SPECIAL REPORT

CMO Perspectives on Email Deliverability

Developing deliverability strategies to meet the demands of today's inbox



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CMO Perspectives on Email Deliverability

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EXECUTIVE SUMMARY

Consumer expectations for a brand goes beyond a organization knowing their name. Today, consumers demand that companies have a true understanding of their purchase history, communication preferences and the exact problems the brand's products or services can solve. Creating a unified and unique brand experience accoss multiple consumer touch points is critical to an organization's success, and essential to

developing brand loyalty. Interactions with consumers during their busy day – on their terms – may include engaging them online or offline at home, work, around town and at the retail store.

Email continues to be the communication tool linking together in-store activity, online shopping, social sharing and Web-based searches. The use of automated emails to respond to customer interactions with the brand is extremely effective. Triggered emails communicate with consumers at the moment they need valuable information, to assist their progression on the path to purchase.

The effort exerted to build integrated customer databases, segment profiles based on behavior and preferences, and craft relevant content will be all for not, if an email does not reach the intended inbox. Email delivery is not guaranteed, it incorporates a complex set of rules

Special Reports

MarketingSherpa Special Reports provide marketing executives with concise research, insights and actionable advice, derived from unique market segments for guiding strategic and tactical decision making.

between Email Service Providers (ESPs) and Internet Service Providers (ISPs). In fact, Return Path, a provider of email certification, finds 20 percent of permission-based email in North America never reaches the intended inbox; four percent is classified as spam; and the remaining 16 percent just goes missing.

Challenges reaching the inbox continue to mount and the tactics to overcome these obstacles are endlessly evolving. To learn more about the latest strategies, MarketingSherpa conducted a study involving nearly 250 Chief Marketing Officers (CMOs) and senior marketing decision-makers. Here is just some of the feedback we received from CMO study participants when asked, "What is the most important objective for email marketing in the coming year and why?"

"Ensure that emails are personalized and relevant to the individual customer. Our emails should feel like a one-to-one conversation."

"Triggered email campaigns; we want to move away from large impersonal email blasts."

"Finding a way of ensuring our email still gets delivered into our subscribers' inbox[es]."

Are you facing similar challenges? We will share the results of this email deliverability study in this Special Report. The in-depth analysis, valuable benchmark data and exclusive CMO insights found here will aid in building the email deliverability strategy right for your organization.

THE STATE OF EMAIL MARKETING DELIVERY

CHART: DELIVERABILITY IMPROVEMENTS OFFSET BY CONTINUED CHALLENGES

Q. How have the following deliverability issues changed for your organization in the past 12 months?



While many CMOs report measurable progress, nearly as many are experiencing worsening conditions. The overall result is a slight change for the better. Marketers are improving list quality and hygiene, which is reflected in the overall lower bounce rates and increased inbox placement rates.

Nevertheless, it is alarming that subscriber dormancy and junk folder placement rates are trending backwards – especially since ISPs and webmail clients are placing a higher value on engagement metrics for inbox placement and delivery.

In an effort to simplify the inbox experience for their customers, AOL Mail, Gmail, Hotmail and Yahoo! Mail beta are vying to become *the* digital communication hub for users to view their email, instant messages and social updates. This comes as good news to consumers feeling overwhelmed by the amount of messages in their inboxes and looking for services to help triage their emails.

As other webmail providers use engagement to filter email entering the inbox, Google's Gmail Priority Inbox feature goes one step further. Gmail Priority Inbox analyzes incoming messages to predict its importance to the individual user. When this optional feature is active, it will automatically classify emails as "important,"

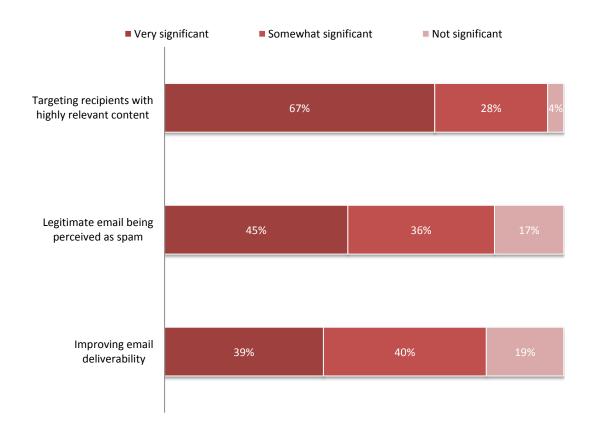
"starred" and everything else. Its algorithms use engagement metrics that show which messages have been read and replied to, and highlight frequent keywords that appear in messages. Users can help make this service smarter by marking email "important" or "not important."

DELIVERABILITY CHALLENGES

Internet Service Providers work diligently to fight spam, phishing scams and other email abuses. ISP email systems continue to become more sophisticated, evolving from spam words and volume tracking, to now monitoring a brand's reputation and the level of engagement of its email recipients.

A company's sender reputation with an ISP is the most influential factor in its email reaching the subscriber's inbox. Four factors in a brand's reputation are relevant content, list hygiene, number of complaints, and IP architecture. In the light of these new deliverability barriers, we asked CMOs about the significance of common challenges to email effectiveness. Three challenges we listed related directly to deliverability.

CHART: THE SIGNIFICANCE OF CHALLENGES TO IMPROVE EMAIL EFFECTIVENESS Q. How significant are the following challenges to email marketing effectiveness?





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

The above chart correctly maps the trail to infiltrate today's inboxes. First, companies should target recipients with highly relevant content, as relevant and timely content increases open and click rates. In turn, an organization's deliverability reputation improves with ISPs, earning it lower spam detection. The improved reputation with ISPs leads to email delivery success.

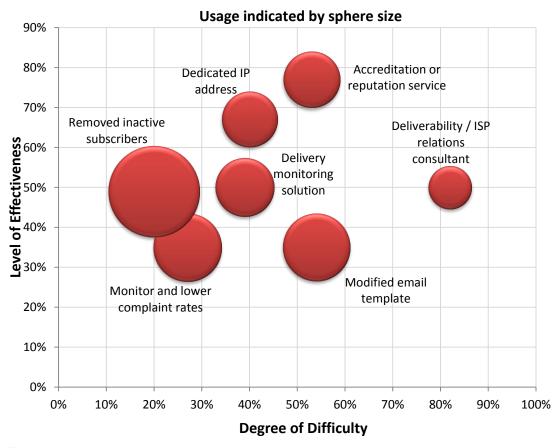
The results reflect CMO acknowledgement that there has been a shift in email marketing strategy. No longer can organizations broadcast the same email to every customer and hope enough of them respond to meet sales goals. To successfully deliver email messages, marketers must harvest in-depth preference data about subscribers and produce high-value content to match their specific needs.

It is reassuring to know that 68 percent of CMOs in this study recognize their involvement in the deliverability of email campaigns for their organization. Taking responsibility and ownership of delivery will pay dividends in working relationships with the brand's ESP and third-party reputation monitoring services.

IMPROVEMENT TACTICS

We wanted to learn more about the tactics CMOs choose to improve deliverability. The chart below gives an overview of the difficulty, effectiveness and popularity of each deliverability tactic.

CHART: THREE DIMENSIONS OF DELIVERABILITY TACTICS - EFFECTIVENESS, DIFFICULTY AND USE

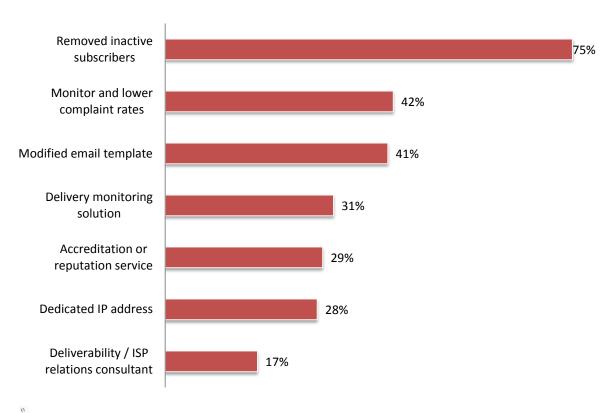




Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

Let's take a closer look at each of the data points surrounding various tactics usage, effectiveness and degree of difficulty.

CHART: IMPROVING EMAIL DELIVERABILITY STARTS WITH REMOVING INACTIVE SUBSCRIBERS Q. Which of the following tactics is your organization using to improve email deliverability rates? Please check all that apply.





Methodology: Fielded Sept. 2010, N=246

LIST HYGIENE

Removing inactive subscribers is the top tactic employed by CMOs to improve deliverability. This best practice not only reduces email bounces, but also increases a brand's open and clickthrough rates, making a positive impact on its sender reputation.

More organizations are starting to immediately watch for inactive subscribers and valid email addresses by implementing a double opt-in email registration. These companies quarantine new subscribers and send them a double opt-in welcome message from a separate server. This step assists in determining if the addresses are accurate and will keep the main IP address reputation in good standing. Email addresses that register a hard bounce or a complaint by hitting the spam button do not move to the main server. Instead, organizations separate the names and attempt to clean or remove them from its database.

As an organization's email marketing program matures, routinely and methodically "scrubbing" its subscriber list becomes a greater priority. Removing hard bounces after every campaign – and inactive subscribers every four to six months – will positively influence a brand's sender reputation. This is due, in part, to an organization removing spam traps in addition to removing inactive subscribers. These spam traps are the fake email addresses ISPs plant across the Web to lure spammers who collate counterfeit email addresses into their email lists.

There may be several reasons why a subscriber goes silent. He or she may have changed jobs or webmail client and left their old email address(es) behind. Likewise, the opt-in's interests may have changed, or may now prefer to communicate though a different channel, such as social media.

Businesses invest significant money, time and resources into building a robust opt-in email list. It is imperative that companies take the initiative to try to reactivate subscribers through either online or offline communications. For some companies it fits their brand to have the sales force or customer service representatives follow up with subscribers to ensure the email address and preferences are correct. Others may find a short email saying, "We miss you" to be effective in rekindling the relationship.

"Removal of non-participating subscribers has had the most influence on improving deliverability and effective email marketing rates in all aspects of email marketing. In other words, get rid of the deadbeat email addresses and everything improves."

-CMO Study Participant

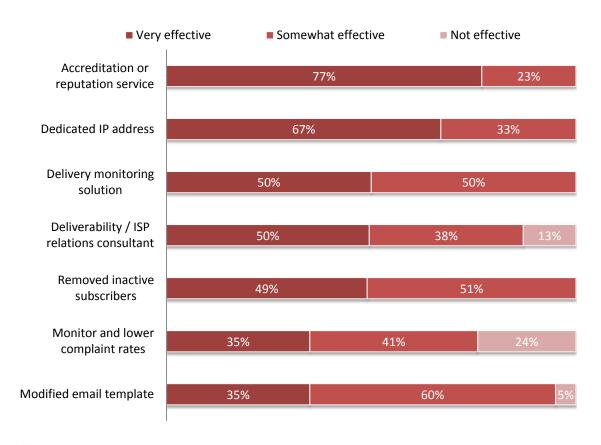
However, if these "Win Back" crusades are unsuccessful, a re-permission or re-opt-in message will need to be sent. These messages speak frankly to subscribers, and ask them they would like to continue receiving email from the company. In most cases, 80-95% of these subscribers will not opt-in again.

COMPLAINTS

CMO's have ranked "monitor and lower complaint rates" as the second most-frequently used tactic to improve deliverability rates. Setting up a complaint feedback loop with major ISPs like AOL, Hotmail and Yahoo! enables organizations to receive notifications that their emails have been reported as spam. Many times, the ESP will handle this process on a company's behalf and incorporate it into a reporting or reputation monitoring service.

ISPs receive user complaints from the "report spam" buttons in webmail clients, or from grievances sent to their help desks. In the MarketingSherpa 2010 Email Marketing Benchmark Report, we found 47 percent of email recipients use the spam button to unsubscribe rather looking for an opt-out link in the email. Similar to opt-outs, complaints received through feedback loops should be removed within ten business days or before the next commercial email is sent.

CHART: DELIVERABILITY IMPROVEMENT TACTICS - LEVEL OF EFFECTIVENESS Q. Please indicate the level of effectiveness for each of the deliverability improvement tactics your organization is using.





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

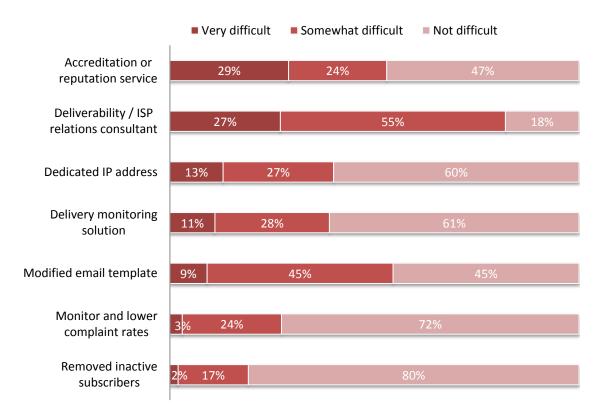
CMOs cited hiring an accreditation or reputation service to be the most effective approach to improve deliverability. Third-party services verify a company's compliance with email best practices and give their programs a seal of approval. In addition to improved deliverability, other benefits may include unblocked images, enabled links, and the ability to bypass spam filters, Web security filters and volume filters.

DEDICATED IP ADDRESS AND SENDER PERMANENCE

For many companies having a dedicated IP address is not only a highly effective tactic for improving deliverability, it's also an easily implemented tactic. Advanced email solutions and full-service ESPs often include a dedicated IP address as part of their service.

Keeping a permanent IP address is a best practice for email deliverability, as spammers are infamous for frequently switching IP addresses. If an organization's IP address has a poor reputation, changing it will not fix the underlying problems. Companies should focus on modifying their email marketing processes. Otherwise, they will most likely be in the same situation a few months later.

CHART: DELIVERABILITY IMPROVEMENT TACTICS - DEGREE OF DIFFICULTY Q. Please indicate the degree of difficulty (time, effort and expense) for each of the deliverability improvement tactics your organization is using





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

CMOs identified the outsourced tactics of reputation services, deliverability consultants and delivery monitoring solutions to be difficult. Working with an outside vendor takes effort to properly communicate and provide the correct documentation. For example, most accreditation services will require companies show proof of opt-in only addresses, industry standard security practices, one-click unsubscribe processes and fulfillment of privacy policy measures.

Conversely, CMOs found the tasks commonly done in-house to be the least difficult tactics; removing inactive subscribers, monitoring complaint rates and modifying email templates. For experienced email marketers the items listed above are routine responsibilities.

Surprisingly, a dedicated IP address fell into the difficult category. While not hard to implement, a dedicated IP address is not always available in basic email solutions.

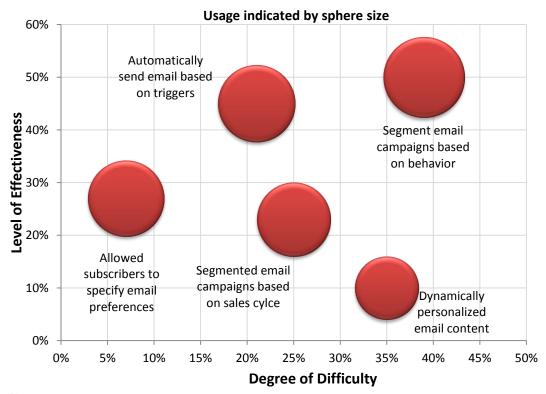
RELEVANCY DRIVING DELIVERABILITY

Relevant content is the driving force determining if subscribers open, click or delete a message. These engagement actions are quickly becoming the most relied-upon metrics for ISPs to decide the placement of an organization's emails. As previously noted, Google's Priority Inbox feature "learns" an individual's model of importance, and ranks the email by how likely they are to take action with the message. They do this in a variety of ways, including measuring the degree of interaction between the sender and the recipient as a percentage of their emails. Similarly, Microsoft's Hotmail monitors if a message is read and deleted, or immediately removed from the inbox.

To ensure emails deliverability in today's inboxes, the content must match the needs and desires of the recipient. Irrelevant emails put a brand's image, reputation and customer relationships at risk. However, sharing expert and valuable information at the right time in the buying cycle is not easy. The CMOs surveyed in this study cited targeting recipients with highly relevant content as the most significant challenge to email marketing effectiveness. Supporting how seriously they perceive this challenge, 84 percent acknowledged their involvement in improving the relevancy of email content for their organization.

The three ingredients to relevancy's recipe are content, segmentation and timing. To learn more, we asked CMOs their perspective on tactics they implement to improve relevancy. Here is an overview of the results.





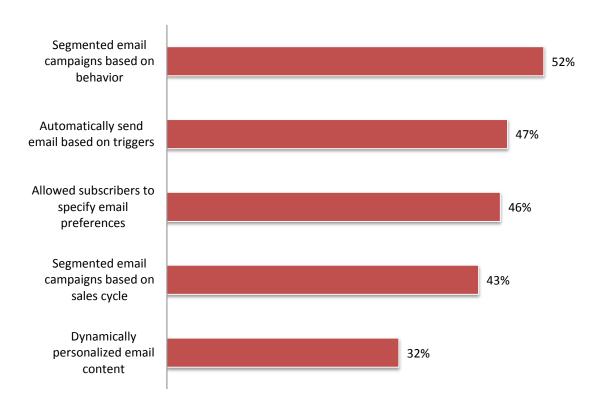


Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey marketing sherpa Methodology: Fielded Sept. 2010, N= 246

Let's take a closer look at each of a CMO's tactical choices for improving relevancy by usage, effectiveness and degree of difficulty.

CHART: TACTICS CMOs ARE USING TO IMPROVE RELEVANCY

Q. Which of the following tactics is your organization using to improve the relevancy of email content delivered to subscribers? Please check all that apply.





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey Methodology: Fielded Sept. 2010, N=246

SEGMENTATION

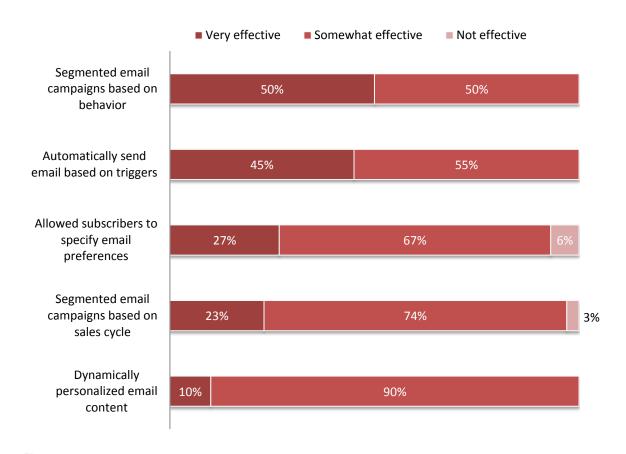
Email segmentation allows organizations to send highly relevant messages to a qualified recipient list. This tactic's narrow focus does not overwhelm readers with a deluge of seemingly random offers, earning trust that transfers into higher open and clickthrough rates.

This chart demonstrates CMO confidence in the power of responding to subscribers' actions. The top two tactics - segmenting email campaigns based on behavior and automatically sending emails based on triggers – are not only the most frequently executed tactics, but CMOs also find them to be the most effective.

Segmentation based on behavior is not easy, and as such, the CMOs in this study found it to be the most difficult tactic. Executing complex data segmentation for drip, win-back and other behavior-based campaigns requires a good amount of an organization's time and resources.

The good news is that senior leadership realizes the effectiveness of focusing on the individual subscriber. Companies can meet the unique needs of consumers by watching their behavior and allowing them to specify their email preferences. This allows brands to stay connected as the person may have changed jobs, developed new interests or have matured into a new life stage.

CHART: RELEVANCY IMPROVEMENT TACTICS - LEVEL OF EFFECTIVENESS Q. Please indicate the level of effectiveness for each of the relevancy improvement tactics your organization is using.





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

TIMING

The effort put forth composing a well-written email and partitioning out to the right subscribers will be lost if not sent at the precise time the recipient needs or expects information. The chart reveals it can be extremely effective to send emails based on triggers, email preferences and place in the path to purchase. Note the tactic of automatically sending email based on triggers; CMOs rank this approach second on the list. Common types of triggered emails are welcome series, transactional, abandoned cart and win-back campaigns.

An organization's delivery reputation will benefit from hosting a robust preference center. Giving subscribers the opportunity to specify their email frequency and choose the types of subjects they would like to receive, allows opt-ins to have more control over communications entering their inbox. Sending messages on the subscribers' terms result in them being more likely to welcome a brand's communications, and open and respond to the enclosed offer.

Likewise, sending educational content to subscribers in the early stages of the buying process, can aid in accelerating their learning curve about a brand's product or service. However, blasting a time-sensitive discount coupon to the same prospective buyers will make the email

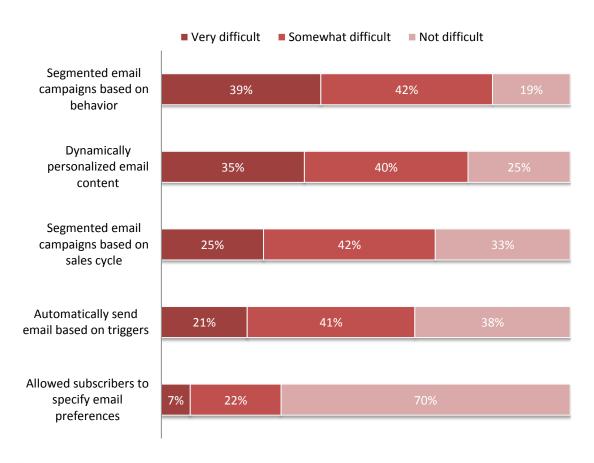
communication irrelevant and unwelcome.

"Targeting recipients with highly relevant content - our database is not specific enough as to products purchased"

-CMO Study Participant challenges

CHART: RELEVANCY IMPROVEMENT TACTICS - DEGREE OF DIFFICULTY

Q. Please indicate the degree of difficulty (time, effort and expense) for each of the relevancy improvement tactics your organization is using.





Source: ©2011 MarketingSherpa Email Marketing Benchmark Survey

Methodology: Fielded Sept. 2010, N=246

Customizing communications with customers has always been a business priority, whether the conversation happens in person or online. How easily a tactic can be automated determines its degree of difficulty. For example, allowing customers to specify email preferences is relatively simple, as reflected in this chart. However, preparing and executing the segmentation of mails based on behavior or sales cycle can be more cumbersome, as is the collecting of necessary data to create dynamically personalized content. Companies need to leverage all of their data mining and social CRM tools in the future to increase this tactic's effectiveness ranking.

CONTENT

As an organization's segmentation strategies become increasingly sophisticated, the demand for more meaningful content grows proportionately. Businesses may find the exercise of generating granular content for behavior-based campaigns to be resource-draining.

CMOs in this study are willing to make the additional investment. Behavior-based email segmentation rates as the most effective (and most used) relevancy strategy. Take notice of the relatively low perception of difficulty with triggered emails. The time and effort spent composing and designing automated email campaigns is quickly forgotten. What senior leadership remembers are the positive results and the ease to maintain these programs once they are up and running.

"Targeting recipients with highly relevant content - with limited resources it is difficult to generate a consistent stream of relevant content to create an on-going program that enables us to be in front of customers via email."

-CMO Study Participant challenges

Companies that prioritize content development use a variety of resources to manufacture valuable content for readers. Some businesses look to hire outside brand journalists or content editors who have the unique ability to uncover human interest stories that personalize a brand. This gives readers revealing insights into the company's culture, products and services. Others may seek internal subject matter experts in departments other than marketing to write informative stories from unique perspectives.

The explosion of digital media technologies – including blogs, social networks, podcasts and question/answer sites – have provided businesses a wealth of comments, testimonials, reviews and ratings to incorporate into email messages. These unsolicited testimonials add a human touch to email communications that also validate a brand's claims.

One constant among these content-driven organizations is the use of an editorial calendar. This calendar is coordinated with the brand's marketing initiatives, building off existing promotions, events and key objectives. The editorial calendar powers the production schedule including milestones, approval processes and ship dates. The editorial calendar ensures content is consistently created and on-target.

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CASE STUDY: INTEGRATED SMS, SOCIAL AND EMAIL PROMO CAPITALIZES ON WEATHER EVENT

Case Study ID: #CS31511

Location: MarketingSherpa Member Library

Summary: See how a hotel and casino marketer took news of a major snowstorm and turned it into a ski package offer that kept customers booking rooms. Includes the SMS, email and social media messages they used to spread the word.

CHALLENGE

Chad Hallert, Director, Ecommerce, Eldorado Hotel Casino Reno, diligently watches weather forecasts. He and his team know that demand for rooms in their luxury hotel and casino can sway with the winds.

In early December, the team got word that a storm was about to drop several feet of snow in the mountains just west of Reno – and about a foot in their area. Since many Eldorado customers come from nearby California, the storm had the potential to drastically cut hotel bookings.

They met and planned how to turn the snowstorm from a threat into an opportunity.

CAMPAIGN

The team created a package of discounted hotel rooms and lift tickets to nearby ski areas, along with other perks. They promoted the offer as soon as the storm cleared, to lure skiers and snowboarders up to the fresh powder. Here are the steps they followed:

Step #1. Craft a relevant offer

The team knew the storm would stop many Californians from traveling to Reno. Skiing and snowboarding enthusiasts, however, would likely be more inclined to make the trip, especially if the team made a compelling offer.

The team secured a bulk rate on ski passes to a nearby resort and passed the discount on to customers. For \$69 customers would receive two lift tickets to a nearby ski resort and one night in the hotel.

Step #2. Drive search traffic to website offer

The team purchased pay-per-click advertising in major search engines to promote the offer. Targeted keywords included phrases related to ski packages and the team's brand terms. They also added the offer to their websites homepage and events page.

Step #3. Send a well-timed SMS message

The team wanted to promote the offer in a channel that would have an immediate impact. They crafted a message to promote a two-night, \$99 version of the ski and stay package. They sent the message "right when the snow changed, the weather cleared and the sun came up. It was the moment you could start thinking about skiing," Hallert says.

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Step #4. Promote in social channels

The team also maintains fans and followers in Facebook and Twitter. They sent updates to their profiles

about three days after sending the SMS message, Hallert says.

Step #5. Send email

While other channels have quicker response times, the team knew their email list would provide the most

impact. This is due, in part, because the list is several times larger than the team's SMS and social

databases.

The team sent an email promoting the packages one week after sending the SMS message. The email included a description of the offer, mention that packages were available from \$69, phone number to call

to book, and a "Book now" button to book via the website.

RESULTS

"We've tried standalone offers with mobile, social and email...when you break them up into pieces, nothing

really competes with email, and the other two don't look as valuable as they are," Hallert says. "But what

we found really valuable is this synergy."

- The team sold 28 percent more ski packages in December than the rest of the year combined, Hallert says.

- Since the team used in-house resources and low-cost channels for the effort, ROI was about 1,200 percent

for the campaign.

- They used Web analytics and custom phone numbers to monitor performance. The campaign's revenue

via channel broke down as:

Email: 56%

Website: 25%

Mobile: 14%

• Social: 5%

"It had great ROI," Hallert says. "I was very happy with it. We had pretty moderate goals going into it, so I

was happy to see it move the needle."

15

RECOMMENDED ACTIONS

The CMO insights shared in this report reflect the changes in today's email marketing environment. As engagement metrics directly impact a brand's deliverability success, there is no longer a place for batch and blast email communications. Social media posts and mobile apps now carry the load of broadcast-branding messages. Email marketing's niche and greatest strength lies with communications that provide a direct value to subscribers. These messages are created and sent based on the individuals preferences, behaviors and transactions made with the sender.

SET EXPLICIT EXPECTATIONS

Establishing clear expectations during each stage of email communications will yield more long-term subscribers to an organization. At registration, businesses can inform new subscribers exactly what they plan to send, giving evergreen examples of their newsletters and offers.

Next when a consumer opts in, the brand can send a welcome message (or series of messages) to introduce the subscriber to the brand's communications. Often, a company will ask the new subscriber to share information at their preference center. With this newly garnered information, organizations can better tailor their communications to the opt-in's unique tastes and needs.

"I want to be sure that our subscribers are being treated with respect. We are focusing on improving the quality of our communication rather than the quantity. That means we strive for very low complaint rates, high open rates, high click thru and engagement scores when subscribers reach our site."

- CMO Study Participant

Finally, it is natural that email lists will suffer attrition. As companies monitor their available engagement metrics, there will be subscribers that have not recently opened or clicked through on emails. Organizations will send win-back – and eventually re-permission – campaigns to remove inactive subscribers. Maintaining good list hygiene practices, along with a list compiled of only opt-ins, will result in few deliverability issues.

DELIVER ONLY RELEVANT CONTENT

A brand's definition of compelling content may differ from its email recipients, and this disparity in expectations contributes to a bad reputation. To avoid this predicament, we encourage companies to review email messages from the subscriber point of view. In short, is it really delivering what was promised?

For marketers who have harvested in-depth preference data about their subscribers, and have the resources to customize content, will be able deliver high-value communications to match their opt-ins' desires. The latest inbox evolution is an opportunity for these brands to separate from the pack.

ADDRESS COMPLAINTS QUICKLY

Complaints received directly or through an organization's feedback loop should be treated in the same fashion as unsubscribes. Remove complainers promptly before the next commercial email goes out.

As mentioned earlier in this Special Report, many email recipients end up clicking the spam button in their email client, rather than looking for the unsubscribe link. Be proactive to counter this trend and make it easy for subscribers to opt-out. Design the unsubscribe button to be easy to locate and a one-click function. Also, have a system in place to remove subscribers via offline channels, such as via telephone and in-store.

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