

Succeeding with Email Marketing:

A GUIDE FOR MICROSOFT
DYNAMICS MARKETERS



 **ClickDimensions**

Table of Contents

Introduction.....	3
Preparing to Send.....	4
• Technical Best Practices	5
• Building and Maintaining Marketing Lists	7
• Segmenting Marketing Lists.....	9
Creating Engaging Emails.....	10
• 6 Types of Subject Lines to Try	11
• Writing Captivating Email Copy	13
• Email Design Tips for Non-Designers	15
• Ideas for Using Personalization	19
Measuring and Optimizing.....	23
• Measuring Email Performance.....	24
• Optimizing for Future Success	25
Conclusion	28
About ClickDimensions	29

Introduction

Despite earlier rumors to the contrary, marketers today know that email marketing isn't dead. In fact, it's far from it. According to research firm MarketingSherpa, 72 percent of those surveyed named email as their preferred method of communication from businesses. Gigaom Research reports that marketers love email as much as their customers and prospects, ranking email as the most effective tactic for awareness, acquisition, conversion and retention. And in today's digital-everything business climate, email marketing is poised to become more important than ever.

While email marketing is still very much alive and well, the tactics for garnering opens and inspiring action have evolved. In this guide, you will find tips for succeeding in the modern era of email marketing and how for Microsoft Dynamics users, the path to email marketing success starts right in your CRM.

Preparing to Send

While the email itself is the star of the email marketing show, a lot of very important behind-the-scenes work occurs well before a message arrives in the inbox. Without this work, there's a chance that an email might not be delivered or might not be relevant to the recipient when and if it does. Let's explore the prep work and ongoing maintenance required for email marketing success.



Only 14% of subscribers believe that the majority of the marketing emails they receive are relevant to them

– OptinMonster



21% of email recipients report email as spam even if they know it isn't

– Convince and Convert



22% of marketing emails sent with subscribers' permission never reaches their inboxes

– ReturnPath

Technical Best Practices

Ultimately, if your organization's emails are never received by your audiences, they have no chance of helping you to achieve the many business goals that email marketing is capable of attaining. Bulking – that's the technical term for when emails are delivered to a junk/spam folder – can occur for a variety of reasons. By following a few technical best practices, you can help ensure high deliverability rates for your email messages, which is the starting point for all successful email marketing efforts.

SPF Record

If you have a SPF record set up for the sending domain, it should include your email service provider's domain (for example, for ClickDimensions customers, it is customers.clickdimensions.com) and it should be free of errors. There are several free sites you can use to check your SPF record: [Kitterman](#), [MxToolbox](#), [wiseTools](#). These sites will check for number of lookups, syntax, redundancies and empty lookups.

If you don't have an SPF record set up for your sending domain, it might not have as big of an impact as a broken SPF record, but we recommend to our customers setting one up as a best practice. Some email providers will flag a sender if there is no SPF record set up.

CNAME

An email CNAME is more optional than the SPF record. A CNAME will rebrand the redirect links in your email to coordinate with your sending domain. When the sending domain and the link domains match, it makes the email look professional and polished. Not having a CNAME set up will not affect deliverability for an email. However, a broken CNAME record can create 404 errors and result in your email being flagged as spam.

Links

There are several things you need to keep in mind when including links and buttons in your email if you want to ensure deliverability.

- Make sure all the URLs resolve to a website (and hopefully the correct one). A URL that is broken or that leads to a page that is no longer available can result in a 404 error. In addition to being a poor customer experience, a 404 error will cause a spam filter to flag your email. Test, test and test again before you send a campaign.
- Don't use short URLs. Short URLs are great for social media where characters or screen space is limited, but they are also a tactic used in phishing emails, which means spam filters will flag your email as spam.
- Most sensitive spam filters (think financial institutions and government agencies) will also flag full URLs used in the body of an email. Instead of linking to [www.mycompany.com/contact](#), instead hyperlink to a word or phrase like "contact us," for example.

Text Version

One of the easiest things you can do to ensure deliverability is to include a text version of your email. Mailbox providers and spam filters like to see emails that come with a HTML and text version (called Multipart MIME).

HTML

Spam filters parse the HTML of an email to determine if there are any elements that look like phishing. If there are errors in the HTML, the filter will be unable to parse it and will most likely flag the email as a result.

Images

There are just a few things to keep in mind about images in emails. First, always have descriptive alt text for images. Spam filters will check for this, but almost more importantly, a recipient can still understand the message and navigate the email with images turned off.

Also, be sure to balance images with text. Image-heavy emails are eye-catching for sure, but an email still needs some text to get your message across to those recipients that have images turned off. Include a few sentences and maybe a text link to ensure all audiences can read your email.

Spam Score

The SpamAssassin spam score is a widely used measurement to predict how your email may be received by various mailbox providers and ISPs. A spam score ranges from zero to 10. You should aim for a spam score of three or less.

[Mail-tester](#) is a free, user-friendly tool that you can also use to see your SpamAssassin spam score for an email. Mail-tester will give you a custom email address where you send your email and then you can view the report on their website.

Spam Assassin Report		
Is Spam: False		
Spam Score: 2.8		
Points	Rule Name	Rule Description
00	T_KAM_HTML_FONT_INVALID	BODY: Test for Invalidly Named or Formatted
02	HTML_IMAGE_RATIO_04	BODY: HTML has a low ratio of text to image area
00	HTML_MESSAGE	BODY: HTML included in message
01	HTML_FONT_LOW_CONTRAST	BODY: HTML font color similar or identical to

The email address Mail-tester provides you for your spam score can be reused. In Microsoft Dynamics, create a contact with the Mail-tester email address and include it on the marketing list you use for testing emails

Building and Maintaining Marketing Lists

Behind every great email marketing campaign is a great marketing list. Marketing lists in Microsoft Dynamics 365 are one of the most valuable assets your company has and keeping them in top shape is critical to your business and the success of your marketing efforts. High-quality marketing lists result in high deliverability rates, increased conversion rates, and an engaged community of prospects and customers. On the flip side of that coin, not building and maintaining good lists can result in low conversions, high bounce rates, spam complaints and even being blacklisted by an ISP.

Building Your Marketing Lists

There are many smart strategies for acquiring subscribers; most involve offering something of value to individuals in exchange for their contact information. Thought leadership, product updates, training or even notifications are all good reasons to sign up for emails. Other examples include offering an eBook in return for completing a form or hosting a webinar that requires registration. In both of these cases, make sure that you use clear language that indicates by fulfilling an action the subscriber is giving permission to receive further communications.

No matter how you entice individuals to give you their email address, the key is to ensure that your lists are permission-based. Permission-based marketing means that the individuals that you're marketing to have directly granted your organization permission to do so. In email marketing, this means that they have "opted in" to be on your list. Giving a recipient an opportunity to unsubscribe or opt-out is important, but your marketing is not permission-based if you didn't first get their consent.

If you use an email list that was purchased or compiled for another purpose, it is likely that a significant portion of the members of that list will have no interest in your messages, resulting in higher numbers of spam complaints and bounces. In addition, you can also run afoul of the growing body of email-related laws and legislation.

Maintaining Your Marketing Lists

Many companies devote considerable time and energy to initially building high-quality marketing lists but fail to follow through on their list upkeep over time. The result is often poor-performing lists with increased bounce rates and spam complaints. Maintaining clean and effective marketing lists is an ongoing process, but by utilizing the tips below you should be able to improve your deliverability by weeding out harmful and unnecessary list members.

Monitor your excluded emails and email events

Every time you send a bulk email, be sure to look at the excluded emails and email events, particularly the bounces. Excluded emails are email addresses that were not sent to due to excessive past bounces. If the email address has been excluded, the recipient did not get the email. It is good to periodically remove these individuals from your marketing lists so that the number of people you think will receive the email will be much closer to the number of people that actually receive the email.

Provide subscription management options

When you maintain multiple marketing lists – for example, a newsletter mailing list, an event announcement list and a list for your loyalty club members – an individual may wish to receive emails from one list, but not another. Subscription management allows customers to choose which emails they would like to receive by giving them the ability to opt in to some lists and opt out of others. Instead of a single unsubscribe link, the person is directed to a webpage where they can select which lists they wish to receive.

Remove fake, invalid and spam trap email addresses

Keeping up with the excluded emails and email events is a good way to catch fake or misspelled email addresses. Spam trap email addresses are valid email addresses that are created for the sole purpose of luring spam. The best way to remove potential spam trap addresses from your lists are to remove the unengaged email addresses. Spam trap addresses, because they do not belong to a human — think of them more like a data collection address — typically do not open or click on an email. Not only is this unengaged population at risk to mark your email as spam but they are also at risk of being a potential spam trap address. It's best to only keep actively engaged email addresses in your lists.

Remove role accounts

While it may not seem like it, role accounts such as sales@somecompany.com often have a negative impact on email campaigns. These email addresses are often checked by multiple people and may change hands frequently. Even if they are collected legitimately, these email addresses are a likely source of spam complaints. All email addresses should provide permission for email marketing, and role account addresses are often used by a team or multiple people making it hard to prove permission was received for all recipients.

10 Ideas for Growing Your Marketing Lists

- 1 Web sign up forms.** Placing easy-to-find email sign-up boxes around your website can help tremendously with list building.
- 2 Contests.** Host a contest or giveaway that you promote on your website and social media accounts and ask for email addresses as part of the entry process.
- 3 Subscription management.** Not only is subscription management great for retaining subscribers, showing individuals that they have options in the communications they receive can help encourage new subscribers too.
- 4 Online ads.** Use online ads to promote email newsletters or other content and collect email addresses via a landing page.
- 5 Social sharing buttons.** Use social sharing buttons in your email messages to encourage your existing subscribers to share your content with their social networks.
- 6 Exclusive offers.** Create exclusive offers just for your email subscribers and tell your audiences about this perk on your website, social media and other communications channels.
- 7 Facebook call to action.** Use a newsletter sign up call to action on your company's Facebook page to create an opportunity to connect with that audience via email.
- 8 Email signature.** Encourage everyone in your organization to include a link to your newsletter sign up form in their email signatures.
- 9 Blog call to action.** Utilize your blog's valuable real estate to the fullest by including a call to action (CTA) at the end of each post. These CTAs can direct readers to subscribe to your newsletter, exclusive discount emails or other marketing lists.
- 10 Send great emails.** Sending emails that people truly want to receive not only helps you retain current subscribers, it also can help grow your lists by encouraging your recipients to forward your emails. If the email content is intriguing or valuable enough, those forwards can result in subscriptions too.

Segmenting Marketing Lists

Segmenting marketing lists is an incredibly powerful way to send your emails to the right people at the right time. List segmentation allows you to match your content with your customers' interests, which will increase interaction with your email and drive conversions.

Within Microsoft Dynamics, the possibilities for segmenting marketing lists are limitless. Depending on the information you collect and maintain in your CRM, you can create lists that are specific to a variety of different audiences, including:

Geography

Geographical segmentation is one of the easiest and most effective ways to customize emails to a specific audience. Sort by country, zip code, state/province or other geographic boundaries. Customize your email to cater to the local area. For example, a sporting goods store could advertise snow boards to customers in Colorado while promoting surf boards to buyers in California.

Verticals

Segment your marketing list by type (corporation, government, non-profit), industry or company size to target specific audiences. A software company, for example, could segment by company size to promote a small business software to one list and an enterprise-level solution to another.

Demographics

Demographic data like age, gender, whether an individual has children, household income and more can be a very effective way to better target your email messages to your audiences. For example, a hotel chain could promote kid-friendly packages to one segmented list and couples-only packages to another. Or a financial institution could create a segmented list of individuals nearing retirement age to connect with them regarding retirement financial planning services.

Interest

Using web intelligence, you can segment your list by how interested a contact or lead is in your company. Send one email to contacts that have a high lead score and a different email to customers that have a low score. The low-score email could attempt to reignite interest in your products or services, while the high-score email could entice interested customers with a special offer.

Behavior

Using campaign automation, you can add and remove contacts to marketing lists based on their interactions with your emails. For example, if a recipient does not open one or more of your emails, they can be put on a "cold" list while an individual who clicks on a link in your email could be added to a "warm" marketing list. You could then use these lists for future segmented email marketing initiatives.

Creating Engaging Emails

Deliverability is just one of the many hurdles marketers must overcome in the quest for email marketing success. Once an email arrives in the inbox, it faces numerous challenges before it can earn a coveted conversion. Will the subject line stand out in a crowded inbox and lead to an email open? Once opened, will the copy inspire action? Will the design make the message feel aesthetically pleasing and easy to navigate? Will it feel personalized to the recipient? Let's take a closer look at these elements of email marketing and how you can utilize them to win the inbox.



293.6 billion emails are sent every day

– Statista



Emails with personalized subject lines generate 50% higher open rates

– Yes Lifecycle Marketing



Up to 60% of emails are opened on mobile devices

– IBM

6 Types of Subject Lines to Try

Email subject lines can be tricky. To be effective, they should be brief – 50 characters or less is ideal – but they also must be compelling. It's also a great idea to switch up the types of subject lines that you use in your campaigns, so your leads and contacts stay engaged, thus increasing your open rates. Here are some effective approaches to subject lines for you to try:

Scarcity

FOMO (fear of missing out) is very much alive and well today. Use FOMO to your advantage in your email marketing campaigns by indicating scarcity. Phrases like "Limited time," "Don't miss out" or "Hurry! Ends soon!" are all effective ways to communicate to recipients that they need to open your email and take action now. Just be careful not to create a false sense of scarcity. If an offer isn't actually available only for a limited time, it's best to opt for a different type of subject line to avoid losing your audience's trust.

Numbered list

Numbered lists can also be very effective in email subject lines. Numbers let us know what we're in for and how much time we can expect to invest, which can help drive your open rates. Examples of numbered list email subject lines include "3 things marketers must try in 2020" or "5 of the best Chicago pizzerias." In most cases, it's wise to stay away from lengthy lists; they can discourage opens by implying that it will take a long time to read.

Curiosity

"This one miracle food can help you shed pounds – you won't believe it!" Clickbait headlines like that work for a reason. People are naturally curious, so they just can't resist clicking on the link to find out about that miraculous weight loss food. While you will want to avoid the sensationalism of clickbait, aim to bring a sense of curiosity to your email subject lines. Questions are great for generating curiosity, as are statements that compel people with vagueness like, "The one thing marketers should do every day."

Don't Overlook the Preheader

There are three things that recipients will see when your email first hits their inbox: the sender name, the subject and the preheader – the line of teaser text that appears below an email's subject. The subject line is what grabs your readers' attention, but as an extension of your subject line, the preheader can help increase opens and clicks. Effective preheader text complements the subject line and adds more detail. In the examples below, you can see two different approaches to preheader text. Carter's looks to erase any doubts about the timing of ordering Christmas pajamas since this email was sent in early November, while Target tells recipients about how they can get additional savings on top of what is promoted in the subject line. Both are a good use of that space.

carter's	50% off Christmas morning jammies! 🎄 - It's never too early to save for opening day!
Target	25% off a toy or kids' book 📖 Perfect for presents. - Free shipping on orders \$35+ or with your RedCard*. Yesss!

Personalized

Dynamic content in a subject line can work wonders for your email open rates. In fact, research from Yes Lifecycle Marketing reveals that emails with personalized subject lines are 50 percent more likely to be opened. Personalization helps show your recipients that you know who they are rather than just treating them like another lead or contact. Subject lines can be personalized with names, locations, important dates or any other data you have available in CRM, which gives you a variety of opportunities to be both personal and creative.

Credibility

Credibility subject lines come in two different forms. The first is more of a case study style along the lines of, "See how Acme Corp. generated 10 times more leads." The second type relies more on authority with subject lines like, "Dynamics 365 experts agree." While they differ slightly in their approach, both rely on building credibility and providing proof of a product or service's effectiveness to encourage opens and conversions.

How to

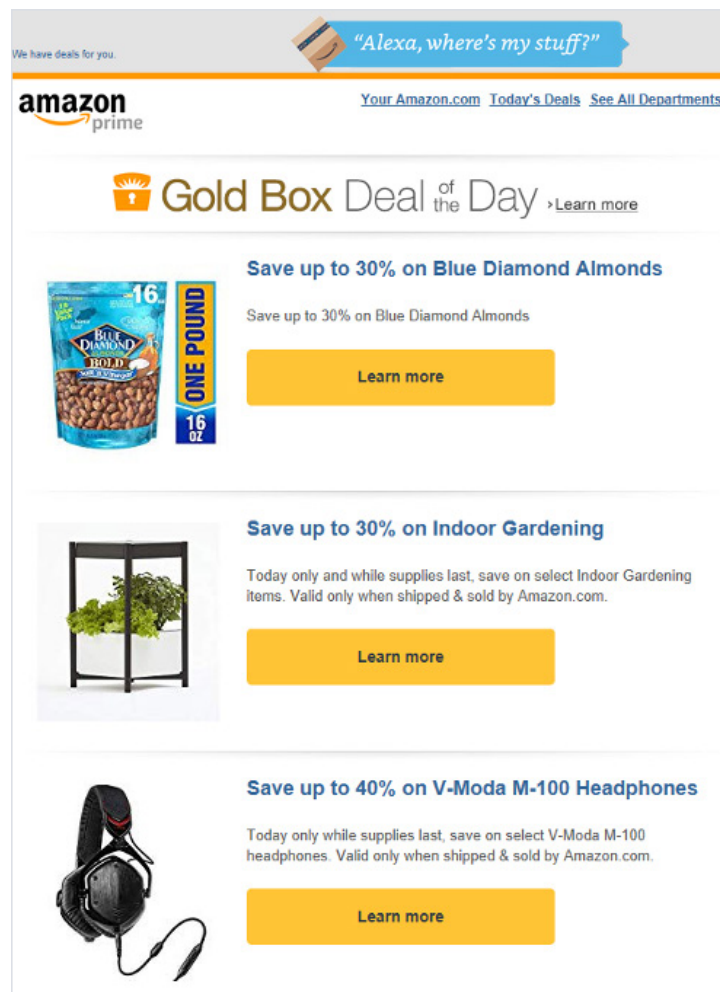
Subject lines that start with "How to" might seem boring or predictable, but they are enduring for a reason – they work. Those two little words let recipients know from the get-go that the email they are about to read is going to teach them something. Everyone likes learning new things that are related to their interests, so while they may seem a little dull, subject lines like "How to crush your sales goals this quarter" or "How to be a more patient parent" are straightforward, effective and cut through the inbox clutter.

Creating Captivating Email Copy

The batch-and-blast approach of email marketing's past have made way for more segmented and personalized email experiences. And just like email marketing techniques have changed, so too must your messaging. Once you have earned an open from your email recipients, your copy is what will lead them to click and ultimately put them on the path to conversion. Follow these tips to improve your email marketing copy to boost your email success:

Create scannable emails

As marketers, we've heard a lot in recent years about diminishing attention spans, and that can be particularly true in email marketing. With so many emails in all our inboxes, there's only so much time recipients are willing to devote to each one – particularly if it isn't easy to consume the information. Images, headers, subheaders and bulleted lists are all effective techniques for making an email more scannable. Also, pare down your copy to the essentials. Once you have written copy for an email campaign, re-read it to ensure that you have eliminated unnecessary words. One great example of an easily scannable email is the Amazon Deal of the Day emails. It's easy to quickly scan the email to determine whether the deals are appealing or not.



Establish relevance quickly

Why are you sending me this email? What's the point? Why now? These are questions we all have about the emails we receive, either subconsciously or consciously. That's why it's your job as a marketer to establish relevancy in an email immediately. Are you sending the email now because you think they would be interested in a limited-time promotion, because their contract is up for renewal, because there is only a small quantity available of what you are promoting or because your business just launched something brand new that you thought they would like based on past purchases? Make sure the relevance of your email is clear and front and center in your messaging.

Remember it's not about you

When you're talking about your company's products and services, it can be hard not to use words like "we" and "our" frequently. But to improve your email marketing copy and make it more engaging, focus on your recipients. What's in it for them? Why should they care about the message you're sending? For example, let's say your company just launched a new line of noise-cancelling headphones that are high quality and low priced. Instead of messaging along the lines of, "We have the best and most affordable headphones," you should try, "You won't hear a thing or break the bank." It's a classic case of benefits versus features and remembering that your marketing should be less about your company and more about your customers.

Be human

No matter what you're selling, promoting, featuring or teaching, it's important to remember that there is a person on the receiving end of your email marketing. So, write your email copy accordingly. This goes for B2B and B2C marketers alike. A great example of humanized email copy comes from Ann Handley, bestselling author and Chief Content Officer of MarketingProfs. Her newsletter, Total Annarchy, is not only cleverly named but also refreshing to read. As you can see in the excerpt, Handley's newsletter is in the style of a letter – and it feels like it could have been written directly to you.

Boston, Sunday, July 19, 2020

Hi, chickadee.

In my two decades of marketing experience, this is one truism I've learned:

Some of the best marketing ideas are first proposed as a joke.

The crazy off-the-wall concept that someone works up the courage to share with the group. The punts that come in the final hour of a brainstorm. The flash of half-drunk inspiration.

That kind of thing.

Why is that? Because good marketing requires fearlessness.

The newsletter copy sounds like a conversation, stirs the imagination, and leaves you hanging on every word and wanting to learn more, which is what all emails should strive to do. After all, it is that need to learn more that will drive clicks and conversions.

Email Design Tips for Non-Designers

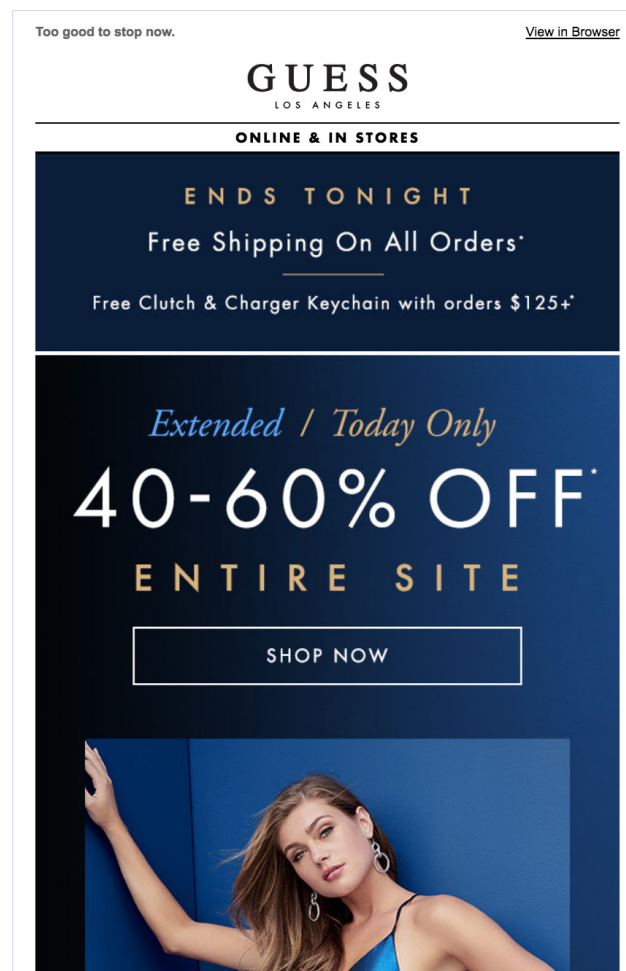
We live in such a visual world today. In addition to compelling copy, your email marketing messages must have an engaging design. Many companies today have a graphic designer on staff who ensures that emails look visually appealing. But what if you don't have a graphic designer on your team? Using the tips below, your emails can still look great even if you don't have a professional designer on staff.

Understand a few basic design elements

There are a few key design elements that, when applied, can drastically improve the look and feel of your email.

Hierarchy of elements

A good design practice that most businesses already follow is putting the most important information at the top of the email. Depending upon the type of device or browser the recipient is using, sometimes longer messages will get cut off. You want to make sure the key message you want to convey is at the top where readers are more likely to see it. For instance, in this email from Guess, the most important information is at the very top of the email. So even if a recipient just saw that part, they would know that the company is having a sale and when it is ending.



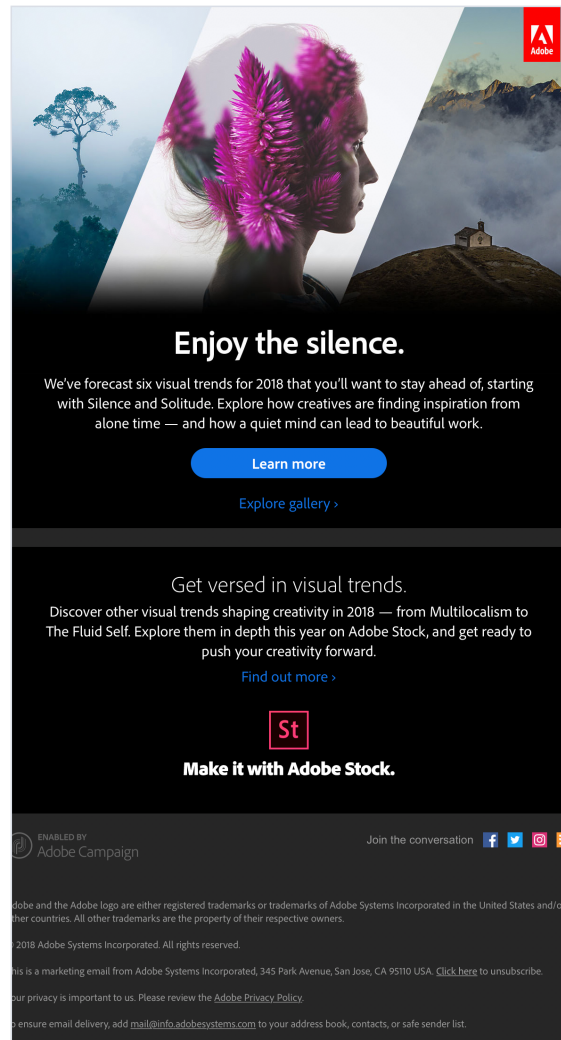
White space

Have you ever received an email that was so over-crowded with information and images that you weren't sure what you were supposed to be looking at? Usually messages like that have very little white space, and sometimes none. White space doesn't have to necessarily be white in color; it just refers to a section that has unused space around it. Apple excels at using white space in their emails and advertisements. Notice how the spacing surrounding the title, the image of the phone and call to actions at the bottom allow the viewer to easily see all the information without any confusion or having to search for it.



Font usage

A good rule of thumb when it comes to fonts is less is more. In most cases, you want to stick to a maximum of two different fonts. Otherwise, the eye finds it hard to scan multiple typefaces and things start to look messy and cluttered. If you are having trouble deciding which fonts look good together, an easy tip is to use different variants of the same font family. For instance, maybe your header is Roboto Bold but your tagline is Roboto Italicized. Another way to make things visually interesting is to use different sizes of the same font. In this email from Adobe, you can see how although the same font is used, the different sizes and styles draw the reader's attention to different parts of the email.

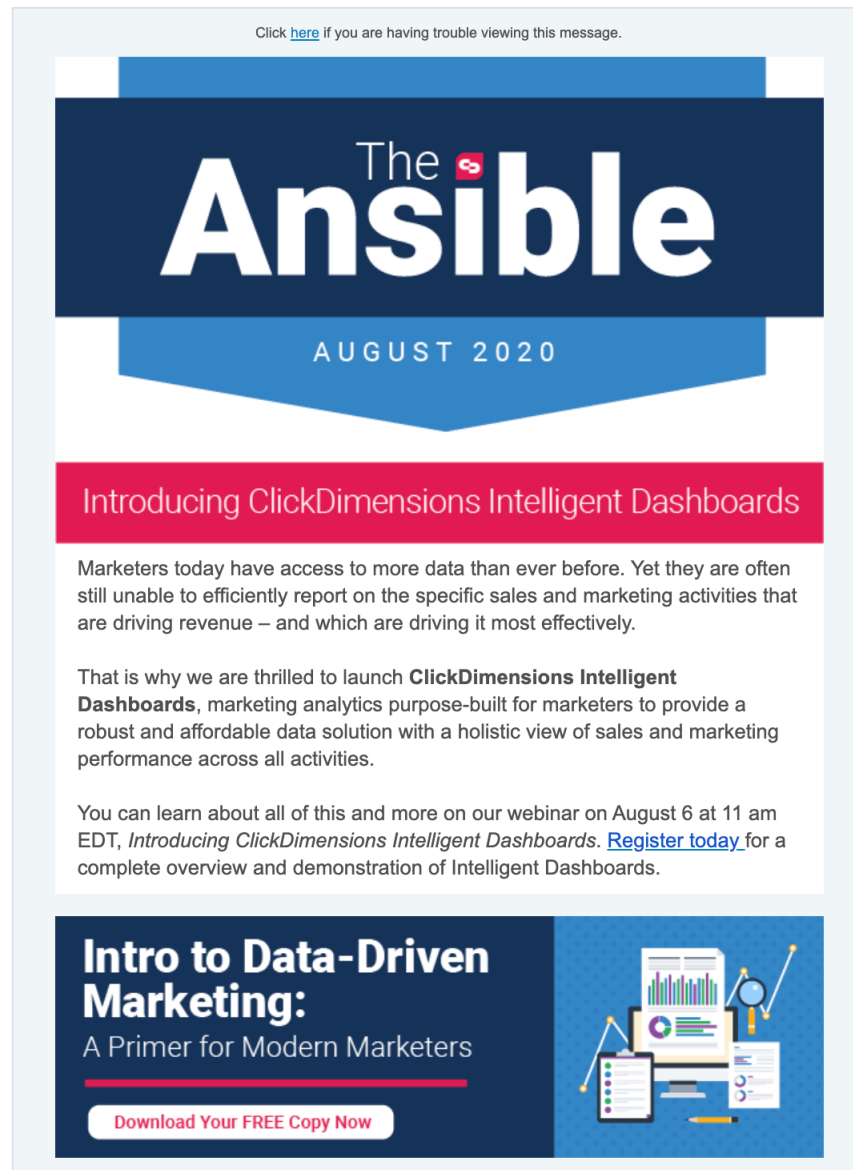


Keep it simple

Often, organizations include way more content than necessary in their emails. Keeping a design clean and simple is usually the best approach. As mentioned earlier when talking about hierarchy, if your message is too long, you risk it getting cut off and your recipients often aren't going to read the entire thing. Studies show that you have an average of eight seconds to catch a reader's attention and engage with them. Make sure you don't waste yours with an email that is overcrowded and overcomplicated.

Consistency is key

Consistency is the foundation of a strong design. If every time you send an email you are using different fonts, colors and styles, your brand is going to suffer. You want your reader to be able to easily recognize your company when they receive your digital communications. An easy way to do this is to learn your brand guidelines so you can implement them in your emails. In our very own ClickDimensions newsletter, [The Ansible](#), we use the same colors and fonts every time to adhere to our brand guidelines and build a stronger connection between our customers and our brand.



As you can see, learning a few email design skills doesn't have to be difficult. Once you start putting these tips into practice, they will soon become second nature and you will be on your way to creating visually engaging emails for your business in no time.

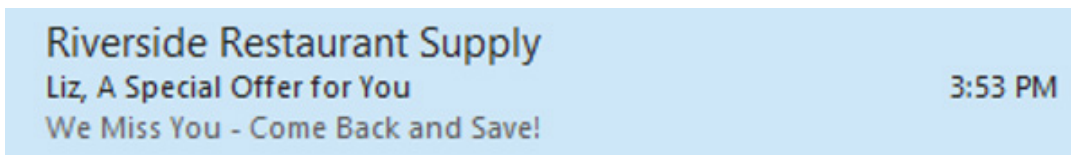
Ideas for Using Personalization

Email marketing is no longer a one-size-fits-all initiative. Consumers now expect customized communications from the organizations they do business with. And when businesses meet those expectations, they reap the benefits. According to Aberdeen Group, personalized emails improve click-through rates by 14 percent and conversion rates by 10 percent.

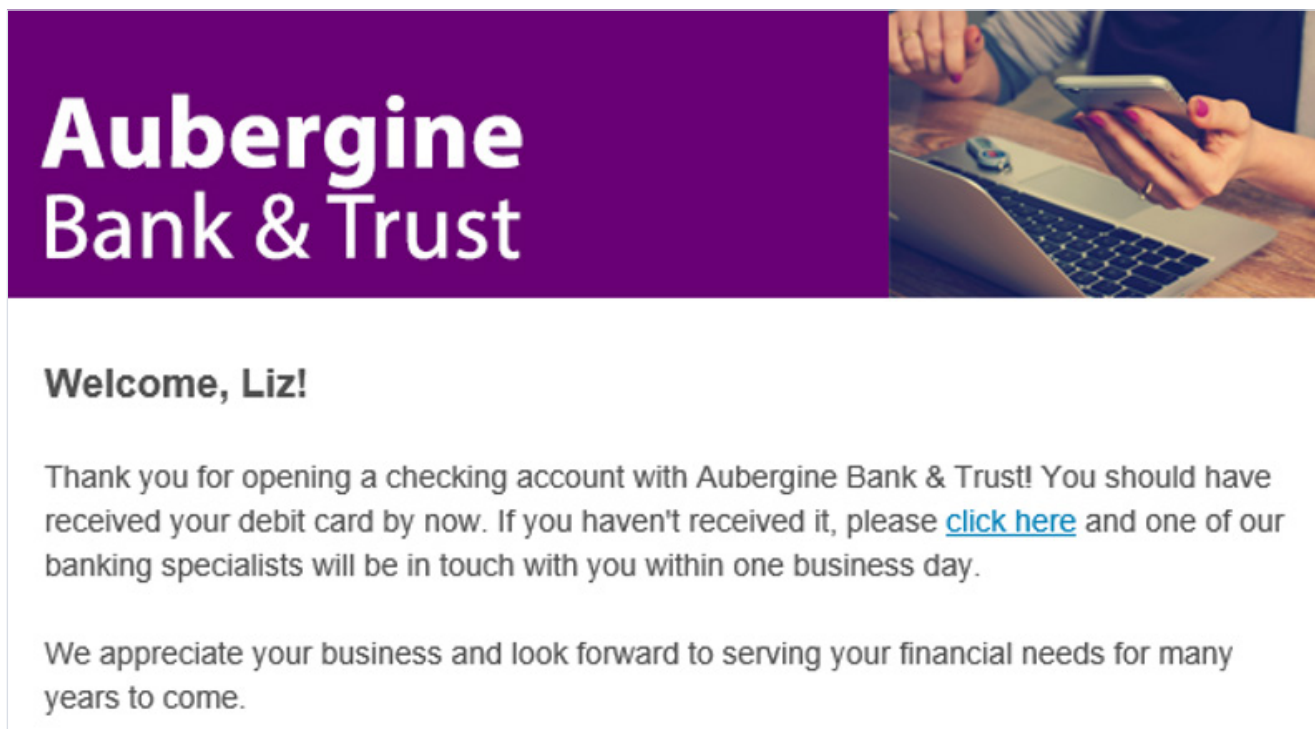
So, what can you personalize in an email? You are only limited by the information that you have available in Microsoft Dynamics. While that's great news in terms of the flexibility you have for customizing campaigns, it can also be a little daunting to figure out where to start. With that in mind, here are some ideas for how to use personalization in your emails:

Names

Using a lead or contact's name in an email is likely the most common use of email personalization, and rightly so. It's a simple and effective way to show your recipients that you know who they are, and it helps create a connection with recipients immediately. You can use names in an email subject line or preheader, as seen here:



Or choose to greet your customers or leads by name in the content of the email:



Important dates

Our lives are filled with dates worth remembering and recognizing, both professionally and personally. So, what better way to endear yourself to your customers or prospects than to acknowledge these important dates too? An anniversary as it relates to your organization is a popular pick for a date to recognize. In the example email below, you can see how a professional association incorporated a date to recognize how long an individual had been a member of the association.



Birthdays are another important milestone to recognize. Other important dates to recognize could be the birth of a child or a wedding date. Again, you are only limited by the data you have available in Dynamics.

Location

Consider these two subject lines: "Check out these scenic hiking trails" versus "Check out these scenic hiking trails near Atlanta." If you enjoy the outdoors, you might be inclined to open the email either way, but the subject line that references the city you live in is more attention-grabbing because you know that the content is localized to you and very relevant. Localization also works well in the body of an email, as seen in the example below for a real estate brokerage, which references the city where the recipient wants to buy a new home and displays a few homes available in that location.

Click [here](#) if you are having trouble viewing this message.



Hi Wesley,

New homes are going on the market every day in Riverside, and Metro Communities Realty wants to help you find your dream home. See our featured new listings below or [search our site](#) for all current local listings.

506 Elm Street



1106 Fox Run Road



326 Windsor Drive



Dollar amounts

As seen in the example below, nonprofits in particular can use dollar amounts as an effective way to personalize their emails. This personalization allows the organization to recognize a donor's specific contribution rather than just a general reference to an unspecified donation amount. Other examples of this personalization in action could be retailers with loyalty programs using dollar amount personalization to thank a customer for spending a certain amount or a financial institution could employ this type of personalization to show how much a customer has saved using a round-up on purchases savings account.

Click [here](#) if you are having trouble viewing this message.



Hi Hank,

Thank you for joining the International Wildlife Conservancy! Your donation of \$100 will greatly help us in our efforts to save critically endangered animal species around the globe.

When you select one of the animals below, we will direct your donation to the conservation of that species and send you an informative email series about that species.

Support the
Mountain Gorilla



Support the
Sumatran Tiger

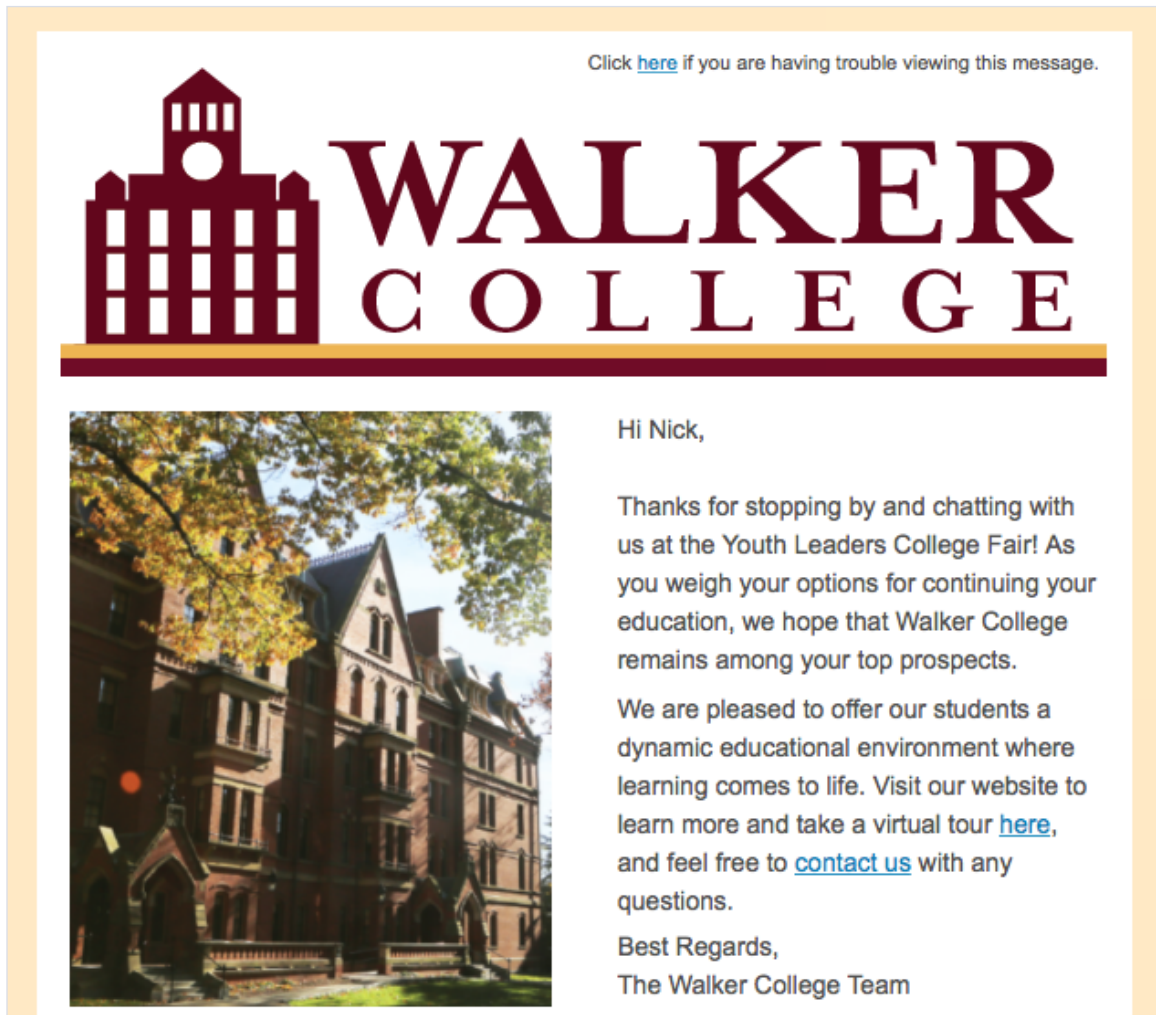


Support the
Leatherback Turtle



How you met

Sometimes people need a little reminder of how they first encountered your organization, and they also like seeing that you remember too. This is particularly true for new leads who are having their first few interactions with your business. Did they visit your website? Make a purchase from your store? Attend a webinar? For example, a college could send an email blast to prospective students that their representatives had spoken with at a series of college fairs. Using personalization, they were able to incorporate the name of the specific event each prospective student attended, providing a more customized email experience.



Measuring and Optimizing

How did my email perform? And what could I do to improve its performance? In short, these are the two essential questions marketers need to ask following every email marketing send. Those questions are at the heart of measuring your present-day email marketing efforts so you can optimize for future results. However, measuring and optimizing email marketing is a bit more complicated than that, as we explore in this next section.



*For every \$1 spent on email marketing, businesses can expect an **average return of \$42***

– DMA



*Marketers who use segmented campaigns note as much as a **760% increase in revenue***

– Campaign Monitor



*There is a **138% increase in spend** by people who buy products marketed through email marketing vs. those that do not receive email offers*

– Convince and Convert

Measuring Email Performance

Measuring metrics such as open rates, click rates and bounce rates can help you determine the effectiveness of your emails, marketing lists and calls-to-action.

To consider an email marketing campaign successful, most organizations strive to achieve:

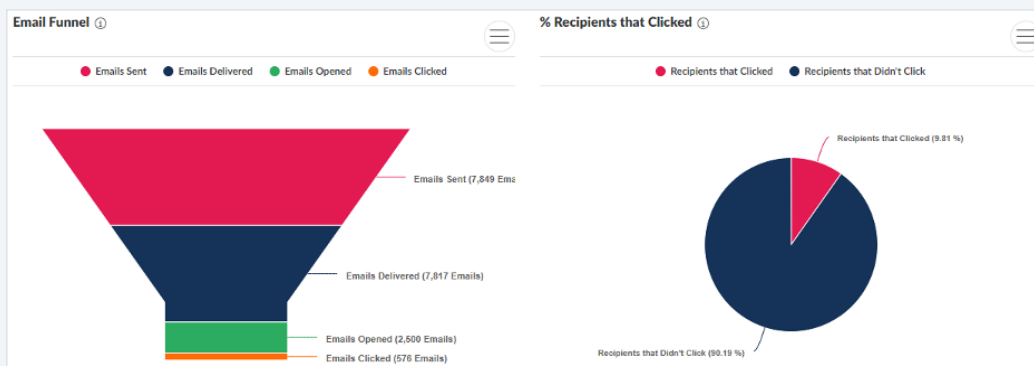
- High deliverability
- High open and click-through rates
- Low unsubscribe rates
- High conversion rates (clicks that lead to a purchasing action)
- High return on investment (revenue generated by the email)

What exactly is a low unsubscribe rate? Or a high conversion rate? For all the metrics described in the list above, what constitutes success and achievement will be unique to each business. Open and click-through rates, for example, are known to vary widely by industry. Ultimately, it is up to you as a marketer to determine what success looks like for your organization, audiences and various types of email communications.

This can be achieved by closely monitoring your email marketing performance to uncover trends and benchmarks. Email statistics generated by your email sends in your marketing automation solution can show you performance on an individual email level. Integrating your marketing automation with Microsoft Dynamics can give you even greater insights, allowing you to see email performance at the individual level on a lead or contact record as well as a more broad perspective across your email marketing efforts by building dashboards in Dynamics.

Measuring Email Performance with ClickDimensions Intelligent Dashboards

ClickDimensions Intelligent Dashboards provides marketers with a robust data solution that is affordable and easy to both implement and manage. With ClickDimensions Intelligent Dashboards, you have access to more than a dozen marketing and sales dashboards designed by marketing, sales and IT experts, tracking over 150 best-practice KPIs across your marketing automation, CRM, web and advertising channels. This includes email marketing, and it can be a powerful tool for understanding overall email performance as well as utilizing collaboration tools to help marketing teams achieve more together. You can watch a short video on Intelligent Dashboards [here](#).



Optimizing for Future Success

Whether you are pleased with or disappointed by the numbers you see when you measure your email marketing performance, there is always room for improvement. Fortunately, there are several tactics and techniques that you can utilize to continuously optimize your email marketing for future success.

Split Testing

Split tests, also known as A/B testing, simply test one variable in an email send against another variable. An example of this would be if you wanted to see whether an email with a green Click Here button receives more clicks than an email with a blue Click Here button. Use these tips to run a successful split test:

Change only one variable

To run a split test, you need to create two different versions of an email. You will send out these two emails to two separate groups of recipients and analyze which email performs better.

As you begin testing your emails, you may find that there are many variables you want to test. However, we recommend that you choose only one of these variables per split test so you can be sure which of the variables causes a change in performance.

Keep in mind that simple things such as the image you choose, your subject line, sender name or the color of your Click Here button can lead to big changes in your email's performance.

Determine your sample size

If you are split testing an email, you will probably want to send the two versions of your test to a smaller subsection of your recipient list. Once the split test has finished running, you can pick a winner based on clicks or opens, and then send the winning version to the remainder of your list.

Split your test groups equally

When sending emails, you have control over your recipients, which means you can create equal test groups. Splitting lists evenly helps ensure that your results are reflective of the entire email list.

Test both versions at once

Timing can make a big difference in your email send's results. The time of day, day of the week and even month of the year can have major impacts on your email send statistics. If you were to send out Version A on Tuesday and Version B on Friday, you would not be able to conclude whether the change in opens was due to the email's different subject line or the day of the week the email was received. For this reason, when you run split tests, we recommend that you run the two versions at the same time.

Run the test long enough to get significant results.

Depending on your business and how you set up the split test, getting significant results could take hours, days or sometimes weeks. When determining how long your split test should run before selecting a winning version, you will want to consider the email events and email statistics of your other email sends. If you receive opens and clicks rather quickly for most of your email sends, you may want to select a few hours as your winning version indicator. However, if there is typically a lag in your recipients interacting with your emails, you will want to increase the time it takes before a winning version is selected.

Ideas for Split Testing

There is a nearly limitless list of possibilities when it comes to what you can tweak in your emails for split testing. Here is a quick list of ideas to get you started.

- ✓ Question vs. statement subject lines
- ✓ Graphical vs. text only
- ✓ Paragraphs vs. bulleted text
- ✓ Business vs. personal sender names
- ✓ Illustrations vs. photographs
- ✓ Call to action on the side vs. the bottom of an email
- ✓ Smaller fonts vs. bigger fonts

Act on your results

If one version of your split test performed better than the other version, congratulations! You have a winner! If neither version performed better, you can conclude that the variable you chose to test did not impact your results. If this is the case, you could either choose one of the versions as the winner or run another split test using a new variable to test performance.

Split tests help you view results on a send-by-send basis. You can, however, apply your learnings from each test to future email sends. For example, if you have conducted multiple split tests and have found that using numbers in email subject lines generates more clicks, or that sending out your emails on Thursdays gives you the most opens, you might want to consider using those methods in your future email sends.

Plan your next test

The split test you just finished may have helped you discover a new way to make your email sends more effective. Just keep in mind that there is always more room for enhancing your email sends. You could even try conducting a split test on another piece of the same email you just ran a test on. For example, if you just tested the subject line of your email send, you could also do a new test on the email's color scheme or images.

6 Questions to Ask Yourself to Improve Email Conversions

In the all-digital world that we live in today, businesses and consumers alike rely heavily on email marketing for communications. While this dependence on email brings opportunities for brands, it also brings increased competition for inbox attention. And even if your email gets opened, are your recipients taking action? To optimize your email marketing performance and improve your email conversion rate, ask yourself these six questions:

Is your subject line engaging?

A successful email conversion starts with a compelling subject line. After all, it's impossible for someone to act on an email if they never open it. There are a number of different approaches to crafting successful subject lines, as we discussed earlier in this guide, but ultimately it comes down to grabbing your recipient's attention and enticing them to learn more. For every subject line you create, ask yourself if you would be compelled to open that email if it was in your own crowded inbox.

Does your audience segmentation need to be adjusted?

Consider how your audiences may have changed over time and whether that necessitates a change in segmentation. It can be easy to fall into the habit of using familiar marketing lists, but your conversion rates can suffer if you think of your audiences as stagnant. Consider too how changes in your product offerings can prompt changes in segmentation.

Are you telling a good story?

The story you tell in your email marketing doesn't need to be a story in the traditional storybook sense – although it could be. Think of how a good story compels you to move forward, to turn the page. Your email should create that same sense of forward momentum. This involves your email copy and design. Both should work together to ensure that your emails feel free of clutter and make recipients want to keep viewing and reading. And don't forget about the importance of a strong ending to your story – in the case of an email, this would be your call to action. Be sure that it's clear the action you want your audience to take and that you have a compelling offer that makes them want to take that action.

Are you using dynamic content?

Consumers today value personalization. Marketers that deliver have a better chance of boosting their conversion rates. Are you using dynamic content within your emails to deliver those personalized experiences? If not, it's time to get started! If so, consider how you can improve your personalization efforts. While people appreciate seeing their name added to an email via dynamic content, and this may be a good way to get started using personalization, it's often not enough to stop there anymore. Whether it is past purchases, the date they became a customer, their geographic location and more, there is a wealth of information at your fingertips in Microsoft Dynamics that can be used to create conversion-driving email campaigns.

How often are you sending?

Have you ever unsubscribed from a brand's emails because you got tired of them sending so many? Even when we're a fan or loyal customer of a brand, email fatigue is real. And an unsubscribe puts an indefinite end to email conversions for that recipient. There isn't a single right answer to the question "How often should I send emails?" That will depend on many factors that are individual to each industry, business and customer segment. Using automated campaigns can help you establish a good cadence and sending based on behavioral triggers can improve conversions. Utilizing subscription management can also give your recipients control over the frequency and types of communications they receive, which can greatly reduce email fatigue.

Have you looked closely at email performance data?

Past email performance can help you improve future conversion rates. Dig back into the details of your recent email sends to find out what was successful and what wasn't. Tools like a click heat map can help you determine which links within your emails garnered the most clicks. Embrace experimentation and trying new things as you work to achieve the best results based on your email performance findings.

Conclusion

With its relatively low cost, the ability to track responses, the capacity to personalize offers and content – among many other benefits – email marketing is essential for marketers today. And in a world that increasingly dictates digital communications, the pressure is on for marketing teams to step up their email marketing game.

For Microsoft Dynamics users, this means that marketers must tap into CRM data like never before. Integration between marketing automation and CRM is a must-have, essential for creating the email experiences that customers demand and delivering the performance that marketers require for email marketing success.

About ClickDimensions

Founded in 2010, ClickDimensions is the leading marketing platform for Microsoft Dynamics, with more than 3,700 customers around the globe and a partner network that spans 76 countries today. As The Marketing Cloud for Microsoft Dynamics™, ClickDimensions is redefining how marketers work and attain results with the only unified marketing technology, analytics and services platform in the market – made exclusively for and natively built within Dynamics.

To learn more, visit us at clickdimensions.com or follow us on Twitter at [@ClickDimensions](https://twitter.com/ClickDimensions).