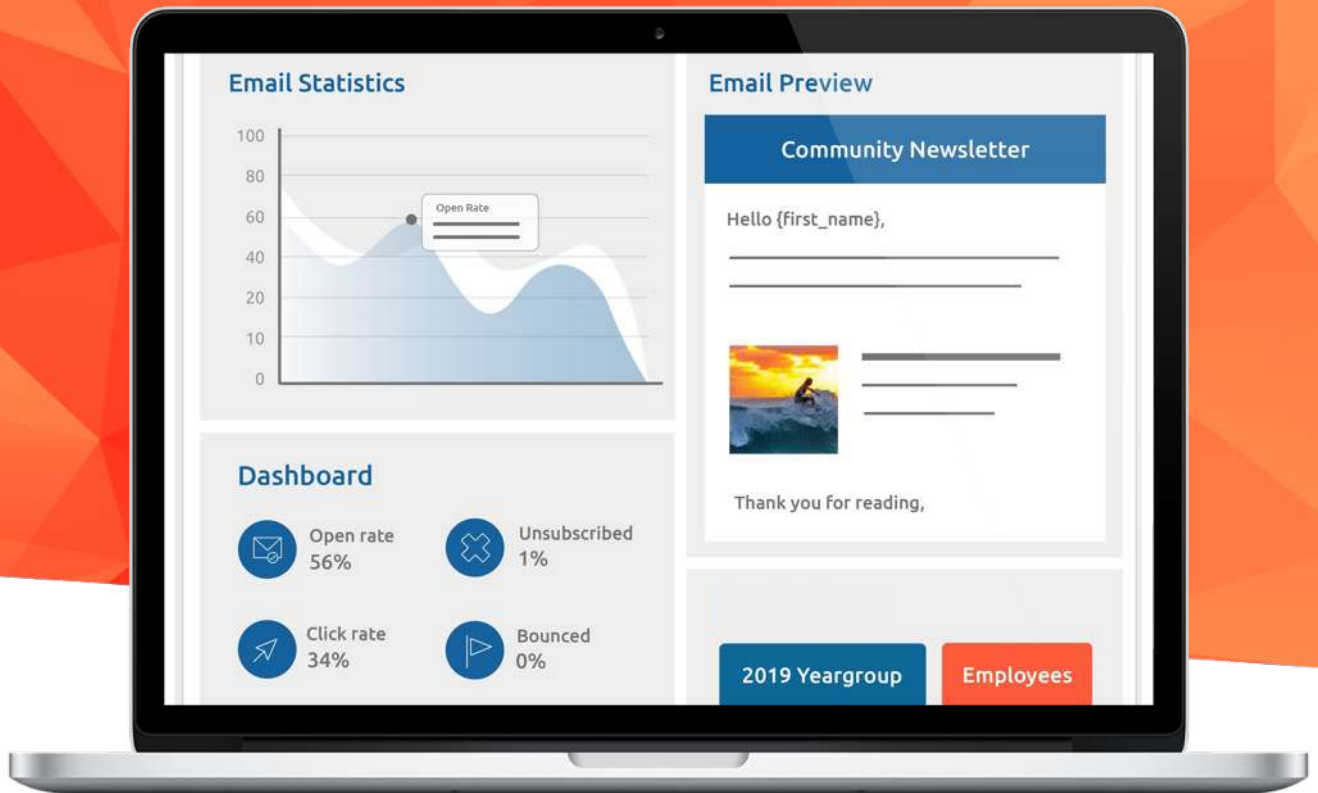


# Guide to Email Marketing

February 2020



# Introduction

Email communication, including newsletters, updates and offers, is a key ingredient of a successful marketing operation. A 2018 Emarsys study\* revealed that 80% of small- and-medium-sized businesses rely on email marketing as their primary tool for customer acquisition – and it's not dissimilar for other types of organisations.

This ToucanTech Email Marketing Guide has been compiled specifically for people working in schools, colleges, charities and business departments who run regular email campaigns or for those looking to start doing so.

We'll cover the fundamentals of what to consider when you're crafting your emails - to help you generate more engagement and drive traffic to your website.

Did you know, for example, that more around 50% of all emails today are opened on mobile devices, and personalizing your emails to the recipient increases every measurable performance indicator substantially?\*

There are many factors that affect a recipient's response or reaction (sometimes more than you would think) - such as the length of your subject line or the first impression when someone opens the email! This guide isn't a complete handbook, but will hopefully give you some ideas and areas to improve for your next set of email communications.

\* <https://www.emarsys.com/app/uploads/2018/01/eTail-Emarsys-WBR-SMB-Report.pdf>

\*\* <https://www.campaignmonitor.com/resources/infographics/24-email-marketing-stats-need-know/>



# ★ Steps to creating your email

## Plan your email strategy

How does email fit alongside your other marketing/ communications and what will be the frequency, content, goals of your email activity etc

## Segment your audience

This could be by region, industry sector, interests, age or job role

## Start writing

Keep it relevant, informative, helpful, interesting!

## Branding/ imagery /graphs

Make your email beautiful, incorporate eye-catching images and use your brand colours & logo to keep your email consistent with your other marketing

## Avoid spam filters

Be careful with words and expressions (\$\$\$, cash, win, swear words etc), strange formatting (all CAPS) or big attachments – these might cause your email to get blocked by spam/ firewall filters\*. Set up DKIM and SPF configuration for your email server to help mark your emails as 'safe'

## Add 'unsubscribe' link

Make sure there's a clear unsubscribe/ opt-out link on your emails and ensure this info feeds in to your database so that you know when/ why someone has unsubscribed

## Make a schedule

Plan the process for compiling your emails (who will be doing what) and decide frequency (don't send too many!)

## Test functionality

Send a test to yourself and colleagues - check for typos and make sure links, attachments and personalisation tags work



## Create templates

Create a set of attractive, mobile-friendly, templates to keep your emails consistent and to save yourself time in the future

## Write a catchy subject line

The subject line in an email is the single line of text that your recipients see when they receive your email. Keep it short (under 40 characters), include an action and/ or ask a question

## Personalise

Use the recipient's first name in the opening message and customise the content to appeal to your audience

## Call to action

Engage readers by suggesting/ asking them to take an action – whether a click-through to your website or news story, an event sign-up or survey etc. Intrigue your readers to click for more info!

## Set up analytics

Track open rates, clicks, bounces and click-throughs etc to help you understand what's popular, what to improve for next time, and which emails to clean out of your database

## "A/B" test

Try sending two different emails – with different subject line and contents, on different days/ times – and send to two similar sample groups to see which generates the best results

## Consider time zones

If you've segmented your recipient list by country/ region ensure you schedule your email to reach the recipients at a good time of day for them

\* <https://www.simplycast.com/blog/100-top-email-spam-trigger-words-and-phrases-to-avoid/#post>

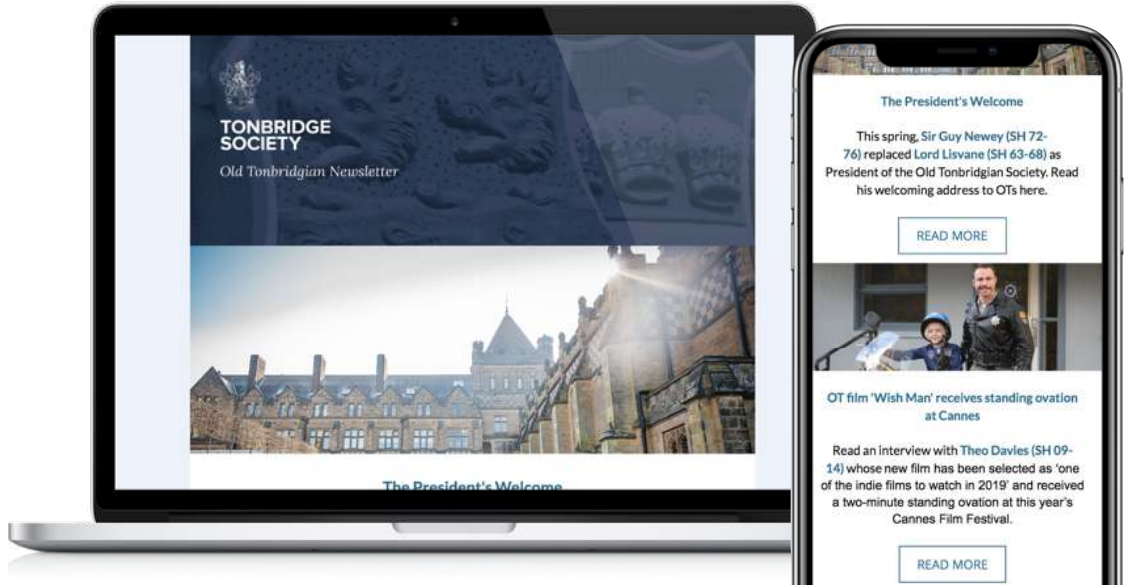


# Your email, content & links



## Keep it short, simple and pretty

Most people don't want to read a long, text heavy email. Keep your text succinct, broken in to digestible sections and, if someone wants to learn more, you can add links out to a website or an article. Throw in some imagery and graphics to make your message attractive to look at – think of the effort you'd put in to a printed magazine or invitation – you can easily replicate the design quality in an email!



## Call to action

Now for the most important part: generating engagement and traffic. If your goal is to drive visitors to your website, you'll need to include prominent links or buttons – for example, 'Read more' or 'Sign up' or 'Don't miss...'. Be reasonable about how many links and buttons you include (it can be annoying for the reader to scroll over too many). One useful trick is to hyperlink an entire image/ background panel to your website so that as someone scrolls over it they can click through if they want to.







# Target optimisation



## Personalise your emails

People react positively if you address them by name – the email becomes more personal and less of a generic ‘catch all’ mass communication. For many, a generic hello prompts them to close/ delete the email if they aren’t familiar with what you do. Obviously it’s important that name details are stored correctly in your database, using preferred names/ abbreviations where appropriate.



Dear Michael,

Dear Michael,

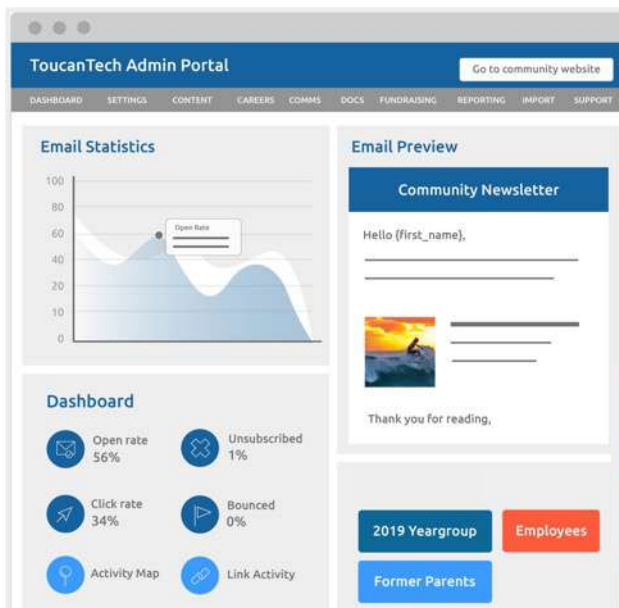
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## Segment your target groups

Most of what you send out won’t be relevant for all of your recipients or potential customers/ stakeholders. Try to group your database in to individuals or organisations with similar interests or goals. You’ll have to put in some initial work to to create your filtered database segments and then create tailored emails for each segment – but the effort will pay off. Across all ToucanTech databases (1 million records, 100,000 emails sent each month) – organisations that segment smaller, targeted groups rather than sending a catch-all email to everyone, consistently see higher open and click rates.

Industry/ market updates, top tips and free guides – if relevant – can be effective content for your emails. If appealing to a specific group, try mentioning influential people known to the group (e.g. in a news interview), or referring to a common event or interest that will appeal to them.



## Recipients:

2019 Yeargroup

Employees

Former Parents

2019 Yeargroup

Employees

Former Parents

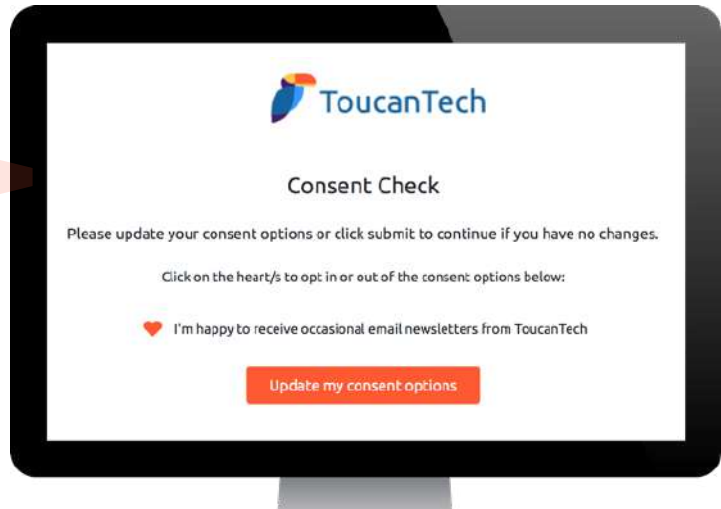


# Actions



## Opting out/ Unsubscribing

If someone really is not interested in what you're doing, make opting out, unsubscribing and selective opt-outs easy for them. They are not going to support you, or buy from you, so sending them newsletters or offers won't be beneficial and can risk your mails getting labelled as spam. Creating different 'types' of emails and then giving people the choice about what types of emails they'd like to receive can be helpful – e.g. someone might be happy to receive an annual update, but not monthly offers from you.



## Track your analytics/ email stats

Set up your analytics before sending out your first emails. Stats like open, bounce and unsubscribe rates and spam notifications give you an indication about the relevancy of your subject line, quality of data and whether you're sending emails too frequently.

Bounce rates give you useful information about your email data. A 'hard bounce' indicates an email address doesn't exist (and ideally you should remove these emails from your database) and a 'soft bounce' indicates the recipient's inbox is full or has rejected your email.

Views across different parts of your email and clicks on different links, gives you useful insight in to what people find interesting and what they feel compelled to click! Try to replicate the the popular content again in future emails...





# Email marketing: don'ts



## Don't spam

Don't bombard subscribers with content, make sure it is always relevant or at least interesting. Quality, rather than frequency or length, tends to be the golden rule for email campaigns – don't send out an email for the sake of it – you're better to skip a month than send a message that doesn't offer value for your audience.



## Don't email without a legal basis (e.g. legitimate interests/ consent)

Don't email people unsolicited marketing unless you have consent to do so. Under GDPR/ PECR and most international privacy laws, you should have someone's consent to send unsolicited email marketing to their personal email address (and under GDPR, consent means a positive opt-in, not just the ability to opt-out). **Sending information emails, updates to current customers ("soft opt-in") or B2B emails from one business to another business** (rather than B2C emails from a business to consumers), are generally OK without explicit consent, as long as you're not negatively impacting anyone's privacy and there's a clear way to unsubscribe. Please check with your own legal / compliance advisor for specific email marketing guidelines for your organisation.



## Don't forget mobile devices

You'll probably be compiling your email on a computer/ desktop, but many of your recipients are likely to open your email on their mobile/ tablet – so make sure you've designed your email to be read-able on different screen formats and check the mobile version of your email before you send it out!



## Don't be hasty

Don't forget to test your emails and check for errors. Check for typos, check that personalisation tags - e.g. Hi {name} – are working correctly, check links and buttons are clicking to the right place and check that images load (and aren't too big) and that formatting appears properly.



## Don't share email data

Don't share your email data with third parties (unless you have consent to do so). Make sure your emails are processed through a secure server (in the jurisdiction of your email subjects) and that email addresses are stored securely. You should publish a clear privacy policy stating how you process email data.



## Don't send your emails to all subscribers at the same time

Keep in mind the different time zones and work patterns of your recipients, to give your emails the best chance of being opened.



## Don't make promises you can't keep

If you promise content every month/ week, or a free/ discounted offer, make sure you deliver! Not upholding these commitments can impact your reputation.



# Email templates

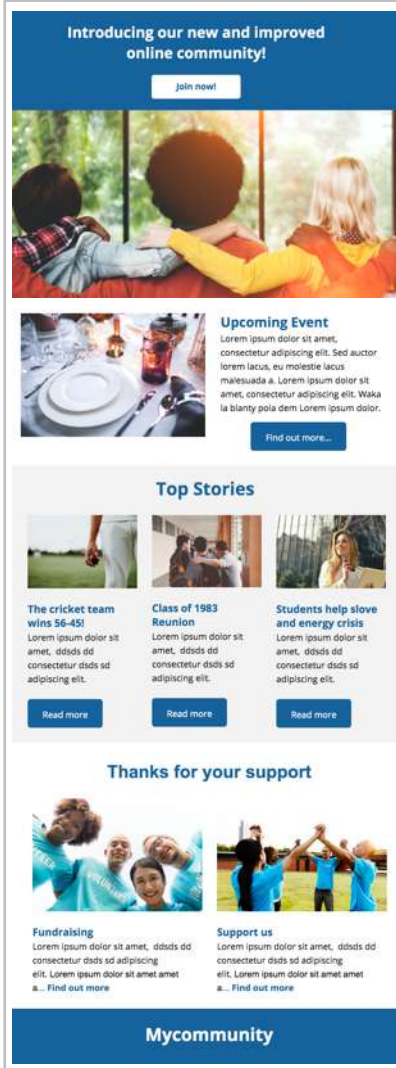
## Standard Email

This template can be used for a simple announcement or letter-style message. Adding an attractive image at the top and signature at the bottom is a nice touch



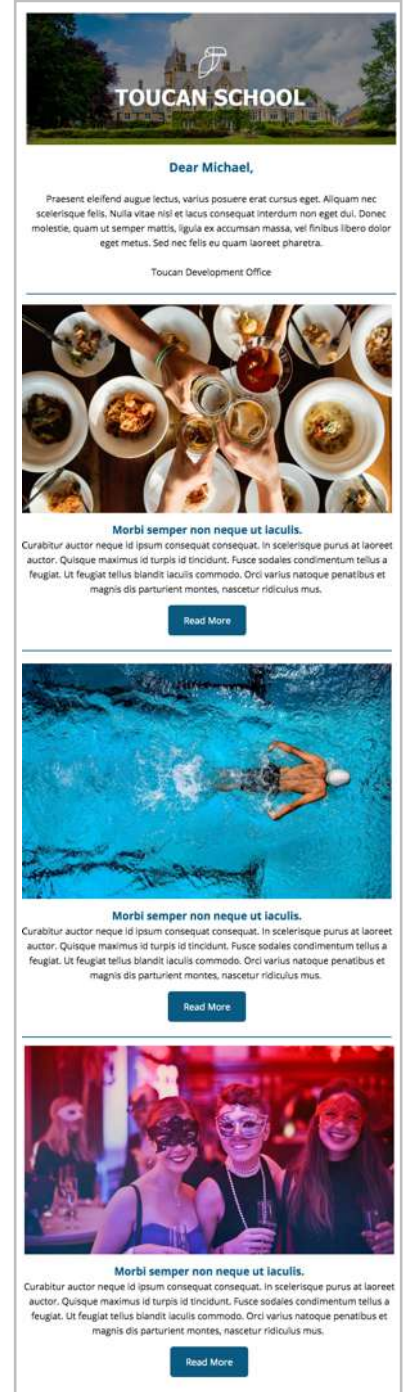
## Newsletter Template

This template can be used for collating lots of news and events together, a bit like a magazine



## Panel Template

This template can be used as a simple round-up, designed for easy scroll-through on mobile devices





# About ToucanTech

Flexible Database,  
Communications +  
Website Software



## What is ToucanTech?

**Database** – securely store your records, link individuals to organisations, create custom fields, run complex search filters

**CRM** – track all interactions with your audience, store notes, plan campaigns, run reports, link activities together

**Email** – create beautiful newsletters, set up automated notifications, generate thank you letters and receipts

**Consent** – manage opt-ins/ opt-outs in a central system, linked to email unsubscribe, with an audit trail

**Payments** – process online payments for one off and recurring payments and manually reconcile other payments (e.g. bank transfers)

**Events** – run events from start to finish including invites, registration forms, ticketing, confirmations, attendee lists

**News** – share news, photos, resources and other content with an SEO-friendly web platform and flexible web pages

**Networking** - run a private members portal to network, search for mentors, run clubs, post jobs and access info behind log-in

*“ToucanTech is highly intuitive (even for a non techy person!) and the email system is easy to use with lovely sample email templates. With ToucanTech’s truly excellent and patient help, our very first mass email was sent to 2,400 people in August to launch our new community”*

**Pippa Blackstone**

Tonbridge Grammar School



*“We regularly get 70%+ open-rates with the in-built ToucanTech email system – I rely on it every week and couldn’t recommend ToucanTech enough!”*

**Sara Eastwood**

Concord College



## Book your free demo

Interested to see how ToucanTech could help you manage your database, community, email campaigns and more?

Email [hello@toucantech.com](mailto:hello@toucantech.com)  
or call us to arrange a demo:

UK: +44 203 189 1774

AUS: +61 7 3186 8774

US: +1 831 226 8774