

MarketReach

Email Guide: Tips, Best Practices and Regulations

MarketReach enables marketers to reach financial advisors, executives and insurance agents using digital programs tailored to their needs. We provide the latest B2B contact data on over 2.7 million professionals. This data includes business and personal email addresses. Additionally, our full service marketing solutions offer telemarketing, ad targeting, direct email, and more.

With email marketing constantly evolving, we have compiled this guide to assist your program!

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Deliverable Checklist

Refer to this checklist when developing an email program. Please note, it does not encompass all deliverability factors. Consult your email service provider (ESP) to understand best practices while adhering to guidelines. Each ESP consist of different requirements and recommendations based on their clients' needs.

Did you refresh your distribution list this week?

Thousands of professionals change firms and leave the industry each year. These changes are captured by MarketReach, and made available to you weekly. Email addresses are also re-validated on an ongoing basis. With this amount of movement taking place, it's imperative to refresh your distribution list the same week your campaign deploys.

Have you narrowed down your list to a targeted audience most likely to benefit from your offering?

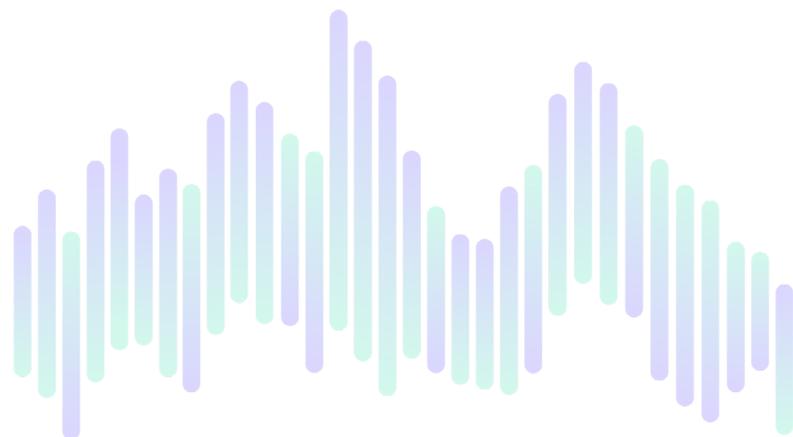
Covering a large list may lead recipients to devalue your offer. This could result in a higher percentage of unsubscribes or spam marks, and prevent or delay message distribution. Additionally, firms monitor volume, frequency and messaging of emails from a specific domain. Your domain may even get blocked if they determine you're not meeting expectations. Check with your ESP on how to best deliver your campaign. and validated emails for mass distribution.

Have you removed emails that do not support validation from your list?

Our Validation Supported field indicates if an email's domain is accurate. Remove invalid emails when conducting email campaigns. An extensive email validation process occurs on an ongoing basis. In some cases, an email's domain blocks validation technology or sends false positive results. This doesn't mean the email is invalid. If the domain does not support the process, however, we can't confirm validity. It's best to reserve use of emails that can't be validated for individual messaging, and validated emails for mass distribution.



Validated for Mass Emailing



Do you have whitelisting efforts in place?

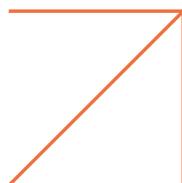
Recipients may want to receive your message, but have not added you as a safe sender in their address book, or their IT department has not added your domain to an approved list. If you provide a valuable service to a company, they will be compelled to whitelist your email domain. If you have a dedicated IP, be sure to request they whitelist this as well.

Are you sending from authenticated IP addresses?

Internet service providers (ISPs) will verify that you are a legitimate sender. Make sure you are registered as an authorized sender.

If you are sending an invitation to obtain a single or double opt-in, are these campaigns being sent on an acquisition IP?

Sending opt-in invitations on a separate (acquisition) IP will help protect your dedicated IP address you have worked hard to build a reputation on.



Are you monitoring and addressing deliverability on an ongoing basis?

There are many ways your email can be prevented from making it into the recipient's inbox. Companies may utilize spam content monitoring services, ISPs may raise a red flag, or simply the recipient's email address has changed and is no longer valid. In order to stay on top of your deliverability, you should speak with your ESP about how you can be alerted when any of these matters occur.

Email Deliverability
STATS:
1,000 Recipients
50 Bounces
BOUNCE REASONS:
8 Marked as Spam
20 Email Invalid
7 Email Temporarily Email Suspended
15 Email Permanently Email Suspended

Take these Authentication and Deliverability Steps:

- 1** Authenticate your emails with DKIM, SenderID, SPF and Domain Keys.
- 2** Make sure you are within the email sending limits of ISPs and other providers.
- 3** Review the types of bounces, blocks and invalid emails below:

Soft Bounce

If an email soft bounces one or two times, it is worth attempting to deliver to that email address again. If they continue to soft bounce, you should consider blocking them from your distribution list or at least postpone your efforts for a period of time. A good starting point is to block emails from your distribution list that soft bounce three times within the last 90 days.

Hard Bounce

If an email hard bounces it is most likely invalid. You should block these emails from your distribution list unless you find an alternate reason for the hard bounce.

Spam Bounce

If an email bounces due to a spam filter, it may be difficult to deliver to them again. If you have a good relationship with the company you are trying to deliver to, you should have them whitelist your domain and IP address as soon as possible to see if this fixes the issue. You can try delivering to them again, but if you are not successful you should consider blocking these emails from your distribution list moving forward.

Best Practices

A challenge for many marketers is the uncertainty of how email campaigns will display to recipients. Will they view your campaign on mobile, webmail or desktop? Is text displaying properly? Once your campaign is received, will recipients find your design appealing and easy to understand? Is there a clear call to action? Here are 12 tips and best practices to help you overcome these challenges.

1 Use a Trustworthy Reply and From Address

While it may seem like a good idea to use a “no-reply” email address, it can harm your reputation and deliverability. You should not assume that recipients will click on the opt-out link—some will try to reply to your email campaign and if that results in a bounce back, they may report you as spam. If it results no response, they may not want to do business with you based on this experience.

With that being said, make your “reply-to” address something friendly that will encourage customer engagement, and make sure someone is actually monitoring that inbox for prompt replies. You may drum up some new business!

In addition to keeping your address friendly, your “from name.” Is this recognizable and trustworthy to your target audience? Usually, you will find a company name, brand or individual here. If the recipient doesn’t know who an email is from, the probability they won’t open the email increases and they may mark it as spam.

Consider your relationship with the recipient—are they more likely to recognize the name of your company or the name of someone at your company? A/B testing can help determine the right approach for you.

[The CAN-SPAM Act](#) states that the from and reply-to addresses “must be accurate and identify the person or business who initiated the message.”

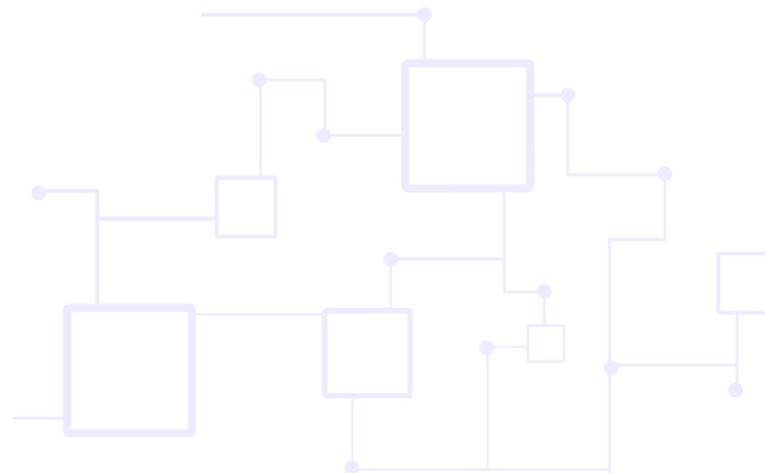
2 Write Compelling Subject Lines

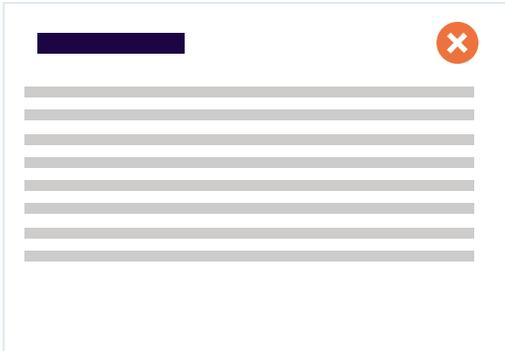
Your subject line is probably the best way to entice a recipient to open your email, and you only have 50 characters to influence the reader to want more. A subject line length of four words tends to correlate with the highest engagement, though there is no set formula for creating a compelling subject line. What works for one company may not work for yours as it all depends on your audience. Utilize A/B testing to see what appeals the most to your audience. Try incorporating useful and specific information, timely topics and urgency, and avoid any language that could trigger your content to be flagged as spam.

TIP: Most ESPs have built-in features to conduct A/B and multivariate testing, so you can easily determine what works best with your target audience.

3 Intrigue Recipients with Pre-Header

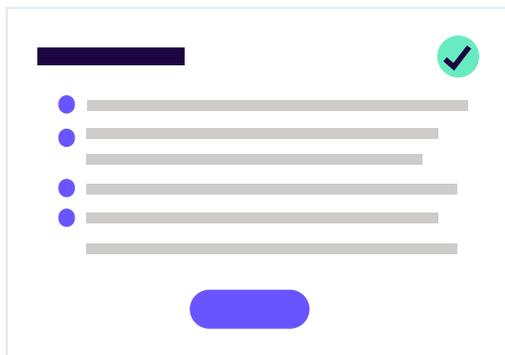
Some email clients such as Gmail and Outlook will show a snippet of preview text in the area underneath or next to the subject line—commonly called a pre-header. This presents another opportunity to intrigue recipients to open your email. This space should be used to add a call to action, a short summary of your email or additional text to support the subject line. By adding a line of HTML code to your campaign, your pre-header will be hidden when the message is opened. If you do not add additional code or text to optimize this feature, the beginning text of your email will display here by default. The average email client displays 75 characters of the pre-header. With this in mind, put your most important keywords and phrases at the beginning.





4 Content: Keep it Relevant and Get to The Point

Relevant content will help grab the recipient's attention and hold their interest, decreasing the likelihood that your emails will be deleted, ignored or marked as spam. In addition, there is no need to pack your email with information; this can be saved for the landing page. Everyone has a lot to say about their great products and services.



Write conversationally, use the active voice, and keep content to a minimum by including short paragraphs and bulleted items where possible to prevent a recipient from being overwhelmed, and to communicate your message positively. Within the first few lines of your campaign make sure the recipient can answer the following questions: Who are you? What do you want me to do? Why should I do that?

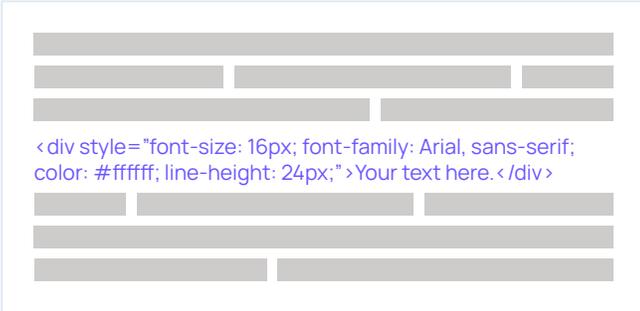
5 Don't Forget The Text Version

Almost all email clients have the ability to display HTML messages, but will only accept a text version. There are also some recipients that have a personal preference to only receive text emails. Based on this information, you should always prepare a text version of your campaign. Depending on the ESP you utilize, a text version may automatically be created from your HTML. If not, create your own text version utilizing of the free online resources available to you.

6 Optimize Your Email for Any Browser or Device

With so many browsers and devices available, it is important to design your campaign in such a way that it displays properly no matter how your recipient chooses to view your message—mobile, webmail or desktop. Ensure that your email renders correctly across various email clients by incorporating responsive design and inlined CSS.

Example of Step 6:



TIP: Use free online tools or trials to view how your email campaigns look in different browsers, versions and devices.

www.litmus.com
www.browserstack.com
www.saucelabs.com

7 Enhance for Images-Off Viewing

Since many email clients don't show images automatically, it is important to optimize your emails for when images are not displaying. By using alt text, font styling and background colors your emails can be more appealing and help communicate your message when images are disabled. Always be sure to include some text within your email campaign in addition to images so the recipient can interpret your offering with images turned off.

9 Make Unsubscribing Quick and Painless

While it may be tempting to hide your unsubscribe link with tactics such as a tiny font size or misleading text, it will only hurt you in the long run. If recipients cannot easily find a way to opt out, they may hit the spam button as their next best option. Some recipients might simply want to change the nature of the relationship, which is another reason to make this link visible and recognizable.

8 Is Your File Size Weighing Down Your Email?

Files that are too large could cause your email to get clipped in webmail or truncated on mobile devices. The size of the HTML file for email should be below 100KB, and this does not include the size of the images used. The total size of the HTML file plus images, sometimes referred as the loaded weight, should be less than 800KB. Consider compressing your HTML file to decrease the file size overall and compress your images when saving for the web.

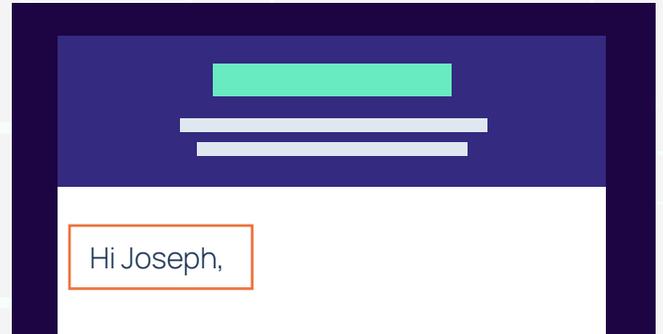
Helpful sites include:

- <http://www.textfixer.com>
- <https://tinypng.com>



10 Build Momentum with Personalization

Personalizing your message can immediately build momentum. Addressing recipients by name in the subject line has the ability to increase open rates, as the recipient will assume the email has come from a trusted source. Additionally, integrating a name in the content of the email can improve conversion rates, as it adds a sense of familiarity and builds brand loyalty between your business and the recipient. Incorporate any other personalization as applicable to reinforce an existing relationship or establish a new relationship.



11 Continue The Email Experience Onto The Landing Page

The recipient's experience with an email continues onto the landing page. For the recipient to take action your landing page should be easy to understand with a clear call to action. Include similar text and images from the email to ensure a smooth transition from one to the other. If your intent is for the recipient to fill out a form, keep the form short and simple. It is recommended to ask for enough information that allows you to contact the lead, but to limit unnecessary fields that only help to qualify the lead. If you utilize progressive profiling on your landing pages, you may have an opportunity to gather additional information from the lead at a later date.

TIP: Try testing different colors and copy on the submission button to see if this is a factor that could increase your conversion rate.

Please fill out the form below.

First Name

Last Name

Company

Phone Number

Business Email

[Get Started](#)

12 Email Best Practices

[Read More](#)

First Name

Last Name

Company

Phone Number

Lead Source

Urgency ●

Relative Score ●●

Lead Score 15

12 Leverage Your Resources with Automation

Email marketing automation has grown tremendously over the years. This is another way to optimize your efforts further—whether it is making the most of your time or improving the customer’s journey. In order to successfully employ automation, you must have a solid lead management process in place—you cannot automate a process that does not exist.

Depending on the platform you are utilizing, you may be able to track a lead’s activity on your website after they perform certain actions, like submitting a form. You can trigger email campaigns to send with relevant information based on the lead’s activity, non-activity, time frame or other variables. This is called lead nurturing. This helps ensure you are delivering the right message to the right audience at the right time.

In addition to lead nurturing, you may be able to qualify your leads by assigning them a score. The “lead score” can be calculated by a number of items including opening an email, visiting a certain web page or even updating invalid information in your CRM. You should keep lead scoring simple to start out, allowing your marketing team to build a baseline for performance and optimize the process based on team feedback.

Email Laws and Regulations

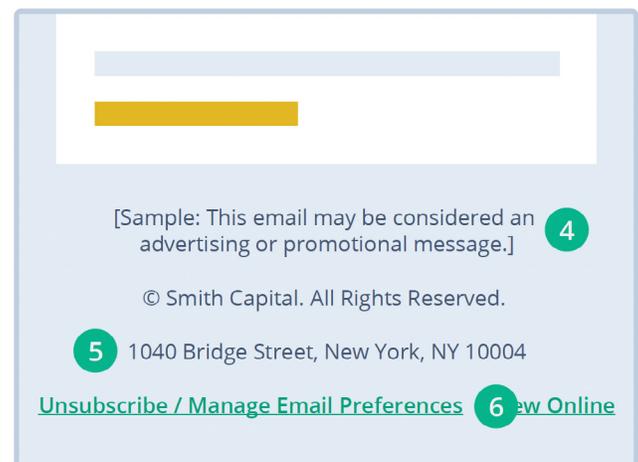
To help understand the different laws involved in email marketing, **MarketReach** has compiled these rules to follow when developing your email program. This is not a comprehensive list of all email laws and regulations. Be sure you are aware of where your subscribers are located and become familiar with the email laws of their countries.

In the United States, the CAN-SPAM Act establishes requirements for commercial messages, gives recipients the right to have you stop emailing them and spells out tough penalties for violations. When sending emails to recipients in another country you must comply with international regulations even if your company is not based where the recipient resides (i.e. European Union and Canadian email laws affect anyone sending to recipients based in those locations).



The United States CAN-SPAM Act

1. Don't use deceptive subject lines.
2. Don't use false or misleading header information.
3. Monitor what others are doing on your behalf.
4. Identify the message as an ad, if that's what it is.
5. Tell recipients where you're located.
6. Tell recipients how to opt out of receiving future email from you, and honor opt-out requests promptly.



For more information about the CAN-SPAM Act, visit the [Federal Trade Commission](https://www.ftc.gov).



The European Union General Data Protection Regulation (GDPR)

- GDPR addresses the sending of email and digital cookies, along with the retention and storage of personal information about EU citizens.
- This law applies to all senders, regardless of location, that send email to recipients based in the European Union.
- Companies are only allowed to send emails to those who have explicitly opted in to receiving emails. Pre-checked boxes are not considered consent.
- Email marketers must keep a record of the permissions they obtained from subscribers, including who, when and how consent was collected.
- Unsubscribe requests must be honored promptly. GDPR also provides individuals the Right of Erasure, which means they can request that all their data be deleted.
- Companies must provide links to privacy policies or notices that communicate required information at the time of collection.
- For more information about GDPR, visit the [European Commission](#).



The Canadian Anti-Spam Legislation (CASL)

- CASL primarily focuses on the sending of email and the installation of applications.
- This law applies to all senders, regardless of location, that send email to recipients based in Canada.
- Companies are only allowed to send email to those who have either implied consent or explicitly consented. Implied consent expires in six months and explicit consent expires in two years. Pre-checked boxes are not considered consent.
- Email marketers must keep a record of the permissions they obtained from subscribers, including who, when and how consent was collected.
- Unsubscribe requests must be honored within 10 days.
- For more information about CASL, visit [Canada's Anti-Spam Legislation](#).

TIP: Explicit consent means the person has clearly agreed to receiving emails orally or in writing. Implied consent includes if someone requests information about a product or service, clearly gives their email address to you or has an existing business relationship with you.

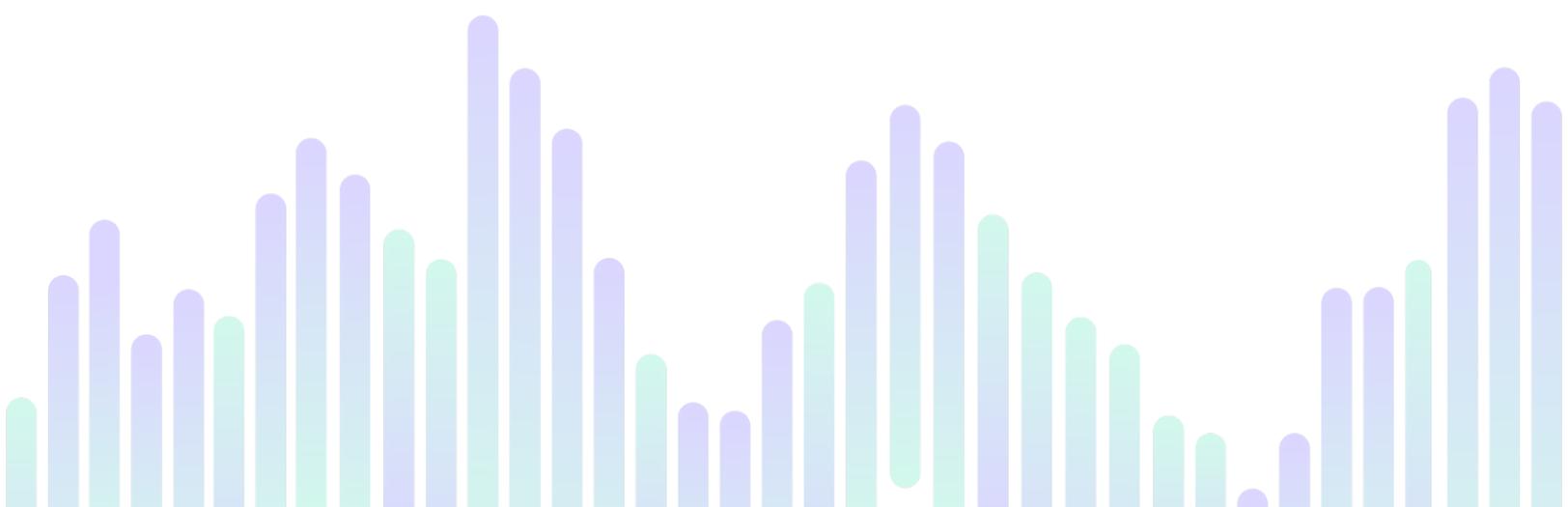
Whitelisting MarketReach

MarketReach would like to request that your network administrator whitelist our domain and dedicated IP address to ensure we can communicate with you via email.

DOMAIN: discoverydata.com

DEDICATED IP ADDRESS: 199.15.212.84

Please contact our [Marketing Team](#) if you have any questions.



About ISS Market Intelligence