


Your First Email Marketing Project

A step-by-step checklist for web designers and managers

from

MailChimp



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If you're a web designer, and you've been put in charge of your very first email marketing gig, we wrote this for you. It's a list of all the things you need to consider when you work on (and bill for) an email marketing project. We'll take you step-by-step through what it takes to get your client's email campaigns out the door.

Background Information

Over the years, we've seen a lot of web designers tackle their first email marketing campaign for a client. The most common mistake we see is when a designer assumes an email campaign is a design project. They design a nice email in Photoshop, slice and dice it into HTML with Dreamweaver, and they start looking for the "Send" button.

But email marketing should be treated like a full blown website project. The same basic methodology is needed: Discovery and Planning, Execution, and Followup. If you break your project down into these stages, you and your client will experience fewer bumps in the road and

Discovery & Planning Phase:

1. Pick an email service provider (ESP). Lots of good ones to choose from, like MailChimp, Constant Contact, iContact, MailChimp, and MailChimp. You want features like list management, with automatic bounce cleaning; email reports; built-in templates (or the ability to upload your own for the client to edit).
2. Find out what different types of email marketing your client plans to send, such as quarterly news, e-coupons, holiday e-cards, event invitations, letters from the president, internal newsletters to employees, etc. This will determine how many different **managed lists** you need to setup, and how many different **email templates** you'll need to design and setup. You may want to offer to setup holiday-specific promotion templates.
3. Try to understand the way they target their marketing and sales. If they send direct mail to customers based on region, or by industry, or by their company title, you may want to consider working those different columns into their database (so long as it doesn't make your signup form get too big). For example, if your client is a franchise, and they send updates to franchisees by region, create a database and signup form that includes "region" as a column. Plan ahead, because these kinds of things are hard to add later.

4. Help your client setup email accounts and aliases on their server. They probably want their email marketing to come from “newsletters@example.com” instead of “bob@example.com” Pick appropriate aliases, because you want them to be used consistently and long term (you’ll be “training” spam filters to accept emails from this address).
5. Check their privacy policy. Sometimes, it’s better if they don’t have one yet. If they *do* have one, be on the lookout for terms that conflict with what they’re trying to do, like “giving emails to a 3rd party” or “tracking with beacons” and “personally identifiable information.” When you send email marketing, you usually host your list on a 3rd party site. You also tend to track opens and clicks, and you tend to link that activity back to the recipient. This is all standard, non-evil stuff in email marketing, but some privacy policies are written primarily with web-browsing privacy issues in mind, and are too broad. This is mainly a concern with larger companies and financial institutions. Sometimes the concerns can be allayed by simply turning off open and click tracking in your email campaigns.
6. API Integration. Some companies prefer to host their databases in-house, because then they can keep everything centralized. So you may need to integrate their database with your email marketing service (ahem, like MailChimp) through an API. API integration will require some programming work and lots of testing. Make sure you plan enough time. Our recommendation is to do it manually a few times (so you get a feel for the process), then come back and automate with the API. Check out: <http://www.mailchimp.com/api/>

The Execution Phase (Woo-hoo! Design and coding!):

Now the fun part. Designing and coding HTML email campaigns. But don’t break out that CSS Zen book just yet. Coding HTML email is like a trip back in time to the late 1990’s. It’s all table cells and---well, more table cells. It’s not like coding web pages. If you don’t read all the secret little tips and tricks and hacks, your design *will* break in some of the major email apps.

So if you haven’t already done it, read how to code HTML emails at:
http://www.mailchimp.com/resources/how_to_code_html_emails.phtml

Once you have a knack for designing and coding HTML emails, you’re ready to get started designing!

Consider the entire subscription experience

You may be asked to handle the entire opt-in process for a client (not just one little email). This means you'll need to design:

1. The subscription (opt-in) form
2. Thank you landing pages (always include whitelist instructions)
3. Confirmation link emails (if they're using a service like MailChimp that employs the confirmed opt-in method)
4. Final welcome emails (maybe you can include a promo code)
5. Unsubscribe forms
6. Unsubscribe confirmation landing pages
7. Unsubscribe "final goodbye" emails (perhaps you can incorporate an exit survey)

Email Template Design

Most clients get started with a simple email newsletter or basic e-coupon type of promotion. Over time, they inevitably end up needing quite a few different templates. Here are some you should consider offering:

- Basic email newsletter (two column, so they can stick promos in the narrow side column)
- Basic email newsletter (one column, for when they have no promos, or want to send a very simple email)
- Holiday promotion (usually a postcard style template, where they can swap out the main graphic)
- A letter from the president (lots of white space, little formatting, simple branding to look like letterhead)
- Event invitation (usually has a side column to put the "what, when, where" info for easy skimming)

Testing & Troubleshooting

When you're designing your HTML emails, you should test them in as many different email programs as possible. This is not like testing a web page in Firefox, then Internet Explorer, then Safari. There are about 2 dozen different email programs (Outlook, Lotus, Entourage, Apple Mail, etc) and webmail services (AOL, Gmail, YahooMail, Hotmail, etc) you should look at.

You can install all those different email programs and sign up for all those different webmail services, or you can use a service that screenshots your design in all of them for you. MailChimp's Inbox Inspector tool will generate

30+ screenshots, and test your campaign against all the major spam filters and email gateways. You just click a button, then wait a few minutes while we do all the work:

<http://www.mailchimp.com/add-ons/inboxinspector/>

It can be really confusing to troubleshoot your very first email campaign. There are so many different variables, you don't know where to begin looking for the problem ("Why's this breaking? Why am I getting blocked here, but not there? Where'd my pretty CSS go?")

So here are some common issues that first-time email coders face, and how you can prevent them.

Troubleshooting Common HTML Email Issues:

Problem:	Troubleshooting tips:
Images are broken in HTML email	<ul style="list-style-type: none">• Make sure you're coding images using absolute paths, and your images are hosted on a public web server (not a client's private intranet).• Make sure your JPGs are in RGB format, because they won't display in your browser as CMYK.
Spam Filters blocking my email	<ul style="list-style-type: none">• Don't use too much "dummy text" (lorem ipsum...) because it looks like you're trying to trick content-based filters.• Don't use the word "test" in your subject line
My client's email server is blocking our tests	<ul style="list-style-type: none">• You're sending from an outside server, using a from-name and reply-to address of an inside-employee. And chances are you're sending to multiple employees to proofread your test. This looks like a spam attack. Your client's IT group needs to whitelist your email delivery servers. If you're using MailChimp, search for "whitelist" at: http://www.mailchimp.com/help/• Try using a different from-name and reply-to• Remove the word "test" from the subject line if you included it.
Formatting is f'ugly!	<ul style="list-style-type: none">• CSS does not work so great in HTML email. Inline CSS is safest, and even then it won't always work reliably. Self-gratuitous plug: MailChimp will automatically fix your CSS for you when you paste your code in.

For a full troubleshooting document, visit:

http://www.mailchimp.com/resources/getting_started/troubleshooting_email_campaigns.phtml

One really important thing we have to stress: you need to test your client's email campaigns like you've never tested anything before. If you haven't sent at least 5 or 6 tests to yourself, co-workers, your client, and maybe to some test accounts, your campaign is not ready to send.

The most common cause for email marketing goof-ups is not testing before sending. We've seen this lead to embarrassing typos and broken links, all the way to outright blacklisting by ISPs. You need to test. Work it into your schedule.

Time To Deliver!

When it's time to deliver, don't just hit the "send" button and move on to your next project. There's still work to be done.

If it's your client's first email campaign (and it's going out to a large list), you may want to be around and on call when you deliver it (so long as it's not going out around 2am or something). Or at least advise your client to have some staff ready at the time of send. Depending on the email campaign, you can get a lot of phone calls and replies back from their recipients. Some positive, some not-so-positive. It can be a stressful time for a new email marketer, so it helps to be available for moral support.

The Followup Phase:

After your client's campaign has been sent, you can give them access to their email marketing stats. They'll poop their pants when they see all those opens and clicks rolling in.

You may want to set aside some time to go over their campaign reports with them, and discuss what it all means, and what stats they should keep an eye on for future campaigns. They may ask you questions like, "How come my open rate was only 50%?" or "What does bounce rate mean?" and "What's a normal unsubscribe rate for my industry?"

Here are some resources that might help you prepare:

Post Campaign Checklist:

http://www.mailchimp.com/resources/post_campaign_checklist.phtml

Improving Your Open Rate:

http://www.mailchimp.com/resources/improving_email_open_rates.phtml

Getting More Clicks:

http://www.mailchimp.com/resources/improving_email_click_rates.phtml

Email Marketing Industry Benchmarks:

http://www.mailchimp.com/resources/email_marketing_benchmarks.phtml

Ongoing Consulting

After your email marketing project is over, there are opportunities for ongoing support (if you have the desire). As clients grow more confident with email marketing, they'll want to experiment with A/B testing, list segmentation, ROI tracking, and API Integration. You may want to research some of these advanced concepts so you can help them:

A/B Testing To Optimize Email Campaigns:

<http://www.mailchimp.com/ab/>

Google Analytics Integration to Track ROI:

<http://www.mailchimp.com/analytics/>

Targeting Segments of Your List:

<http://www.mailchimp.com/segmentation/>

Integrate Your System With MailChimp's API:

<http://www.mailchimp.com/api/>

Conclusion

As you can see, an email marketing project can involve a lot more than slicing up a JPG into HTML. It can be just as large, complex, and resource-intensive as a web development project.

But with the right methodology, a healthy dose of planning and testing, and the proper tools (ahem---MailChimp), you'll be a pro in no time at all.