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BACK TO BASICS:

The Blueprint for Email Innovation

Conceptually, focusing on the basics doesn't seem like the path to innovation, but realistically, most brands don't even get the basics right. Without a solid foundation to build on, you can't reasonably expect to take advantage of the new and the next.

Email marketing can be an extremely effective channel for engaging with customers. It can be used for customer support, promotional marketing, brand awareness, and relationship building. However, most marketers simply use it as a discount channel. To truly maximize the email's potential, your impact on customer relationships, and your bottom line, you need to get the basics right.

As consumer behavior evolves, and attitudes toward marketing shift, it's critical for marketers to keep their finger on the pulse of customer evolution and use it as a north star when creating campaigns. Innovation is essential, but having the right building blocks in place is necessary to move the ball forward.

Get Back to Basics

Focusing on the basics sounds good in theory, but what does it mean? The short answer is that it's different for everyone. Regardless of your starting point, now is a great time to assess your maturity against the basics to validate your path to innovation. With so much noise bombarding marketers today, it can be challenging to know where to start. In this guide we'll try and simplify it for you.

Managing Permissions and Sources

This may seem like a no-brainer, but carefully managing permissions is critical, and not always as simple as a binary opt-in or opt-out. There may be different layers of subscription across multiple channels, opt-down scenarios, or temporary holds on communications. Sometimes, someone opts out but wants to opt back in later. It can get confusing. Understanding these moving pieces and stitching them together is crucial for long-term success.

Then you need to factor in where someone entered your program. Did they come in through a purchase, through registration on your website, in-store, or through a third party? And what was the motivating factor for the subscription? Was it for a one-time discount or was there no incentive provided? Each scenario will leave the customer with a different level of understanding and trust and will help to indicate intent and long-term customer value.

Make sure you have a firm grasp on where your users came from and how they expect to be communicated with.

Segmentation and Personalization

Segmentation and personalization have been hot topics in email for over 20 years. Now more than ever customers have a real expectation that the brands they engage with will know and understand them across all interactions. However, knowing and understanding them doesn't always mean you have to segment your audience or personalize every email communication.

Personalize when:

- Recent on- or offline behavior suggests the customer is in a buying cycle.
- The customer appears to be searching for information or researching.
- An abandoned experience has been recognized on the website.
- The customer has interacted with your call center.
- A meaningful in-store interaction with a sales associate has occurred.

While there are other scenarios for applying segmented or personalized experiences, not every scenario requires it. **It's good to find a balance to avoid over-segmenting your customers, which can reduce the potential pool of responders**. Unless the experience is a 1:1 message triggered by a direct interaction, a good rule of thumb is if the audience for the personalization logic is less than 1,000 people, you may be over-segmenting.

Do not personalize when:

- The offer or content has wide appeal and will resonate with a large group.
- The desired personalization is based on information the brand shouldn't reasonably have—don't be creepy.
- The data has meaningful latency and could be incorrect when received by the customer.
- The effort to personalize outweighs the expected ROI.
- The only personalization is the first name in the subject line—that's not personalization and doesn't demonstrate understanding of the customer.

Personalization isn't just about what you put in the email; it can also be reflected in what you don't do. Be mindful of the holistic customer experience and pull back as necessary to acknowledge where they are with the brand.

This may mean not sending an email today because the customer had a bad experience yesterday with customer service, or not sending a discount offer on something they just purchased yesterday. **Sometimes, personalization is the absence of action**.

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Relevance and the Value Exchange

Email is often used as a promotional channel, but at its core, it's a relationship channel. It works best when there is an ongoing dialogue with the customer. **Not every interaction has to revolve around selling something**. Find ways to become a reliable and trusted resource for your customers and extend your support beyond just what they may want or need to buy from your brand. Focus on helping them make decisions, predict what they may need next, and assist them along the path.

Many brands have excellent informative and educational content on their websites that can effectively address these moments. This extends the relationship with the customer beyond discount-based interactions, which is especially important for brands with infrequent transaction cycles, heavy seasonality, or high-research purchases. Communicating during lull cycles, providing value, and remaining top of mind only helps when the customer is ready to come back.

Creative and Content

Content tends to be one of the last elements addressed before a message goes out. It's estimated that about 20% of the conversion decision is determined by the creative mechanism delivering your brand message. Using compelling subject lines and pre-headers helps customers to understand your message before opening it—sometimes leading them straight to the website to engage.

It's also important to keep your call-to-action (CTA) succinct, obvious, and engaging. It shouldn't blend in with the rest of the content and should be a scannable element of your communication, clearly indicating the action you want the reader to take. **Don't try to be overly creative unless it's complementary to your brand or contains well-known verbiage your customers understand**.

While creative and content best practices could fill an entire white paper, one critical component is optimizing the message for where it's being read. Email layouts can be fluid, flexing based on where someone engages. Don't try and save money by not including responsive design. Brands that only optimize for mobile create less-than-ideal formats for large and medium screen users. Email is flexible —take advantage of it

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Testing and Measurement

As the opportunities to personalize evolve, and AI/ML increasingly determine email content and timing, the discipline of testing and effective measurement often falls by the wayside. Historically, marketers isolated components of a message to gauge their impact on success—subject lines, offers, calls-to-action, highlighted products, and message timing.

However, customers consider their overall experience rather than individual elements, and sometimes external factors, like a poor customer service experience, can impact email program performance. **It's crucial to recognize that the sum of the customer experience, not just each individual interaction, determines success**.

Email is an inherently measurable channel, allowing marketers to track opens, clicks, inbox placement, and conversions. However, attributing these linear interactions to the customer experience can be misleading, as the customer journey is not always linear. Too often, brands focus on improving click rates without considering if clicks truly measure success.

Instead, marketers should optimize for conversion, site traffic, or time on site, aligning goals with tactics. Focusing on impressions, revenue per email delivered, and conversion within a window of email send can provide a more accurate measure of program success.

It's also important to measure your program's success against your own performance instead of arbitrary industry email benchmarks. Industry benchmarks can be misleading so focus on what you can change. Set goals and iterate until you hit them!

Automation and Timing

"Blast" is the original dirty word in email marketing. It implies that little thought or effort was put into the communication. Instead of treating email as a one-way channel to broadcast your message, marketers should focus on engaging in meaningful conversations with customers. By shifting from batch communications to behavioral and data-triggered messages, you can be more relevant and drive more engagement.

Triggered email requires more up-front planning, but are easier to manage in the long term, and outperform batch communications by nearly 4X.

Personalization extends beyond content to include timing, which can sometimes be even more crucial than the message content. The 40/40/20 rule of email marketing says that 40% of your ability to convert is dependent on sending the right message to the right person, another 40% is dependent on sending it at the right time, and 20% is creative execution.

You read that right–40% of success is timing. Finding the right time to engage with someone is critical – when they are in market, when they are in the inbox, when they just visited a store. Don't discount the importance of the timing of your message – not everyone is going to engage on Wednesday at 2PM EST.

Understanding the Customer

Understanding your customer means humanizing data, signals, and interactions. Simply having data isn't enough. The data must inform decisions and enable you to act accordingly. Marketers mainly use zero-party, first-party, and third-party data to gain insights into customer behavior and preferences.

- Zero-party data is provided directly by customers in exchange for value and enhances data accuracy.
- First-party transactional and loyalty data predict future behavior and reveal motivations. Other first-party data like customer service and site behavior data help gauge relationship health and inform engagement strategies.
- Third-party data, like data from the Zeta Data Cloud, offers comprehensive insights into customers.

Interpreting this data is crucial. Understanding lifecycle implications allows marketers to tailor communication timing and content. Behavioral insights help identify customer motivations and desirable behaviors and help predict intent which positions your brand as proactive and relevant.

To truly understand your customers, you need to rethink your data strategies, leverage the right technology and partners, and measure success through clear metrics. When you can draw deep insights from your data it can fundamentally transform business outcomes and change how you think about customer communications.

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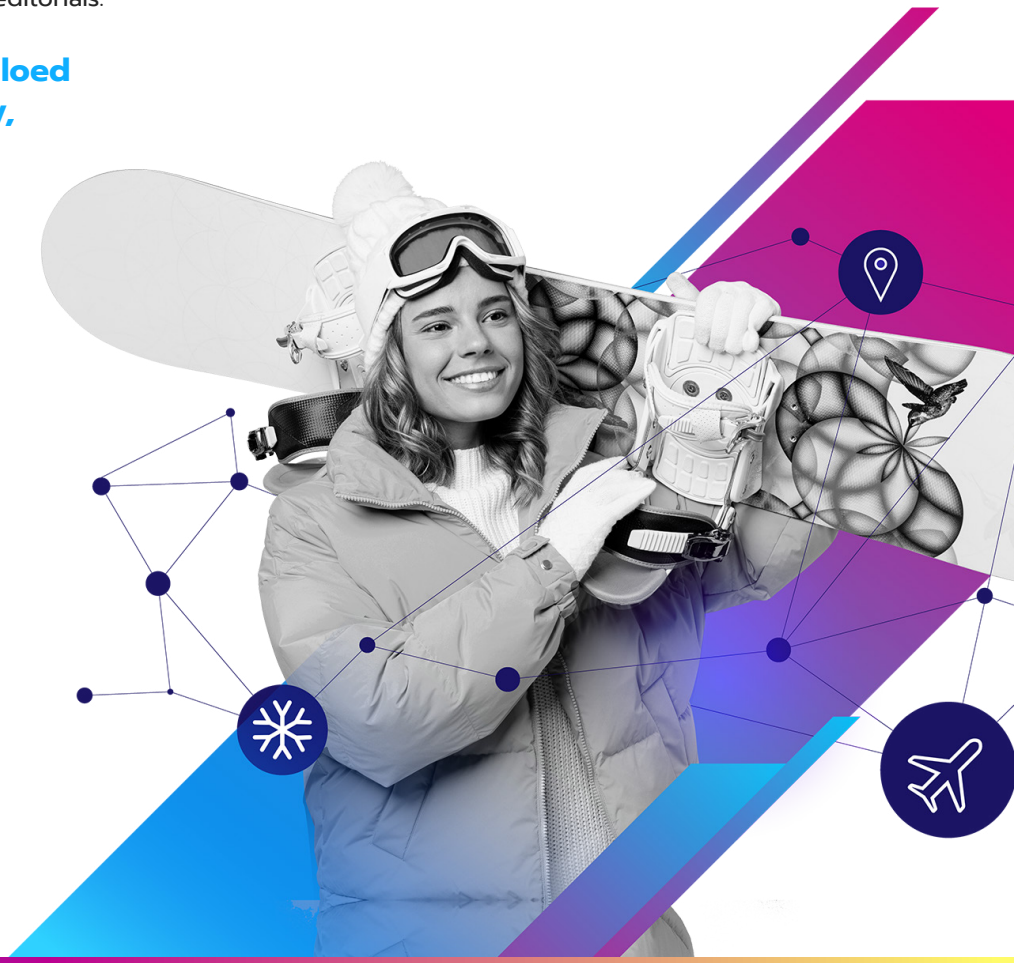
Recognize the Holistic Experience

Recognizing the holistic customer experience goes beyond opens and clicks and includes all interactions with your brand. For many brands, coordinating experiences across channels is challenging, often due to siloed teams with misaligned goals, objectives, or budgets, but customer-centricity is critical to long-term success. If you aren't orienting around the customer, then you're simply forcing your brand's narrative and editorials.

Customers view your brand as one entity, not siloed channels. Recognize their experiences in totality, not just one channel at a time.

Getting to Innovation

Innovating the email channel requires marketers to step out of their comfort zone. Growth happens when we challenge ourselves. But we can't grow and innovate without getting the basics right. Chances are you aren't doing at least one of the things we've discussed here. Pick one and be a driver of evolution for the channel while optimizing program performance and improving the customer experience end-to-end.



Zeta's AI-Powered Marketing Cloud Helps Marketers Drive Profitable Customer Growth

Zeta is the only platform that is made up of a CDP, ESP, DSP, and the largest private, unwalled, data cloud which gives marketers the tools they need to be successful. The Zeta Marketing Platform (ZMP) is designed for marketers' needs with the unique flexibility to wrap around and augment your tech stack, providing speed to intelligence, deeper analytics, and activation to deliver greater return on investment.

Whether the ZMP is the single platform environment removing the need for multiple point solutions, or it's connecting the dots to extract more value from current tech investments, the AI-powered ZMP is at the forefront of the next generation of marketing technology.

Reach out to ZetaCRM-Partners@zetaglobal.com for more information