A Step by Step Guide to Email Marketing Success
# Table of Contents

**Introduction** ............................................................................................................. 3

**Quick Start Guide** ................................................................................................. 4

**Step 1: Setup Your Account** .................................................................................... 7
   How Does Pricing Work? ......................................................................................... 11

**Step 2: Create Your List** ........................................................................................ 13
   Using a Lead & Contact Query ................................................................................ 15
   Using the Members of a Salesforce Campaign ....................................................... 18

**Step 3: Building Your First Email** .......................................................................... 20
   The Library ............................................................................................................... 21
   Using the Wizard ..................................................................................................... 24
   The Email Canvas .................................................................................................... 29
   Write / Paste / Edit Text .......................................................................................... 34
   Create Links ............................................................................................................. 36
   Personalize Your Message Using Merge Fields ...................................................... 37

**Step 4: Launching and Analyzing Your Email** ....................................................... 41
   Reporting .................................................................................................................. 43

**Marketing Tips** ...................................................................................................... 48
   Building Blocks – Relationship Building ............................................................... 48
   Ask for Permission ................................................................................................. 48
   Nuture the Relationship for Maximum Potential .................................................. 49
   Reporting: How Are You Using It, Or Are You? ..................................................... 50

**Common Email Marketing Mistakes** ...................................................................... 53
Introduction

Why VerticalResponse for AppExchange?

If you’re looking to grow your business by marketing to your customers but you’re short on time and resources, VerticalResponse is the perfect solution. At VerticalResponse we strive to make small businesses look like giants (and who doesn’t want to look like a giant?).

Small businesses today increasingly rely on the ease and affordability of tools like those VerticalResponse provides. In just a few minutes you can easily create professional looking e-newsletters, direct mail postcards, and online surveys to engage your customers, learn more about them, and increase sales. You’ve got a few minutes to increase your sales don’t you?

Simply put, we are an online (Software-as-a-Service) provider that allows anyone, regardless of technical experience, to create & send emails, surveys, and postcards from any web browser.

As a company, we pride ourselves on being experts in marketing and the products we build, sell and support. This guide is proof that we practice what we preach.
Quick Start Guide

8 Easy Steps to Send Out Your First Email Campaign

There is a lot of great, detailed information to be found throughout this guidebook. But what if you need to get an email out right now and don’t have time to read through everything first? Just follow the 8 easy steps below:

1. **Open Your Free VerticalResponse Account** – If you don’t already have an account, you’ll need one before you can do anything else. Install our application into your Salesforce account by visiting our AppExchange page ([http://www.salesforce.com/appexchange/detail_overview.jsp?id=a0330000000GI9FAAW](http://www.salesforce.com/appexchange/detail_overview.jsp?id=a0330000000GI9FAAW)) or by going to [http://www.appexchange.com](http://www.appexchange.com) and searching for VerticalResponse.

2. **Upload Your List(s)** – You’ll find a New List link within the Quickstart section of your VR Email tab (this tab is one of three added to your Salesforce account as part of the installation). Click this link and you’ll be given three options to build the audience for your email:

   - **Create a List of Leads & Contacts** - This option provides a query tool that can be used to search through your Lead & Contact records to build a list of people you’d like to mail. You can search through both your Leads & Contacts at the same time and can run searches based on Standard, Custom, Owner and Account level fields.
   - **Use the Members of a Campaign** - Select this option if you want to use the members of an active Salesforce Campaign as a list.
   - **Upload an External List to Your Account** - The third and final choice allows you to upload a spreadsheet file from your computer to use as a list. This option should generally be avoided, as the list will not be connected to your Salesforce records and you’ll lose out on some very useful reporting that will be pushed back into your Salesforce account after the email goes out.
3. **Upload (or Find) Your Images** – The Media Library section of your account is where you upload the images you want to use in your emails. Don’t have any images? Just search through the 75,000 pictures in our free Stock Photo Gallery to find the pics you need. You can find the Media Library in the **Resources** section at the bottom of the **VR Email** tab. Any uploaded images need to be in JPEG (.jpg) or GIF (.gif) format. Using one of these two formats ensures your pictures will look right to all your recipients.

4. **Edit Your Images** – Use the Library’s editor to resize, crop, flip or rotate your pictures. You can edit any image in your Library by mousing over it and clicking the pencil icon. You can also access the editor when you’re adding pictures to your email.

5. **Choose Your Email Builder** – There are five different email creation options in VerticalResponse: the **Wizard**, the **Canvas**, **Freeform**, **Plain Text**, and **Saved Salesforce Template**.

   ✓ The **Wizard** is a template-driven editor that is great for new users.

   ✓ The **Canvas** is a graphical HTML editor with enhanced design options and flexibility

   ✓ **Freeform** allows users to copy and paste their own pre-designed HTML code into our system

   ✓ **Plain Text** can be used to create simple text emails without pictures or logos

   ✓ The **Saved Salesforce Template** option allows you to access any templates you’ve saved to a custom folder within Salesforce. When you select a template,
our system will open that template up in the canvas so you can edit your message.

We recommend the Canvas for most users. You can find these different options under the New Email link found within the Quickstart section of your VR Email tab.

6. **Build Your Email** – Several sections of this guide provide detailed instructions on how to use the various email creation options. If you need specific help, you should check those sections (page 22 for the *Wizard*, page 28 for the *Canvas*).

7. **Launch Your Email** – After you’ve designed your email, it’s time to send it out. Launching an email through VerticalResponse is a quick and painless five-step process:

   ✓ **Preview**: This tab – as you might expect – provides a preview of your email message.

   ✓ **Send Test**: From here you can send tests of your email to your own email address and to a list of other people who may want to look over your message before you launch it to your list.

   ✓ **Select Lists**: You can select one or more lists as the audience for your message. If you select more than one list, then we'll automatically de-duplicate email addresses that may exist between those lists so every recipient receives only one copy of your email.

   ✓ **Schedule**: You can choose for the email to be sent as soon as possible or schedule it for a date/time in the future. Just choose your scheduling option and proceed to the next tab.
Launch: VerticalResponse will ensure you’ve completed all the previous steps before allowing you to launch. If you missed a step, you’ll need to go back and finish it before continuing. But if everything is ready, click the Launch button.

8. Look Over Your Reports – Once your email is sent, you’ll immediately begin seeing reporting that tells you who opened your email, clicked on links (and which links they clicked), bounced and unsubscribed. You can also turn on more advanced – and free – reporting like Google Analytics Integration and Click-to-Conversion Tracking by changing the Analytics Settings found within your Account section. The basic reporting data can be accessed through your VR Email or VR Statistics tabs. You’ll find an Update Statistics button under both these tabs - this button allows you to push this data back into your Salesforce account, where you can access it under your Reports tab, within each Lead & Contact Record, and through Dashboard graphs.

That’s it for the Quick Start Guide. Now we’ll examine each of the above steps in much more detail.
**Step 1: Setup Your Account**

Before you reap all the benefits that VerticalResponse has to offer you must first create an account. Creating an account with VerticalResponse is free to do (there are no contracts to sign and no fees associated with having our program installed within Salesforce) and generally takes no more than five to ten minutes. You do need to be an Administrator for your Salesforce org to install VerticalResponse - if you are not an Admin, ask your Admin to perform the installation for you:

1. Go to our Salesforce AppExchange listing, which can be found here: http://www.salesforce.com/appexchange/detail_overview.jsp?id=a0330000000GI9FAAW. You can also just go to appexchange.com and search for VerticalResponse.

2. Click *Get It Now* and fill out the form that follows.

3. Next up is the “Trial this Application in Your Org” page. Agree to the terms and *Continue*.

4. The “Package Installation Details” page details everything that’s being installed. Click *Continue*.

5. Read over the “Approve Package API Access” and click *Next*.

6. On the “Choose Security Level” page you can select who your Org will have access to VR for AppExchange. You can provide access to Admins only, to everyone, or to select groups within the Org. This can also be altered after the package is installed. Click *Next* after making your selection.

7 Click the *Install* button to install!
At no point in this process do we ask for your credit card or payment information - that’s because the account itself is free. All the steps described in this guide (aside from actually launching an email), can be performed without any payment. We’ll take a look at how pricing works at the end of this section. But know going in that there are no contracts to sign and no minimums to buy.

Now that the account has been installed, you should see that VerticalResponse has added three news tabs to your account: **VR Email**, **VR Postcard**, and **VR Statistics**. If you don’t see these three tabs, then make sure you’ve selected VerticalResponse from the Force.com drop down menu in the upper right hand corner of your Salesforce Account. Let’s quickly go over each of these sections.

---

**VR Email**

Most of your work will likely be done from within this tab, and it’s broken into three sections:

**The Quickstart Menu**

Form here you can create a new email, build a new list, plus look over email drafts and manage all the lists you’ve already created.

**Recently Sent Emails**

This section displays the reporting data for the last five emails you’ve sent out. Data for older emails is stored within the VR Statistics tab.

**Resources and Tools**

An appropriately named section, as it includes links to a number of useful resources and tools:
Watch Demos - This is our “How To Do Everything” website, home to more than 35 video tutorials (and an equal number of text tutorials) that can show you how to do just about anything with your account.

Community - This is our VerticalResponse Marketing Lounge, a social network where you can join thousands of VerticalResponse users (along with all our employees) to chat about marketing tips for growing your business and also how to get the most from VerticalResponse. You can also see what the hot topics are at any given moment. Check it out, it’s free!

http://lounge.verticalresponse.com

Library - This is our free image hosting and editing tool. It’s also home to our Stock Photo Gallery, which includes 75,000 free images provided by Photos.com. That’s right FREE, we picked up the tab for these. Also, any images you upload or find here will be available to add to your emails, postcards or surveys as you’re building them.

Calendar - Calendars usually don’t need much of an introduction, and this one is no exception. Keep track of emails that have been sent out, emails that are scheduled to go out, personal events, and holidays here. We'll pre-populate the holidays for you, depending on the timezone/location you’ve set within your profile (found under Account Information).

VR Postcards

This section allows you to create direct mail postcards that we’ll print and mail for you First Class through the USPS. We may be email providers, but we still know the value of good
ole snail mail. Keep our postal carriers working! You can either upload your own design for the front of the card, or choose an image from our Free Stock Photo Gallery.

**VR Statistics**
This is where you’ll find reporting data for all the emails you send out. Reporting can be pushed from here to several different places within your Salesforce account. We’ll take a closer look at reporting later in this guide.

**How Does Pricing Work?**
We’ve used the word free several times in describing each of the sections above - so where does actual payment come in? With our flexible approach you pay for the emails you send out and the postcards you mail. None of the other features (like the image hosting in the Library or the sent email reporting) cost a thing.

Email is paid for on a Pay-As-You-Go basis. You are simply purchasing email credits that can be used at any time. Each purchased credit is equal to one recipient – so sending an email out to 500 people would require that you have at least 500 credits in your account. Credits can be purchased at the time of launch, or in advance and in bulk (the more you buy, the cheaper individual credits become). There are no minimums for a purchase of credits and they do not expire for a year.

To take a close look at pricing, use the **Buy More** link found under the **VR Email** tab or visit the **Pricing page** on our website.

Also note that 501c3 non-profit organizations within the US, and similar organizations in other countries, can use our email service for free (up to 10,000 emails/mo). **Take a look at the Pricing page on our website for details.**
Now that we’ve setup and taken a short tour of your account, let’s walk through the steps for sending your first email. (See page 4 for a quick start.)
Step 2: Create Your List

Before you can send an email out through VerticalResponse, you’ll need to get your list ready to go. You can have as many lists in your account as you need. These lists will be built from your Salesforce Lead & Contact records.

It’s important to note that VerticalResponse maintains a strict anti-spam policy as this helps us achieve extremely high delivery rates for the emails you send. We don’t allow the use of purchased, rented, or harvested lists. We require that email sent through our service only go to those people who have requested to receive that email in one way or another (i.e., through your website, over the phone, at a tradeshow, etc.).

To start building your list, navigate to **VR Email > Quick Start > New List**. This will present you with three different options:

*Create a New List of Leads and Contacts* - Use our Query tool to search your Lead & Contact records using Standard, Custom, Account and Owner level fields for people you want to mail.

*Use a Salesforce.com Campaign* - Choose this option to use the members of an active Salesforce.com Campaign as an email list.

*Import an External Mailing List* - This third option will let you upload a spreadsheet from your computer to use as a list. Records added in this way will not be added to your Leads and Contacts, and will not be connected to Salesforce. This means you’ll miss out on all the reporting connectivity between VerticalResponse and Salesforce - described later in this guide - so you should really only choose this option if you don’t care about the integrated reporting or don’t need it for a particular email.
In this section, we’re going to look at how to build a list of Leads and Contacts and how to build a list using a Salesforce.com campaign. You will, of course, only need to use one of these options to build a list.

Create a New List of Leads & Contacts

If you select to create a new list of Leads & Contacts, you’ll be presented with a series of steps:

**Step 1: Define Your Query**

In this step you define your search parameters. Start by using the Data Source drop down menu to select whether you want to search through just Leads, just Contacts, or both Leads & Contacts at the same time.

Whichever option you choose, you’ll need to set your search parameters using Standard, Custom, Owner and Account level fields. In this way - for example - you can find everyone within certain states, records that belong to certain owners, or records associated with various accounts within your Org.
Note that any record that does not include an email address, or that has its opt-out box checked, will be suppressed from the search and not included in the results.

After you select your parameters, go to Next Step.

**Step 2: Map Your Fields**

On this page you select which fields of data - like First Name, Last Name, City, etc. - you want to pull from your records into your list. Email Address is checked by default since it is the only field that is absolutely necessary to send an email out.
But one of the great things about sending an email through VerticalResponse is that you can personalize your message using any data in your list. So if you pull over First Name, you’ll be able to insert each recipient’s first name into the message. You can use the standard fields we provide or use the blank fields towards the bottom of the page to create any field that we do not provide by default - just use the drop down menus to choose the Lead and Contact fields you want to pull over and then use the blank fields to name them in your list.

Click next when you’re finished. Note that we’ll go over exactly how you can personalize your email message later on in this guide.

**Step 3: Summary of Your Query**

This preview will display up to 200 Leads & 200 Contacts from your search results, so you can ensure your data looks right. Note that the 200 Lead / Contact limit is only part of the preview - there are no limits on the number of records you can have in your list.

**Step 4: Create Your List**

On this step, you are presented with three choices:

1. **Create List** - Choosing this will simply create a list based on your search results.

2. **Save Query** - This will just save your search parameters for future use so you don’t have to enter them again.

3. **Create List & Save Query** - This will both create your list and save your query.

So, depending on which of these you choose, you’ll either just name your list, name your saved query, or name both your saved query and list. Let’s look at the third option, which allows for both:
The first field is where you should enter a name for your list. You’ll reference this name later when choosing which lists you want to use with the email you create.

The second field allows you to append the results of your query to an active Salesforce Campaign, much the same way you can add the members of a report to a Campaign. This option is not necessary and is rarely used. Unless you know your way around Salesforce Campaigns, you should leave this option set to default: “Do not append to a Campaign”.

The third & fourth fields are where you enter a name and description for your saved query. You’ll refer to this info whenever you select to run the saved query again in the future.

Once you’re done here, click the Create List & Save Query button. The list will now be compiled, and you’ll be able to access it either when building your email or directly through the View Lists link found under the VR Email tab.

Use a Salesforce.com Campaign

Note that you must have active campaigns which were built using Salesforce’s own Campaigns module to use this option. Just as with Creating a New List of Leads & Contacts, selecting to use a Salesforce.com Campaign to build your list will present you with a series of steps:
Step 1: Select salesforce.com Campaign

All you’re doing here is selecting the Campaign whose members you’d like to use as a list. If you have a lot of Campaigns, use the built in search functionality to find the Campaign you want.

Step 2: Map Your Fields

Selecting a Campaign will bring up the Map Your Fields step. This is identical to the Map Your Fields step that’s encountered if you use the Create a New List of Leads & Contacts option.

On this page you select which fields of data - like First Name, Last Name, City, etc. - you want to pull from your records into your list. Email Address is checked by default since it is the only field that is absolutely necessary to send an email out.

But one of the great things about sending an email out through VerticalResponse is that you can personalize your message using any data in your list. So if you pull over First Name, you’ll be able to insert each recipient’s first name into the message. You can use the standard fields we provide or use the blank fields towards the bottom of the page to create any field that we do not provide by default - just use the drop down menus to choose the Lead and Contact fields you want to pull over and then use our provided fields to name them in your list.

Click next when you’re finished. Note that we’ll go over exactly how you can personalize your email message later on in this guide.
**Step 3: Summary of Your Query**

This preview will display up to 200 Leads & 200 Contacts from your search results, so you can ensure your data looks right. Note that the 200 Lead / Contact limit is only part of the preview - there are no limits on the number of records you can have in your list.

If everything looks good, continue on to *Next Step*.

**Step 4: Create Your List**

Give your list a name and click *Create List*. The list will now be compiled, and you'll be able to access it when building your email or directly through the View Lists link found under the *VR Email* tab.
Step 3: Building Your First Email

We have clients whose expertise with email, HTML, and the Internet range from beginner to super nerd. To help ensure such a wide variety of users can get the most out of VerticalResponse, we offer four different email creation tools to cover all levels of expertise. They are:

- **The Email Wizard** – This is a basic email builder for novice to moderate users. The **Wizard** gives you the choice of about 300 different email borders and then walks you through adding your content to the border you’ve chosen.

- **The Email Canvas** – This is a graphical HTML (WYSIWYG) editor for moderate to expert users. The **Canvas** is far more flexible than the **Wizard**, and allows for more types of layouts and content editing.

- **Freeform HTML** – This tool is for anyone (generally an expert user) who has their own HTML design ready to go. All that’s necessary to create an email with this tool is to copy and paste HTML into the provided content box.

- **Plain Text** – This editor creates simple, plain text emails. You can’t add images, change font styles or adjust layouts with this tool - plain text is as basic as an email can get.

- **Salesforce Mail Templates** - This option provides access to any of your Salesforce Mail Templates that have been saved to a custom, public
folder within Salesforce. Your chosen template will be opened up within our Canvas editor so you can make content changes.

In this section, we’ll take a detailed look at two of these tools: the **Wizard** and the **Canvas**. But before we do that, let’s examine a resource that plays a very important part in the email creation process.

**The Library**

You can access the Media Library through the Resources section found at the bottom of the VR Email tab. With the Media Library you can:

- **Upload Your Own Images** – Have your own images ready to go? Great! Just make sure they’re in .jpg or .gif format (the two standard image formats on the web) and upload away.

- **Search Our Free Library** – Don’t have the right pictures for your message? Then just use our Free Stock Photo Gallery. There are more than 75,000 pictures available in numerous categories. You can use as many pictures as you want, as often as you want, and it won’t cost a thing.
- **Resize your images** – Easily create email-friendly graphics that complement your layout. You can adjust the image by pixel or percent to get the exact size you need.

- **Flip & rotate images** – Looking to go vertical (pun very much intended)? Heck, horizontal is fine too. With the flip & rotate tools you can instantly change the orientation of your image without bugging your web designer. With a simple click you'll have your image pointing in the right direction.

- **Need to crop?** – The *Media Library* comes with a simple cropping tool that allows you to capture specific sections of your image. Simply highlight, crop and save!

- **Organize your images** – Create and manage folders and subfolders to store all your images. Start by uploading new images then drag-and-drop from one folder to another. You’ll never waste time searching for frequently used graphics once you’ve got them organized in folders!

**Library Tour**

How do you access all these great features from within the *Library*?

- To upload your own images, choose the **Upload Images** link in the Lower Left. Then browse your computer for the file(s) you want to upload.

- To choose images from our free Stock Photo Gallery, click the **Search Gallery** Images link, which can be found right next to the Upload Images link within the *Library*. This will open a pop-up window where you can either search for photos or
browse through a variety of different categories. Scrolling over an image will open a larger preview, and you’ll have the option to choose a large or small version of each picture. Unless you’re planning to edit the photograph, always choose the smaller version - the larger picture is much too big for an email.

- To access our provided photo editing tools, just scroll over the image you want to edit. This will present you with the options to either delete or edit the image. Selecting the edit option will open the image up on a new screen - from here you’ll be able to easily resize, crop, rotate and flip the image around.

- After you make your changes, you can either Save over the current image or Save As a new image using the options found in the lower right hand corner of the screen.

- Creating folders and sub-folders is as simple as clicking the Create New Folder link on the main page of the library. Then you can just drag-and-drop images between folders to keep things nice and organized.

To access more information about the Library, go to http://www.verticalresponse.com/tutorials/salesforce and choose the “Library” tab.
Using the Wizard

As noted at the beginning of this stage, the *Email Wizard* is a basic email creation tool that steps you through the process of adding your content to any one of 300 different borders. The *Wizard* is a tool perfect for beginners or users who don’t have access to a web designer.

To access the *Wizard* from within your account, go to *VR Email > New Email*, select the *Email Wizard Option*, and click *Next Step*.

The first step to creating a *Wizard* email is to choose the border you want for your message. The borders are categorized according to design & industry. They all function in the exact same way, aside from two exceptions:

✔ Some of the borders are known as “Color Match” Borders (these appear within their own marked categories). These are basic borders that allow you to choose your own border color or to match the color of your border to a color in your email logo. If a border is not marked as “Color Match” then you will not be able to change its color later on.

✔ Other borders are “Fixed Width” borders (these can be found under various categories). This means the width of the border, and by extension the content within that border, is set to a specific pixel width that does not change with the size of the recipient's email browser. Any borders not noted as fixed width are variable width, which means they expand and contract with the size of the recipient’s email browser.
Write Your Copy

After you select your border, the system will take you to the Write Your Copy page. From here you can start adding your text content in the form of a From Label, Subject Line, Salutation, Greeting, and Closing. Let’s look at each step on this page:

1. **Enter Your From Label** – We recommend that this be something that is consistent and rarely changes, like your company name. You’ll get a much better response to your email if the name is one your recipients recognize.

2. **Enter Your Subject Line** – The subject line is like the headline of a newspaper article: it should be concise, interesting and describe what the message is about. Try to keep the subject under 45 characters, because many email browsers cut the subject line off at that point.

3. **Hosted Version** – This check box inserts a link at the top of your email that points readers to an online version of the email message that we host on your behalf. If a reader clicks that link, then your email will open up in a web browser. This is useful since there are still email browsers out there that could break some part of your email message, and opening the email in a web browser - which will always support a wider range of HTML and content - will ensure everything looks exactly right. Most recipients won’t need to use this, but it’s nice to include for the small number that might.
4. **Enter Your Salutation** – This is a great place to personalize your message. Type Hello, Dear, etc. and follow that with `{FIRST_NAME}` and we’ll automatically populate the first name of each recipient within the individual email they receive. So “Dear {FIRST_NAME}, friend of XYZ Company,” in an email received by Rebecca will become “Dear Rebecca, friend of XYZ Company”. It’s as easy as that, and works no matter how big your list is. You can merge any data from your mailing list into any part of your message simply by writing the name of the field within the `{}` brackets. And note that the Salutation field is optional (you can enter a salutation anywhere in the message that you like), but it’s a good idea to use this field until you get used to how the **Wizard** works. If you don’t have first names on your lists you might just want to use “Hello” or “Greetings”, or you can use a default value in the event that you have personalization data for only a portion of your list. Ex. `{FIRST_NAME|Valued Customer}...

5. **Greeting** – Generally used as an opening paragraph for your email message. On the section following **Write Your Content**, you’ll be given the option to add numerous “offers” or “articles” to your message that will follow the greeting. As with **Salutation**, the **Greeting** field is optional, but should probably be used until you get the hang of the **Wizard**.

6. **Closing** – The ending paragraph(s) and signature for your message. This will follow any “offers” that you add in the next section. It is optional, just like the two steps that precede it.
7. Unsubscribe Message – As noted in the List section of this guide, VerticalResponse takes care of all unsubscribes on your behalf. We do this by automatically inserting an unsubscribe link at the bottom of every email you send out. You can use the provided drop down menu to have that link say something other than “unsubscribe” (like Remove Me or Leave This List) and customize the unsubscribe message that introduces the link. In addition you can choose from a variety of languages for this text if you’re sending your emails to non-English speaking recipients.

8. Postal Address – Including your organization’s postal address within the message is required by the US CAN-SPAM Act of 2003 (as well as laws within many other countries, if you’re not in the US). You’re required to enter your current postal address within this box, and we’ll automatically populate the address if you enter it in your profile. Your profile can be found under the Account section.

Once you’re done with this page, click Next Step. You’ll now be able to select your first Offer Style.
Offer Styles

Offer Styles allow you to add images, links, and other text content to a Wizard email. You can add as many of these sections as you want to your message – think of them as individual content blocks that stack on top of one another. There are a number of different types of offer styles – some are image only, some are text and link only, and some allow you to add links, text, and images. You’ll find a description and an illustration of each layout to help you choose.

Let’s take a moment to look at an Offer that allows you to add links, text, and images.

1. Content Title – This creates a bold header or title for this particular offer section. This field is optional, in case you have no need for a headline.

2. Copy – This is the text message of your offer, and it can be as long or as short as you like. You can use personalization (such as {FIRST_NAME}) here, the same as with anywhere else in the message.

3. Click-through URL - Click-through URL – Use this to create a link to your website. The link has two parts, the link itself and the link text. If we at VerticalResponse wanted to create a link to our How To Do Everything tutorials site, we would fill each part out like so:

   URL: http://www.verticalresponse.com/tutorials/
   Link Text: Visit our How To Do Everything Site

That would create a link at the end of the offer that looked like this:

Visit our How to Do Everything Site

Offer Image – You can either browse your computer for an image or grab one that you’ve already saved to your Library. The image will align to the left, right or above your text depending on which offer layout you selected

When you’re done, click Next.
Edit Email Campaign

This will bring you to the Edit Email Campaign staging area of your email. Your work has now been saved up to this point, and you can do just about anything with your email from here:

✓ Use the green buttons along the top of the page to choose a different border, change the color of your current border (if it’s a Color Match border), add a logo, or add more offers.

✓ Use the links in the upper right hand corner to add a Forward to a Friend Link or do a basic Spam Check of your content – we recommend doing both for all of your emails.

✓ Use the links within the body of the message to edit any part of your content, to delete offers, and, if you’ve added more than one offer to the message, move offers up and down in relation to each other.

✓ Use the tabs along the very top to launch your email out. You must go through each tab before you can send your email. To learn more about this, move on to the next section – Launching and Analyzing Your Email - to read about the email launch process.

To find out more about using the Wizard, take a look at the videos and tutorials found at http://www.verticalresponse.com/tutorials/email/

The Email Canvas

The Email Canvas is a Graphical, or WYSIWYG – What You See Is What You Get, HTML tool. The Canvas opens with a blank canvas, and provides a full “designer’s toolbar” to assist you in adding and editing content.

With the Canvas you can create emails with multiple columns, change text fonts, colors, and sizes like you would in a word processing program, import images from the Library, turn any text or pictures into links, alter background colors, and so on. The flexibility and
customization options are the major benefits of the Canvas.

There are three ways to start adding content to the Canvas editor (listed in order from least advanced to most):

1. The most straightforward way to build a Canvas email is to click the Choose Layout button and select one of the over one hundred starter layouts we provide. You can then alter the layouts and add your content. This is the method used by nearly all Canvas users, and is also the method we’ll look at in this guide.

2. If you have your own HTML design ready to go, but want to tweak it a bit using the Canvas, then you can use the Edit Source tab to paste in your own code – your design will then appear in the editing area and you can use our tools to make changes.

3. If you know your way around a WYSIWYG editor, you can build every single part of the email from scratch by adding and formatting tables, and then dropping your content into those tables.

To get started with the Canvas, go to VR Email > New Email, choose the Email Canvas, and click Next Step.

Just as with the Wizard, you’ll first be prompted to enter your From Label and your Subject Line. To repeat:
Enter Your From Label – We recommend this to be your company name. You'll get a much better response to your email if the name is one your recipients recognize.

Enter Your Subject Line – The subject line is like the headline of a newspaper article: it should be concise, interesting and describe what the message is about. Try to keep the subject under 45 characters, because many email browsers cut the subject line off at that point.

Beneath these two steps, you'll find the Canvas itself, which is divided into an HTML Content and Text Content section. The HTML Content section is open by default, so we'll start there and discuss the Text Content section later on.

Within the HTML Content area you'll find the Designer's Toolbar and the blank canvas itself. The best way to get started is to click the very first button in the toolbar: Choose Layout. (See Item 1 in diagram on page 31). This will open a pop-up window that provides numerous layouts filtered into several categories. Many of the layouts are themed with particular industries in mind, but you can choose any layout you like regardless of whether it matches your industry since, unlike the Wizard borders, every part of each layout can be edited and changed very easily.

After you choose your layout, you can start adding content. In this guide we'll look at specific actions like adding images, creating links, adding / editing text, personalizing your message and changing background colors. But performing even relatively simple actions like these can be confusing at first if you don’t know the function of each button within the Designer’s Toolbar. So let’s start with a quick description of the buttons that are most often used, starting from the top row and working to the bottom.
1. Choose Layout: Create your email using a blank canvas or select a pre-built layout
2. Save Canvas: Save your email content
3. Undo: Undo the previous action
4. Redo: Redo the previous action
5. Find and Replace specific content in your email
6. Cut specific content in your email
7. Copy specific content in your email
8. Paste specific content in your email
9. Paste MS Word content to remove proprietary characters
10. Insert Image / Edit Image Properties: Place or edit properties of selected image
11. Hyperlink: Create a clickable hyperlink
12. Unlink Link: Remove a clickable hyperlink
13. Anchor Link: Create a clickable hyperlink to text within your email
14. Custom Character: Insert a custom character
15. Horizontal Line: Insert a horizontal line
16. Insert Table: Insert and format a table in your email
17. Document Properties: Set default fonts and colors for your entire email
18. Font Color: Choose a specific font type
19. Font Background Color: Choose a background color for the font within your email
20. SpellCheck: Check for spelling mistakes within your email
21. Font Family (dropdown): Choose a specific font type
22. Font Size (dropdown): Choose a specific font size
23. Insert Merge Fields (dropdown):
   Insert personalization fields, survey links, forward to a friend links, etc.

24. Bold the chosen selection
25. Italicize the chosen selection
26. Underline text
27. Left Justified: Make all text left justified
28. Center: Center all text
29. Right Justified: Make all text right justified
30. Bulleted List: Create a bulleted list
31. Numbered List: Create a numbered list
32. Indent: Indent your text
33. Outdent: Outdent your text
34. Remove Formatting:
   Remove all formatting from selected text
Now, let’s take a look at some specific tasks that are integral to any email campaign.

**Write / Paste / Edit Text**

You can write your entire message within the **Canvas** itself, write it in another program (like Microsoft Word) and then copy & paste it in, or do a mixture of both. The **Canvas** includes a full range of text editing options (like altering Font type and size, changing colors, adding bullets, and other similar options), so writing & editing text is pretty straightforward and should not be all that different than using any other text editor.

Pasting text from another document editor like Microsoft Word or Google Docs is also straightforward – generally speaking you just copy and paste the text into our system the same way you would do it between programs on your own computer. The copy shortcut is **CTRL-C** on a PC and **Command-C** on a Mac. The paste shortcut is **CTRL-V** on a PC and **Command-V** on a Mac.

The only snag here is that Microsoft Word, specifically, uses proprietary formatting that can leave behind some foreign or malformed characters if it is pasted directly into an HTML document like an email, website or a blog. To help you get around this problem, we’ve included a **Paste from Word** option in the toolbar that will remove that proprietary formatting and ensure all your recipients can see your text without any problems.

**Add / Edit / Delete Images**

**Add**

To add an image, just select where in the message you’d like to place it and click the **Insert Image** button in the top row of the toolbar. This will open up your Library, where you can select any image you’ve previously uploaded or chosen from our Stock Photo Gallery.
Now you’ll see the **Adjust Display** page. This page allows you to edit several different properties of the image:

- **Alternative Text** – The *Alt Text* for the image should either be a description of the image or of the action you hope recipients will take. The *Alt Text* serves two purposes:

  1. Many email browsers initially block images when an email arrives in the inbox, requiring the recipient to click a button or link to turn the images on. Many of these same email browsers will display the *Alt Text* to the recipients to help them decide if they want to turn the images on or not. So it’s a good idea to be either descriptive or action oriented like “Go here to read more!”

  2. If you have any blind subscribers who use a screen reader to check email and access the internet, their screen reader will read the image *Alt Text* aloud.
- **Alignment** – This drop down menu lets you set how the image will align with nearby text (to the left, right, etc.). If there is no text near your image, then you don’t need to make a selection here.

- **Dimensions** – Allows you to alter the height and width of your image. Note that it’s much better to make alterations using the editor provided within the **Library** itself (as described in the **Library** section on page 19), and we would recommend against using this field to make changes to the size of your image.

- **Vertical and Horizontal Space** – These two fields allow you to add some space around the image to cushion it from whatever other content surrounds it.

- **Border** – This very simply determines whether your image will have a blue border around it if you add a link to it. If you don’t want to put a border around a linked image, then keep the default to 0 here.

Click **Insert** when you’re finished, and the image will be added to your email.

Now, what if you want to **Edit** the properties of an image you’ve added? Just select the image and click the **Insert Image** button. This will pull up the **Adjust Display** page for that image.

To **Delete** any image (either one you’ve added or one that is included in the layout by default), just choose the image and click the delete key on your keyboard.

### Create Links

You can turn any images and text within your email into links (the more opportunity your readers have to click-through to your site, the better!). To do so, highlight the text / select the image you’d like to turn into a link and click the **Hyperlink** icon within the toolbar.
This will open a dialog box where you can enter your link – be sure to include the http:// portion of the link when you type it in. You can also remove links by selecting a created link and clicking the Unlink icon.

**Personalize Your Message Using Merge Fields**

As noted in the Wizard section, you can personalize your email using any data from your mailing lists. This is most commonly used to address recipients by their own names, instead of by a generic title like “customer.” Here’s how you do it:

1. Select the Insert rop down menu (located on the bottom row of icons in the Designer’s Toolbar).

2. Choose to insert First Name, Last Name, Title, etc., depending on what information you want to merge into the message.

3. You should now see an equivalent merge field in your email that looks like this: {FIRST_NAME} or {TITLE}. 

![Image of merge field insertion](image-url)
4. The insert drop down menu shows only standard fields. If your list includes custom fields, you can merge those by manually entering them. A custom field named LastPurchase, would be merged as {LastPurchase}.

5. If you’re worried that you don’t have the appropriate data for all your records, you can set default text for your merge field like so: {FIRST_NAME|Reader} or {FIRST_NAME|Subscriber} - with this example, anyone whose first name does not appear in your list would see the default text instead (like Reader or Subscriber) instead. The system will prompt you to enter this backup text if you use the Insert drop down menu.

A few other important things to note about creating an HTML email within the Canvas:

✓ There is an Undo button! This is an easy way to erase mistakes.

✓ The first time you press Enter while writing text, you’ll notice it creates a double line paragraph break. What if you just want to jump down one line, instead of two? Press Shift-Enter.

✓ Be sure to use the Save button fairly regularly. This way you won’t lose your work if you get disconnected from VerticalResponse for some reason.

Earlier, we mentioned that the Canvas is divided into an HTML Content section (described above) and a Text Content section. What is this Text Content section and why is it here?
Every email sent out through VerticalResponse is formatted as multi-part MIME. This means that any HTML email you create and send out using our system includes a backup text version that will be visible to recipients using email clients that, for whatever reason, cannot display HTML. Though these text-only folks will generally be an extremely small percentage of your recipients, including the text backup message ensures they receive a legible message instead of a broken HTML email.

So all you’re doing in the **Text Content** section is creating this backup text version. You can either write the backup version from scratch or use the **Import from HTML** button at the very top of this section to pull all the text you wrote in your HTML document into this text version. Using the Import option is usually the way to go - just be sure to go over the imported text to make sure everything looks right after it’s been converted into a single column, plain text document.

Once you’re done creating both the HTML and text versions of your email, you are ready to move on. And just like with the **Wizard** tool, you’ll be asked to enter your **Unsubscribe** message and Postal address:

**Unsubscribe Message** – As noted in the **List Management** section of this guide, VerticalResponse takes care of all unsubscribes on your behalf. We do this by automatically inserting an unsubscribe link at the bottom of every email you send out. In this section you can use the provided drop down menu to have that link say something other than “unsubscribe” (like **Remove Me** or **Leave This List**) and customize the unsubscribe message that introduces the link.
Postal Address – Including your organization’s postal address within the message is required by the US CAN-SPAM Act of 2003 (as well as laws within many other countries, if you’re not in the US). We prefer you enter your address within this box, and will automatically populate the address if you enter this information in your profile. Your profile can be found under the Account section.

When you’re done here, click **Next Step**. This will save all your work. You can now Launch the email as soon as you’re ready.
Step 4: Launching and Analyzing Your Email

Now that you’ve designed your email, it’s time to send it out! The launch process consists of six easy steps, each of which is represented by a tab in the email editor. You must step through each of these tabs to send your email. These six steps / tabs are:

1. **Edit Email Campaign** – Guess what you can do here? Make changes to your email before you launch it!

2. **Preview** – This step gives you a preview of both the HTML and Text versions of your message.

3. **Send Test** – From here you can send a test of your email to either yourself or to a seed list of email addresses. There is no cost for sending tests. The only difference between a test email and a live email is that the subject line in a test message clearly states that the email is a test and we send out both HTML and text versions as separate messages. Remember, in a live email the appropriate version will display depending on each recipient’s preferences.

4. **Select Lists** – Choose any of your mailing lists as the audience for the email. If you select more than one list, we’ll de-duplicate between those lists to ensure you don’t mail the same email address twice.

5. **Schedule** – You can schedule your email to go out up to 4 months in the future or send it as soon as possible. The key thing to note when scheduling an email is that we actually look over nearly every email that is sent through our system before it can
go out the door. This helps us put a full stop to spam, fraudulent messages, and other emails that violate our Terms of Service, which in turn helps us ensure that the email campaigns for all our users get delivered at a high rate.

Because of this policy of looking over every email, we have approval windows that fall between the hours of 7 AM to 7 PM PST (7, 9, 11, 1, 3, 5, 7), seven days a week. Each noted approval time represents the guaranteed time an email will be approved. If you launch an email at 1:30 PM, the next approval time is at 3:00, which means the email will be approved between 1:30 and no later than 3:00 (as that is the guaranteed time).

Even if you schedule an email two months in advance and launch it, it will still be approved by the next guaranteed time on that same day. The email will then sit in your account – with a status of pending launch – until your scheduled date and time arrive.

7. **Launch** – This page is naturally the final step of the Launch process. From here the system will ensure you’ve followed all the necessary steps that came before, allow you to set your reply-to address (this is the address that receives any replies to your message), tell you if any duplicates have been removed from your list, prompt you to buy email credits if needed, and present you with a big tempting Launch button to press.
Reporting

A key part of the integration between VerticalResponse and Salesforce is the reporting data we provide that details how your email performed. Once your email is sent out, you'll start seeing reports detailing who opened your email, clicked a link, bounced, unsubscribed, or wasn't tracked as doing anything at all. How do we define these five categories?

1. **Open** – We track an email open based on whether or not an invisible tracking image within the email was loaded by the recipient. Since many email browsers turn images off by default (requiring end users to click a link to view images in the email they receive), only those people interested enough in the email to turn the images on - or those people who do not have this restriction on their own inbox – will be reported as an open if they open the email. The need for an image also means that opens for plain text emails cannot be tracked.

   If someone opens an email more than once, we'll still only count it as a single open.

2. **Clicks** – The total number of clicks displayed in the report quite simply shows exactly how many times each link within the email has been clicked. Even if one
person clicks a single link several times, each of those clicks will be counted individually (the opposite of how opens are treated).

3. **Bounces** – If an address bounces, it means the email could not be delivered to that address. Bounces are broken down into two categories:

- **✓ Hard Bounces** – Bounces that very clearly state the email could not be delivered (i.e., “user unknown”, “no user mailbox here”, etc). We mark these as bounced within the account immediately.

- **✓ Soft Bounces** – Bounces that are caused by an apparent temporary error. We try to deliver these for three days - if the message still can’t be delivered after this period then we mark the email address as bounced.

4. **Non-Responder** – A non-responder is an address that cannot be placed into any of the above categories.

This reporting data can be found under VR Statistics or, for your most recent emails, under VR Email. Clicking on the name of any sent email will open up your Reporting Dashboard. Consider this the “executive summary” for each email you send. Short on time? No problem, look at everything you’ll find on the main Dashboard view:

- **Overall Performance** – View the totals and percentages for Opens, Clicks, Bounces and Unsubscribes, as well as Forwards, Conversions, Sales and Non-Responders.

- **Top Performing Lists** – If your campaign is made up of multiple mailing lists you can view the response rates for each individual list to see how they performed. Use this information to run targeted follow-up emails.

- **Top Performing Links** – Quickly see the top 5 most clicked links for your email. Then dive into the Detailed Reporting (see below) for more thorough click through stats.
Recent Email Comparisons – Quickly and easily compare the performance of your email to other recently sent campaigns. Identify noteworthy trends in your campaigns and then make changes to increase your response rates.

Printable and Exportable Dashboard – Print a summary of your response data to share with co-workers, colleagues or clients. Or export this data to a PDF or Spreadsheet.

In addition, you can access Detailed Reports from within your Dashboard so you can see what’s driving your statistics:

Click-Through Performance – View the total number of clicks and click-through percentage for all links within your email. You can also filter this data to display HTML, Text and total clicks vs. unique clicks. It’s easy to see which links are working for you.

Compare Campaigns – Select up to 5 sent campaigns from any time period you choose and evaluate the performance. You can choose to view this data over time (i.e. first 24 hours) or the summary totals for Opens, Clicks, Bounces and Unsubscribes.

Domain Tracking – View statistics on your top 100 mailed domains (aol.com, yahoo.com, hotmail.com, etc) including Sent, Opens, Clicks, Bounces, and Unsubscribes.

Download Center – Get access to the specific email addresses that opened and clicked, bounced or unsubscribed. Instantly create a new mailing list from your responders and non-responders or export your bounces and unsubscribes into a CSV or TXT file so you can update another list.

We also enable you to push this data back to several places within your Salesforce Account:

1. Reports - We add two custom folders under your Salesforce Reports tab: **VR Email History Lead** and **VR Email History Contact**. These folders contain reports on exactly who did what with each email and can be customized just like any other Salesforce report.
2. **Lead / Contact Records** - Our Custom Email History Object can be added to the page layout for all of your Lead & Contact records. This object enables you to see which emails every record has received, whether they opened the email, which links they clicked (if any), if they bounced, what the email looked like, and so on. To add this to your records, you must edit the Page Layout for your Leads & Contacts, which can be found under *Setup > App Setup > Customize*. A help video showing specifically how to add this to your Page Layouts can be found by using the *View Demo* link in the Resources section of your *VR Email* tab.

We'll also mark the opt-out box for any recipient who unsubscribes from your emails.

3. **Dashboards** - We've built a number of graphs that compare how your emails have performed in relation to each other, and these graphs can be found under the Dashboards tab in Salesforce. If you know your way around Salesforce Dashboards, then you can create your own graphs using the data we provide.

4. **Campaigns** - If you used a Salesforce Campaign to build your list, then you can see the opens, clicks, bounces, and unsubscribes in the Campaign Member Analysis Report. Just note that you'll need to go into the Advanced Setup for the Campaign in question, and add Opened, Clicked, Bounced and Unsubscribed as Member Status Values to make this work.

To push our reporting data into these areas of Salesforce, you need to go to *VR Statistics* or *VR Email*, check the box next to each email whose stats you’d like to update, and then click the *Update Statistics* button.
In addition to this default reporting, you can activate more advanced - and free - tracking options through VR Email > Account Information > Analytic settings. These advanced options are:

- **Click-to-Conversion (CTC) Tracking** – This requires that you add a snippet of code to a page on your site. Then if someone clicks a link in your email and makes their way to that page, we’ll count them as a conversion. An example of how someone could use this – if the point of your email was to drive subscribers to sign-up for an event, you could add the code snippet to the “thank you for signing up” page that is viewed by everyone who completes the event registration process. In this way, everyone who signs up for the event would be counted as a conversion.

- **Click-to-Sale (ROI) Tracking** – This allows you to track how much money any email recipients who clicked a link in your email spent once they reached your site. You can then use this data to calculate the Return on Investment for your email (money earned “minus” money spent on marketing).

- **ROI tracking works in much the same way as Click-To-Conversion tracking** – you add a snippet of code to your site that we then use for reporting within your account. This does require a bit more technical knowledge, though, as it must be setup on your site in such a way that it can capture the specific amount of money spent by each individual.

- **Google Analytics Integration** – Our integration with Google Analytics allows you to take our click-through tracking to the next level - you can follow a recipient from an open, to a click, and then to see exactly what that recipient does on your website through your Google account.
Marketing Tips

Building Blocks – Relationship Building

Whenever you interact with a customer or prospect, you are marketing your business. Whether you’re having a simple conversation or your customer is making a large purchase, the customer’s experience has a direct influence on their decision to become a loyal customer. So how do you know where to begin with growing a base of loyal customers? Sure, you need to offer them great products and services, but what are some other ways you can create a meaningful experience for customers?

Ask for Permission

Prospects visit your website or walk through the door of your business on a daily basis. How many of them become a customer at that moment? We’d guess most of them don’t. So how can you make it more likely they’ll return and become a customer down the line? Easy answer – ask for their contact information, and give them a good reason to provide it. Getting permission to contact a potential customer puts the ball in your court.

We don’t mean to suggest that you ask for the full postal address with work and home phone numbers. Their first name and email address is all you need to start building the relationship, but other bits of fun information can help create great marketing offers as well.

Hint!

For permission-based email marketing to work, it must be:

- Relevant
- Valuable
- Appealing
If you have a website, create an opt-in form to capture contact details online. If you have a storefront, you can use a guestbook or fish bowl to collect business cards. If you talk to prospective customers on the phone, you can simply ask them. Just remember that the barrier to entry should be as low as possible, so the less contact info you request the easier it will be to build your list. Asking for unnecessary information like phone numbers (unless you need this info for a real reason) will lead people to wonder why you’re asking for so much and make them less likely to sign-up or join the list. You can always ask for more information once they know you better or after they become a customer.

Remember to be up front with how you plan to use the information you collect. If you’re going to send out a newsletter, then let customers know when they can expect to hear from you. If you’re going to send special offers, be explicit wherever you ask for information so they can see the benefit of signing up. Your email content provides added value to potential subscribers in exchange for their willingness to share their details. When you explain that email subscribers receive exclusive content and get first dibs on sale items, you automatically give them more of a reason to join your list.

**Nuture the Relationship for Maximum Potential**

Collecting contact info is only the first step in establishing a connection with potential customers. Once you’ve got their email addresses, you have to start providing them with the great information you promised at the time of sign-up. The goals of your email
marketing program, and the personalities of your company and customers will determine the kind of information you send. Are you hoping to drive immediate sales with your emails? Or create brand awareness and establish yourself with subscribers? There is no ‘one-size-fits-all’ approach here. What works for the company down the street may not work for you at all.

**Reporting: How Are You Using It, Or Are You?**

If you are currently using any reputable email service provider like VerticalResponse, you definitely have access to basic reports about how your email marketing campaigns are doing. The real question is, what are you doing with that information? We’ve put together some ranges for the stats you probably view and some ideas of what you could be doing with that information to make your email campaigns even better.

**Open Rate**

Customers who tend to have great relationships with their customers can get open rates as high as 40%, which is great. Others that have gathered their lists over several years and potentially lost some customers could be in the 14-18% range.

***Ideas:***

- ✓ Get rid of the dead weight. If you’ve been sending someone email for years and they’ve never opened your email or clicked a link, then maybe email just isn’t the way you should be contacting them. Why not try calling them or dropping them a postcard to see if that wakes them up? THEN you can try to develop an online relationship with them at a later date. You’ll be mailing to more active people in the long run.

- ✓ Download your list of NON-RESPONDERS, these are people who have neither clicked on a link nor opened your email. Then, a week or so after you’ve sent a campaign, send them the same email, but switch up the subject line to something more catchy to see if you can get more people opening.
✓ Don’t try to be cute or misleading in the subject line. Using “Re:” so it appears as if you’re sending these individuals a reply to a message they’ve sent is deceptive. This practice is now against the Federal law.

✓ Keep your subject line concise. Some ISPs will shorten the subject line to 30 or 40 characters. You want your recipients to open and read your email; you don’t need to tell the whole story here.

✓ The most important thing to remember is that an open rate is only valid for people who receive HTML emails. Make sure you evaluate your campaign performance with this fact in mind.

**Click Rate**
Click rates usually fall in the 1-3% range. However, if you’ve got an amazing story to tell or great deal to give, then we see it skyrocket to the 8-10% range. Anything over that you’re off the charts. Again it all depends on that relationship you have with your customers.

**Ideas:**

✓ Test including more links in your email. We tested linking our article headlines and squeezed some more clicks out of people. Make sure all of your images are linked as well.

✓ Put your most important articles or offers above the fold or at the top of your email.

✓ Targeted, relevant messages not only receive higher open rates, they also receive much higher click-through rates. Target your messages based upon your subscriber’s demographics, preferences and interests, and past purchase history.

✓ Use graphics or pictures to explain your product, and make the graphic clickable to direct readers to a web page providing more information.
Lastly, the best thing you can do to increase your rates is give your recipients value. Whether you define value as a discount off of goods and services or a piece of information your recipient can’t do without, this will strengthen your relationship, thereby increasing your response rate.

**Bounce Rate**

We’ve seen our customers average bounce rates usually come in under .5%. However, lists mailed less frequently can have bounce rates in the 5%-7% range. A list that is mailed for the first time can have up to a 50% bounce rate depending on how “new” it is.

✔ **Idea:** Download your list of bounces. If you have their postal addresses, send them a postcard asking them to update their email address. Then direct them to an opt-in form where you capture their new address. You may have to sweeten the deal with an offer on their next purchase or something free like a gift card. It’s worth it for you not to lose that customer.

**Unsubscribe Rate**

A regularly mailed list has an average unsubscribe rate around the .2-.5% range. A less frequently mailed email list can creep up to the 2-5% range.

✔ **Idea:** Keep in more frequent touch with your recipients. Instead of once every 3 months why not make the time and increase it to once per month. A customer of yours may be on their way out the door, you don't want that.
Common Email Marketing Mistakes

**Get Permission**
Just like in grade school, you have to get permission first. Unless you have the recipient’s permission, you may be sending spam, which is against the law. Buy e-mail lists on a CD or harvesting them from the Web is bad news. Spam hurts the reputation of your business. The [CAN-SPAM Act](http://www.ftc.gov/bcp/edu/pubs/business/spamct.cfm) provides strict requirements about what you can and cannot do; for more information, go to the Federal Trade Commission Web site.

**All Sizzle, No Substance**
Make sure your content is relevant and timely. Make sure your campaigns contain something value to the recipient. You need to provide them with something that they desire. Interesting content should hold their attention long enough for you to market yourself successfully.

**Stick to the Subject**
Put some thought into your “from” and “subject” lines. People often determine that they do not know the e-mail sender and delete it immediately. The “from” line should be the exact company or newsletter name with which they signed up. The subject line can be the name of the newsletter or a well-thought-out, clever headline that grabs their attention.

**What Do You Want?**
What is your call to action? You can’t get results without one. Do you want the reader to go to your Website? Buy something? Take a survey? Whatever you want them to do, make it clear and simple.
VerticalResponse
Marketing Lingo 101

A/B Split
When a list is divided into two equal segments, each of which can be tested with different variables as part of an effort to determine which is more effective.

Above the fold
When you launch your internet browser or while viewing your email in your email reader, the bottom of the window is commonly referred to as the “fold”. The viewable areas before one has to start scrolling are “above the fold”.

API (or Application Programming Interface)
An application programming interface (API) allows a software’s functionality to be extended to ‘the outside world’. Examples of APIs include Google’s Gmaps pedometer, where users can map out their running routes.

ASP (or Application Service Provider)
An application service provider (ASP) is a company that provides access to software applications via the Internet that otherwise would have to be installed on a user’s personal computer. Current buzzterm for this is Software-as-a-Service (SaaS). See also: SaaS (Software as a Service)

Auto Reply
When an email recipient is “Out of the Office” or “Away on Vacation” they often set up an automated reply message alerting the sender to this fact.

B2B
B2B (business-to-business) companies that primarily sell products or provide services to other businesses.

B2C
B2C (business-to-consumer) companies are those firms that sell products or provide services primarily to end-user consumers.

Bandwidth
The amount of information that can be transmitted over a network such as the Internet in a specific amount of time.

Blacklists
Blacklists are made up of lists of IP addresses belonging to organizations that have been identified as senders of SPAM (unsolicited commercial email). Blacklists are often used by ISPs and corporations as part of the filtering process that determines which IP addresses they prohibit from sending mail to their members.
Blocking

When emails are prevented from reaching their intended destination, typically due to action taken on the part of the Internet Service Provider (ISP).

Blog

A user-generated website where entries are made in an informal journal style and displayed in date order with the most recent entries first. Readers may or may not be able to comment on specific posts within the blog.

Bonded Sender Program

Sponsored by IronPort Systems, the Bonded Sender program identifies legitimate email traffic. Originators of legitimate email can now post a financial bond to ensure the integrity of their email campaign. Receivers who feel they have received an unsolicited email from a Bonded Sender can complain to their ISP, enterprise, or IronPort and a financial charge is debited from the bond. This market-based mechanism allows email senders to ensure their message gets to the end user, and provides corporate IT managers and ISPs with an objective way to ensure only unwanted messages get blocked.

Bounce

A “Bounced” email indicates that an attempt to deliver an email to a particular address has failed. This may occur if the email address is no longer valid or the intended recipient’s ISP and/or email servers were not functioning over a period of 3 consecutive days. See also: Bounce - Hard, Bounce - Soft

Bounce - Hard

An email address that is rejected for a permanent reason that cannot be resolved, such as: “the address does not exist”. See also: Bounce

Bounce - Soft

An email address that is rejected for what is most likely a temporary reason, such as an overfilled inbox. See also: Bounce

Call-to-Action

Phrasing that encourages a reader to take action. For example, “Click here to register for the VerticalResponse newsletter.” or “Get started with your free trial of VerticalResponse today!”

CAN-SPAM Act of 2003

The CAN-SPAM Act of 2003 (Controlling the Assault of Non-Solicited Pornography and Marketing Act) is a federal law that establishes requirements for those who send commercial email. It spells out penalties for spammers and companies whose products are advertised in spam if they violate the law, and gives consumers the right to ask emailers to stop spamming them. Among other measures, the law:
✓ Bans false or misleading header information. Your email’s “From,” “To,” and routing information – including the originating domain name and email address – must be accurate and identify the person who initiated the email.

✓ Prohibits deceptive subject lines. The subject line cannot mislead the recipient about the contents or subject matter of the message.

✓ Requires that your email give recipients an opt-out method. You must provide a return email address or another Internet-based response mechanism that allows a recipient to ask you not to send future email messages to that email address, and you must honor the requests. Any opt-out mechanism you offer must be able to process opt-out requests for at least 30 days after you send your commercial email.

✓ It requires that commercial email be identified as an advertisement and include the sender’s valid physical postal address. Your message must contain clear and conspicuous notice that the message is an advertisement or solicitation and that the recipient can opt out of receiving more commercial email from you. It also must include your valid physical postal address.

The CAN-SPAM Act also provides for penalties for a number of other offenses, which can be reviewed here: http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm

CAPTCHA
A Completely Automated Public Turing test to tell Computers and Humans Apart is used to determine whether or not the user is human. Users are asked to type in a series of distorted images to prove that they are not a machine.

Challenge Response
A challenge-response system is a program that replies to an email message from an unknown sender by subjecting the sender to a test designed to differentiate humans from automated senders, also known as “bots”.

Click-through Rate (CTR), Click Rate
An indicator of response to a given email message, as measured by the percentage of recipients that click on a link enclosed in the email. To determine the click-through rate, divide the number of responses by the number of emails sent (multiply this number by 100 to express the result as a percentage).

Co-registration or Co-Reg
Co-registration is the process of using other websites to generate opt-in email leads that you can add to your mailing list for marketing purposes. When you reach a co-registration
agreement with a site or a network of sites, they will ask new registrants if they would like to receive information from your company as well. If the registrants opt-in (choose to receive mailings), they will be added to your mailing list so you can market to them directly.

**Confirmed Opt-in**

“Confirmed opt-in”, also known as “double opt-in” or “closed loop” in some circles, provides an additional layer of security by requiring that an email account be both subscribed and then verified by a confirmation email before it is added to the list. As a result, only those people with access to the account can respond to the confirmation message, greatly reducing the chance of abuse. For this reason, confirmed opt-in is regarded as the gold standard for secure email marketing.

**Content**

The copy, graphics and images that comprise your email, website or marketing materials.

---

**Conversion Rate**

A metric which measures the percentage of people converted into subscribers or buyers out of the total population exposed to a particular campaign.

**Copy**

The text of the campaign, distinct from the graphics.

**CPA (or Cost per acquisition)**

A payment model in which payment is based solely on qualifying actions such as sales or registrations.

**CPM (or Cost per thousand)**

In marketing, CPM commonly refers to the cost per 1,000 names on a given list or impressions served. For example, a list using VerticalResponse priced at $10 CPM would mean that the list owner charges $.01 per email address.

**CRM (or Customer relationship management)**

Customer relationship management (CRM) is a broad term that refers to concepts businesses use to maintain and improve relationships with customers. CRM involves collecting, storing and analyzing customer information. CRM enables businesses to provide personalized services to meet their customers’ needs and retain their business.

**Database**

A database is a collection of information.
stored in a computer in a systematic way, such that a computer program can consult it to answer questions. For email marketing purposes, a database is the software that stores your records or lists. Your database may be in the following forms: ACT!, Filemaker, GoldMine, MS Excel, Access, Netscape, Outlook, Outlook Express, Oracle, Salesforce, Saleslogix, Sybase or many other forms.

**Dedupe**

Deduplication refers to a data cleansing technique where duplicate data is removed from a set.

**Deliverability**

The ability of the email sender to consistently deliver an email to a recipient’s inbox with HTML and text intact. Marketers operating permission-based email schemes need to carefully consider deliverability due to aggressive SPAM filters.

**Domain**

Generally refers to internet addresses, the memorable form of a website’s numerical IP address. VerticalResponse’s domain name is verticalresponse.com.

**DomainKeys**

Or DKIM: Domain Keys Identified Mail. An anti-spam software application that uses a combination of public and private keys to authenticate the sender’s domain (A name by which a computer connected to the Internet is identified) and reduce the chance that a spammer or hacker will fake the domain sending address.

**Double Opt-in**

“Double opt-in”, also known as “confirmed opt-in” or “closed-loop” in some circles, provides an additional layer of security by requiring that email accounts be both subscribed and then verified by a confirmation email before they are added to the list. As a result, only those people with access to the account can respond to the confirmation message, greatly reducing the chance of abuse. For this reason, double opt-in is regarded as the gold standard for secure email marketing. See also: Opt-in, Opt-in form

**Email Campaign**

When you build an email and send it to your recipients using VerticalResponse this is an example of an email campaign. Your campaign may be a newsletter or may consist of offers. Some marketers may define a campaign as a series of email messages using a common theme, but in the VerticalResponse system, any email sent - even one at a time as opposed to a series of emails - is classified as a campaign.

**Email Client**

An application used to send, receive, store and view email like Outlook, Mac Mail, Yahoo! Mail, Gmail, etc.

**ESP (or Email Service Provider)**

Email Service Providers (ESPs) are companies like VerticalResponse that provide a service of enabling a user to send permission-based email campaigns to designated users. They are usually
Software-as-a-Service Providers (SaaS) who offer their services in an online fashion. There are also software ESPs.

ESPC

The Email Sender & Provider Coalition (ESPC) was formed to fight spam while protecting the delivery of legitimate email. The ESPC members have recognized the need for strong spam solutions that ensure the delivery of legitimate email and have been very active in the war against spam. VerticalResponse is an active member of this organization. For more information on the ESPC, visit www.espcoalition.org.

Feedback Loop

Service provided by Internet Service Providers to other providers or mailers who have a good reputation and send a large amount of mail into their network. A feedback loop sends email reported as spam back to the sender so the sender can take action to resolve the problem.

Font

A specific size and style of type within a type family.

Footer

Some emails include a “footer”. This is the area at the bottom of an email where you might find unsubscribe information.

Forward to a Friend

Forward to a Friend refers to an option (usually a link) provided to an email recipient that provides them with an easy method to share that email message with someone else.

Frequency

The intervals at which email marketing efforts are repeated: weekly, bi-weekly, monthly, bi-monthly, etc.

From Line

The information that appears in the “From” line at the top of the email and typically indicates the identity of the sender.

Hard Bounced Email

A hard bounce is an e-mail message that has been returned to the sender because the recipient’s address is not valid. A hard bounce might occur because the domain name doesn’t exist or because the recipient is unknown.

Harvesting

The illegal process of obtaining lists of email addresses to send bulk emails, or spam. Harvesting can include list purchase and spam ‘bots’ scanning web pages for email addresses.

Header

The header in an email is the part of the email that is not transparent to the recipient unless they have their “View Headers” turned on. This tells the recipient what servers the email is coming from and what programs are being used to
generate this email. Headers contain information on the email itself and the route it’s taken across the Internet. Recipients can normally see the “to” (identity of recipient), “from” (identity of sender) and “subject” (information in the subject line) headers in their inbox. You can modify these to influence their decision to open or delete an email.

**Headline**

The announcement recipients see when they open an email. Ideally, the headline expresses the company’s value proposition and encourages the recipient to read further.

**Hosted Email**

A hosted version of an email allows users to view the email message as a web page, thus ensuring that all formatting remains intact. VerticalResponse does this for you for free.

**House List**

A permission-based list that you build yourself. Use it to market, cross sell and up-sell, and to establish a relationship with customers over time. Your house list is one of your most valuable assets.

**HTML (or Hypertext Markup Language)**

A “markup” language designed for the creation of web pages and other information viewable in a Web browser.

**HTML Email**

HTML email is simply an email created with HTML that allows for the display of images as opposed to simple text. Ninety five percent of all email readers have the ability to display HTML emails, which are more visually appealing and attention-grabbing than mere text. However since 2005, many readers have the default where images are “turned off” or not viewable by the recipient. For this reason you need to make sure your recipients add you to their address book so you’ll always go into the inbox where images will show.

**IP Address**

The Internet Protocol (IP) address is simply a computer’s address. The IP address refers to the numerical component of an internet address or domain name. An IP address in general looks like this: 123.45.6.789

**ISP (or Internet Service Provider)**

Internet Service Provider is a company that provides access to the Internet. AOL, Yahoo!, MSN, Comcast and various local phone companies are common ISPs.

**Landing Page**

The page on a website where the visitor arrives (which may or may not be the home page). In terms of an email campaign, if a user wants to track a campaign separately they set up an additional page for recipients to visit. This way they can track distinctive traffic to this page from their email.

**Layout**

The arrangement of content within an email. A layout is designed to optimize the use of space while presenting the critical content in
the portions of screen most likely to attract the recipient’s immediate attention.

Links
Text links, hyperlinks, graphics or images which, when clicked or when pasted into the browser, direct the reader to another online location.

Load Time
The length of time it takes for a page to open completely in the browser window. You’ll want your load time to be as fast as possible.

Look and Feel
The degree to which design, layout and functionality are appealing to prospects and fits the image the business is trying to portray.

Mailing List
A set of email addresses designated for receiving specific email messages.

Mailto:
An HTML command that allows collection of email addresses from a website. When readers click on a link (such as `<a href="mailto:info@verticalresponse.com">`) their default email program composes an email message to send to that address.

Multi-part MIME Email
Multipurpose Internet Mail Extensions (MIME) is an Internet standard for the format of email.

Virtually all Internet email is transmitted in MIME format. This simply means that two versions of the email are sent, one graphical and one text. The appropriate version is then directed to the recipient based on the recipient’s email client’s preferences.

Navigation
The path by which a user can click from page to page on a website and move around within a page.

Nth Sampling
When a subset of the list is constructed based on every Nth individual. For example, if you need to create a sub-list with 100 members from an overall list of 1,000 names, every tenth person is selected. If you need to create a sub-list of 5,000 from a list of 100,000, then every twentieth name is chosen.

On Demand
The phrase “On Demand” refers to a service or feature that is available for immediate access whenever an individual chooses to access it.

Open Rate
The number of HTML message recipients who opened your email, typically measured as a percentage of the total number of emails sent, although calculation methods may differ. The open rate is considered a useful metric for judging response to an email campaign but it should be noted that open rates for text emails can’t be calculated.
Open Relay

An open relay is an email server configured so that anyone on the internet can dispatch email. Once an acceptable means of sending email in the past, spammers have used open relay to re-route their email through a third party to avoid detection. The CAN SPAM Act of 2003 made it illegal to send spam through an open relay.

Opt-in

Opting-In is the action a person takes when he or she actively agrees, by email or other means, to receive communications from an email sender. There are different types of opt-in practices, some of which are more demanding than others. See also: Double Opt-in, Opt-in form, Single Opt-in

Opt-in form

A form that website owners can add to their site to collect newsletter signups from visitors. See also: Double Opt-in, Opt-in, Single Opt-in

Opt-Out

Opt-out email marketing assumes the recipient wants to receive email unless they specifically ask to be removed from the list - in other words, "opt-out" or "unsubscribe". If readers fail to state explicitly that they no longer wish to remain on the list, they can expect to receive messages until they make their desire known. Response rates tend to be lower when sending opt-out email, so be prepared for this result when you’re analyzing your campaigns.

Payoff

When offering customers further information, such as a whitepaper or article via a link in an email, the payoff is the information they gain access to when clicking on that link.

Permission-based email

The practice of only sending email messages to those recipients who have agreed (or asked) to receive them.

Personalization

The practice of writing the email to make the recipient feel that it is more personal and was sent with him or her in mind. This might include using the recipient’s name in the salutation or subject line, referring to previous purchases or correspondence, or offering recommendations based on previous buying patterns.

Phishing

In a phishing scam, a spammer, posing as a trusted party such as a bank or reputable online vendor, sends email messages directing
recipients to Web sites that appear to be official but are in reality fraudulent. Visitors to these Web sites are asked to disclose personal information, such as credit card numbers, or to purchase counterfeit or pirated products. See also: Sender-ID, Spoofing

**Preview Pane**

Email programs such as Microsoft Outlook, Entourage, and Mac Mail allow users to view email through a preview pane. The preview pane is important to bear in mind when composing the opening lines of an email.

**ROI (Return on Investment)**

A measure of the profit realized and/or costs saved at a company, or as the result of a specific project within the company. ROI measures how effectively the firm uses its capital and resources to generate profit; the higher the ROI, the better. An ROI calculation is sometimes used along with other approaches to develop a business case for a given proposal.

**SaaS (Software as a Service)**

Software as a service (SaaS) is a software distribution model in which applications are hosted by a vendor or service provider and made available to customers over a network, typically the Internet. See also: ASP (or Application Service Provider)

**Salutation**

This is the area in an email where you address your recipient. Examples are “Dear Customer”, “Hello Larry”, and “Dear Member”.

**Sender-ID**

Sender-ID is an email industry initiative championed by Microsoft and other industry leaders as a technical solution to help counter spoofing - the #1 deceptive practice used by spammers. See also: Phishing, Spoofing

**Signature File**

A short block of text at the end of a message identifying the sender and providing additional information about them.

**Single Opt-in**

Under single opt-in formats, businesses only mail addresses that have been actively subscribed to their list, typically by completing a web form, filling out a business reply card or sending an email to a specific address. Because the registration process is proactive, a single-opt in policy offers a higher level of security than the opt-out approach, but also has the following limitations:

Since single opt-in procedure does not require email address verification, it is possible to register other people without their consent, merely by having knowledge of that person’s email address.

A mistyped address or the entry of a bogus email account that happens to belong to someone else