SPECIAL REPORT

How to Segment & Integrate Your Emails for Better Results

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How to Segment & Integrate Your Emails for Better Results

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Fellow Evidence-Based Marketer,

"We had a whole lot of old email addresses from the last 10 to 15 years of business. We had little other data than the email address. And we had the desire to begin mobile marketing because we had just launched a mobile version of our website." – Greg Moser, Web Director, Nytro Multisport

Do Greg's challenges sound like your own? The need to better understand your email list? The desire to reach your audience through a new channel? (*You can read the case study that begins on page 10 to see exactly how Greg and his team addressed these challenges*).

Thank you for downloading this MarketingSherpa Special Report, provided courtesy of HubSpot.

Over the next 38 pages – a compilation of MarketingSherpa 30-Minute Marketers, case study reporting from our newsletters, and Benchmark Report research – we will share our research and reporting about **email segmentation and integrating other channels with your email marketing** to help you address challenges like the ones Greg's team was facing.

This report seeks to answer segmentation and integration questions such as:

- What are the most significant challenges to email marketing effectiveness? (*page 2*)
- How segmented do you really want to get? (*page 9*)
- Would a sexy image trump an action image when it came to click-throughs for an athletic audience? (*check out the case study beginning on page 10 to get ideas for segmentation tests of your own*)
- To what extent are your fellow marketers integrating social media? (*page 13*)
- Which marketing channels are your marketing peers integrating with email? (*page 22*)
- What percentage of subscribers read email on mobile phones? (*page 29*)
- How many marketers are designing emails for mobile viewing? (*page 34*)

"In my opinion, making sure you're not sending irrelevant messages to each of your customer segments is perhaps even more important than focusing on relevant messaging," – Halley Silver, Director of Online Services, King Arthur Flour (*learn more from Halley beginning on page 2*)

We hope this report, provided courtesy of HubSpot, **helps you provide more relevant communications to your audience through more relevant channels.**

At MarketingSherpa, our job is to help you do your job better. Let us know how we can help.
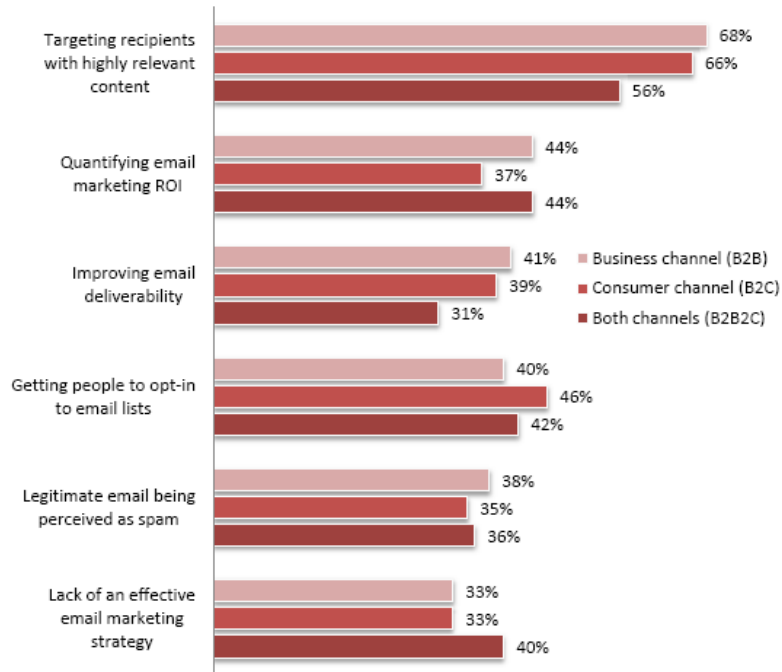
Best Regards,

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HOW TO SEGMENT YOUR LIST FOR BETTER RESULTS

As seen in this chart from the MarketingSherpa *2011 Email Marketing Advanced Practices Handbook*, the biggest challenge for email marketers is targeting recipients with highly relevant content. Segmenting your list helps solve this problem by allowing you to target subscribers with content that will appeal to them. Crafting messages that are timely and significant to the reader will increase open and clickthrough rates. Irrelevant emails put your brand's image, reputation and customer relationships at risk.

Chart: Most significant challenges to email marketing effectiveness, by primary channel

Q. How significant are the following challenges to email marketing effectiveness?

Challenge	Business channel (B2B)	Consumer channel (B2C)	Both channels (B2B2C)
Targeting recipients with highly relevant content	68%	66%	56%
Quantifying email marketing ROI	44%	37%	44%
Improving email deliverability	41%	39%	31%
Getting people to opt-in to email lists	40%	46%	42%
Legitimate email being perceived as spam	38%	35%	36%
Lack of an effective email marketing strategy	33%	33%	40%

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Source: MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded Sep 2010, N=1,115

Tactic #1: Be prepared to make your case

Segmentation—or, more specifically, the work and expense involved in segmentation—is not always an easy sell. So it's important that you cite the valuable benefits segmentation can provide. In this MarketingSherpa interview, email researcher Michael Wexler advises, "There's a high cost to entry for classic segmentation testing; it costs more than a simple test. However, this investment helps a lot. It stems lowered results, reporting of spam, unsubscribes, and it results in higher lifetime value per name."

In this MarketingSherpa how-to article on database segmentation, Halley Silver, Director of Online Services, King Arthur Flour, says her team wanted to deliver relevant content to its niche audiences, such as subscribers interested in gluten-free baking or wholesale products. Featuring such content in emails sent to King Arthur's general database typically generated poor results.

This motivated the team to pursue segmentation. The team wanted to identify specific groups within its database to send content that connected with the groups' interests. Doing so would also help avoid sending niche content to the team's entire database, which many subscribers considered irrelevant.

"In my opinion, making sure you're not sending irrelevant messages to each of your customer segments is perhaps even more important than focusing on relevant messaging," Silver says. "By sending irrelevant messages you run the risk of being perceived as a spammer, and your unsubscribe rates go way up."

Fortunately, the resulting numbers helped sway any remaining skeptics. The average click-through rates and open rates both showed a considerable increase for the segmented lists compared to the overall lists.

Such results are common among marketers who segment their lists effectively, as Wendy White, Senior Marketing Strategist, Global Media Division, Acxiom, says in this MarketingSherpahow-to article. "It is dramatically effective," says White. "If someone is not segmenting, then they are leaving money on the ground. There is gold in segmentation."

There is one caveat. You may need to warn your team (and stakeholders) to be patient when waiting to reap the rewards of segmentation. Wexler says segmentation tests do not always show immediate results. "It takes a few emails to [recipients] for them to recognize that it's the right email for them. It may take six emails, and maybe they'll only open three of them."

Tactic #2: Assemble the key components

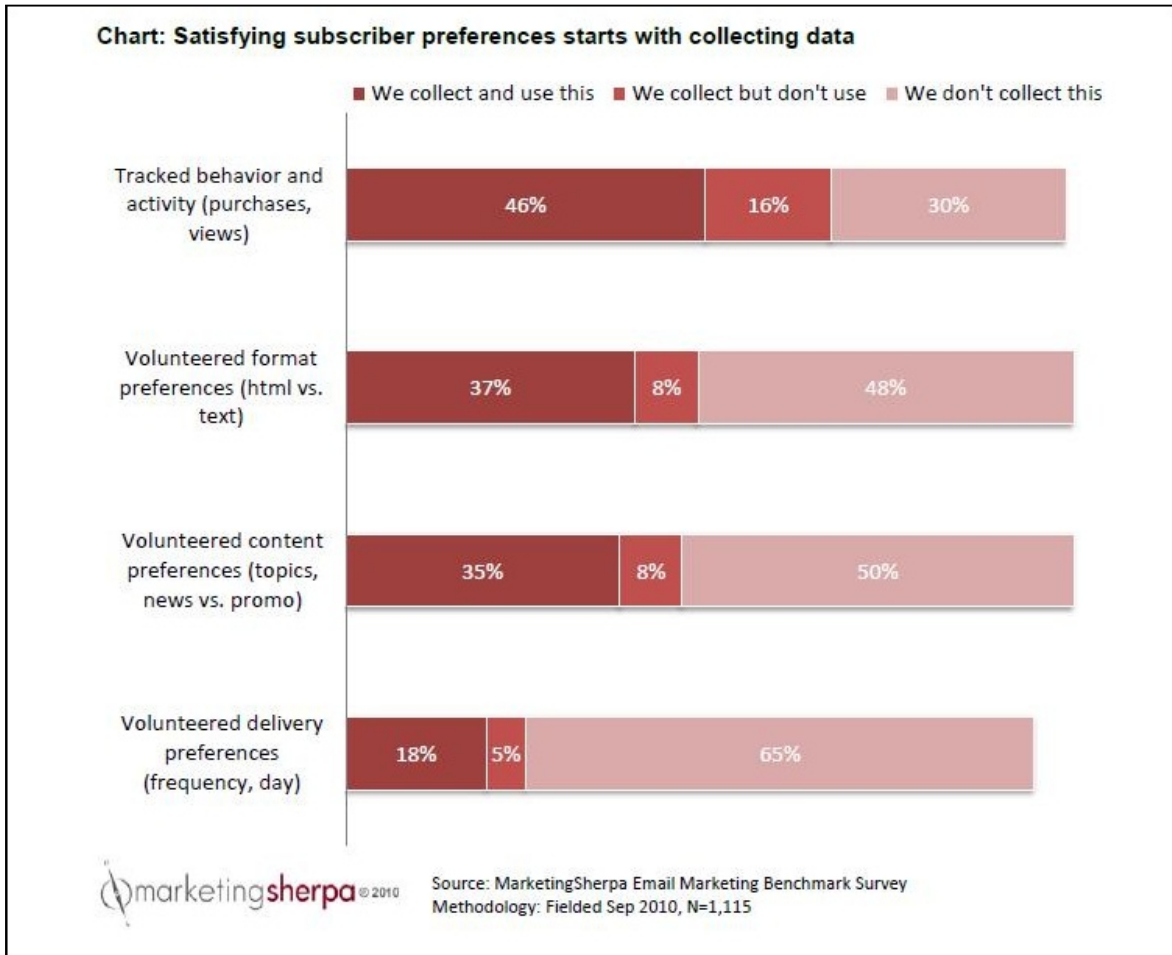White also lists three assets you'll need to effectively segment:

- Email database

Segmentation relies on data. You do not need an elaborate database with 50 fields of information for each subscriber, but you *do* need more than a list of email addresses. Even the most basic data, such as whether your subscribers are prospects or customers, is enough to get started.

"If you are tracking opens and clicks, you have enough information to dramatically improve your performance of your emails," White says. If you do not have enough data, then you need to start collecting it. Here are a few places among the many you can pull from:

- CRM system
- Subscriber preferences center
- Third-party data append services
- Your ESP's tracking data

The following chart, taken from the MarketingSherpa *2011 Email Marketing Benchmark Report*, shows the most popular types of data collected on subscribers, and the percentage of marketers who use them. As you can see, tracked behavior and activities top the list.

Chart: Satisfying subscriber preferences starts with collecting data

■ We collect and use this   ■ We collect but don't use   ■ We don't collect this

	We collect and use this	We collect but don't use	We don't collect this
Tracked behavior and activity (purchases, views)	46%	16%	30%
Volunteered format preferences (html vs. text)	37%	8%	48%
Volunteered content preferences (topics, news vs. promo)	35%	8%	50%
Volunteered delivery preferences (frequency, day)	18%	5%	65%

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Source: MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded Sep 2010, N=1,115

- Testing process

The goal of segmenting your database is to send targeted messages. The only way you can be sure your messages will improve performance is to test them against a control group. Unfortunately, only 39% of email marketers routinely test emails, according to the benchmark report.

- Content

Each new segment you target can multiply the amount of content you need. This is true whether you are altering a single email for each segment, or launching targeted newsletters. This is another reason to start small.

"Once you get into segmenting, you start to realize you don't have one list. You have a bunch of little lists that you had previously been managing under one roof, and so you break those out and you start to treat them as individual campaigns," says Justin Premick, Director, Education Marketing, AWeber.

Tactic #3: Collect as much data as possible

This MarketingSherpa how-to on database refinement identified the four types of data you can use:

Endemic data is information solicited from – and provided by – the subscriber. It includes contact and demographic information, as well as preferences.

Transactional data, as one might expect, is information captured during transactions. It includes financial information, as well as when and where the interaction occurred.

Behavioral data encompasses actions that occur once, such as abandoning a cart, as well as activities observed over time that help you establish patterns of behavior. These include when subscribers open emails, types of websites they visit and their tendency to use coupons.
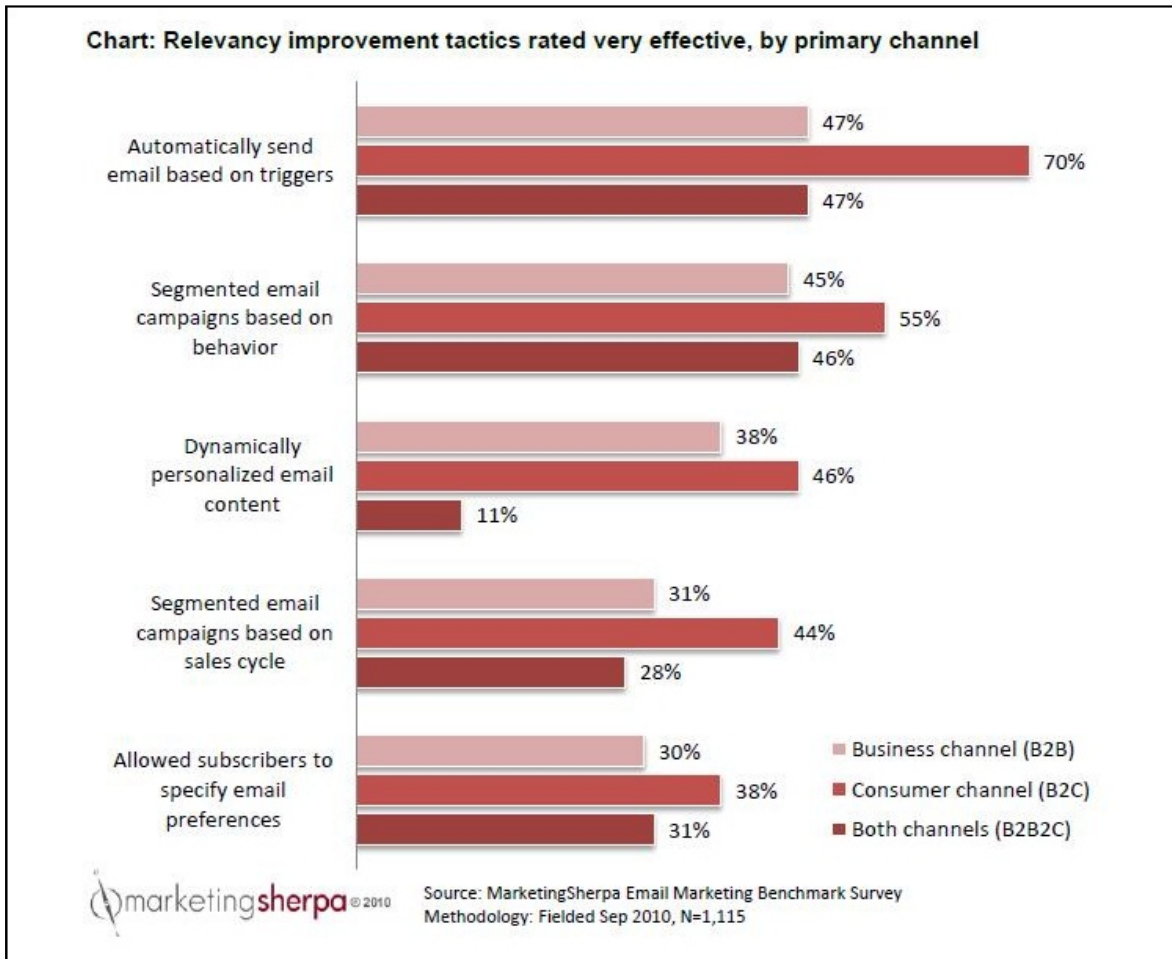
As you can see from the chart above, marketers find segmentation based on behavior to be one of the most effective relevancy improvement tactics.

Computed data is created by performing calculations on one or more variables. The resulting factor can be as simple as distance from a retail store or as complex as expected lifetime profit value.

Tactic #4: Develop segments based on long-term behaviors

We've illustrated the value of behavioral data above. This MarketingSherpa how-to on email relevance expands on the value of studying long-term behaviors in your segmentation efforts.

When you collect behavioral data over the long term, you learn enough about customers to accurately group them with others who behave and respond in a similar fashion. Segments create a collective intelligence useful and often actionable for members of that grouping.

For example, you can determine if subscribers are brand- or price-sensitive. For specific products, such as 3D televisions, you can group consumers by the size of the TV they bought, to recommend what type of 3D glasses they need.

Once you've identified a behavior-based segment with shared behaviors and tastes, it opens up the possibility for customer-generated content – namely recommendations, ratings and reviews. You can leverage the probability that people within a segment will resonate and respond to the opinions and views of others in that grouping.

Tactic #5: Identify your segmentation types

In the MarketingSherpa blog post, Email Marketing: Groupon's segmentation strategies across 115 million subscribers, senior reporter Adam T. Sutton shares some tips from John Becvar, Sr. Director of Relationship Marketing at Groupon.

Segmentation #1: Geographic

Groupon's core business value proposition, Becvar said, is about discovering great local things to do. As the company's reach expanded into more than 500 cities, it found more subscribers and adapted its definition of "local."

"Being geographically relevant is the first most important thing," Becvar said. The company first segmented its list by general metro areas. Then, getting more specific, it targeted offers by ZIP code. Now the company wants to determine not only which offers are available near a subscriber's home, but also which are available near places they often visit.

Segmentation #2: Product type

Groupon was a pioneer in the daily deal market. Competitors have since emerged, some of which target niche categories such as travel or home goods. Not to be outdone, Groupon's marketers started offering specific types of local deals via email, not just local deals in general. A few examples of Groupon's newer, more-specific email programs:

- Groupon Getaways – focuses on travel
- GrouponLive– focuses on live events
- Groupon Now! – same-day deals

Segmentation #3: Lifecycle

Every subscriber was treated the same when Becvar joined the company, whether they bought zero deals or 100. Groupon has since "tried to evolve that into a more of a lifecycle strategy," he said.

For example, new subscribers receive a series of 12 messages over their first 45 days in the program. The emails are designed to excite and engage new subscribers with the brand. "For the best customers, we're doing things to reward, recognize, and retain them as well," Becvar said.

Segmentation #4: Personal data

The team also gathers data to personalize its emails. Three types of data Becvar mentioned that help drive Groupon's personalization

- Self-reported – such as age, gender, zip code
- Appended – data purchased from third-party services
- Behavioral – data based on what subscribers click and purchase

Tactic #6: Consider other segmentation approaches

Your specific segmentation types may vary depending on your goals and consumer characteristics. This MarketingSherpa Email Summit Wrap-Up Report shared two ways Summit speakers segmented their databases:

By customer profile

Don McNichol, Director, eCommerce and Direct Marketing, Intermix, analyzed purchase records to identify three types of customers:

- VIPs who spend tens of thousands with the company annually
- Sale shoppers who only buy when there's a sale or discount
- Brand shoppers who are loyal to a specific brand

By targeting messages and offers to each group, the team achieved a 90% increase in open rates, a 46% increase in click-throughs, and a 28% increase in email marketing profit.

By email activity

Brooks Bell, President, Books Bell Interactive, revived the AARP's email newsletter program by performing a series of tests on segments of the audience identified by email activity:

- Active – clicked in the last four months
- Passive – opened in last four months but did not click
- Inactive – no opens or clicks in the last four months

Through several tests and campaigns aimed at re-engaging passive and inactive subscribers, they were able to generate a 59% increase in their active subscribers.

Tactic #7: Start with a single segment

As seen earlier, King Arthur Flour did not jump headfirst into segmentation. Instead, the team focused on a single segment: subscribers interested in the brand's retail store.

Starting with a single segment helped Halley Silver's team in the following three ways:

- Managing unforeseen challenges

The team was able to work through the growing pains from new strategy in a controlled environment. The team would also know what to expect when launching new segments later on, and would have a tested process for segmentation and delivery.

For example, after struggling to keep up with deadlines for emails going to the retail subscribers, Silver's team built four email templates for all emails going forward. This reduced time spent on design and revision, and enabled the team to focus more on the creative material and content that had proved to lift results.

- Adjusting strategy

Emails to this first segment began as a daily alert about specials at the retail store and menu options in the store's bakery. The team had to quickly shift from a daily email with detailed information to a monthly email with general highlights.

"It was incredibly difficult to get that daily content we wanted to send. We were trying to find out what was going to be in the café and what the bakery was going to be baking on a certain day. But if they didn't have the ingredients, they had to switch gears and it was operationally quite difficult."

This transition was simpler than it would have been if the team had also been establishing several additional segments (which also might have needed adjusting).

- Proving results

The marketers were able to prove that segmenting and sending targeted content improved results, giving them the confidence to expand the strategy and gradually add more segments.

"The open rate was high, the unsubscribe rate was low, the click-through rates were high, and we sent out the emails and saw people coming into the store. It was as simple as that," Silver says.

Tactic #8: Treat inactive subscribers as a segment

As this [MarketingSherpahow-to on email relevance](#) shows, not all segmentation needs to be complex. By using email analytics to recognize and group inactive subscribers into a segment early in the process – perhaps after six weeks, rather than six months – you improve your chances of re-engagement.

In general, the approach to reactivation is simply doing something different than you usually do in emails for that specific segment.

A reactivation program can be as simple as reducing the amount of email you send that segment of your list. Moosejaw, an outdoor gear and apparel retailer, uses this approach. When the company finally sends an email to the disengaged group, they employ humor and surprise to earn back their interest.

Tactic #9: Avoid the temptation to go overboard

While some segmentation can be great, excessive segmentation can be wasteful . How segmented do you really have to get? "Not one-to-one," says Michael Wexler. "You don't need to segment to every single person. It just so happens that many people cluster together. A lot of people like 'Star Wars' for example. You certainly have to treat them differently than fans of 'Harry Potter,' but you don't have to treat them differently from each other."

"For resource allocation, pick the groups that appear to be high value, and then combine others. With high value groups you spend a bit more; with others you're throwing away a bit of power. You have to play with it to determine which ones may not make enough of a difference to segment for."

Tactic #10: Leverage internal resources for content

The whole point of segmentation is to allow you to target content of interest to specific consumers—but this in turn can lead to another challenge: how to then come up with all of that content to deliver to these segmented lists.

Developing and formatting content was the most time-consuming part of King Arthur Flour's email program, Silver says. Every email the brand sends includes a recipe that is related to the audience's interests. For example, gluten-free subscribers will receive gluten-free recipes, and subscribers who are interested in the education center will receive recipes that are taught at the school.

Silver's strategy is to repurpose content from throughout the company, enlisting staff to write blog posts, provide recipes, or help in other ways. She also reaches out to the appropriate stakeholders related to each email segments. "They are as eager to build their lists and their program as we are. So they are usually very responsive in terms of helping develop content for the emails."

Another way Silver's team regularly generates content is through repurposing content used in other marketing efforts and recipes that are developed for other areas of the company.

"We definitely reuse as much as we can and try to take advantage of what is already out there," she says. "Then it is just a matter of adapting and publishing it for email and the Web."

Useful links and resources:

Email Marketing: LEAPS Methodology for Improving Performance

"Mind Type" Segmenting Lifts Email Donations 42.5: Six Steps to Find Subscribers' Underlying Motivations

Email Marketing: Groupon's segmentation strategies across 115 million subscribers

Marketing Testing and Optimization: The value of being wrong

MARKETING AUTOMATION: SEND EMAIL TARGETED BY BEHAVIOR

HubSpot's multichannel marketing automation increases the power of your nurturing campaigns. With marketing automation, your leads' behavior, not your marketing schedule, determines when emails get sent. Deliver information at critical moments in the decision-making process.
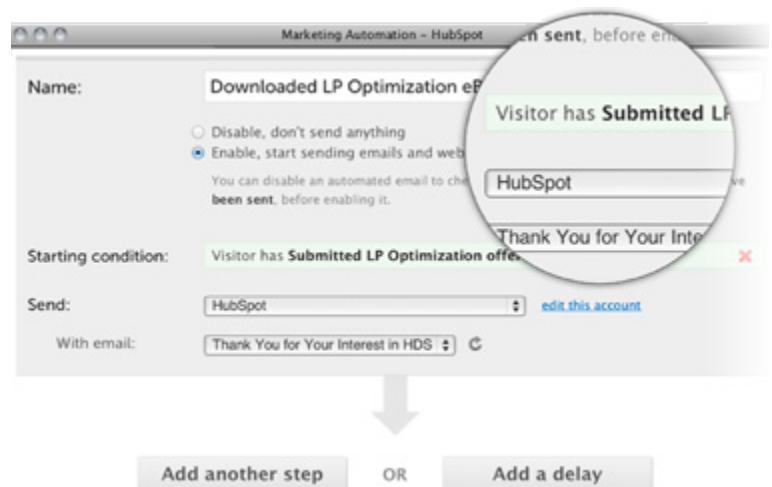
✔ **Trigger emails based on page views, social media mentions and other activity.**

✔ **Send SMS messages or internal notifications in addition to just email.**

✔ **Incorporate social media, help-desks and billing systems into your campaigns.**

✔ **Use HubSpot email or integrate with other ESPs.**

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CASE STUDY: ONE-TWO CAMPAIGN PUNCH GROWS EMAIL AND MOBILE LISTS, SEGMENTS AUDIENCE

SUMMARY

Improved list quality and list growth can sometimes seem like competing endeavors for emailers. See how one sports e-retailer set out to clean up their list and discovered how to add thousands of names along the way.

This process also birthed a mobile marketing program. And they did it with just two emails that provided a 40 percent lift in click-through rate.

CHALLENGE

Last summer, Greg Moser, Web Director, Nytro Multisport, and his team were charged with turning their increasingly stagnant email list into a highly relevant, targeted email program. They also had fallen woefully behind most retailers when it came to the emerging channel of advertising to mobile phones and handsets.

"We had a whole lot of old email addresses from the last 10 to 15 years of business," Moser says. "We had little other data than the email address. And we had the desire to begin mobile marketing because we had just launched a mobile version of our website. We wanted to do text messaging. We knew the only way to do it was have people subscribe."

The only problem was their house email list of tens of thousands of names had become weary of stale messaging.

CAMPAIGN

The team spiced things up with a pair of sweepstakes-driven campaigns designed to grow their list while incrementally segmenting their audience.

In a careful one-two fashion, they ran these campaigns:

Campaign #1. Run sweeps/learn more about current subscribers

Even without much backend data, Moser could extrapolate from anecdotal takeaways and sales sheets that their database had two key consumer segments:

- Tri-athletes
- Cycling-only enthusiasts

But they didn't know which subscribers belonged in those segments, or for that matter, where they lived.

In August, to encourage people to provide more information, they sent an email that promoted a chance to win one of two high-end road bicycles. The email campaign was supported by the following aspects during the sweepstakes' 40-day run:

- Display ads via select cycling-oriented sites.

- Facebook and Twitter posts, which announced the sweepstakes and its winners.

In order to enter the contest, registrants had to enter the following information on the landing page:

- Full name
- Email address
- City/state/zip code
- Country
- Birthday
- Bike of choice
- Opt-in check boxes for email and mobile alerts

Moser says that one of the prize bikes was a favorite of tri-athletes and the other was more likely to be purchased by a road cyclist. This is why the team gave registrants a choice about which prize they'd prefer.

"Some people won't come out and tell you right away if they are a road cyclist or a tri-athlete," Moser explains. "Through that kind of bike selection [in the registration process], it was meant to give us more of an idea of what kind of enthusiast he or she really is."

Campaign #2. Segment list and test creative

Next, Moser and his team aimed to use the information gained from the first campaign in a more targeted effort.

- They separated actives from inactives and added them to the new names that ended up entering through the display ads or through viral email pass-along.

Moser says the second campaign went to just half as many names as the first.

"It was definitely something that was the next step, something that built off the first campaign, in terms of being able to target our audience."

- This campaign, which lasted 45 days, included the same push of display ads across cycle-oriented sites that the first effort did, as well as the modest Facebook/Twitter promotion.

- The email portion of the campaign mirrored the creative style of the prior effort. Here are the key elements conjoining the two emails' look-and-feel:

- A landing page that included checkboxes to join the mobile list and email program
- Subject lines similar in style and character length
- A red-colored top navigation bar in the email body
- An image hyperlinked to the landing page underneath the navigation bar
- Two smaller boxes showing other offers or advertisements
- A forward-to-friend feature

- The only major creative difference was how the first message utilized a suggestive picture of a young woman as the top image, while the second email showed a well-known female cyclist in action. Would a sexy image trump an action image when it came to click-throughs for this athletic audience?

RESULTS

Moser and his team saw outstanding successes and intriguing takeaways from the campaigns.

The open and click-through rates for each campaign were significantly higher than the brand's previous averages. And the list growth was considerable for the email program, showing that there was likely a viral effect in conjunction with a healthy performance by the display ads.

Results from the first campaign:

- Open rate increased 112 percent
- Click-throughs increased 6 percent
- 9,877 new people signed up for emails
- 2,318 opted in for text messages

Results from the second campaign:

- Open rate increased 142 percent
- Click-throughs increased 40 percent
- 10,045 new people signed up for emails
- 3,634 opted in for text-messages

Moser says the improved performance of the second campaign indicated a significant advantage -- higher relevance. In this case, sex didn't appear to sell, as the action-based image handily surpassed the suggestive image in terms of click-throughs.

He also lauds the lead-gen production (almost 20,000 new names) from the two sends.

"We more than doubled our subscriber list overnight."

The campaigns boosted the mobile marketing program, building the team's mobile list to almost 6,000 names, with just a small number of emails and a few weeks of targeted banners.

"It was definitely a success," Moser says.

The winning nature of the second campaign also led to a recent spin-off email that could help Moser and his team take the next step in turning email and mobile sends into something other than list-building or viral efforts.

In the message, Nytro offers an exclusive, limited time $1,900 discount for preorders on a new bike model premiering this winter. The only reason Nytro's promotional idea passed muster with the bicycle manufacturer -- at risk of upsetting its other retail partners -- was because the effort could be highly targeted via email due to the first two campaigns, Moser says.

"So at the end of the day, the whole thing started as lead generation," he adds. "But it's probably going to create sales for a very targeted product."

HOW TO INTEGRATE SOCIAL MEDIA WITH EMAIL AND SEO

Most marketers use social media as part of their marketing strategy. But, rather than approach this as a separate, isolated strategy, it's important to incorporate it to work alongside other tactics, such as email and search, for best results and maximum efficiency. It may require some extra effort, but a carefully planned strategy that properly integrates social media with other tactics can pay off for marketers.

In the MarketingSherpa blog post, "Making Social and Email Work Together," Jeanne S. Jennings points out that social media share links included in email messages received click-through significantly higher than the click-through rates on the "forward this email to a friend" links marketers have been using for years.

"When someone shares your email message on a social network, it's the ultimate [form of] viral marketing," Jennings says. "With very little effort your message has the potential to reach all of the recipients' friends and contacts on that network." In her blog post, Jennings cites a report by email automation company Silverpop which estimated that posted messages have an average increase in reach of more than 24.3%, based on original email messages delivered.

Marketing Research Chart: To what extent are marketers integrating social media?

The chart below from the 2011 MarketingSherpa Social Media Benchmark Survey looked at how marketers are integrating social media with other marketing tactics.

Q. To what extent does your organization integrate social media into the marketing mix?

Source: ©2011 MarketingSherpa Social Marketing Benchmark Survey
Methodology: Fielded February 2011, N=3,342
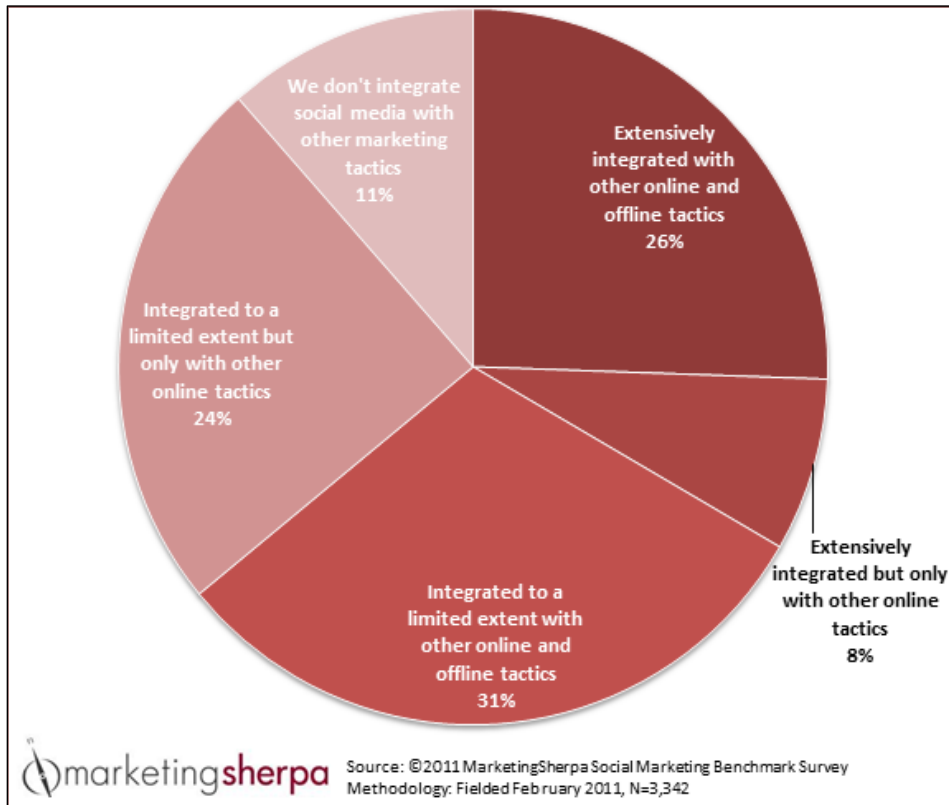
Only 11% of respondents said they don't integrate social media with other tactics. The majority integrated social media—at least to some extent—with other online and offline tactics. The remaining 32% integrated social media only with other online tactics.

Bottom Line: Most marketers realize the importance of working social media into a bigger and more comprehensive marketing strategy.

Tactic #1: Use sharing buttons wisely.

As Adam T. Sutton writes in the MarketingSherpa blog post, "Social Email Marketing: How to encourage sharing wisely, not randomly," just dropping in some social sharing buttons in your emails indiscriminately usually doesn't work very well.

Instead of using buttons randomly, you need to think about how you can best use them effectively. In the KFC Double Down promotion cited by Sutton, for example, the KFC team designed an email that was solely focused on encouraging recipients to share the message.

EXAMPLE: KFC DOUBLE DOWN EMAIL

Tactic #2: Design sharing buttons carefully

As Sutton points out in the previous blog post, the message generated when someone clicks on a sharing button in your email is very important to the performance of your campaign. "So, program your buttons carefully," he writes. "Be sure their default messages are relevant and compelling to the audience on the social network, because you need people to notice the link, click it, and engage with your page."

Tactic #3: Use a multi-faceted approach to generate more qualified leads

As explained in the MarketingSherpa article, "Using Social Sharing to Achieve Specific Email Goals: Five Insights," the combination of email and social media offers B2B marketers (and marketers in general) a powerful way to stay in touch with prospects, distribute thought-leadership content, or extend offers that can turn social followers or email subscribers into qualified leads.

You must be prepared to invest some extra effort, though. Achieving the benefits of social sharing for lead generation can require more work than, for example, sharing a simple consumer product offer with social followers. Pam O'Neal, VP Marketing, BreakingPoint Systems and her team have created a multifaceted email/social integration strategy that includes:

- Creating a monthly email newsletter from the company's top blog posts
- Placing social sharing buttons on all content
- Maintaining LinkedIn groups with their own email communications
- Using email drip-marketing campaigns to drive prospects back to the website where they can request a meeting with a sales team

Tactic #4: Realize the importance of providing share-worthy content

In the MarketingSherpa article from Tactic #3, B2B newsletter publisher SmartBrief said that after adding social sharing buttons to articles featured in their emails, there was a notable increase in visits from the social networks where subscribers shared content:

- Visits from LinkedIn increased 2,070%
- Visits from Twitter increased 1,680%
- Visits from Facebook increased 1,351%

The huge jump in traffic from those networks almost certainly featured many visitors who were encountering the SmartBrief brand for the first time. "For the most part, it's about visibility and showing the value of your publications, because this is the way people are sharing information with each other," says Rob Birgfield, Director, Audience Development, SmartBrief.

In the MarketingSherpa blog post, "Social Bookmarks in B2B Email," Adam T. Sutton shares the strategy used by Kennametal in a campaign to target metal workers. The team realized current email subscribers may not be the target audience for the specific campaign, so they incorporated social bookmarking buttons in the email, to make it easier for recipients to share the content with the correct customers.

EXAMPLE: KENNAMETAL EMAIL WITH BOOKMARKING BUTTONS

Tactic #5: Be selective in what you ask people to share

As noted in the *MarketingSherpa 2012 Email Marketing Handbook*, not every email message is a fit for social sharing. Choose messages that your audience will find relevant to pass on to their friends or colleagues. Then make the content easy to share using a format with a single purpose, simple navigation and a strong prompt to share.

Similar to email, the content must be helpful, interesting and pertinent to motivate subscribers to share and for the brand to be respected as a thought leader. What is different is that many social sites (especially Twitter) will use your email subject line as the default text when published.

Carefully consider your subject line wording; what makes it stand out on a social media feed might (or might not) be the same for an email inbox. In addition, Twitter has a 140-character limit for its updates, so your subject line should be shorter to allow space for the post to be re-Tweeted.

Tactic #6: Use social media to help build inbound links for SEO benefits

In the MarketingSherpa article, "Special Report: Social Media's Impact on SEO – Five Trends to Guide an Integrated Strategy," several marketers said social media and search naturally complement each other, especially when it comes to link-related tactics.

"There's natural relationship," says Craig Macdonald, VP, Marketing and Product Management, Covario. "If you execute good linking strategies when you're doing content development for social media, then you find you can drive better rankings from an SEO standpoint."

In the same article, the team from Hearst Digital Media discussed the importance of providing good content so audiences will link to it.

"Our entire interest from a search perspective is almost exclusively on the power of social for link building, which is such a critical part of search performance," says Dan Roberts, Senior SEO Strategies and Analyst, Hearst Digital Media. Roberts' team found that repurposing content for social news websites such as Digg and reddit can generate a tremendous number of inbound links.

Some things to keep in mind:

- Most network links are "nofollow"

Many social networks links are meant to be passed over by search engines, as they employ the "nofollow" tag in the HTML code. This code means that many social media links, such as Facebook and Twitter updates, will not provide a direct SEO benefit to their destinations. However, linking to good content in an update calls an audience's attention to that webpage. The audience can then publish the link elsewhere or share it further in the network.

- Profiles have good links

Robert Holland, Founder, Social Media SEO, an industry blog, says marketers can get SEO benefits by adding relevant URLs to their profiles on Facebook and Twitter.
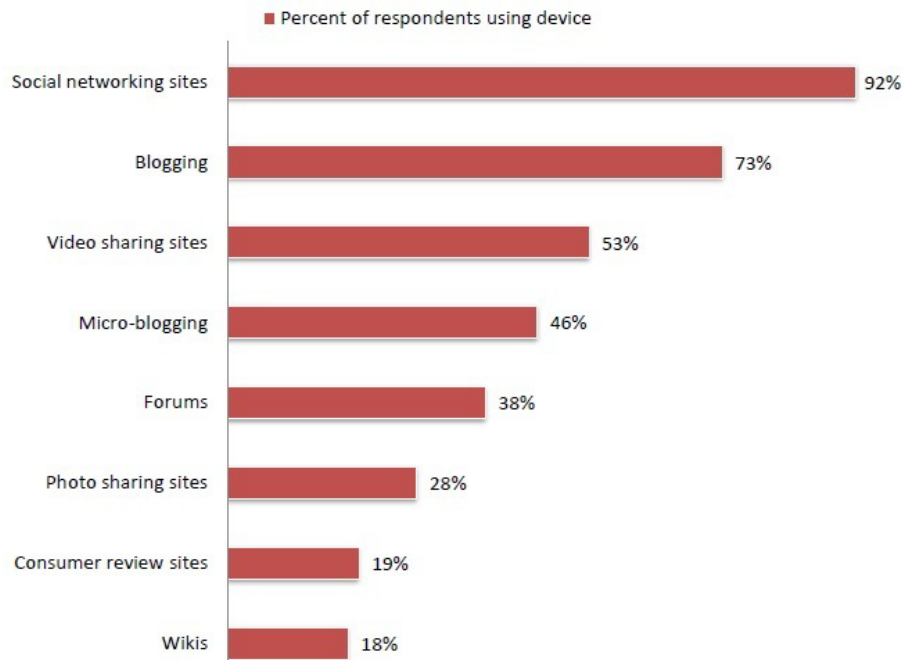
- Social channels get links out fast

When dealing with emerging topics, Marshall Simmonds, Chief Search Strategist, New York Times Company, finds his team only has a matter of hours to build link authority. "In the early phase of a breaking news story, link equity is doled out, and sometimes that window of opportunity is very small."

The team compensates by pushing hard to ensure content is accurate and that it immediately gets pushed to Google News, Twitter, Facebook and other channels so audiences see it immediately.

Tactic #7: Realize the importance of social networking sites for SEO purposes

One advantage of using social networking for SEO purposes is that most likely you already have the basic tools in place. As the chart below from the 2011 MarketingSherpa Social Media Benchmark Survey shows, nearly all marketers are already using social networking for SEO. So the foundation is already there—it's just a matter of utilizing these tools wisely and incorporating them efficiently into your overall SEO efforts.

CHART: SOCIAL MEDIA DEVICES UTILIZED FOR SEO PURPOSES
Q. What social media device(s) does your organization currently utilize to support your search engine optimization (SEO) plan? Please check all that apply.

■ Percent of respondents using device

Social networking sites	92%
Blogging	73%
Video sharing sites	53%
Micro-blogging	46%
Forums	38%
Photo sharing sites	28%
Consumer review sites	19%
Wikis	18%

MarketingSherpa ®2010
Source / Methodology: MarketingSherpa Search Marketing Benchmark Survey / Fielded April, 2010 N=2,194

The chart shows that social networking sites were the social media devices most commonly used for search purposes, with nearly all respondents using them for that purpose. This is likely due to both the popularity of some social networking sites as well as the ease of set-up for profiles on these types of sites. In very little time, a company can be up and running with an active social networking profile.

Tactic #8: Consider how search and social data complement each other

As the MarketingSherpa article in Tactic #6 points out, many tools used to monitor social media conversations are keyword-driven. Search engine marketing is also keyword-driven – and the two channels can benefit from one another's data. For example, SEO keyword research can identify keywords and phrases to use in social media channels to attract more visitor traffic to that content, and to help that content rank well.

Analyzing the language customers use to discuss your brand in social media circles can contribute to your SEO keyword research. Adding social data to keyword research keeps marketers from guessing, Macdonald says. "Have the consumers tell you how they want to find your brand."

Also, Macdonald's team found success using search and social media data to measure the impact of clients' branding campaigns. After the team launches a major campaign, they can monitor the level of social media discussion and searches around the campaign and brand keywords. They then use the data to help gauge branding impact.

Tactic #9: Determine your audience's habits and preferences.

In the MarketingSherpa article, "[Email and Social Media Integration: Five Strategies to Grow Audiences and Design Campaigns]()," the team from cookware and cake-decorating accessory company Wilton decided to supplement email marketing tactics with a social media strategy. They wanted to see how much overlap there was between their opt-in database and social media channels.

To find out, they conducted several surveys—one asking their email recipients which social media sites they used, and another (posted on their social media feeds) asking people about their newsletter subscription and social media habits. They also observed discussions on social media sites to gather information about their followers' habits and characteristics. This helped identify differences between their social media followers and their email subscribers.

Armed with this information, the Wilton team adjusted their messaging strategy to appeal to each group. They developed a cross-channel list building strategy:

- Email promotion to gain Facebook fans

The team used their email newsletter to boost awareness of the Facebook page. They added buttons to their email newsletter to encourage subscribers to follow the brand on Facebook, and saw a 325% increase in new Facebook fans on the day they sent the newsletter.

- Facebook promotion to gain newsletter subscribers

The team also tested the effect of promoting the email newsletter to Facebook fans. They created a Facebook wall post that encouraged fans to opt-in, and saw a 225% increase in newsletter subscriptions compared to the average daily sign-up rate.

EXAMPLE: WILTON EMAIL WITH SOCIAL MEDIA SHARING BUTTONS

Useful Links and Resources:

[Location-based Email Marketing: 6 Tactics to Leverage Social Check-In to Grow Email Lists and Improve Engagement](#)

[MarketingSherpa B2B Marketing Summit '10: Integrating Social Media with B2B Email](#)

[Inbound Marketing: Unlock the Content from Your Emails and Social Marketing](#)

[Combining Email, Search, Social and PR for a Content Marketing Campaign](#)

[MarketingSherpa 2012 Search Marketing Benchmark Report – SEO Edition](#)

WARM UP LEADS WITH TARGETED SERIES OF EMAILS

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INTEGRATING EMAIL INTO THE REST OF YOUR MARKETING MIX

It has never been so challenging, nor have the options been more plentiful, for marketers to weave a brand's personality into a person's daily life. We live in a society constantly on the move. No longer does a consumer focus attention on just one activity. While sitting on the train, a rider will simultaneously text, talk to the person next to them, and work on their tablet. To effectively reach consumers, brands now have to envelop the shopper in the brand's experience. To cultivate an environment for a relationship to grow, organizations must make a number of marketing tactics work seamlessly together. Email continues to be a common thread. In this chapter, we will uncover how email marketing is being integrated into the mix.

TOP MARKETING TACTICS TO INTEGRATE WITH EMAIL

Chart: Three dimensions of tactics integrated with email - effectiveness, difficulty and use
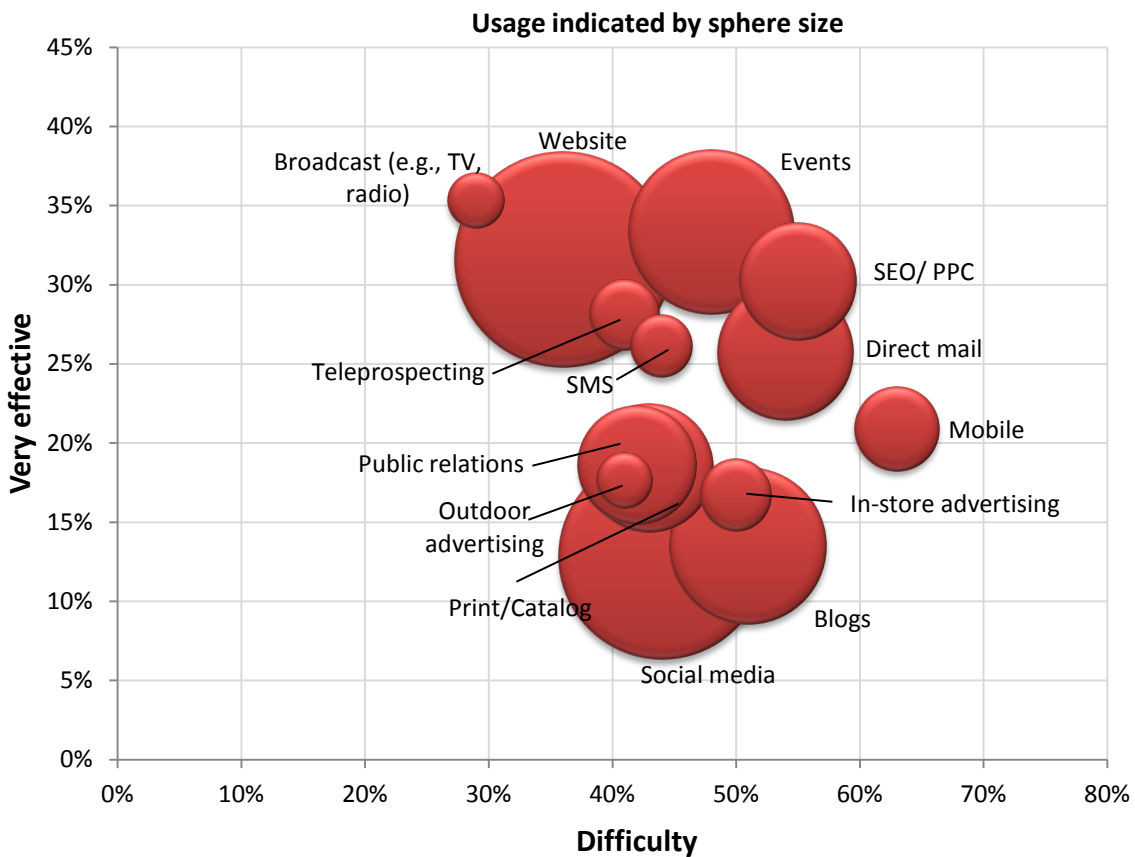
Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

CHIEF CHANNELS TO INCORPORATE WITH EMAIL

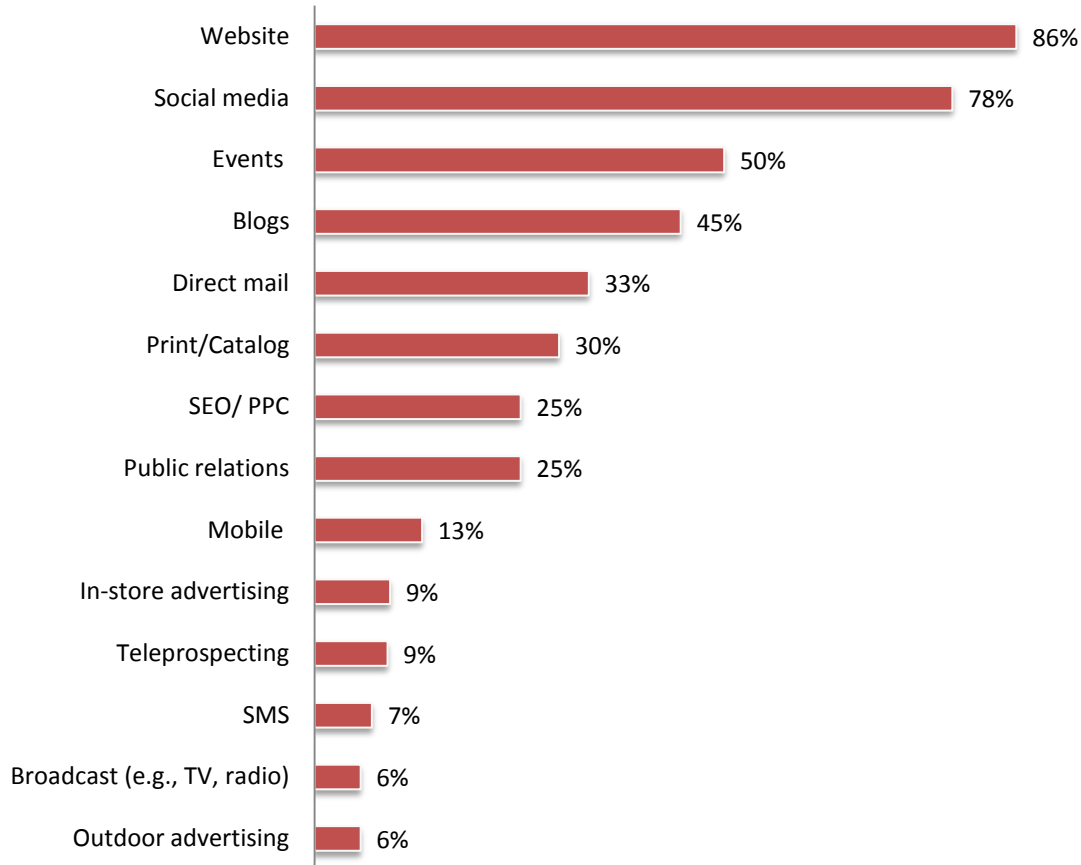### Chart: Website and social media friendly with email

Q. Which marketing channels does your organization integrate with your email program?

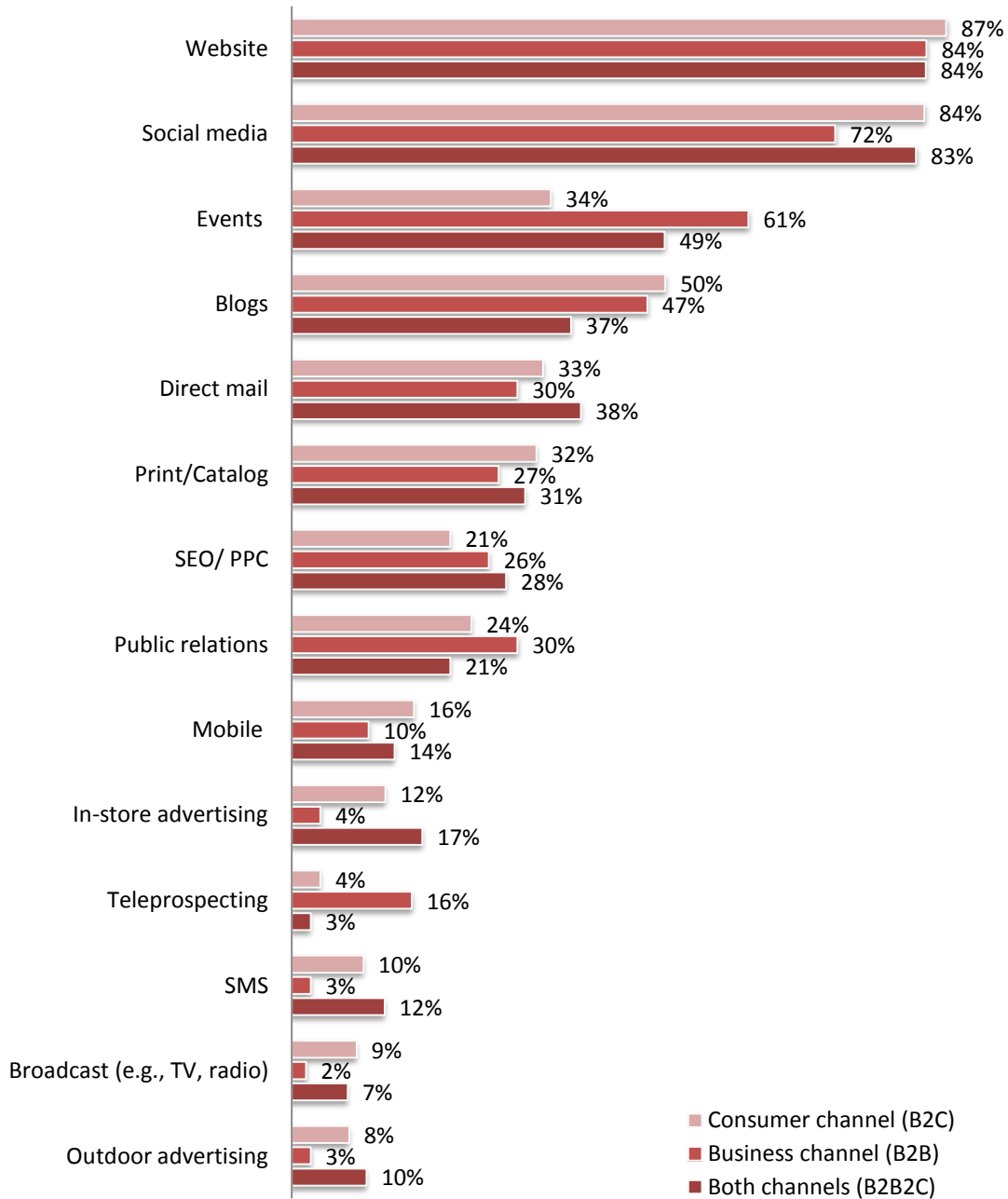| Channel	Percentage
Website	86%
Social media	78%
Events	50%
Blogs	45%
Direct mail	33%
Print/Catalog	30%
SEO/ PPC	25%
Public relations	25%
Mobile	13%
In-store advertising	9%
Teleprospecting	9%
SMS	7%
Broadcast (e.g., TV, radio)	6%
Outdoor advertising	6%

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

As an organization's website has traditionally served as its marketing hub, email has constructed a mutually beneficial relationship. A reported 86% of organizations integrate their website with email. The outgoing email communications have driven traffic back to the website for news, product details and for many, participation in an active community of like-minded consumers. Conversely, the website is the common venue to acquire opt-ins for email campaigns.

Social media may be relatively new, but it has been quickly incorporated with email campaigns as 78% of marketers fuse the two tactics. The simplistic nature of adding share-with-your-network (SWYN) buttons and for social media users to disperse email content contributes to the fast adoption of this strategy.

It's no coincidence that beyond websites and social media, there is no one marketing tactic the majority of organizations incorporate with email. Recall an earlier chart uncovered only a small percentage of CMOs made integrating email with online (27%) and offline (10%) marketing tactics top objectives.

Chart: Channel integration, by primary channel

Channel	Consumer channel (B2C)	Business channel (B2B)	Both channels (B2B2C)
Website	87%	84%	84%
Social media	84%	72%	83%
Events	34%	61%	49%
Blogs	50%	47%	37%
Direct mail	33%	30%	38%
Print/Catalog	32%	27%	31%
SEO/ PPC	21%	26%	28%
Public relations	24%	30%	21%
Mobile	16%	10%	14%
In-store advertising	12%	4%	17%
Teleprospecting	4%	16%	3%
SMS	10%	3%	12%
Broadcast (e.g., TV, radio)	9%	2%	7%
Outdoor advertising	8%	3%	10%

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

B2C organizations are three times more likely to integrate email with short messaging service (SMS) than B2B firms. In fact, 12% of B2C marketers reported using SMS to alert subscribers of email in their inbox.
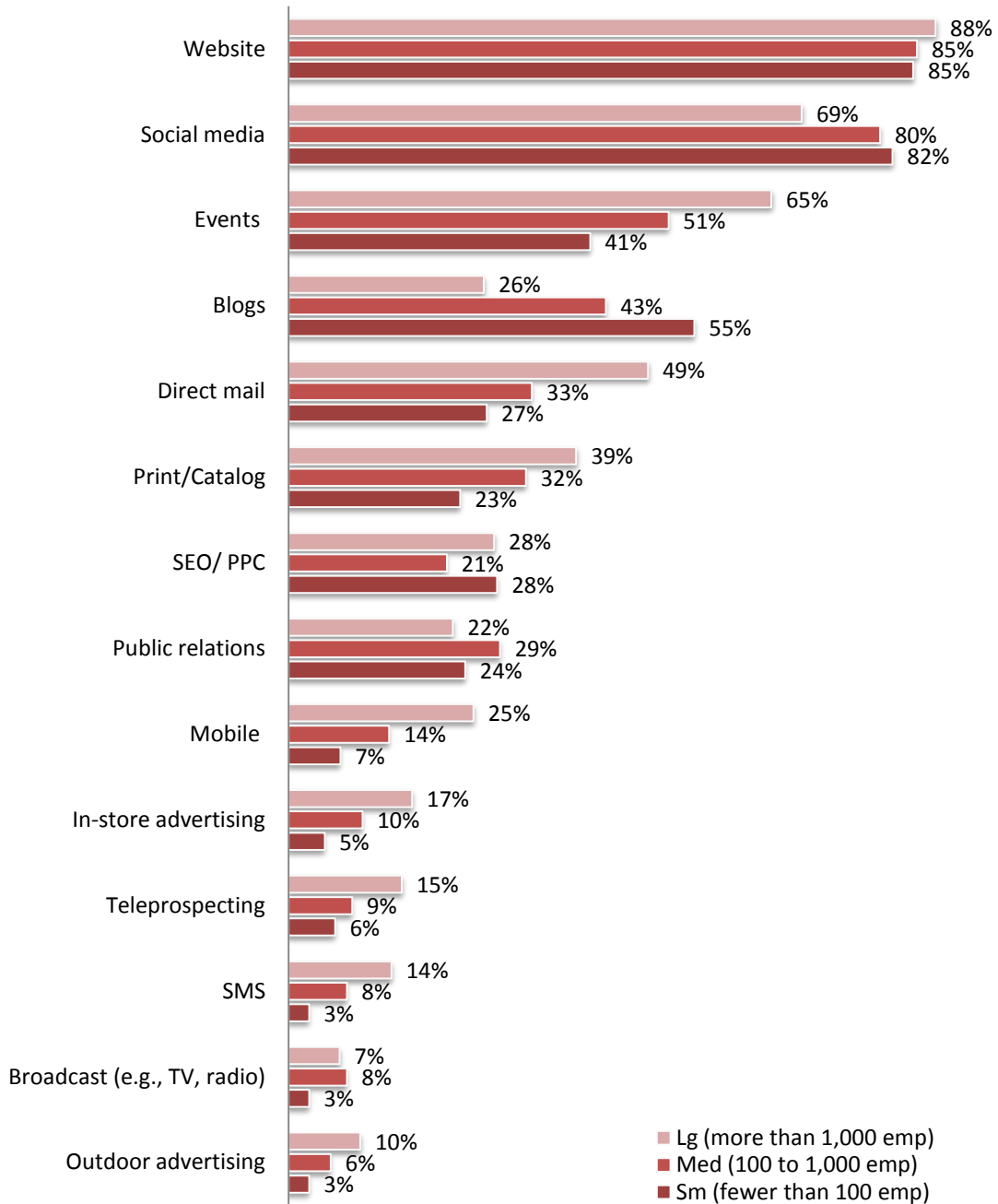
Chart: Channel integration, by industry sector
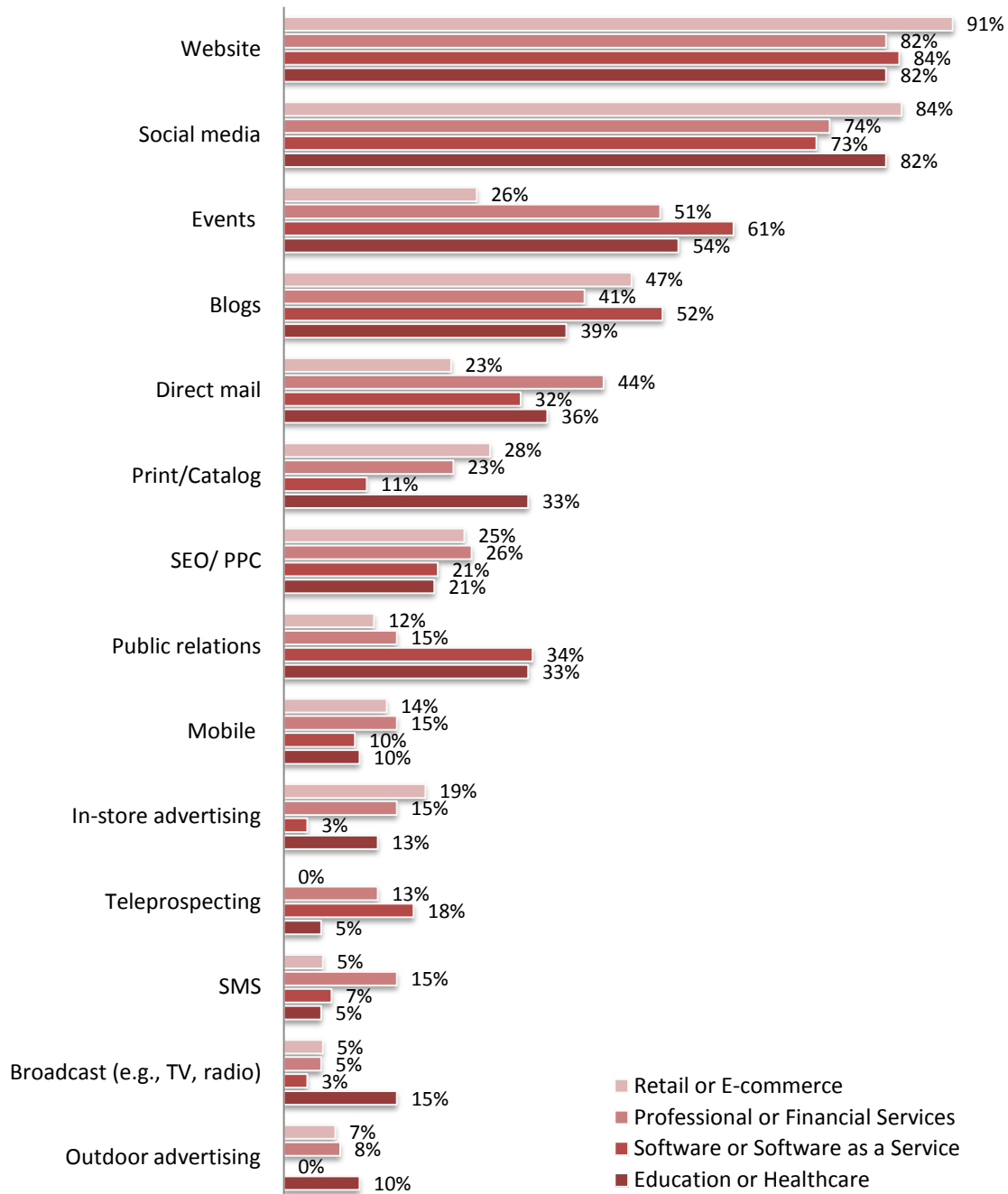
Channel	Retail or E-commerce	Professional or Financial Services	Software or Software as a Service	Education or Healthcare
Website	91%	82%	84%	82%
Social media	84%	74%	73%	82%
Events	26%	51%	61%	54%
Blogs	47%	41%	52%	39%
Direct mail	23%	44%	32%	36%
Print/Catalog	28%	23%	11%	33%
SEO/ PPC	25%	26%	21%	21%
Public relations	12%	15%	34%	33%
Mobile	14%	15%	10%	10%
In-store advertising	19%	15%	3%	13%
Teleprospecting	0%	13%	18%	5%
SMS	5%	15%	7%	5%
Broadcast (e.g., TV, radio)	5%	5%	3%	15%
Outdoor advertising	7%	8%	0%	10%

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Organizations are well aware of the positive influence that search engine optimization and pay-per-click advertising has on their marketing programs. However, only 25% businesses are combining SEO/PPC with their email campaigns. Professional and Financial Services are integrating slightly above the average at 26%. Companies that pair the tactics have found success in using PPC to test subject lines and gain higher conversion rates by promoting the offer the day before and after the email is sent.
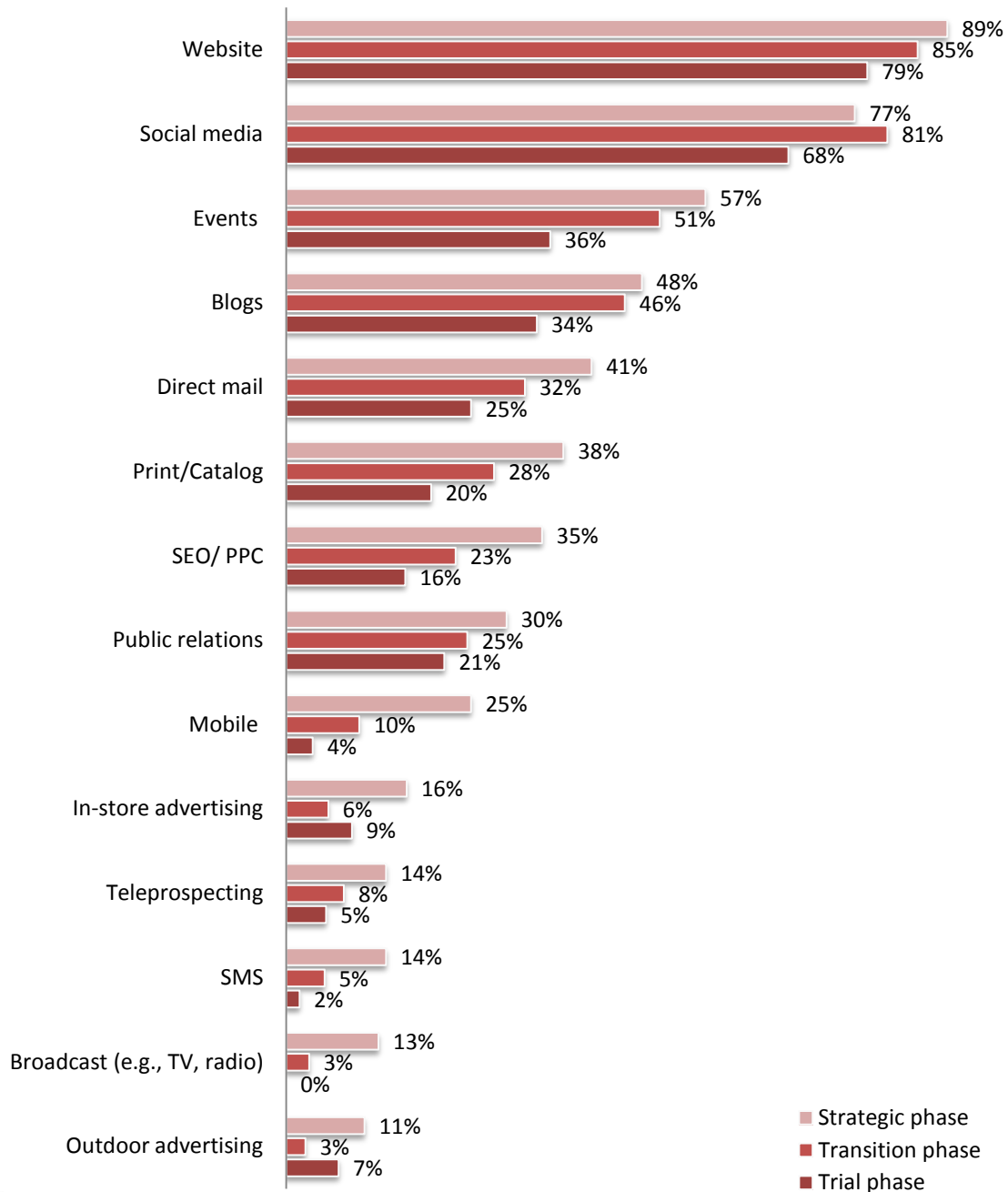
Chart: Channel integration, by organization size

Channel	Lg (more than 1,000 emp)	Med (100 to 1,000 emp)	Sm (fewer than 100 emp)
Website	88%	85%	85%
Social media	69%	80%	82%
Events	65%	51%	41%
Blogs	26%	43%	55%
Direct mail	49%	33%	27%
Print/Catalog	39%	32%	23%
SEO/ PPC	28%	21%	28%
Public relations	22%	29%	24%
Mobile	25%	14%	7%
In-store advertising	17%	10%	5%
Teleprospecting	15%	9%	6%
SMS	14%	8%	3%
Broadcast (e.g., TV, radio)	7%	8%	3%
Outdoor advertising	10%	6%	3%

■ Lg (more than 1,000 emp)
■ Med (100 to 1,000 emp)
■ Sm (fewer than 100 emp)

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Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

The low cost of constructing a corporate blog page compared to a website could be the reason smaller companies are twice as likely to integrate with blogs as their large competitors. For small businesses without the internal skill set to develop a site or the financial resources to outsource the project, blogging offers an inexpensive method to create a digital footprint. By sharing their subject matter expertise, small firms can attract a loyal readership and convert those to email subscribers.

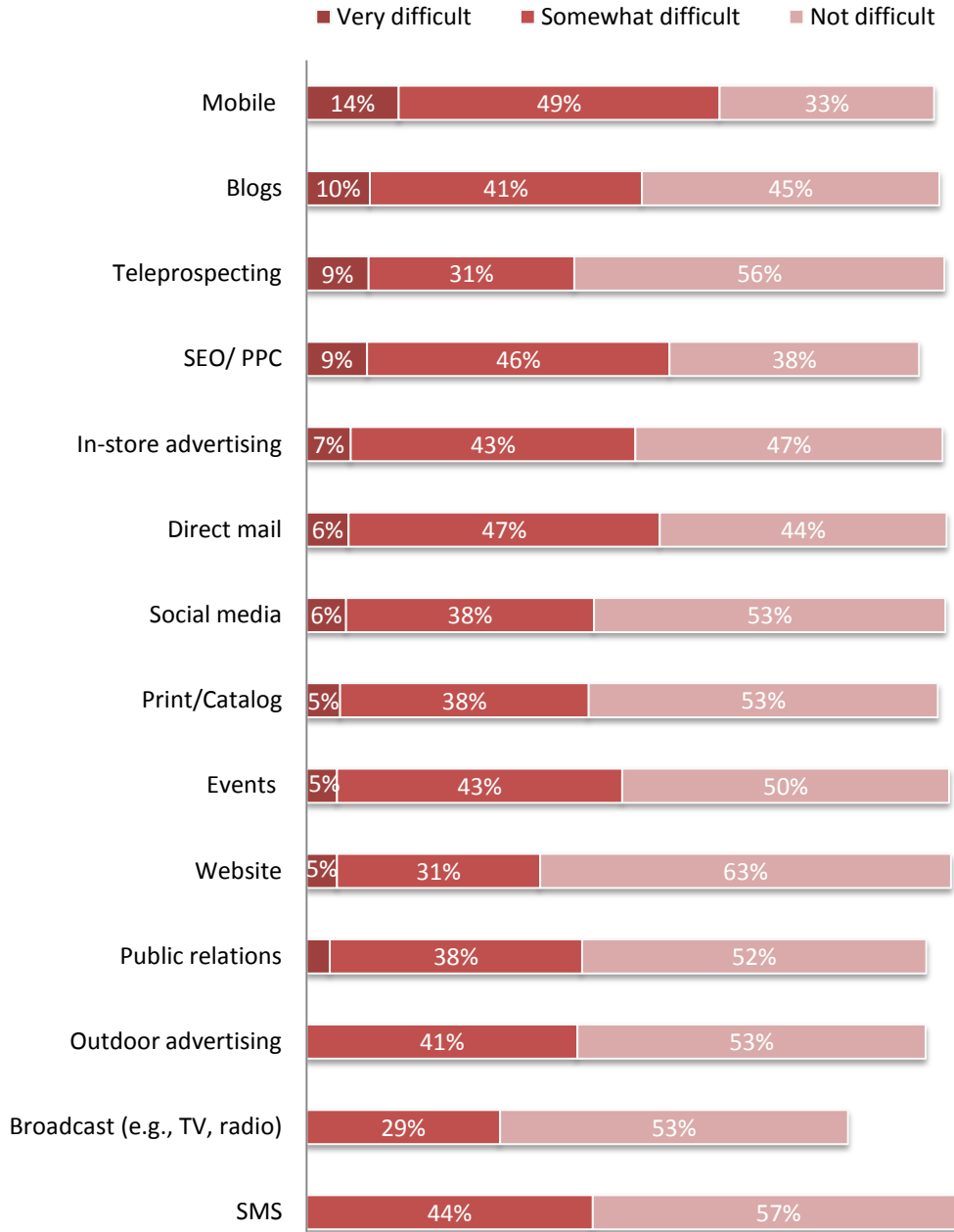**Chart: Channel integration, by email integration maturity**

Channel	Strategic phase	Transition phase	Trial phase
Website	89%	85%	79%
Social media	77%	81%	68%
Events	57%	51%	36%
Blogs	48%	46%	34%
Direct mail	41%	32%	25%
Print/Catalog	38%	28%	20%
SEO/ PPC	35%	23%	16%
Public relations	30%	25%	21%
Mobile	25%	10%	4%
In-store advertising	16%	6%	9%
Teleprospecting	14%	8%	5%
SMS	14%	5%	2%
Broadcast (e.g., TV, radio)	13%	3%	0%
Outdoor advertising	11%	3%	7%

■ Strategic phase
■ Transition phase
■ Trial phase

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Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Engaging the mobile user involves more than ensuring the email renders properly. To be successful marketers, messages must connect with readers on the move, and take advantage of opportunities to provide value, specifically with location-based marketing. This endeavor is talent and resource intensive. The proceeding chart will reveal that mobile is the most challenging channel to unify with email. This is consistent with the above chart demonstrating that companies in the Strategic phase of integration maturity are six times more likely to combine email with mobile than Trial-phase marketers.

T̶HE TIME, EFFORT AND EXPENSE REQUIRED FOR CHANNEL INTEGRATION

Chart: Mobile identified as a challenging channel to integrate with email

Q. Please indicate the degree of DIFFICULTY (time, effort and expense) involved in integrating email with the following marketing channels.
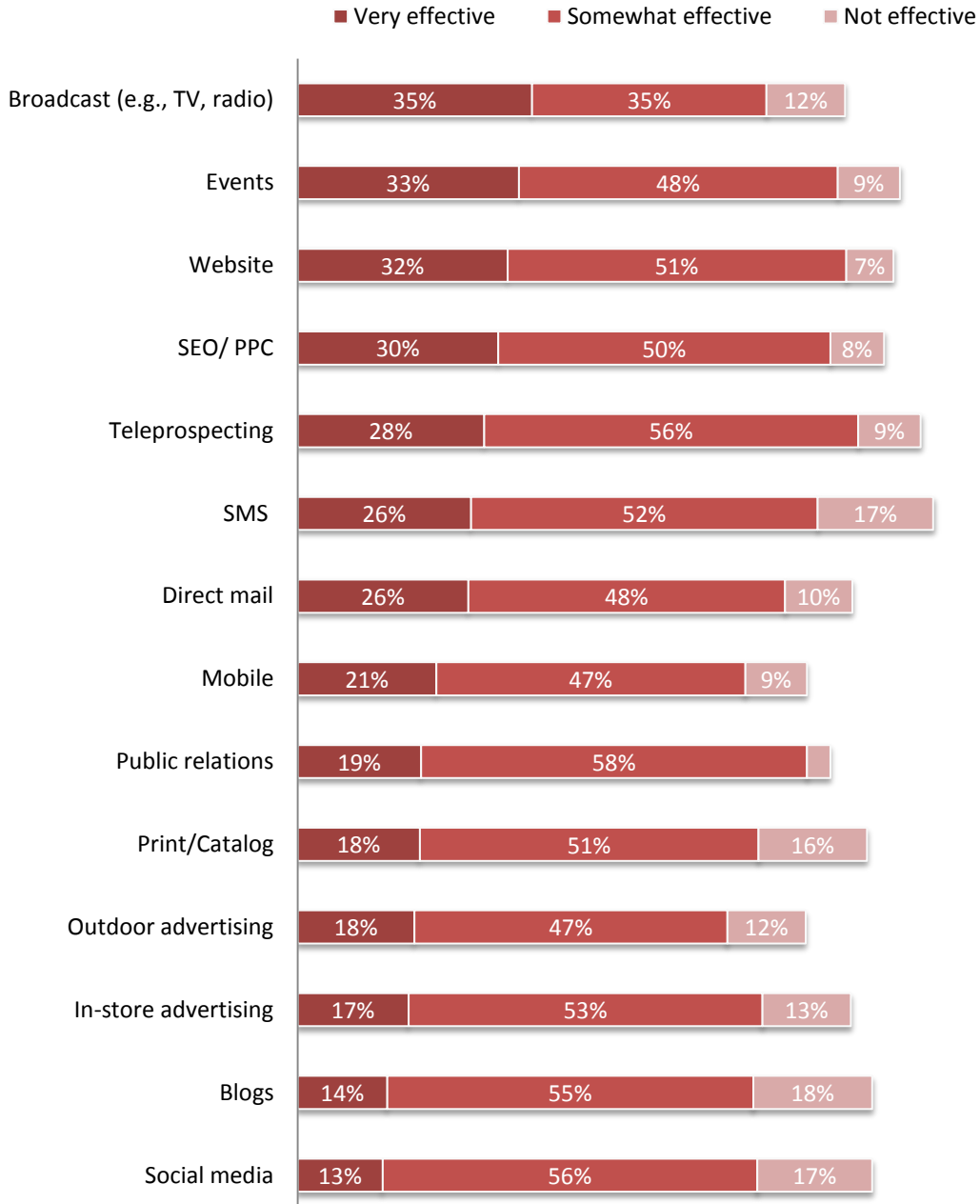
Legend: ■ Very difficult ■ Somewhat difficult ■ Not difficult

Channel	Very difficult	Somewhat difficult	Not difficult
Mobile	14%	49%	33%
Blogs	10%	41%	45%
Teleprospecting	9%	31%	56%
SEO/ PPC	9%	46%	38%
In-store advertising	7%	43%	47%
Direct mail	6%	47%	44%
Social media	6%	38%	53%
Print/Catalog	5%	38%	53%
Events	5%	43%	50%
Website	5%	31%	63%
Public relations		38%	52%
Outdoor advertising		41%	53%
Broadcast (e.g., TV, radio)		29%	53%
SMS		44%	57%

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

THE EFFECTIVENESS OF CHANNELS INTEGRATED WITH EMAIL

Chart: Channel integration - level of effectiveness

Q. Please assess your email program's effectiveness when integrated with the following marketing channels.

■ Very effective ■ Somewhat effective ■ Not effective

Channel	Very effective	Somewhat effective	Not effective
Broadcast (e.g., TV, radio)	35%	35%	12%
Events	33%	48%	9%
Website	32%	51%	7%
SEO/ PPC	30%	50%	8%
Teleprospecting	28%	56%	9%
SMS	26%	52%	17%
Direct mail	26%	48%	10%
Mobile	21%	47%	9%
Public relations	19%	58%	
Print/Catalog	18%	51%	16%
Outdoor advertising	18%	47%	12%
In-store advertising	17%	53%	13%
Blogs	14%	55%	18%
Social media	13%	56%	17%

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Only 6% of firms are integrating email with broadcast assets, but those that do are finding it fruitful.

EMAIL READERSHIP ON MOBILE PHONES

Chart: Marketers report 11% of their subscribers read emails on mobile phones

Q. Approximately what percentage of email subscribers read your organization's emails on mobile phones?
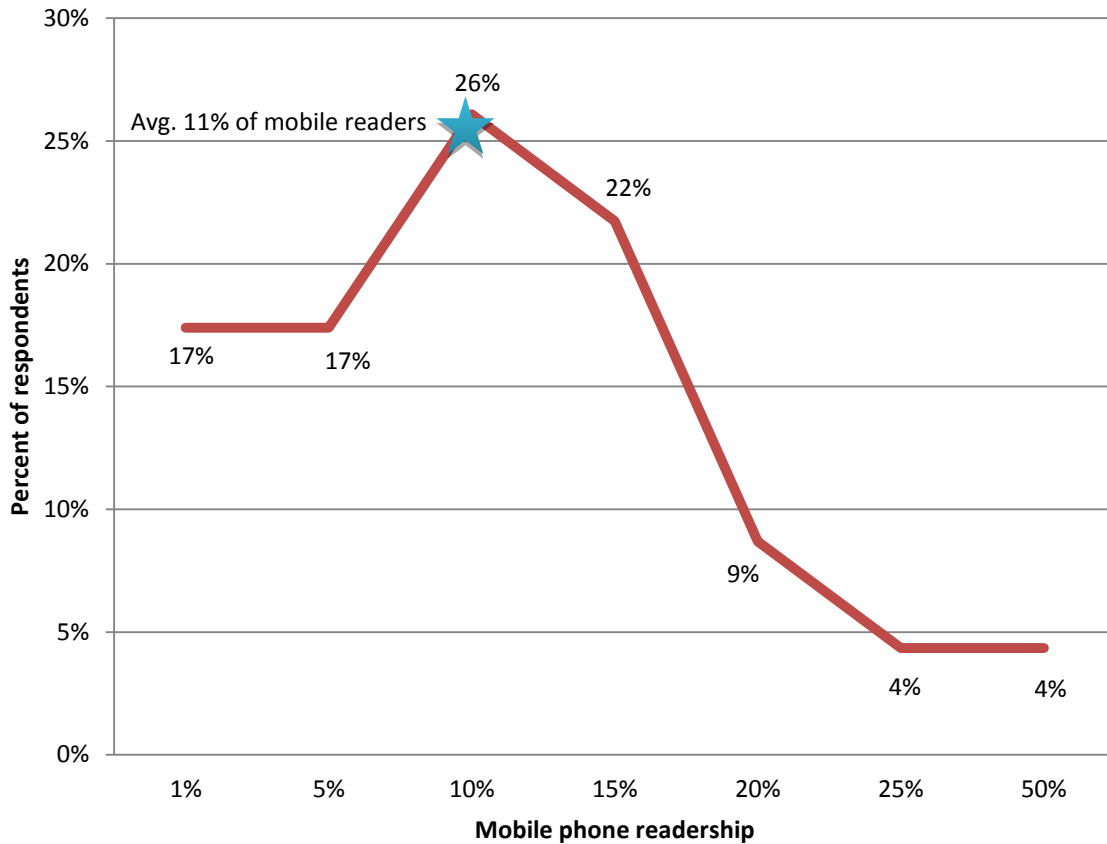
Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Mobile marketing has been discussed at length in every email marketing publication and conference, and for good reason. Consumers are relying on mobile devices to retrieve information, respond to urgent news, and make purchasing decisions. Regarding email, Nielsen found in May 2010 that email dominates time spent on the mobile Web at 42%. The next closest activities are portals (12%) and social media (11%).

In this survey, we found that marketers reported an average of 11% of their subscribers read emails on mobile phones, which is a slightly smaller percentage than other industry benchmarks report such as Return Path and Litmus both at 15%. As the chart above demonstrates, there can be a wide variance depending on an organization's target audience's age and income demographic.

In addition to rendering quality, which will be discussed later in this chapter, it's essential for marketers to determine when an opt-in is likely to open an email on their mobile device. For example, a publisher catering to parents may choose to send their emails during the morning school drop-off hours to allow subscribers to read their newsletter while they wait in the carpool line.
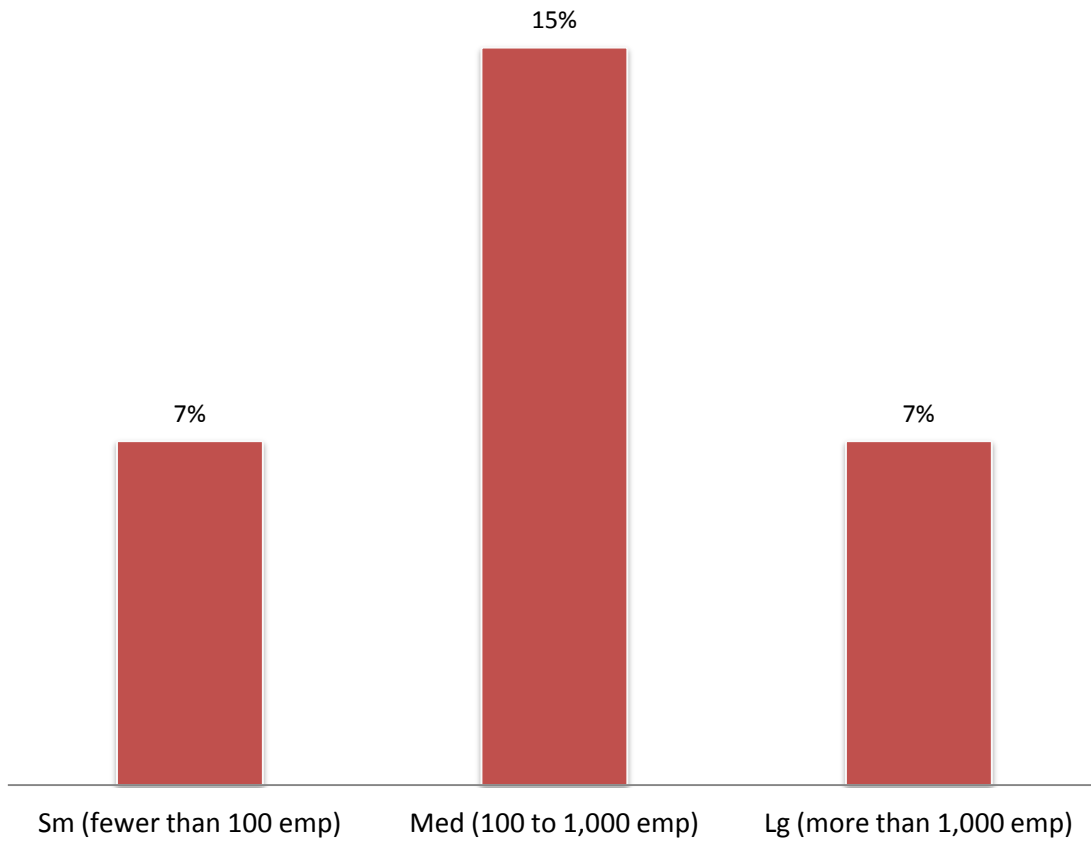
Chart: Mobile readership, by primary channel
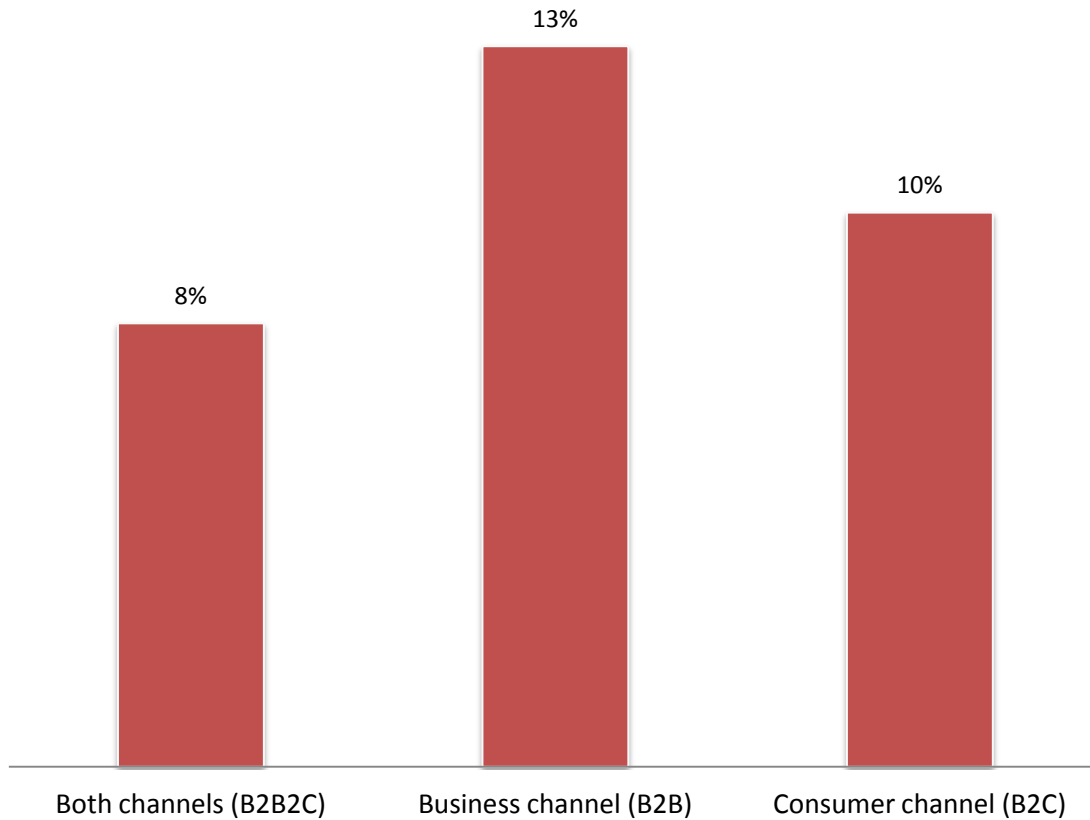
Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
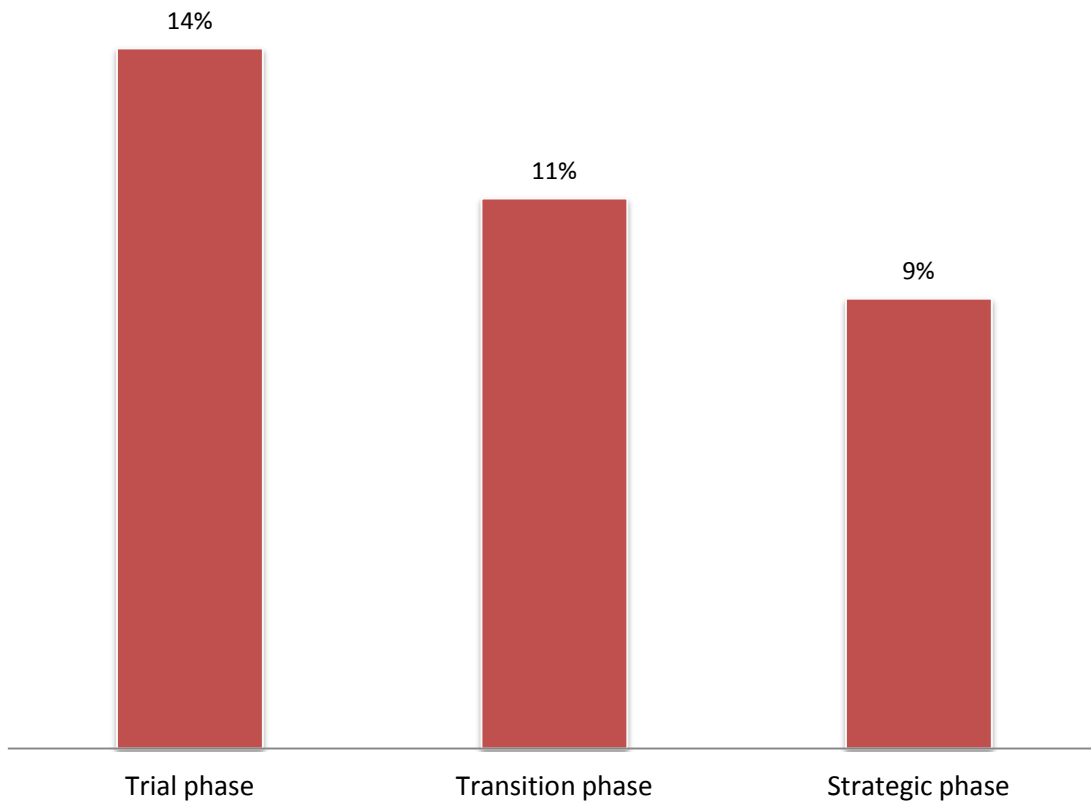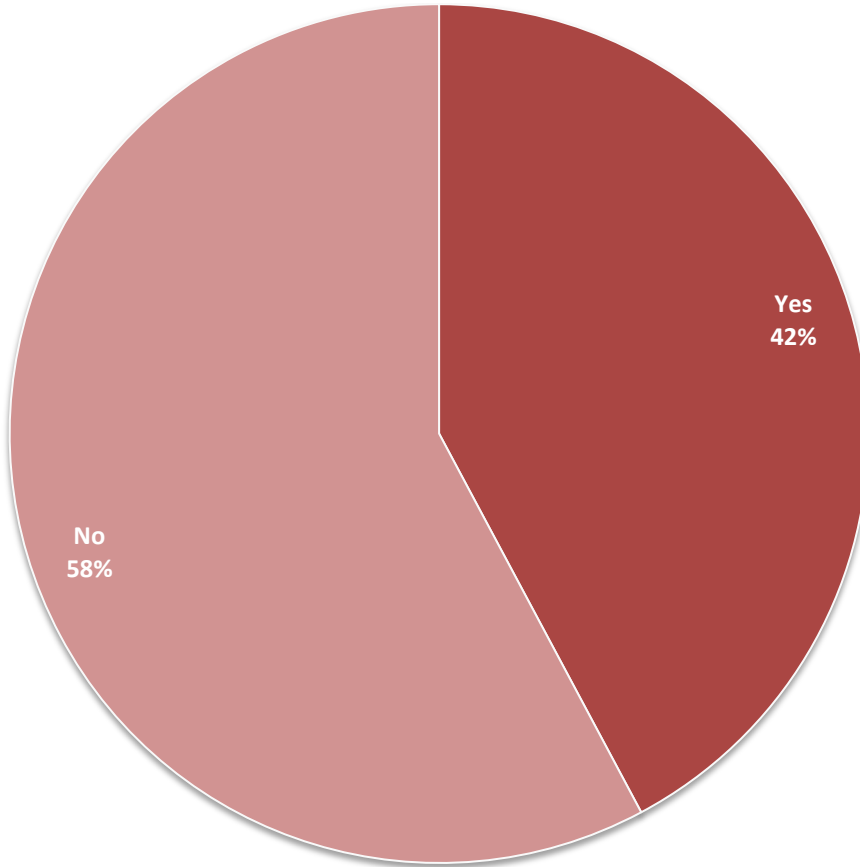Methodology: Fielded July 2011, N=2,735

The pervasiveness of the Blackberry in the business channel has created a slight lead in mobile readership. With Nielsen reporting in May 2011 that 55% of new handsets purchased in the U.S. are smartphones, look for the other channels to catch up quickly.

Mobile marketing - Our target audience is primarily female, married with kids. They're using smartphones at an accelerated rate, and we need to be sure they see our messages."
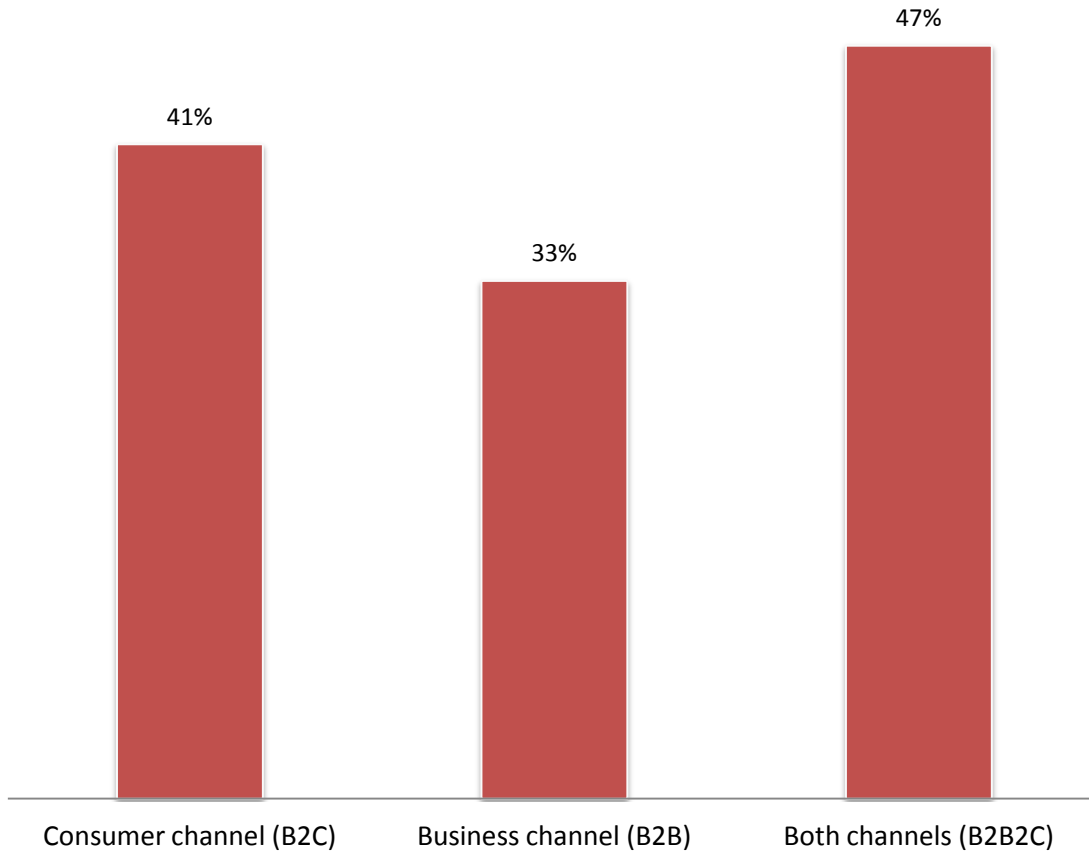
-Marketer insight on trends

Chart: Mobile readership, by industry sector
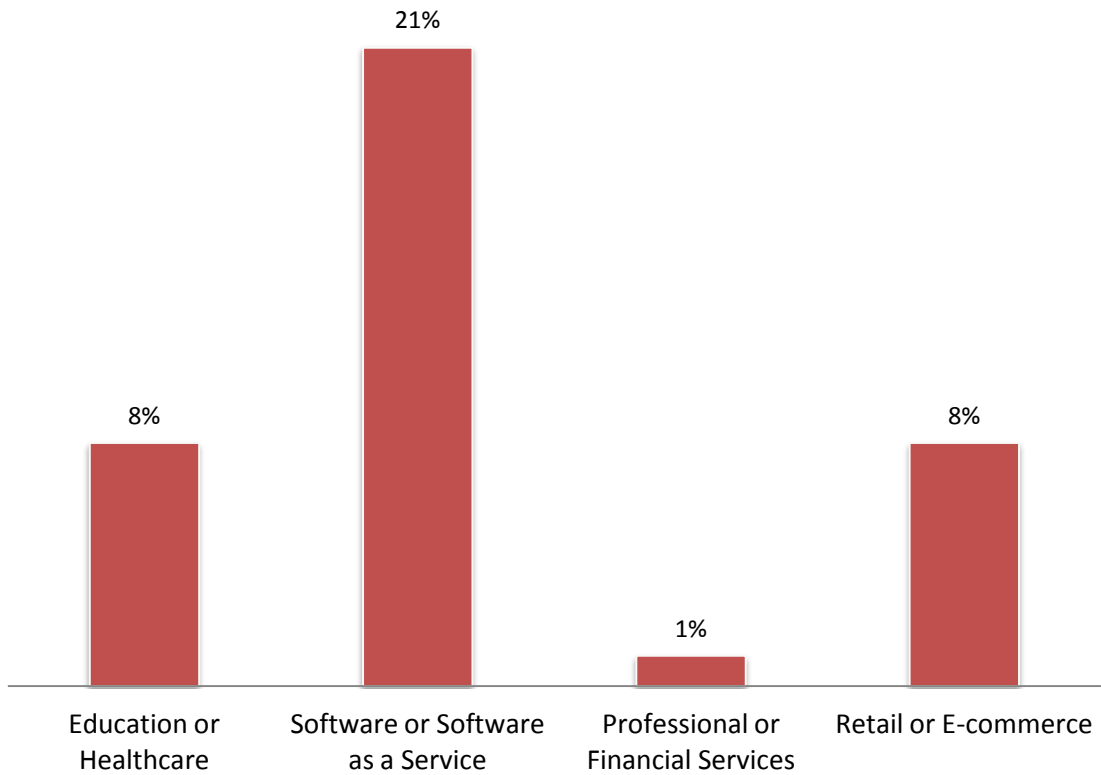
Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Software and SaaS companies lead all industries in mobile readership. This may be because those working in the technology sector are traditionally early adopters of the proficiencies provided by mobile devices.

Chart: Mobile readership, by organization size

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Chart: Mobile readership, by email integration maturity

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

MOBILE MAKEOVER IN ANTICIPATION OF MASS ADOPTION

Chart: Nearly half of marketers are designing emails for mobile viewing

Q: Are you designing your emails to render properly on smartphones? (e.g., iPhone, Android)

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Organizations are eager to better understand their customers' preferences and continuously watch the latest trends in technology and lifestyles. Many are finding email subscribers are no longer viewing their communications on large PC monitors, but rather on small mobile screens. To ensure their brand is providing a great customer experience, marketers are optimizing their email designs for mobile devices, specifically smartphones.

Even with a reported average of 11% of customers viewing email on mobile phones, 42% of marketers are designing messages to render properly on smartphones. Clearly organizations are investing resources to keep ahead of what many feel is the inevitable shift from using the personal computer to mobile phones to access the Internet. The new best practices for the smaller screen include brief copy, one column format, larger font sizes and plenty of space around links to enable fingers to accurately make contact. The last thing a marketer wants to do is make an opt-in work to read the message by forcing him or her to enlarge the screen or unnecessarily scroll down to view the copy.

Chart: Designing emails for smartphones, by primary channel

In addition to rendering properly to produce an enjoyable mobile experience, marketers need to consider the environment in which the email arrives. The subscriber can check his or her inbox on the weekend at a sporting event, waiting for a flight, or before stepping into a business meeting. Readers on the run frequently triage their inbox looking for urgent messages, deleting the junk, and filing what they will review at a later time.
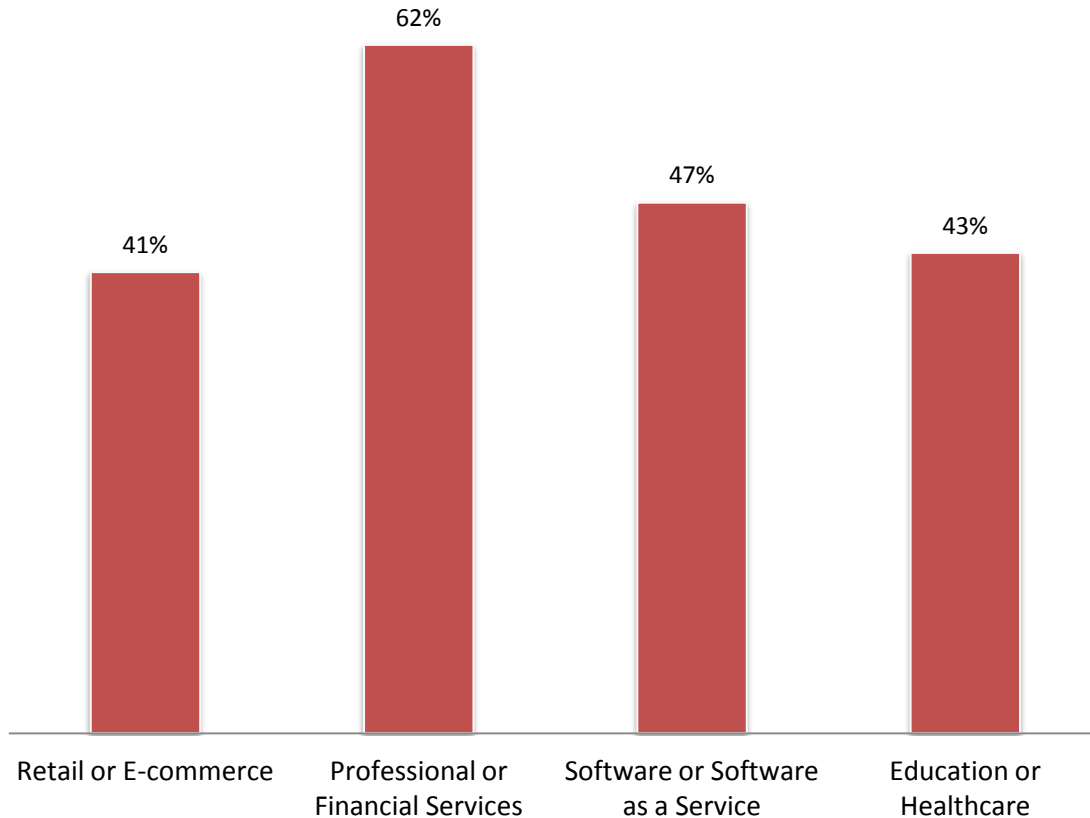
Marketers recognize smartphones have many capabilities beyond retrieving email. Leveraging a phone's ability to snap photos, or identify the subscriber's geographic location, can create opportunities to engage in a more relevant fashion with the opt-in.

We have seen B2C firms use technology that allows the offer sent in a communication to change based on the location and time the email is opened. Similarly, B2B marketers use quick response (QR) codes in trade show booths to encourage attendees to download the code and register for the company's email newsletter.

"Learning how to manufacture relevant content that will be acceptable to mobile phone customers to get a better clickthrough ratio."

-Marketer insight on big barriers

Chart: Designing emails for smartphones, by industry sector

62%

47%

41%

43%

Retail or E-commerce   Professional or Financial Services   Software or Software as a Service   Education or Healthcare
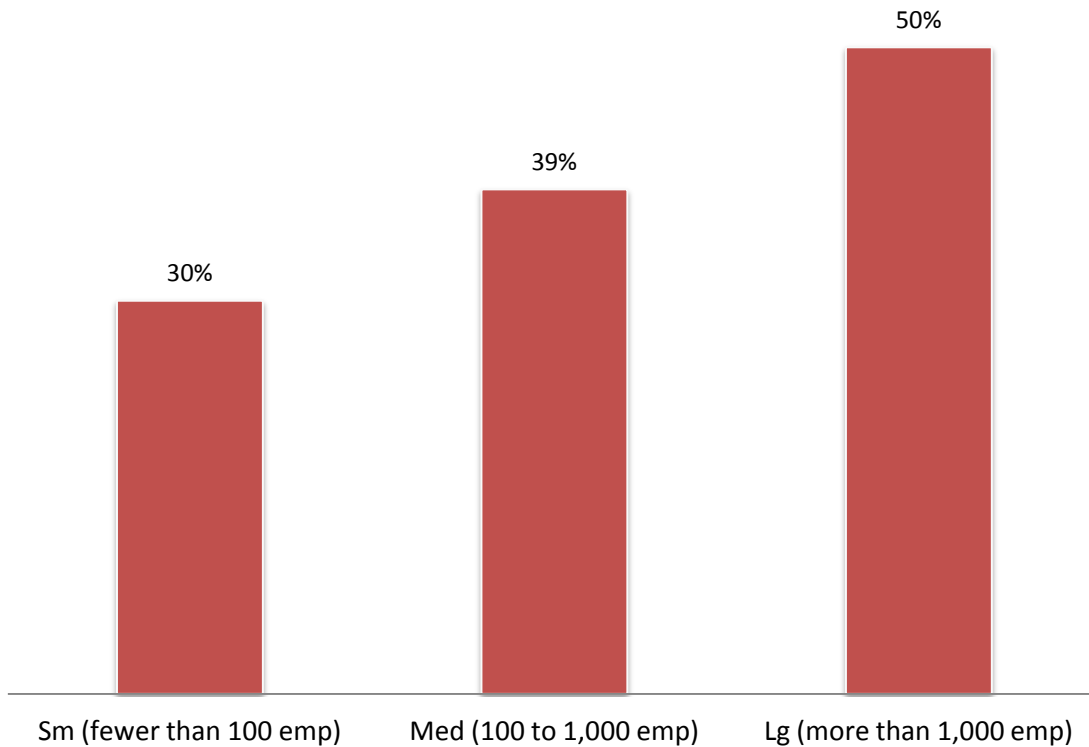
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Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

The professional and financial service industry has reached the tipping point in which the majority of firms are designing emails to render properly on smartphones. Software and SaaS businesses are not far behind with 47% of marketers reporting the adoption of mobile email layouts.

Learn more about how to integrate email into an overall marketing strategy in Chapter 2 of the MarketingSherpa [2011 Email Marketing Advanced Practices Handbook](#).

Chart: Designing emails for smartphones, by organization size

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Designing and testing mobile emails can be resource intensive. Many times an organization outsources the tasks to specialty services if the required skill set cannot be found in-house. Therefore, it is not a coincidence that organizations with greater resources will be more likely to design smartphone-friendly emails.

Chart: Designing emails for smartphones, by email integration maturity
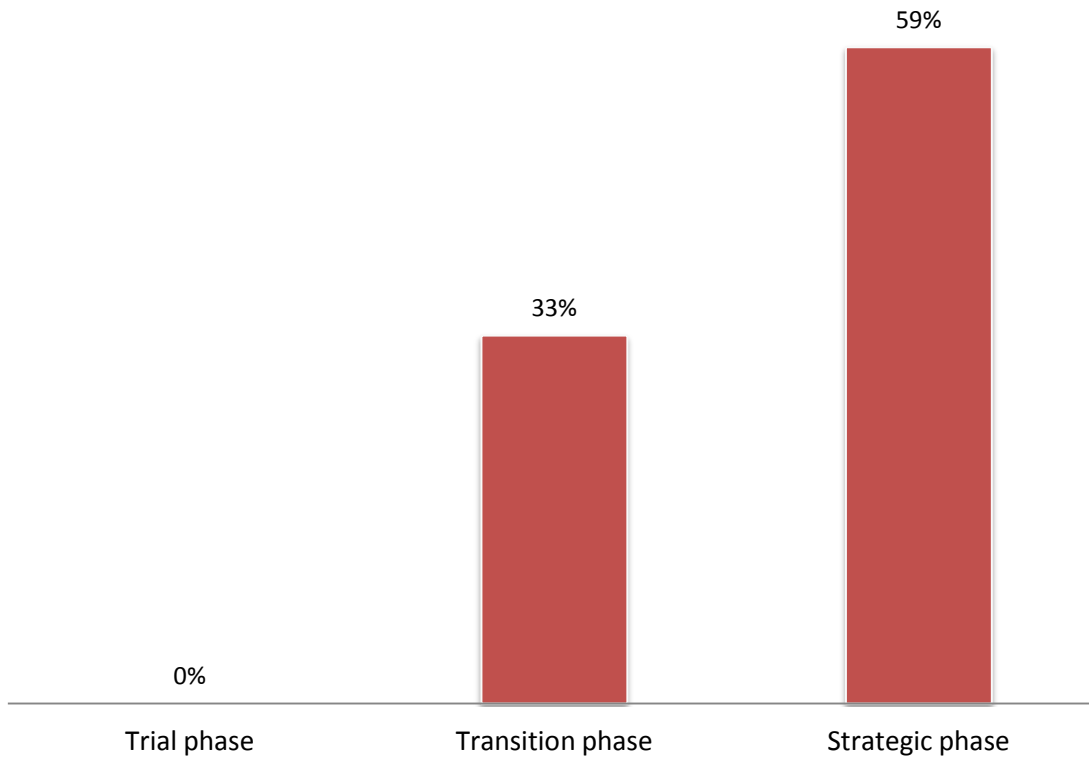
59%

33%

0%

Trial phase   Transition phase   Strategic phase

Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded July 2011, N=2,735

Marketing departments with routinely practiced written guidelines for integrating complimentary tactics with email are more likely to take advantage of the new opportunities provided by smartphone technology.

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MARKETING ANALYTICS

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MECLABS is a science lab that uses real-world research and training to **help business leaders get better use out of sales and marketing technology and resources**, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

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- **1,300** experiments

- Over **1 billion** emails

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