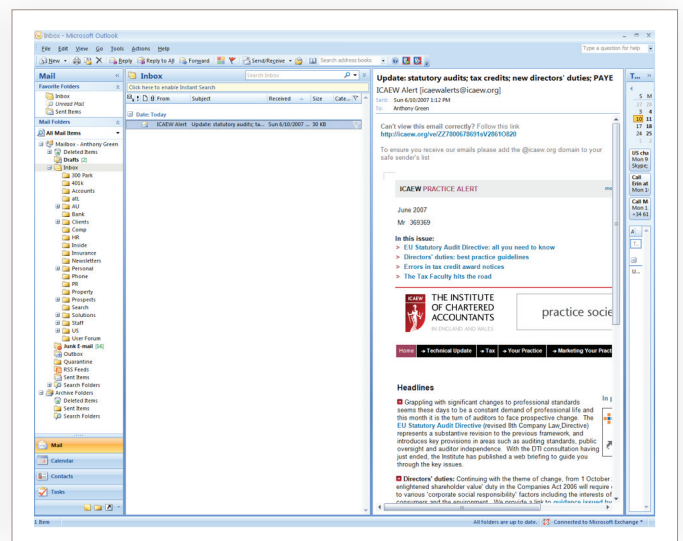


Fig. 3.2 – Preview pane with image blocking off

If the campaign is light on content, make any “call to action” prominent at the top of the email. Be sure to include a text link (not only an image) to counter image blocking. See fig. 4 below.

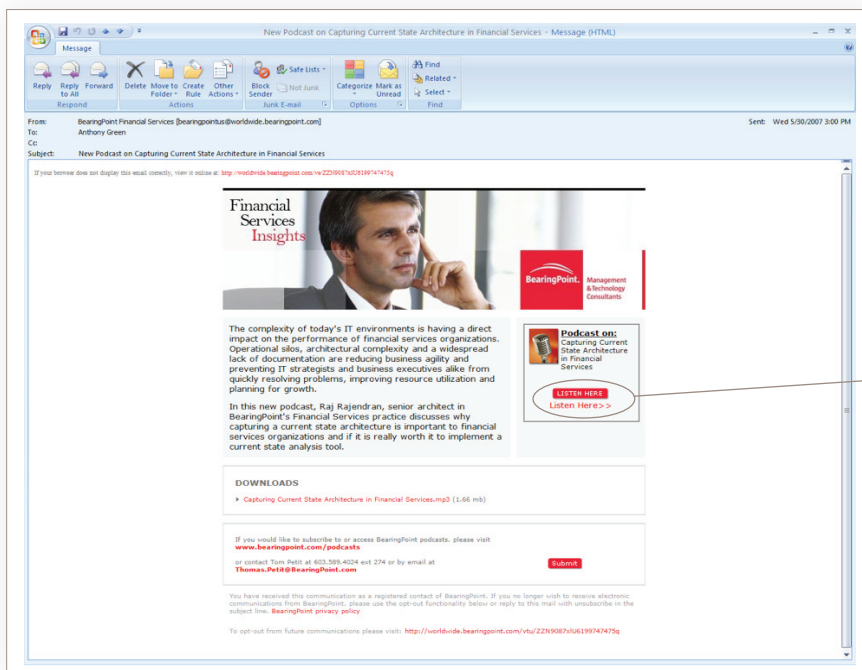


Image and text both link to hosted podcast page

Fig.4 – Ensure the “Call to action” is prominent

Use images within the email campaign as appropriate but balance them with text. Ensure alt tags are added to every image. Compare the difference between an email made up solely of images and one with a mixture of pictures and text in fig. 5.1 and 5.2 below:

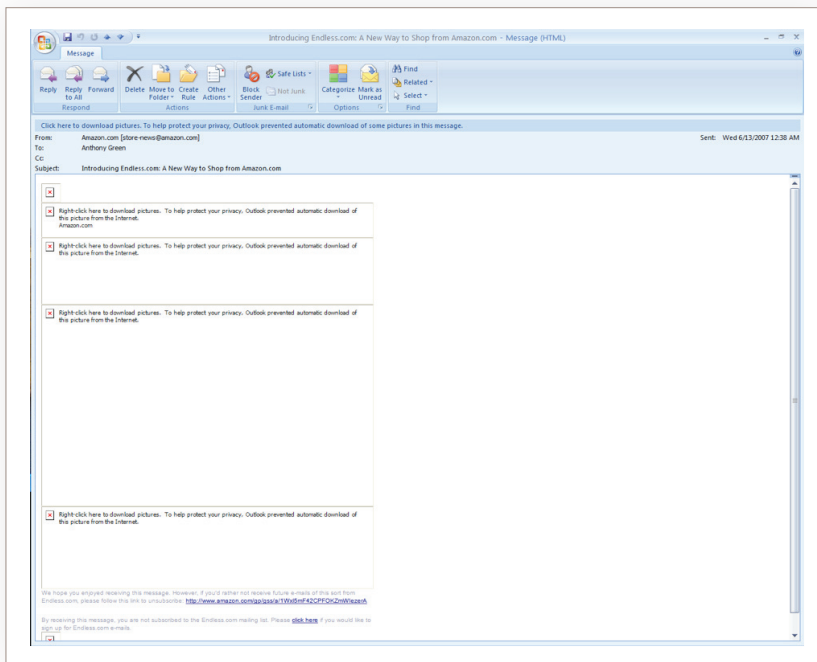


Fig. 5.1 – Image blocking switched on – no balance of images with text

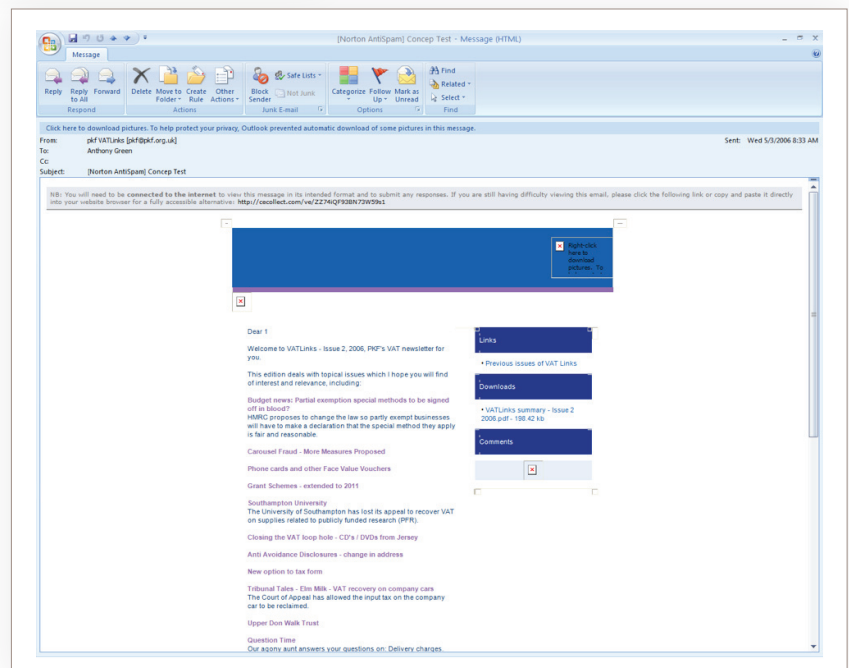


Fig. 5.2 - Image blocking switched on – a good balance of images with text

A footnote to this is that Outlook 2007 adds default text before the alt tag to make life just a little bit more difficult for us all!

DIFFERENT RECIPIENTS, FIVE DIFFERENT EMAIL FORMATS

HTML is not the only version to consider, however. Another advantage of using a dedicated EMS is that your emails will (at least, they should) be delivered as a multi-part message. This means that the recipient will receive a plain text version in their Inbox if their email client cannot accept or render HTML correctly. You should give subscribers the option to change their delivery format by way of a subscription form. (see more on subscription forms under the opt out/unsubscribe section below).

Concep recommend that you don't include the entire content of the HTML message in the Plain Text version. Instead, use a personalized message and introductory text enticing the reader to follow a link which will take them to a web-hosted version of the email. This way, you can still use the reporting functionality of the EMS. See fig. 6 below.

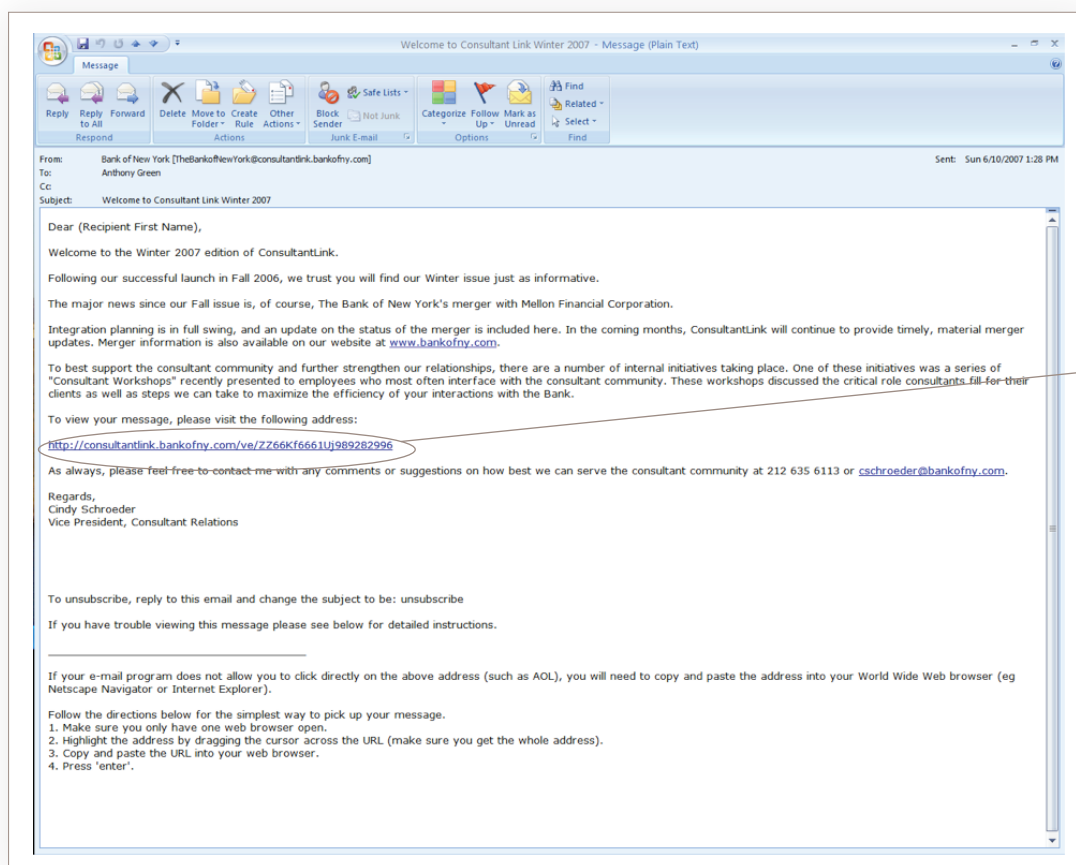


Fig. 6 – Plain text message with link to web version

Two versions down but still three to go! A link to the web-hosted version should also live at the top of the HTML campaign, this time for those who receive a mangled version of the HTML (old versions of Lotus Notes, Novell Groupwise etc will mangle HTML). For the growing number of recipients who pickup their email via a mobile device (e.g. Blackberry) another link to a print/mobile version should be prominent “above the fold”. See fig. 8 below.

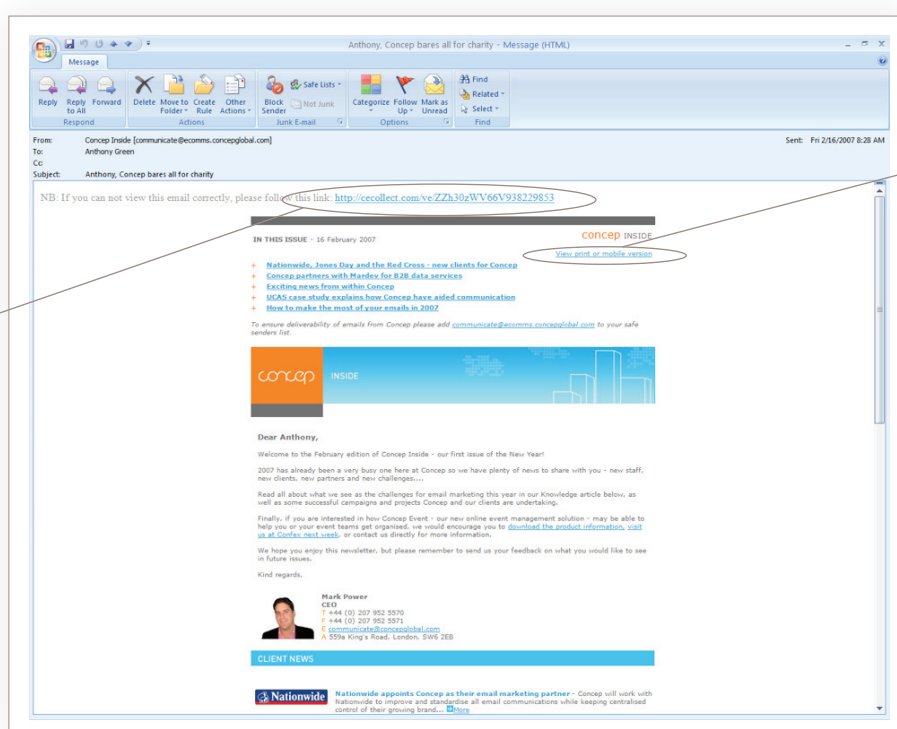


Fig. 8 – Links to web and print/mobile versions

The final version involves attaching a PDF version of the full email campaign. With some EMS platforms you can, prior to send, convert the entire HTML email to a PDF and attach it as a downloadable file within the email. Some recipients will prefer to save your email marketing messages to their desktop or print them in PDF form, so including this fifth and final version caters for almost all tastes.

DELIVERABILITY AND RENDERING

Don't send email marketing messages from your/your company's day-to-day email address or even its domain. Use a dedicated domain for marketing messages so they are separated from regular email communications. This is important because phishing and spoofing schemes, where fraudsters send emails under the guise of a recognized brand (financial services brands are a key target), in an attempt to dupe recipients into giving up personal information, use real domains (such as @hsbc.com or @ebay.com) but are sending the emails from other mail servers.

Another risk with using your own domain for your email marketing is that of blacklisting your whole organization's email traffic. Groups such as "Spamhaus" and "Spamcop" see themselves as the spam police and have the ability to contact ISPs to register a domain as spam. Management are understandably upset when the entire company cannot send any emails because your last email marketing campaign was reported by one person to Spamcop who acted on it. See fig. 9 below for examples of dedicated domains.

Company	Standard domain	Dedicated domain for email marketing
Concep	@concepglobal.com	@ecomms.concepglobal.com
Grant Thornton	@gtuk.com	@ecomms.grant-thornton.co.uk
Bank of New York	@bankofny.com	@consultantlink.bankofny.com

Fig. 9 – Examples of standard and dedicated domains

In addition, creating HTML code in Dreamweaver (or similar) and pasting HTML into Outlook or Lotus Notes is an absolute no-go. Not only does this break the rule about not using your day-to-day email client and domain but less control can be exerted over how the email will render once it arrives at its destination, if it gets there at all. I strongly recommend using a dedicated EMS; it not only gives you more control, but you can also see how many emails were delivered, how many were opened and how many were undeliverable (just a few of the wide array of other reports available across various EMS). Creating and sending email from Outlook and Lotus Notes is email marketing in the dark.

Further, you should send all email marketing campaigns from a consistent and recognizable address (hence my previous point about using a hard-coded dedicated domain across all communications). The "from" name can be adapted, of course, and should be as specific to the mailing list as possible. Many EMS allow you to mail merge this from the database, so that each recipient can receive their email from the specific contact within the business with whom they deal. It's been proven that open and response rates increase when the recipient receives an email from a senior partner "Bob Smith" rather than "Smith and Smith LLP".

See fig 10.1 and 10.2 below.

THE BASICS | PROFILES

Your campaign title
Client Care UK - July 2007 - Draft 1

This is for your records and Reporting.

Email subject: Insert recipient details
Client care - July 2007 - Major usability updates in Campaign

The recipients will see this in their Inbox list.

Send the campaign using the email address:
☒ From the system email address: clientservices@comms.conceptglobal.com
Only the first portion of the email address can be updated.

Forward all campaign replies to these email addresses
Optional. Campaign replies are stored in Reporting. Separate email addresses with a semicolon (;)

☐ Include campaign title in forwarded replies.
Optional. Email subject is included in forwarded reply by default.

SAVE **SAVE & CONTINUE**

Customizable prefix to email address

Hard-coded dedicated domain

Fig 10.1 – “From” email address

THE BASICS | **PROFILES**

Select the sender profile to send with the corresponding button.

SELECT	FIRST NAME	LAST NAME	EMAIL ADDRESS
<input checked="" type="radio"/>	Concep	Client Services	support@conceptglobal.com
<input type="radio"/>	Concep	Events	sarah.marshall@conceptglobal.com
<input type="radio"/>	Tim	Abbott	tim.abbott@conceptglobal.com
<input type="radio"/>	Concep	Events	sarah.marshall@conceptglobal.com
<input type="radio"/>	Peter	Byre	peter.byre@conceptglobal.com
<input type="radio"/>	Ross	Warren	ross.warren@conceptglobal.com

ADD & EDIT SENDER PROFILES

SAVE **SAVE & CONTINUE**

Mail merge the recipients contact name with the company

Fig 10.2 – “From” name

SUBJECT LINE

Ensure the subject line accurately reflects the content of the email but also grabs attention. You can try some split testing to see what works across different mailing lists. Divide your mailing list up into smaller groups (perhaps simply down the middle) and test different subject lines on each group to see if there is any change in open and view rates or other statistics such as click-throughs or response rates.

The more targeted your campaign, the more engaging the subject line can be. You can focus in on the main message without worrying about alienating other readers.

PERSONALIZATION

At the very least, the "To" line should include the recipients first and last name. It's also a good idea to personalize the introduction, such as "Dear Mr Green" or "Hi Anthony", via a simple mail merge through the EMS. See fig. 11 below.

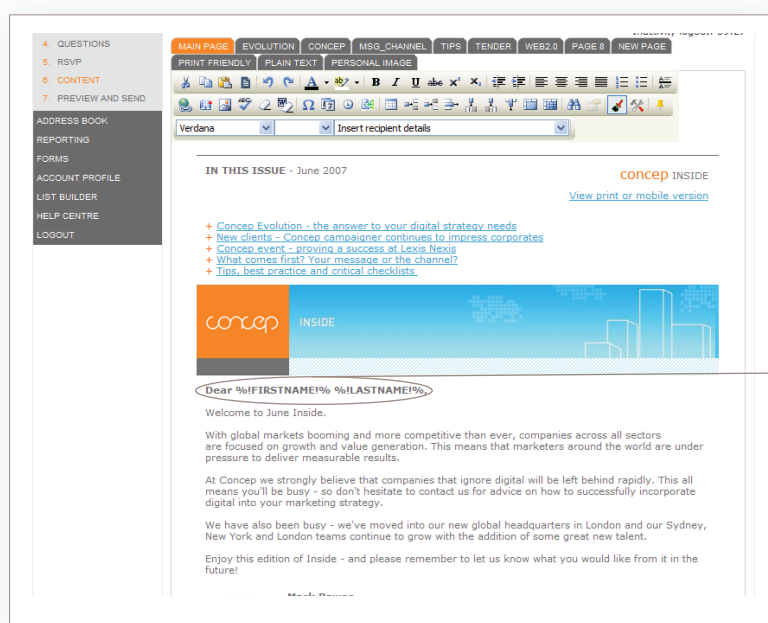


Fig. 11 – Personalization

OPT-OUT/UNSUBSCRIBE

It's paramount that you give the recipient the ability to easily opt-out or unsubscribe from either the particular type of communication you have sent them (e.g. financial services newsletters) or all communications from your organization. Once unsubscribed, the EMS must not allow that recipient to receive an email of that nature again, even if they are added to a mailing list inadvertently. See fig. 12 below.

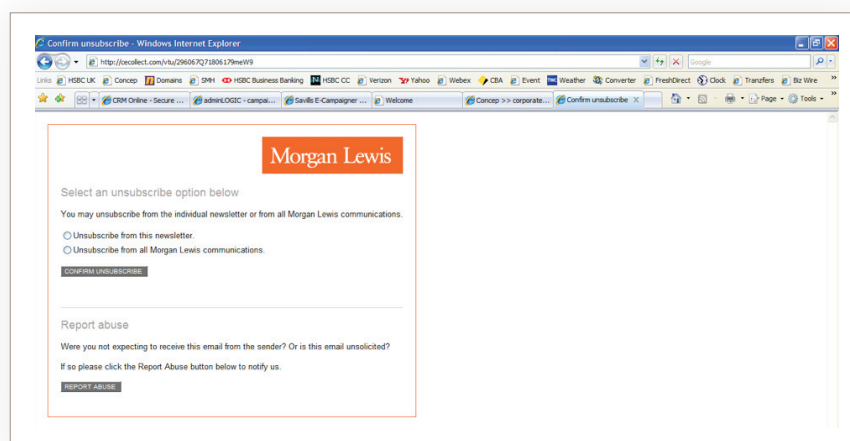


Fig. 12 – Unsubscribe page

Linking to a subscription page is a more robust method of managing user preferences and unsubscribe requests. Instead of only offering the ability to unsubscribe, give users the option to also change their preferences by communication type, frequency etc. See fig. 13 below.

The screenshot shows a web browser window titled 'Baker & McKenzie - Subscriptions'. The address bar shows a URL starting with 'http://bakermckenziesubscribe.ccollect.com'. The page has a blue header with the word 'Subscribe'. Below the header, there is a thank you message and a form titled 'Your Contact Information'. The form has fields for First name (Anthony), Last name (Green), Email address (anthony.green@concepglobal.com), Confirm Email address (anthony.green@concepglobal.com), and Company (Concep Inc). Below the contact information, there is a section titled 'Your Subscriptions' with a note about checking/unchecking boxes for subscriptions. There are four main categories of subscriptions: 'Customs and Trade' (with checkboxes for Global, Customs Update (monthly), and Homeland Security Update (quarterly)), 'Legal Developments by Jurisdiction' (with a checkbox for Europe, Kyiv Legal Alert (periodic)), 'Press Releases' (with checkboxes for Global, Baker & McKenzie Press Releases (periodic), and Europe, Kyiv Press Releases (periodic)), and 'Intellectual Property' (with a checkbox for Global, Intellectual Property Webinars (periodic)). There is also a 'Doing Business In... Guides' section with a checkbox for Europe, Conducting Business In Ukraine (annual).

Fig. 13 – Link to an unsubscribe page

DATA PROTECTION

Under CAN-SPAM you must also include the valid physical postal address of your organization. More information available here: <http://www.ftc.gov/bcp/online/pubs/buspubs/canspam.shtm>

Under EU data protection a similar rule applies. Within the UK, a new rule was introduced on January 1, 2007 stating that the name of the UK Registered company entity, the company registration number, the place of registration (i.e. England and Wales) and the registered office address be included on every email marketing campaign. See fig. 14 below.

Additionally, it is illegal to move data out of the EU without the recipients' knowledge. Otherwise the data controller must be registered with "Safe Harbor" or have Model Contracts in place which ensure the data is held in an environment acceptable under EU law.

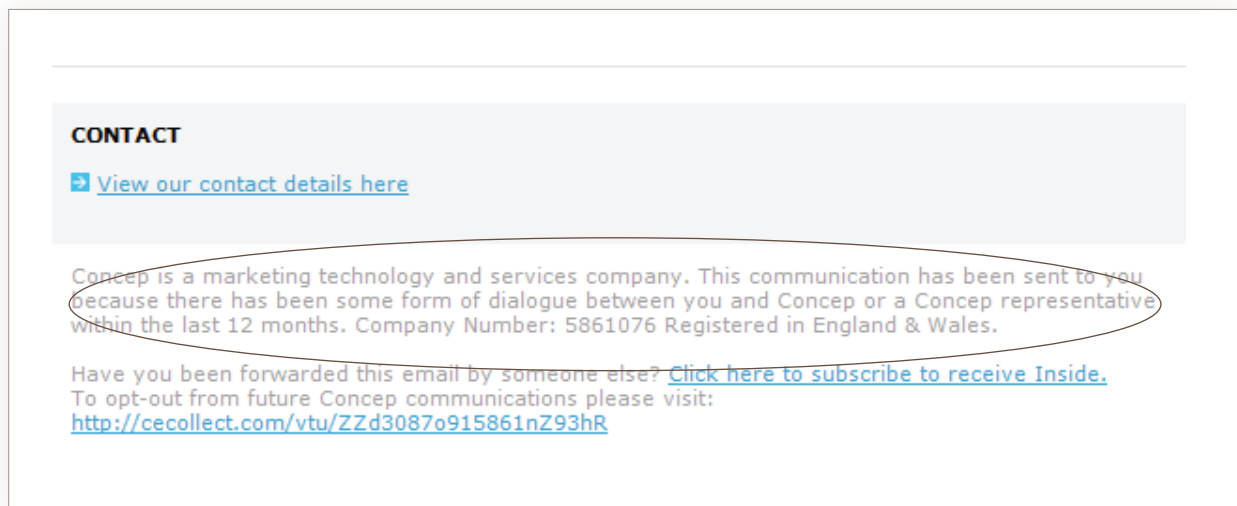


Fig. 14 – Include company number and place of registration/head office address

INTEGRATE WITH WEBSITES/MICROSITES

If your email is heavy with content, don't include everything within the first page (i.e. the page that arrives in the Inbox). As a rule of thumb, the email should not be more than 2-3 screens deep. Use links to "Read more" and take the recipient through to a web page to read additional content. This also lets you track the topics of interest to the entire mailing list and the individual themselves.

Many EMS now integrate with a web-tracking facility or provide their own. This means that once a recipient clicks on a link, you can see every page of the website/microsite that each individual recipient visits and for how long!

INTEGRATE WITH CRM

Today it's mandatory for any professional organization to have a centralized CRM database where all client and staff data is maintained. All other systems, including the EMS should integrate with this by pulling data (names, email addresses etc) from it and feeding relevant information (opt-outs/unsubscribes, undeliverable emails/ bouncebacks etc) back once an email campaign has been delivered.

GLOSSARY OF TERMS

Email client – Outlook, Lotus Notes, Hotmail, AOL etc are all examples of email clients.

EMS (Email Marketing System) – a dedicated technology developed to create and deliver email marketing campaigns. This does not include Outlook, Lotus Notes and other email clients designed for one-to-one or one-to-few communications.

Image blocking – refers to an email client that does not download imagery within a HTML email by default. Research suggests 50-70% of recipients of B2B emails will have image blocking enabled.

Alt tags – are descriptions of an image (such as “Concep logo.gif”) that will appear in place of an image if image blocking is enabled.

Reports – Among the many advantages of an EMS are the reporting capabilities. Seeing who opened/ viewed your email, what links they followed or files they downloaded and which addresses “bounced” or were undeliverable are just a handful of the reports available to the marketer.

ABOUT CONCEP

Concep provide marketing technology and services globally through offices in London, New York and Sydney.

Our experienced team partners with organizations that need to harness and nurture high-value commercial relationships. Ten of the world’s top 30 law firms work with us and over 120 of our clients are globally recognised brands across property, financial and professional services sectors.

Concep campaigner is the leading interactive email marketing platform for business to business marketers. It supports the needs of busy marketers who need to deliver highly professionally branded interactive email communications, whilst providing an insight into the behaviour of recipients through detailed reporting.

ABOUT THE AUTHOR

Anthony Green was Sales & Marketing Director at Concep London for over three years, driving Business Development within key vertical markets. During that time Anthony worked with clients such as Baker & McKenzie, BearingPoint, Ernst & Young and Cushman & Wakefield. He was the founding Chairman of the Internet Advertising Bureau (IAB) B2B Council, a member of the IAB Email Marketing Council, a member of the Institute of Direct Marketing (IDM) B2B Council, a course lecturer at IDM courses and a presenter for the IDM Academy at industry events, such as Technology for Marketing & Internet World. Anthony also regularly talked on B2B Marketing for Professional Services Marketing Group (PSMG) and the Financial Services Forum (FSF).

Anthony is a member of the Email Experience Council (EEC) and the Legal Marketing Association (LMA). He moved to the role of President, Concep New York in February 2007 and now heads up Concep’s US operations. He may be contacted at anthony.green@concepglobal.com

CHECK LIST

	YES	NO
Have I developed a pre-approved set of email templates that ensure brand control and brand consistency across all my email communications and that reflect other marketing collateral?		
Have I incorporated "above the fold" design to counter the effects of image blocking?		
Is my "Call to action" prominent and in the form of a link, not just an image which could be blocked?		
Have I considered all the different circumstances and preferences of my recipients, in terms of the format of email they wish to receive? HTML, Web, Plain text, print friendly and PDF?		
Am I sending my marketing messages from a dedicated domain or risking my companies day-to-day email domain?		
Am I sending raw HTML code from Outlook or Lotus Notes, thereby exerting little control over how the email will look when (if) it arrives at its destination?		
Is my subject line both reflective of the content of my email but also attention grabbing?		
Do I incorporate some level of personalization within my email? Am I building these recipient profiles over time?		
Have I offered a no-nonsense opt-out/unsubscribe option for my recipients?		
Have I set up a web subscription form to capture new subscribers from my website that also offers other options (different content, more/less regular emails etc) than simply "unsubscribe".		
Have I integrated my email marketing campaigns with my website so I can track traffic on each page?		
Can I integrate my EMS with my central database or CRM system for seamless data control?		



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