

## **Everything Alumni Relations and Development Professionals Should Know about Email Marketing:**

Using Email Communications to Build and Manage Alumni and Donor Relations

Includes:

### **Best Practices for Email Appending**

by Dave Best, Director of Marketing  
HEP Data Services, Inc

### **The CAN SPAM Act of 2003: A Checklist for Nonprofits**

by Senny Boone, Executive Director  
Direct Marketing Association  
Nonprofit Federation



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## ABOUT THIS GUIDE

Each day, people face an increasing barrage of email communications. Getting emails delivered, opened and read — key to any online strategy — is tougher than ever due to spam filtering technology, which often mistakenly blocks legitimate email. And, even when emails do get through spam filters, constituents with overloaded "inboxes" do their own filtering and decide which messages to read or delete, unopened.

More than ever, schools need effective online tools and techniques for connecting with alumni and other constituents on a timely basis and successfully delivering the right message to prompt action such as registering for a regional event or participating in the annual fund through an online donation. This guide was created specifically for alumni relations and development professionals as a handbook about the strategies every alumni relations and development professional should know to execute effective email communications.

Throughout this guide, you will notice words or phrases that appear in **bold** type. These terms are defined in the glossary on page 21. You also will notice small text boxes that contain tips to make your email programs run more smoothly. These tips come from a team of experts with the experience of working on Web site and email marketing projects with more than 250 nonprofit organizations and universities throughout the United States.



# Introduction to Email Marketing

An increasing number of schools are using the Internet to build and manage ongoing relationships with alumni and other constituents by delivering regular, relevant information to each person. This approach is critical for building alumni affinity and driving participation in events and online giving campaigns.

The cornerstone of any online marketing strategy, email allows schools to communicate with large volumes of constituents in an ongoing, highly personalized and cost-effective manner. Schools must learn how to use email marketing software and techniques effectively to achieve alumni relations and development goals.

Here are a few reasons why:

## **EMAIL IS COST EFFECTIVE**

Since it allows you to eliminate the high costs of printing, fulfillment, and postage, email is far less expensive than traditional direct mail efforts. The average total cost to send an email message is pennies, compared with dollars for direct mail and telemarketing. Though email is not a replacement for direct mail, its cost-effective nature makes it a logical complement to traditional marketing programs — allowing you to communicate quickly (in response to current or urgent events) and more frequently (to develop relationships) with your constituents.

## **EMAIL HAS IMMEDIACY**

Email eliminates the long production lead times inherent with direct mail, enabling you to execute campaigns, send ad hoc communications and respond to timely issues in a matter of hours.

## **EMAIL ALLOWS YOU TO SEND PERSONALIZED MESSAGES**

Unlike static, printed direct mail pieces, email allows you to segment your database and send targeted messages based on individual constituent interests, donation history or any other field in your database.

## **EMAIL ALLOWS YOU TO SEGMENT AND TEST OFFERS**

Email also allows you to test different messages on different segments of your list quickly and inexpensively, so you can fine-tune your message based on real results before you send to your entire list.

## **EMAIL YIELDS RAPID RESULTS**

Unlike direct mail, in which there can be a response lag of several weeks or even months, email campaigns can return 80 percent of total responses within 48 hours of your mailing. This allows you to evaluate results and adjust your strategy immediately.

## **EMAIL GIVES YOU NEW INSIGHTS**

Through email, you can track open and click-through rates on both emails and links within emails, allowing you to quickly and easily analyze the effectiveness of your messages and your campaigns to determine your constituents' interests and to ensure you are giving them the information they want.



# Getting Started

## Building an Email Address File

The first step in any effective email marketing strategy is to build an email file — the fuel for your email marketing efforts. Most schools discover that — despite their large and detailed constituent databases — they have few constituent email addresses on record. The prospect of building a usable email file can be daunting, but you can easily grow your email file using several proven tactics.

### GATHER EMAIL ADDRESSES OFFLINE

Even if you are just starting out with an online presence, you can easily begin developing your email file by integrating email address collection into your existing marketing or fundraising initiatives. Every time you communicate with alumni and other constituents, you have the opportunity to collect email addresses.

#### Gather addresses through every interaction

Planned interactions such as telethons, regional events or reunions are perfect times to ask for email addresses. Simply add a field for email collection to all response forms. At events where you will interact with a large number of constituents, consider setting out a newsletter sign-up sheet.

#### Promote the benefits of email communication

When asking for email addresses offline, it is important to emphasize the benefits your constituents will receive by providing you this information. Remind alumni and other constituents that by communicating with them online, your school can save money and administrative manpower, allowing more contributions to be allocated to the school's core operations. Also emphasize the benefit of timely communication. With email communications, you are better equipped to respond to compelling events and inform them quickly of important news, developments, campus events and programs such as athletics or performing arts.

#### → TIP

When collecting email addresses, be sure to let people know that the school is collecting this information and how it will be used. Always give people a chance to opt out of receiving email by providing a check box that says something like, "I'd like to receive future mailings," which they can uncheck.

### GATHER EMAIL ADDRESSES ONLINE

Your Web site is the best source for collecting email addresses. Visitors to your Web site have sought you out because they want to stay in contact with the school and other alumni. This existing affinity is a powerful incentive for your online visitors to provide you with the information you need to build longer-lasting relationships with them online.

#### Drive traffic to your Web site with every communication

Maximize traffic to your Web site by including your **URL** wherever you list phone numbers, mailing addresses or other contact information. This includes brochures, ads, staff email signatures, voice messages, phone hold or intro message and business cards. Tell alumni and other constituencies about the resources available to them on your Web site and keep the Web site content current and informative, so site visitors will return.

#### Provide an online registration mechanism

Use a Web-based form that allows site visitors to register for your online community, and that automatically captures the information provided in an online database. Your registration form should be easy to read and fast to complete. Think carefully about the information you wish to capture, and minimize the number of required fields. Be sure to provide examples if your system requires data to be entered in a particular way (i.e. "Please enter dates in mm/dd/yyyy format") to avoid frustration for your registrants.



## Promote the benefits of online registration

Make registration compelling for your site visitors, and they will register. Highlight special benefits for registered members of your online alumni community. Consider including a link to a separate page explaining the perks, such as access to an alumni career network, email newsletters, advance notification of upcoming events, members-only pricing for ticket sales or special premiums. Then, invite site visitors to register by using an action phrase such as "Register to access the career network " or "Sign up for our newsletter."

## Use "quick registration"

Instead of requiring site visitors to complete a lengthy registration form, consider requiring only basic information (such as name and email address) for a visitor to sign up for more information, updates or an email newsletter. Once you have captured this information, you can send follow-up communications and use other mechanisms to gather more profile information about that constituent. [See pages 7 and 8 for more information on building constituent profiles].

## Give site registration prominent and clear placement

Dedicate a consistent area of your home page to promoting online registration. Place it in an eye-catching spot **above the fold** to reflect its importance. You might also use an image or graphic to draw attention to this message. Don't forget to promote registration throughout the rest of your Web site — you may consider including a registration link in your **page wrapper** so the message will be promoted on every page of your site.

## BUILD YOUR LIST THROUGH VIRAL MARKETING

"Forward to a friend" email campaigns, also known as **viral marketing**, can help you to reach lost alumni and grow your email file efficiently. In a viral campaign, your organization sends an email with a call-to-action (such as an event invitation) to selected groups of alumni. The email also asks recipients to forward the message to classmates or other alumni so they, too, can get involved. When a lost alumnus clicks through to your Web site to register for the event, you can ask for his permission to include him in future communications. Email greeting cards, or "ecards," are another way to build your email address list through viral marketing. With ecards, your constituents can create their own emails — using your email greeting card template, with your school's branding — to send to their networks of classmates, friends and family.

## USE AN EMAIL APPENDING SERVICE

If you have valid email addresses for less than 15 percent of your alumni, you should consider using an **email appending** service to quickly connect with alumni via email. This service adds individual email addresses to existing postal records (usually stored in a school's fundraising database). This is accomplished by matching the school's name and address database with a permission-based database of postal and email address information. While individual results will vary, schools can acquire a valid email address for approximately 20-25 percent of their alumni through an email append service. Be sure to choose a service that includes a step in the process that sends a permission-based message to each individual.

### TIP

When using an email appending service, be sensitive to the fact that some recipients might not want to receive email from you. Ensure that your vendor provides notice and choice to constituents regarding their acceptance of receiving email from you. (For more information on spam, see page 11.)

# Best Practices for Electronic Email Appending

by Dave Best, Director of Marketing, HEP Data Services

Email communication offers many benefits including lower communications costs and higher response rates. One challenge to maximizing these potential benefits is the time and effort required to capture email addresses. Another is obtaining permission to communicate or solicit by email.

In a span of a few weeks, an organization can substantially increase (even double) its number of valid email addresses using an email append service. Because schools typically have a high percentage of valid mailing addresses — and an established relationship with alumni — an email append project can produce great results for capturing alumni email addresses. Here's a list of best practices for maximizing the results of an email append project while conforming to standards of the CAN SPAM Act and the Direct Marketing Association (DMA).

## The email append process

Email appending is the process of adding an individual's email address to his or her record in the school's database(s). A school sends a file of data with name and address information to an append service provider who matches the school's data against a permission-based database (with postal and email addresses) to produce a corresponding email address match. The append service provider returns a file of data, which includes new email addresses, to the school.

## Best practices and standards for the email append process

**Current or historic relationship:** The practice of email appending is ethical if the recipient is a customer of the organization or has another previous business relationship with the organization. Due to the nature of the alumni relationship, colleges conform to the relationship standard of best practices.

**The source of data maintained by the append service provider:** The data maintained by the append service provider should be permission-based in that the contacts provide notice and choice regarding the acceptance of receiving third-party email offers.

**Security of client data during the email append process:** The append service provider should maintain infrastructure and policies to prevent accidental and otherwise unauthorized use or release of the client data. Email append vendors should send and receive client data via secure Web sites. Schools should request that the append service provider hold customer files in strict confidence and not disclose or use it for any purpose other than the append process. Schools should request a data confidentiality agreement to confirm this.

**Notification, deliverability, and affirmative consent:** Once files are matched, schools should notify the email recipients and provide them with opt-out options. These include:

Affirmative consent — Individuals receive notification and have to take action to be added to the school's email list (such as clicking on a check box).

Notice and choice — Individuals are provided a choice to opt-out of receiving emails.

**Dispensation of opt-out and undeliverable alumni emails:** The append service provider should exclude bounced and opted-out email addresses from the data returned to the school. The append service provider should also send the school a separate file of data (with name and mailing address information) about individuals who opted out or who have undeliverable email addresses. Schools can use this information to manage subsequent direct mail or telemarketing programs for email address collection.

**Management of recipient inquiries during the email append process:** Typically, the school and the email append service provider share responsibility for accepting and responding to any communication initiated by the recipient arising from the email append process. For email communication with a recipient after an email append project, the school is responsible for managing opt-out requests and other inquiries regarding email permissions and preferences.

**First time and ongoing email communication:** The first time a school sends an email message to the recipient of a matched email address, the organization should clearly express the intent of the email solicitation. Additionally, the organization should provide the recipient the opportunity to opt-in or opt-out of receiving future email messages from the organization.

**Ownership of appended alumni email addresses:** The email addresses obtained through the append process should not be made available to outside organizations. Schools should carefully consider how and if email addresses should be used by various departments, programs and school-affiliated organizations.

*HEP Development is a leading data solution provider to the nonprofit market. HEP currently serves 2,500 active clients — 1,500 of which are colleges and universities. HEP is headquartered in the Washington, D.C. metro area and has regional offices in Houston and West Palm Beach, Florida.*



## Practicing List Hygiene

Maintaining the accuracy of your email file is critical to optimizing email message delivery and maximizing response rates to email communications. Email addresses change frequently, and your hard work building a sizeable list may be lost if your file is cluttered with outdated or inactive email addresses.

Follow these guidelines to maintain a clean email file:

### USE AN EMAIL SYSTEM THAT AUTOMATICALLY PROCESSES BOUNCES

A good email delivery system will help you maintain the integrity of your email file by automatically tracking and processing both hard and **soft bounces**. When considering email marketing software, look for products that automatically flag inactive email addresses (**hard bounces**) in your database so you do not continue mailing to that address. Your system should also re-queue soft bounces and systematically attempt to redeliver your message.



#### TIP

Bounced email consumes resources, so Internet Service Providers do not appreciate repeated emails to addresses already identified as bad. They use high bounce rates as an indicator of spam, or unsolicited email. (For more information on spam, see page 11.)

### PROVIDE AN ONLINE MECHANISM FOR UPDATING INFORMATION

Allow your constituents to update their information online, using easy-to-update forms. Remind site visitors that by keeping their registration information current, they will save your organization costly administrative time and they will be able to stay informed of important information and activities. You may also include a recurring reminder at the bottom of your regular email newsletter or other communications, encouraging alumni to return to your Web site to inform you of any contact information changes.

### CAPTURE OFFLINE ADDRESS CHANGE REQUESTS

Some alumni will inform you of their change of email address via offline methods such as phone, fax or mail. Develop an administrative process for handling these requests and be diligent about updating this information in your database. Consider contacting an alumnus by phone or mail if email is returned as undeliverable to his or her email address — the constituent could have entered the email address incorrectly or changed email addresses, but still may want to receive email communications from you.

## Building Constituent Profiles

To deliver truly personalized communications, you will need to supplement the basic data (name, email address) you have collected from your alumni with more detailed demographic information, and information about their attitudes, interests and online behaviors. Using this advanced profile information, you can create and send messages that target specific interest groups within your database. Delivering regular and relevant content to each individual is critical for building a loyal and involved alumni community — and to driving response rates to events and online campaigns.

Follow these guidelines to help gather profile information:

### USE ONLINE SURVEYS

A simple online survey can allow you to gather almost any type of information simply by asking constituents to respond. By using an online survey tool, you can automatically add what you learn about them to their profile in your database.

### CAPTURE DATA BASED ON ONLINE BEHAVIOR

You can gain valuable insight into your constituents' interests simply by capturing data as they click through your Web site. By embedding trackable links in content on your Web site, you can flag an



alumnus' profile with information about his particular interests. If an alumnus clicks on a link to information about planned giving, for example, you can automatically capture this data and use that information to include the individual in future online and direct mail campaigns to promote planned giving opportunities.

### **INTEGRATE OFFLINE AND ONLINE DATA**

Most schools have a significant amount of information about alumni and donors in one (or more) offline databases. Integrating this data with the information you are now collecting online can be time-consuming and costly. You should consider one of the more sophisticated email marketing software tools, which include database integration capabilities. These tools can simplify the process of combining information you gather online with what you know offline into a detailed profile of each constituent.





# Making Sure Your Email Gets Through

As schools increasingly turn to the Internet as an effective means of managing alumni relations, spam — or unsolicited email — becomes a growing threat to legitimate organizations that use email as part of their marketing strategies. Internet Service Providers (**ISPs**) are engaged in a war with spammers, resorting to increasingly aggressive tactics to protect their email systems. In addition, the growing nuisance of spam has earned the attention of legislators in Congress, prompting them to pass the CAN SPAM Act of 2003.

Organizations using email must be aware of these issues and take action to ensure email gets delivered properly. This section discusses the basics of **permission marketing** and how you can avoid becoming a spammer.

## The Basics of Permission Marketing

Permission marketing is the practice of obtaining consent from a prospect or supporter before sending them a marketing message. Permission is a key concept for understanding spam legislation and serves as the foundation of an ongoing online relationship with your constituents. The following guidelines will help you understand the basics of permission marketing.

## Obtaining Permission

Some of your Web site visitors will want to register for your online community for purposes other than signing up to receive email communications — perhaps to search in the alumni directory, to register for a regional event or to gain some other benefit you've made available to registered visitors online. These people have not yet given you express permission to communicate with them on a regular basis.

For any type of registration (other than explicit newsletter signups) it is important to provide your visitors with the option to receive regular communications from you. There are several ways to do this, all representing varying degrees of permission stringency:

### THE OPT-IN METHOD OF GAINING PERMISSION

With this method, you give constituents the choice of requesting communications from you by including a check box or button on your registration page. Your constituent actively checks this box or button when registering, thereby "opting in" to your communication program. If you plan to provide your contact information to any partner organizations or companies, you should include a second check box or button that indicates your constituent would like to receive communication from them as well. This is the minimum amount of permission required in order to comply with commonly accepted marketing best practices.

### THE OPT-OUT METHOD OF GAINING PERMISSION

The set-up for this method is almost identical to that of the opt-in. The only difference is that the box indicating permission to send email is already checked in advance when the constituent registers. Therefore, he must "opt out" and uncheck that box if he does not wish to receive any email communication from your organization. Some organizations choose not to use this approach because it is more passive and easier for the constituent to overlook than the opt-in method, and therefore may not be evidence of genuine permission.

## Confirming Permission

If you do either of the above, you have met the basic standards for gaining permission. However, many marketers prefer to take a further step to confirm that the "opt-in" is genuine.



## **THE CONFIRMED OPT-IN**

After your constituents select the opt-in box during registration, automatically send an email confirming their desire to receive future communications for your organization. This email should include a link the supporter can click to unsubscribe. No reply is necessary to remain on the list. This gesture gives the constituent who inadvertently signed up the opportunity to opt out before receiving any unwanted communications from you.

## **THE DOUBLE OPT-IN**

This is similar to the confirmed opt-in, as an email is automatically sent to your constituent after he checks the opt-in box and registers. However, the double opt-in method requires that he actively respond to the message to confirm his interest. If he does not reply, he is not added to the email file. Although this method is the most rigorous at determining a constituent's interest, and there is a danger that you may lose a portion of your registrants who do not open or respond to the confirmation email, it is by far the safest way to ensure a completely permission-based email file.

## **Providing Constituents with a Way Out**

As vigilant as you may be about obtaining and confirming permission, a constituent can decide at any point that he no longer wishes to receive communications from your organization. Don't take permission for granted once you have obtained it, because the minute constituents decide they no longer want your emails, every future message you send to them is spam and may have negative consequences.

It's important that you to give the members of your email file an opportunity to change, renew or revoke their permission on an ongoing basis. Include a link or other form of instructions at the bottom of every email communication about how to unsubscribe from your mailing list. While you may lose a small percentage of your email file each time you send a mailing, the trust you will have gained in the minds of your constituents will more than compensate, and your response rate will reflect that.

## **The Importance of a Privacy Policy**

Internet users are more aware than ever of the importance of their privacy online. Your organization can gain trust and credibility among its constituents by developing and adhering to a privacy policy. A privacy policy reassures your Web site visitors that you recognize the value of the information that they share with you, and that you promise not to violate that trust. Here are a few tips that will help you develop your privacy policy:

### **WRITE A CLEAR, USER-FRIENDLY DOCUMENT**

Keep your policy free of jargon and intimidating legal terms. State exactly what information you collect online and how your organization plans to use this information. Also be clear about how the information will not be used, as well as any list-sharing agreements you may have with other organizations.

### **PROMOTE YOUR PRIVACY POLICY PROMINENTLY ON YOUR WEB SITE**

While many sites include a privacy statement somewhere on their site, they fail to promote it in a prominent, heavily trafficked area. Consider including a link to your privacy policy in your primary navigation or page wrapper. And remember that privacy statements should appear on all Web pages requesting the end user to submit personal information.

### **BE SURE YOUR PRIVACY POLICY CAN STAND THE TEST OF TIME**

While the Web is a powerful tool that allows for dynamic marketing and instantaneous changes, a privacy policy shouldn't change frequently. Before posting your policy, make sure that it can stand unchanged as your organization's membership grows.



## Avoiding the Spam Can

Identifying spam is not a black and white matter. Anti-spam techniques try to strike a balance, filtering as much spam as possible while rarely discarding email the recipient would want. Inevitably, some email sent by any organization will be incorrectly blocked. The goal for an organization should be ensuring delivery of the vast majority of its email.

### TIP

Your email marketing software should offer a spam checker so you can check your email communications for any potential spam violations and correct them before sending your communication. This capability helps ensure that more of your recipients receive your communications, which will help maximize response.

### KEEP TO THE POINT

Though email is cost-effective, over-emailing can sour people on an organization, increase spam complaints and raise opt-out rates. Any organization must coordinate mass emailings across departments and ensure the content is relevant to recipients. Schools have a unique challenge as alumni often have multiple affiliations with various schools, departments and programs. To help you segment email recipient lists by topic, make it easy for alumni and other constituents to select which mailings they wish to receive. Dedicate an area within your online directory where alumni can opt in or out of various emails and newsletters, and promote these subscription options on a regular basis.

### CONTENT FILTERS

Spam tends to focus on a few "hot" topics — current favorites are mortgages, medications and pornography. Content filtering uses keywords and phrases characteristic of common spam themes. Modern content filters use advanced scoring algorithms, so rarely does a single, common word mistakenly trigger them. However, it is important to avoid use of more specific terms likely to be found in spam.

Spammers trying to bypass content filters use uppercase letters, numbers and punctuation in subject lines to form misspelled variants of keywords that would trigger filters. Modern filters look for this trick, so avoid excess punctuation or capitalization.

Be careful not to trigger "filtering" by recipients themselves. Use concise, informative and literal "Subject" lines; don't sensationalize, pun, or employ generic statements like "Your help needed." The "From" address should include a display name clearly identifying the organization so the email stands out, e.g., "The Helpful Society <info@helpful.org>" The most powerful email solutions available today can check for these and other spam filter triggers and notify you of the violation so you can correct it before sending the email.

### ACQUIRING ADDRESSES

The most qualified additions to an organization's email file are people who have expressed an interest by signing up for email, donating or registering for an event online. When collecting email addresses, clearly inform people that you are collecting their data and explain how it will be used. Give people a chance to opt out — provide a checkbox saying, "I'd like to receive future mailings," which they can uncheck.

### LIST HYGIENE

Always honor unsubscribe requests — never send email without a clear, convenient way for people to opt-out of future mailings. Update your email file, even if that means some manual processing. Discard stale addresses, especially by automatically processing bounces (delivery failure notices). Bounced email consumes resources, and ISPs do not appreciate repeated emails to addresses already identified as bad. Spammers rarely bother with bounce processing, so ISPs use high bounce rates as a spam indicator.

### DELIVERY RELATIONSHIPS

Since schools often email "home" rather than "work" addresses, half of a group's typical email file consists of addresses at major ISPs, or consumer providers, such as AOL™, Yahoo!™ and Hotmail™. Check with your email solution provider to ensure it has "white list" relationships, or exemptions from volume filters, with these major providers so your email does not get blocked.

# The CAN SPAM Act of 2003: A Checklist for Nonprofits

by Senny Boone, Executive Director, Direct Marketing Association Nonprofit Federation

The CAN SPAM Act of 2003 went into effect in January of 2004, aiming to wipe out illegitimate email practices that threaten the growth and success of the Internet marketplace. For nonprofit organizations, the Internet is a new frontier for advocacy efforts, member involvement, member relations and fundraising, and many organizations already have had great success in reaching online funding and membership goals.

Congress certainly did not intend to eradicate this new form of communication. Instead, it sought to crack down on misleading and fraudulent activity by unscrupulous spammers. Note that the new CAN SPAM law relates primarily to commercial, not nonprofit, activities. The law applies to all commercial email whose primary purpose is defined as trying to sell a product or service — it does NOT apply to informational email such as account balances or bills due. It also does not apply to pure fundraising appeals that solicit funds and other contributions.

Since many organizations do sell products and services, and may at times cross the line between commercial and non-commercial activities, it is better to tread carefully with email practices rather than face regulators or further legislation aimed directly at nonprofits. Currently, the Federal Trade Commission is studying the creation of a Do Not Email list, and many states have spam laws in the works that would be enforced by state attorney generals that may be even more stringent than the federal CAN SPAM Act.

The Direct Marketing Association (DMA) and the DMA Nonprofit Federation have a stringent set of ethical guidelines applicable to email marketing that go further than federal law in some instances. Here is a checklist of some guidelines to follow as you communicate with the public via email marketing:

- If you are sending a commercial email, make sure that you communicate that the email is an "offer" to the recipient. The sender can accomplish this by using "advertisement" or "solicitation" in the body copy of the email; specific language is not required by law.
- Provide a valid postal address. The law is unclear about whether a Post Office Box or mail drop constitutes a physical address. However, the DMA guidelines require that marketers provide a physical street address, not a PO Box.
- Provide an honest, rather than a misleading, subject line.
- Provide an easy-to-use, Internet-based mechanism for recipients to remove themselves from your mailing list. If you are using a service provider, you should have a written procedure since your organization would ultimately be responsible. For unsubscribe requests, the sender (the organization) would be responsible, not the email service provider who may have sent the email on behalf of the sender. The sender may outsource the processing of these removal requests, but the sender is still responsible.
- "Remove" means remove. The electronic remove feature must be reliable, functional and prompt.
- If a recipient removes himself/herself from a marketing list via an email service provider, that email address does not have to be removed from all future campaigns, unless the service provider is represented in the "From: Line." The DMA recommends that the email service provider who is listed in the "From: Line," but who may be sending an email on behalf of a marketer, should also honor the removal request.
- DMA has a prohibition against "harvesting" email addresses — there should be no surreptitious acquisition of email addresses via automated mechanisms without the consumer/customer's awareness and agreement. This includes a prohibition on "dictionary" attacks or other mechanisms for creating email addresses without the awareness and private approval of the addressee.
- Your message text should be consistent with the subject line text.
- The FROM: line should not be ambiguous and should be a valid return email address.
- Email lists must not be sold or provided to unrelated third parties unless the owner of the list has provided notice and the ability to be removed from such transfer to each email address on the list. Related third parties include other brands/subsidiaries within the same parent company as well as outside affinity partners as a reasonable consumer is likely to perceive them.
- A commercial email should contain the sender's privacy policy, either within the body of the email or via a link.

*The DMA Nonprofit Federation represents nonprofit organizations before Congress, federal and state agencies on matters impacting the nonprofit community involved in fundraising and advocacy. For questions or comments, contact Senny at [sboone@the-dma.org](mailto:sboone@the-dma.org), or at (202) 861-2498.*



# Executing an Effective Email Campaign

Any successful direct marketer will tell you that strategic planning is a critical element in the success or failure of a direct mail campaign. The same is true for an **email marketing campaign**. Your campaign can have multiple email messages, with each response triggering a series of subsequent email messages. You might want to include or exclude recipients who responded a certain way from future email messages, and your email marketing software should help you do this. A strategic plan will help you organize all of these considerations for a more effective campaign.

This section will take you through the email campaign development process — from setting your objectives to measuring your results — and help you put your email address file to use.

## Establishing a Communication Schedule

As you prepare to execute an email campaign, it is important to consider the frequency with which you will be contacting your constituents. Determining optimal frequency is key, as both too-frequent and too-infrequent communications can result in deteriorating relationships with alumni and friends.

The best approach is to set a schedule that you think makes sense, try it, listen to feedback and adjust accordingly. Your constituents will let you know by their response if you are contacting them too little or too often. Consider these pointers as you develop your overall communication schedule:

### **SYNCHRONIZE ONLINE WITH OFFLINE DIRECT MARKETING PROGRAMS**

Remember that email communication should complement offline communication programs. Time email campaigns to coincide with direct mail delivery. Offer constituents the option to not receive direct mail, if they would rather correspond only by email.

### **COORDINATE WITHIN YOUR ORGANIZATION**

Remember that other individuals and departments within your organization may be planning to use the email address file. It is important to coordinate usage so that your organization does not flood its constituents' inboxes with multiple email messages. Your alumni and friends will expect you to communicate in an organized and unified manner.

#### **TIP**

The most effective way to ensure you do not overwhelm constituents with too-frequent emails is to ask about their preferences. Consider posing this question on your Web site registration form, or sending an online survey. Aggregate the responses to determine the majority preference of your constituents, or use this information to send weekly communications to those who request it, and monthly communications to others.

### **PAY ATTENTION TO THE DAY AND TIME OF SCHEDULED DELIVERY**

Most marketers avoid weekends, Mondays and Fridays for delivering email communications. On these days, constituents may be most distracted and your email could get lost in their email backlogs. Mid-week, early- or mid-morning and mid-afternoon are generally good times to test in an attempt to drive higher response rates. Don't be afraid to test a variety of schedules and be sure to carefully track response rates. [See pages 18-19 for more details on response metrics].

### **LET RELEVANCY DRIVE FREQUENCY**

The type and relevancy of information you will communicate can help determine your email schedule. For general organizational updates and news, monthly or bi-weekly communications might be most effective. Information that frequently changes (such as volunteer schedules), or is more urgent, may require that you communicate more often.



## Determining Campaign Objectives

As with any marketing campaign, it is crucial to clearly understand your objectives before you send an individual email or launch an email campaign. Setting objectives for the email or email campaign will help you sharpen your message and determine the best approach — from email newsletters and urgent news updates to email fundraising appeals — for your communications. It also will help you to effectively evaluate results and understand your return on investment.

For instance, your goal may be to establish a campaign for ongoing communication with your existing constituents to keep them updated and connected with the organization, and therefore strengthen their loyalty. This campaign might include a monthly email newsletter with content that reminds alumni and friends how annual giving supports various programs, departments or initiatives.

Because email is far less expensive than direct mail, consider also how donor acquisition or renewal solicitations might be executed through a series of email messages — instead of a single appeal. If, for example, your goal is to improve annual fund participation in recent graduating classes, an email campaign might include four different individual emails, executed over a 12-week period. The objective of the first communication might be to engage recent grads with an informational update on alumni services available online. The second email might be an invitation to area regional events. And the third might include a fundraising appeal centered around a challenge to set a class record for dollars or percent participation, followed by a reminder to those who have not yet donated. Your email marketing software should help you execute this series of messages in an automated fashion — to make sure the right audience is receiving the right message at the right time.

## Segmenting Your List to Target Specific Audiences

As in direct mail, you will improve response rates to solicitations by segmenting your email file based on factors such as constituent interests, donation history, school affiliation or other defining characteristic, and **targeting** them with specific messages. Traditionally, schools target annual appeals according to class and/or school. An increasing number of schools are now supplementing traditional annual fund appeals with campaigns targeted to various affinity groups. These campaigns might be used to solicit donations to a restricted fund or for the general operating fund from which a program receives support.

### **Use email communication to support affinity-based campaigns**

A "full cycle" of communication can significantly increase response rates to affinity-based campaigns. The full cycle of communication includes several phases: outreach, interest and affinity data collection, campaign promotion, email solicitation, and subsequent messages for donor stewardship.

For example, the first message of a series might present an overview of programs supported through the annual fund with links to more detailed information about programs, giving societies or initiatives. If your email software is fully integrated with your directory database, you should be able to update the profile of individuals who click on these links to record their interests. A second message might then be sent to specific interest groups — composed of individuals who clicked on links in the first message as well as individuals who have previously contributed to individual programs — with an appeal for support of the program in which they have expressed an interest. Subsequent messages might then be sent to all donors to report on the success of the campaign and the impact of total dollars raised.

### **TIP**

In addition to helping you create and send individual emails, your email marketing software should allow you to set up email campaigns. This will allow you to configure multiple emails and audiences in a single campaign, and track all responses within the context of the campaign, versus having to track results for each separate email, then aggregate those results.



## Creating Compelling Email Messages that Get Read

Strategic planning and list-building is just the foundation of an effective email marketing campaign. Once these pieces are in place, the following guidelines can help you create a message that will motivate your constituents.

### OPTIMIZE THE MESSAGE ENVELOPE

Pay close attention to the information you include in the email's **message envelope**, as it can be critical to your response rate.

#### Write an intriguing subject line

The purpose of your message's subject line is to get the message opened. Your subject line should be no more than 40 to 60 characters in length, and should tell the recipient something about your message. Use short, action-oriented words or draw on emotion. If you do not use your organization's name in the "from" line, consider using it here.

#### Choose a familiar sender

Most people scan their emails to see who messages are from and then prioritize which messages to open. If an email appears to come from an unfamiliar source, your open rates may suffer. Capitalize on the strong affinity constituents have for your school by putting the organization's name in the "from" line.

#### TIP

Spam filters watch for excessive punctuation and capitalization in email subject lines. To avoid having your message blocked by spam filters, use concise subject lines. Clearly identify your organization in the "from" address to avoid manual spam filtering by recipients themselves.

### DESIGN YOUR EMAIL TO DRIVE RESPONSE

Your message's design and layout can significantly impact response rates:

#### Send graphically rich emails

Using **HTML** in your email messages allows you to include photos and images as well as control design elements such as fonts and colors. HTML email is visually pleasing, professional looking, and generally easier to read. Plus, it allows you to reinforce your school or campaign brand by including the appropriate logo or other recognizable visual elements in each message.

#### TIP

Some constituents who can receive HTML emails may prefer plain text. Give them the option of choosing their preferred format, and they will be happier readers of your messages.

However, it is important to remember that some of your constituents may not be able to read HTML messages because of the limits of their particular email provider. Choose email marketing software that supports **multi-part email distribution** of both HTML and text format messages, which will automatically detect when someone cannot accept a graphical email, or has indicated that he or she prefers to receive text-only messages, and will deliver a text version in its place.

#### Keep key message points above the fold

Most email programs today allow users to preview messages without fully opening them. Although your readers may be able to pre-set the size of their viewing window, you can assume that only the top 25 percent of the email will be visible. Make sure you include the most compelling elements of your message and any calls-to-action in this top portion of the email.



### **Keep your message short**

Don't overwhelm your message recipients with too much copy. Limit the message to one or two key points and keep your overall message to less than two screen lengths to reduce the amount of scrolling required by readers.

### **Drive readers to your Web site**

One way to keep email messages short is to replace lengthy explanatory text in your message with a compelling call to take action — usually a request to click on a link to your Web site. This tactic has the added benefit of allowing you to track "click-through rates," which will help you measure constituents' interests and the impact of your message.

### **Drive potential donors to campaign-branded Web pages and forms**

The context of an email solicitation presents unique circumstances that require careful planning. The message in the email, the call to action and the Web page to which you direct a potential donor will each impact response rates.

You will achieve best results if the path you ask the donor to follow is a convenient and coherent sequence of steps. For example, instead of simply dumping individuals onto your homepage, place a link in your email to send recipients directly to a page with graphics and content about the program for which you are asking support. This approach allows you to present a compelling case for supporting your campaign. And, recipients interested enough to click through the email message won't have to navigate through your site to find more information about the campaign. Your email software should allow you to place trackable links in your email solicitations, and your online fundraising tools should allow you to create campaign-branded Web pages and donation forms.

## **PERSONALIZING YOUR MESSAGE**

The power of email marketing lies in the ability to create and develop relationships with your constituents by delivering content that is specific to their interests, motivations, geographic location and other characteristics.

### **TIP**

Your email marketing software should allow you to easily add content to a single organizational email or email newsletter, delivering local content just to constituents in that area. This can be done by state, ZIP code, affiliate and/or region.

### **Address each individual recipient by name**

Addressing constituents by name is a simple way to add a personal touch to your email communications, and alone can make a significant impact on response rates. A good email marketing tool makes it easy to insert merge fields into your messages. These merge fields pull any data from your database, allowing you to automatically send a unique version of the email to each constituent.

### **Use conditional elements to personalize email content**

While selectively displaying personal information is important, the real power of personalization lies in automatically customizing the content a constituent receives in an email message. As with the personalization merge-fields that allow you to address each constituent by name, this technique also draws from the profile information you have gathered in your database. But in this case, the "conditional content" might be a single sentence, a full paragraph, images, a survey or even unique donation forms. This content is automatically inserted into an email if a constituent meets particular criteria that you have designated. By adding content based on each constituent's interests, your organization will make its communications more relevant, and more valuable — key for developing strong, sustainable relationships online.





## Testing Your Message

Even a successful campaign can be improved. For the most effective and efficient use of an email marketing campaign, conduct simple tests prior to distributing your message and measure campaign results afterward.

### TEST INTERNALLY FOR QUALITY ASSURANCE

Prior to sending your email out to hundreds or thousands of constituents, it is crucial that you thoroughly test your communication internally. This important process prevents distribution of emails containing costly and/or potentially embarrassing mistakes.

Designate and train a few people within alumni relations, communications, annual fund and donor relations departments, and send test messages to these same groups to maintain consistent quality standards. These internal testers will:

#### Check for display variations

Set up test email accounts on a variety of email clients (i.e. Microsoft Outlook™, AOL, Hotmail, and Yahoo!). Have your testers evaluate the appearance of the email in various email clients so you have an understanding of what your constituents will see, depending on their ISP of choice.

#### Check proper functionality

Your testers should check and ensure that the various technical components of your campaign work properly. Testers should attempt to mimic the experience your constituents will have when they receive your email. Be sure to click through all links in the email and on any **landing pages**. Also test the transaction, registration, or other functionality associated with your call-to-action.

### TEST EXTERNALLY TO FINE-TUNE THE MESSAGE AND CHECK THE PROCESS

Take advantage of the inherent benefits of the Internet by sending test messages to a sub-set of target recipients prior to sending it to your entire email file.

#### Check for message effectiveness

Because the Internet allows you to send messages and receive responses quickly, you can compare response rates of different messages and subject lines, then refine your email message before sending it to the entire constituent base — ensuring the maximum response for each email campaign.

#### Check your campaign process

In addition to testing the effectiveness of the email itself, it is important to send a test message to ensure you are prepared to handle responses — particularly if you are sending a message to several thousand constituents or more. Is your telemarketing team staffed appropriately to handle the volume of responses? Is your marketing staff prepared to reply to the email messages that come back from your constituents? Sending a test message to a small percentage of your target audience will help you to identify any holes in your process before sending to the entire list.

#### TIP

Your email marketing software should allow you to send two or more different messages to a percentage of your target audience to test the effectiveness of each message (often called split A/B testing), then send the most effective message to the remainder of the audience without sending to the test group again.



## Measuring Results

The relative success of an email marketing campaign can be judged on a variety of criteria, depending on the specific goals and objectives set forth in your initial campaign strategy. As you learn more about your constituents' online preferences, polish your message, and develop online benchmarks for successful email marketing campaigns, you will be able to fine-tune your email marketing strategy.

### USE YOUR EMAIL MARKETING SYSTEM TO MEASURE KEY INDICATORS

Powerful email tools provide marketers with the ability to track and measure a wide variety of response metrics that are not available with traditional vehicles like direct mail. By setting benchmarks and diligently tracking each campaign against them, you can gain invaluable insight into the quality of your email file; the fine-tuning of communications; and perhaps most importantly, whether constituents value the content they are receiving. But what indicators do you track, and what does each tell you?

#### Open rate

This is the percentage of people who open your message, either by clicking on it in their inbox or by opening it in preview mode. Though it does not necessarily indicate the number of people who actually read your message, this measure can give you a better idea of your subject line effectiveness, and can be an early indicator of the success of your campaign.

#### Click-through rate (CTR)

This measures the percentage of people who click on links within the body of your email to seek more information or take action. Sophisticated email marketing tools allow organizations to insert trackable links within the email body for determining individual CTR for each link, or an aggregate CTR for the message as a whole. To calculate CTR, divide the number of clicks by the number of messages sent (your email software should provide this statistic as part of a standard report). This measure indicates the effectiveness of the text and graphics in your email message, as well as the level of interest in your campaign or organization.

#### Response rate

The ultimate success of an email may be measured by the percentage of people who take some type of action — such as completing a survey, registering for an event or making a donation — after clicking through to your Web site.

#### Abandonment rate

This rate shows the percentage of "drop offs" at any stage in the process — for example, the number of recipients who open your email but do not click through, or who click through but do not contribute or take action. Assessing this measure at each stage of the process helps you to understand any weaknesses in your campaign or strategy. Is the message or content irrelevant? Is the call to action inappropriate? Are there navigation or usability problems on your Web site? These are some of the problems that a significant abandonment rate could indicate.

#### Unsubscribe rate

If subscribers do not continue to find content compelling, they may choose to unsubscribe, or "opt-out" of receiving future email communications from your organization. Email marketing tools should allow you to include an unsubscribe link at the bottom of your message, and automatically process opt-outs. Increases in your unsubscribe rate can be an indicator of over-frequent or inappropriate communications with constituents. When unsubscribe rates

#### TIP

Not all click-through rates are equal. When analyzing key indicators, remember that click-through rates for an email newsletter sent to people who signed up to receive the communication will likely be higher than click-through rates for a fundraising solicitation sent to your entire email address file. Track CTR separately for different types of email communications to ensure your data's accuracy.



surge, evaluate the frequency of your email and direct marketing campaigns to ensure that you are not over-communicating in both the offline and online worlds. Consider sending a survey to constituents to determine what information is important to them, as well as their preferred mode and frequency of contact.

### **Forward rate**

Another measure of success is the frequency with which alumni forward messages to their classmates and friends, and whether those additional recipients click through. This is an indicator of your success with viral marketing and your ability to attract a greater number of donors, volunteers or members.

### **Bounce rate**

The number of hard and soft bounces you receive will help you evaluate the quality of your email file and determine if list hygiene is necessary to avoid continued list erosion.

### **Average time spent on landing page**

The amount of time the message recipient spends on this page gives you an indication of the success and efficiency of the page's design and content.



# Spotlight on Convio

Whether the goal is to drive alumni participation in an online community or increase donations to online campaigns, Convio's email marketing solution helps alumni relations and development professionals like you to wage email campaigns that drive significantly higher constituent response and participation. It incorporates email marketing best practices directly into email software — helping you build more effective email campaigns every step of the way.

## **GROW YOUR EMAIL FILE**

Convio Internet solutions for alumni relations help you manage online relationships with a broad population of alumni, learn what is important to them, and then tailor communications to their interests. Our alumni directory, class notes, career center and online events promotion will drive traffic to your Web site and help you to capture email addresses and other information about your alumni.

## **SEND INTERACTIVE EMAIL COMMUNICATIONS**

Convio helps you quickly create and send personalized email communications to constituents:

- Create graphical emails with content specific to constituent interests or participation history. For example, send an email newsletter to all constituents, and include a paragraph about your latest fundraising campaign just for constituents who have donated in the past.
- Allow clubs, classes, departments and other contributors to submit content for your newsletter or other campaigns, then automatically deliver relevant content to each constituent.
- Develop email templates that include links and dynamic content — branded with your school's design.

In addition to helping you create and send individual emails, Convio's email marketing solution allows you to set up email campaigns. You can configure multiple emails and audiences in a single campaign, and track all responses within the context of the campaign, versus having to track results for each separate email, then aggregate those results.

## **OPTIMIZE EMAIL DELIVERY**

To help ensure your email is delivered to your intended audience, it's important that your messages are not perceived as spam by email provider filters, individual email tool filters or by recipients mistaking your email for spam. Convio's email marketing solution includes spam testing so you can check emails for spam filter triggers, such as too much punctuation in a subject line, before sending the email.

## **IMPROVE RESPONSE RATES**

Convio's email marketing solution allows you to send two or more different emails to a percentage of your target audience to test the effectiveness of each message (often called A/B testing). Because the Internet allows you to send messages and receive responses quickly, you can compare response rates of different messages or subject lines, then refine your email before sending it to the entire constituent base — ensuring maximum response for each email.

## **UNDERSTAND CONSTITUENT BEHAVIOR AND PREFERENCES**

Convio's email marketing solution includes Constituent360™, the online database included with each Convio software solution. It houses the information from your online interactions with constituents, and synchronizes with your offline databases. This allows you to integrate the information you gather online with constituent interaction history for in-depth analysis of your constituents. You can analyze email marketing results and tailor email communications to constituent preferences.

For more information about Convio, visit [www.convio.com](http://www.convio.com), or call **1-888-528-9501**

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# Glossary

## **ABOVE THE FOLD**

*The portion of a Web page or email that is visible without scrolling. The fold varies depending on the resolution settings on a visitor's monitor. At lower settings (i.e. 640x480) the fold is relatively high on the page. At higher settings (i.e. 1280x1024) the fold extends much further down the page. Decisions concerning what goes above or below the fold are often made based on a minimum targeted resolution.*

## **EMAIL APPENDING**

*The process of adding an individual's email address to that individual's record inside a marketer's existing database. This is accomplished by matching the marketer's database against a third-party, permission-based database to produce a corresponding email address.*

## **EMAIL MARKETING CAMPAIGN**

*A coordinated set of individual email marketing messages delivered at intervals and with an overall objective in mind. A campaign allows each new message to build on previous success.*

## **HARD BOUNCE**

*A hard bounce is an email message that has been returned to the sender because the recipient's address is invalid. A hard bounce might occur because the domain name doesn't exist or because the recipient is unknown.*

## **HTML**

*HyperText Markup Language; the set of symbols or codes inserted in a file that allows for the display of visual elements such as graphics, formatted text and background colors.*

## **ISP**

*Internet Service Provider; a company that provides users with access to the Internet.*

## **LANDING PAGE**

*A special page that is set up for visitors who clicked a link from another source such as an email or advertisement. The landing page may contain detailed information about a program or offer, direct visitors to take action, or serve to reinforce branding.*

## **MESSAGE ENVELOPE**

*The header of your email, which the recipient also views in their email inbox. The envelope includes the "To" line, the "From" line, the date and the "Subject" line of your message.*

## **MULTI-PART EMAIL DISTRIBUTION**

*An email delivery process in which a content-type header is included in the message, which indicates to an email client that the message has multiple parts in alternative formats. The email client will display the format most suited to its environment: HTML for HTML-capable clients, text for plain-text only cable clients.*

## **PAGE WRAPPER**

*A consistent, graphical element (usually in the masthead position or along the left side of the page) that is branded to your organization and frames the content of each page of your Web site.*

## **PERMISSION MARKETING**

*Marketing centered on obtaining constituent consent to receive information from an organization.*

## **SOFT BOUNCE**

*A soft bounce is an email message that gets as far as the recipient's mail server but is bounced back undelivered before it gets to the intended recipient. A soft bounce might occur because the recipient's inbox is full. A soft bounce message may be deliverable at another time.*

## **TARGETING**

*Sending the right message to the right recipient at the right time.*

## **URL**

*Universal Resource Locator, or the "address" of a particular Web page.*

## **VIRAL MARKETING**

*Marketing phenomenon that facilitates and encourages people to pass along a marketing message.*