E-mail Best Practices of the Ivy Plus, from Set Up to Send

"From" line

- University's name needs to be in either the From line or in the Subject line, no need for both
- Try to keep From line short, as it gets cut off in email programs
- Use a person's name sometimes to personalize messages, but be careful not to "brand" a person
- Program brands tend to generate high open rates, but watch click through rates, as these brands can get stale over time.

Reply line

- Doesn't have to be the same person as the From line (i.e. replies can go to the admin of the person in the From line.)
- Make sure person in reply line is in the office and capable of handling customer service requests.

Subject lines

- Eight words or less is ideal
- Spend most of your time crafting subject line; it's the reason people open or don't
- Some email programs allow you to include person's name in the Subject line; there's not much data on whether this is effective or not
- Include the city and date in subject line for events
- Stress different angles in each subsequent email about the same event
- These five approaches encourage the most opens/click throughs:
  - **Direct**: "University Class of 2007 Newsletter"; "Don't delete this video"; "Early-bird pricing"
  - **Hot Topic or Hot Speaker**: "Cloud computing at Microsoft, 2/8" "An invitation from University President"
  - **Immediate Action/urgency**: "Last call for faculty event on 8/10 – only 7 spots left!"
  - **Question**: "Are you ready to ditch your cubicle?"
  - **Invitation to opine:** "Tell Yale what you think"

Elements to include in the body of every event invitation mail:

1. **Who, What, Why, Where, When**

2. **Register and See Who's Coming**. Put these up front for those people you "had at hello." Always include **see who's coming**, as networking is a huge reason people come to our events. Exception: webinars.

3. **Dear First Name** is optional and advisable only if you know the first names in database are actually first names that people go by, not initials or formal names (Elizabeth vs. Buffy, J., e.g.)

4. A **photo** of your speaker if you have one.

5. **A two-sentence bio of the speaker** that links to a more extensive bio on the web page about the event. Put the most impressive, brand-name accomplishments upfront.

6. **A human being's name.** The email / phone can be a program's email (pccw@cornell.edu) but a human's name is important for customer service reasons.

7. Include "**add this to your calendar using iCal"** if your email program allows.

8. **Registration confirmation emails** should include directions, onsite phone numbers, event timing, and other important details; many attendees print these out and rely on them for relevant information. However, keep the overall length of the email to a minimum. Put more extensive details on a website (web pages can be printed too).

Newsletters

- Keep all listings as short as possible - for events, include time, date, location, price, very short description, and a link to a website for more details.
- Include a table of contents at the top. If possible, jumplink the T.O.C. items to the listings.
- You may wish to start with a short paragraph highlighting newsletter items that are particularly relevant.
- Send your newsletter the same time every month (i.e. the first Tuesday of the month).
- If you are soliciting content from alumni volunteers or other university organizations, distribute style guidelines for submissions so you don't have to spend so much time reformatting.

Spam Filters (thank you to MailChimp for many items on this list)

Spam filters look at a long list of criteria to decide whether or not an email is junk. These items are almost always on their lists of spammy criteria:

- Going crazy with exclamation points!!!!!!
- USING ALL CAPS
- Sloppy HTML coding (usually from converting a Microsoft Word file to HTML). To avoid this write your emails in Notepad and then cut and paste into email program
- Using certain spammer-like words in the subject line: "free" "urgent" "test"
- Creating an email that's nothing but one big image, with little or no text. These don't render well on mobile devices, which many alumni use to read e-mail
- Read more tips on this page: http://mailchimp.com/resources/

Length

"An email is like a retail store window; it needs to reveal just enough to compel viewers to enter the store." Lisa Harmon, principal of Smith-Harmon, a leading email marketing design shop

- **In general, keep e-mail short!** All relevant text should be "above the fold" meaning that users shouldn't have to scroll down to see important information.
- Could we start doing 140-character emails so people could easily Tweet?!
- Emails are teasers that should lead people to longer information or registration pages.
  Industry best practice (ConstantContact):
  Email length should be exactly how much copy it takes to get your reader to do whatever it is you want them to do, and not any more. For instance, longer copy can work for a newsletter, because the reader is expecting to learn something new. Shorter, more promotional copy works when you're trying to create action, like making a sale or inviting someone to an event.

Design

- **Certain pieces of information are at the top for a couple reasons:**
  - User testing tells us that eyeballs start at the top and skim for basic info first
  - 60% of people view emails on mobile devices, which have tiny screens. You want the most important information at the top so they'll be motivated to scroll
- **Photos** clog up some mobile devices and email programs with weird html, so try to use photos just in the header and the bio.
- **The header** should span the width of the email; otherwise it looks like you just slapped it on.
- **Allow for white space**
- **Stay Consistent**: Use one sans-serif font throughout your message. Use larger font size, bold, and another color for your headings
- **Bullets!: Industry best practice (ConstantContact):**
  Limit the number of fonts you use as a means of keeping the communication easy to read. Make sure that the fonts you use are very legible, not fancy or distracting. And limit headline fonts to a single style. With everything that I design, I first put all the copy in the exact same font and the exact same size, and then I go back and create emphasis with font size.
- **Include** forward link so people can easily invite other alumni (if it's an open invite)
- **Include** "view this email on website" and "Share this via social media" buttons.
- **Include a** really big call to action button

- CSS support in mail clients (regularly updated - check back frequently!): http://www.campaignmonitor.com/css/
- General email design guidelines: http://www.campaignmonitor.com/design-guidelines/

Timing

After studying Cornell's click through rates and registration trends, it seems there's no "right" answer for when the best time to send an email is.

Here's the industry's take:
- In general, **e-mails sent to people's work addresses** do best on Wednesday afternoons. Distribute them early in the morning so that they're near the top of the inbox when workers arrive or at midday when workers often try to catch up on email.
- **Emails sent to people's home addresses** typically get higher open and click-through rates before or after the workday — if people are logging in from home. You might find a higher open rate for business-to-consumer (B2C) e-mails sent on Friday or over the weekend, simply because your message has less competition.

Frequency and Opt-in/Opt-out

Jury is still out on how to handle opt-in/opt out. Some universities have technology capable of handling requests, while others have shadow databases and murky processes. The more alumni trust us, the more forgiving they'll be when emails arrive that aren't particularly relevant.

Stanford is counting how many emails different target segments get each month. For some segments, 50/month may be OK, for others it's too much.

Cornell is testing with posts on social media before sending emails.

This being said, we have to assume people have ability to manage their own inboxes, including filters for our emails they don't want.

Industry best practice (Email Marketing: An Hour a Day):
It generally takes 3 emails to prompt recipients to notice your email and take action.

This is consistent with Cornell's experience. Click through and sign up rates dive after 3 emails about the same event. Ideally, your subject line is so powerful and your event so hot that you sell out in one or two emails.

Industry best practice (Email Marketing: An Hour a Day)
Separate your recipient list into active event attendees and "lurkers," people who open your emails but never attend. Send the lurkers just one email announcement and send the active attendees three.

Analytics

Don't use **open rate** as your barometer. Programs that use viewing panes, like Outlook, falsely count an email as opened. Also, just because someone opens doesn't mean they read or take action.

Click-throughs are a much better way to judge success. Data shows that the vast majority of click-throughs in any given email are for the primary action we've asked people to take (registration, pay class dues, etc.).

Registrations are the true measure of success for event emails. Measuring your conversion percentage from number of emails sent to number of registrants is the key.

It's smart to do **A/B testing**, i.e. send one version to one group, one to another, then compare registration or click through rates. This can be especially effective data to have when you're coaching a group of colleagues or volunteers to edit their emails.

Mobile platforms

In 2009, according to Pew Research, 40% of people used cell phones to access the Internet, send email or instant message. Most of these are smartphones, which can read HTML, i.e. your emails look the same on these devices as they do on the PC (but smaller). For dumb phones, Constant Contact automatically creates and sends a text version of your emails for you.

In most email clients you can edit the text version separate from the HTML. It's smart to take a look at the text version and remove any extraneous links or image code.

Email clients

When you test your emails, it's a good idea to send tests to a few different providers, to make sure they look good in all. Outlook, Hotmail, Yahoo, and Gmail are probably sufficient.

Top 10 email clients

Email client	Market share
Outlook	43%
Outlook 2003 and earlier	34%
Outlook 2007	9%
Hotmail	17%
Yahoo! Mail	13%
Gmail	5%
Apple Mail	4%
iPhone	4%
Thunderbird	2.4%
Windows Live Mail (Desktop)	2%
AOL Mail	1.2%
Lotus Notes	0.4%
Others	8%

Data collected from 250,000,000 email recipients using our Fingerprint analysis tool. This chart shows the top 10 email clients by market share. Compiled 24 February 2010.

Checklist prior to hitting SEND

- **TEST** your email first and click on **ALL YOUR LINKS**, make sure they go to the right events registration page or outside link.
- Confirm that all **phone numbers** are accurate and **names/titles** are spelled correctly.
- **EDIT** the text version of the email to strip out the funky code.
- Make sure **Reply** email address or **Contact** information lists someone who will physically be in the office to answer questions that inevitably come the day you send.
- If you're copying another email, make sure your **Subject Line** is the right one and you erase all remnants of the previous email.
- Check that you have **included the date** at the top, and that **Friday**, January 15 is not in fact **Saturday**, January 15.
- Ask **another person** to read your email before you send and/or wait a day between writing and sending, so you can look at it with fresh eyes

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