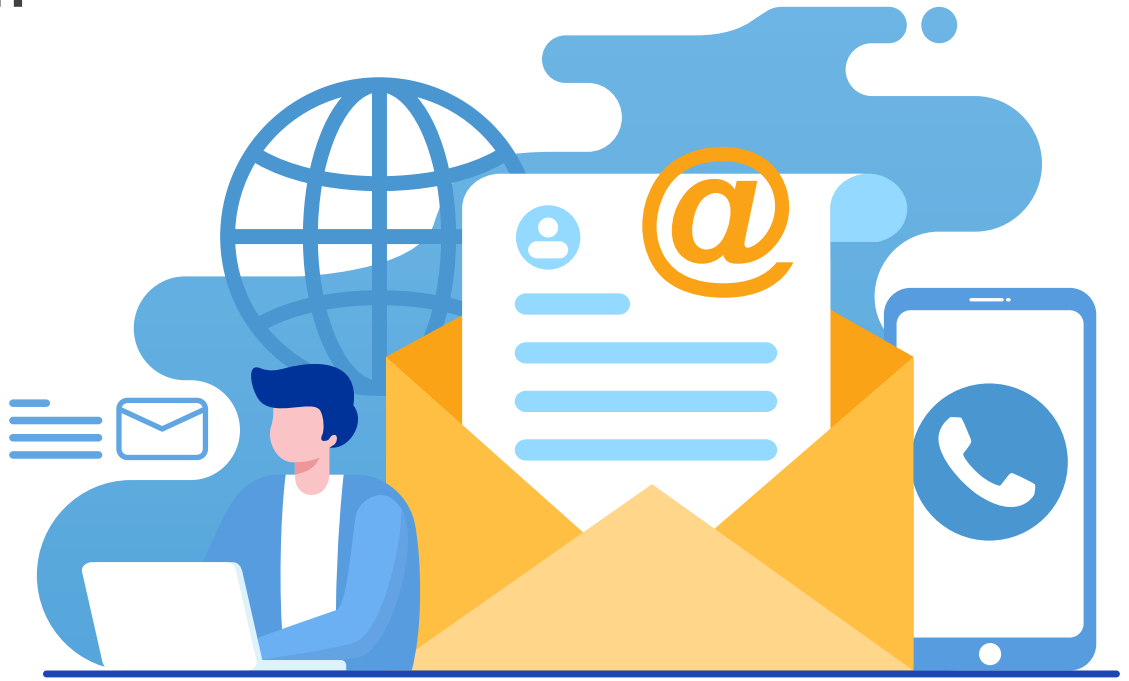




Email Marketing

Optimization for HubSpot

Introduction



Email is a powerful and decentralized tool for communicating with customers, prospects and business partners. Unlike social media followers, you own your email list, the ability to reach them and you don't have to pay to reach them like you would for an advertising audience.

Sending an email is essentially free and can be sent to 1 person or 1 million people with the same amount of effort. It's this great usability and low cost that's email's greatest pitfall for companies that don't properly invest in the channel.

If you treat email like a commodity, you will get commodity results. Your email database is only as valuable as your ability to reach the people in it. If you abuse your subscriber list, over time, your sender reputation will fall. Much like banks and other institutions use a credit score to determine your credit worthiness, email providers use your sender reputation to determine your inboxing worthiness; i.e. whether your email should land in the inbox or the spam folder. Return Path found that on average, only 80% of email makes it to the inbox, but for senders with the worst sender reputations, [less than 1% of email made it to the inbox](#).

If you blast emails like it's still 2015, then yes, it's fair to say that email marketing is dead. But if you use technology to build an email program on a good foundation of best practices, email marketing can easily be the most cost-effective and biggest revenue generating tool to help you scale your business.

Over the next few pages, you will discover best practices you should have in place to build a solid email program. Once these best practices are in place, you can move to the [Advanced Optimization Section](#) where you'll learn how to use the latest technology that will help you take your email to the next level.

Basic Email Best Practices

- ▶ Documenting New Contacts/Recording Permission to Contact Status
- ▶ Documented Schedule of Email Sends
- ▶ Email Sending Domain Authentication
- ▶ Email Sending Domain Monitoring
- ▶ Sending from a Real Address
- ▶ Automated Bounce Handling
- ▶ Basic Dashboards and KPI's
- ▶ Basic Personalization
- ▶ Subject line/Preview Text Optimization
- ▶ Branding/Templates Established
- ▶ Basic Segmenting (if needed)
- ▶ Tracking Return on Email Marketing Investment

If you have all the best practices in place, skip to the [Advanced Email Optimization Section](#). If not, use the guide below to meet the basic email best practices before considering optimization of your email program.



Documenting New Contacts/Recording Contact's Permission Status



Documenting how new email addresses are acquired and keeping up-to-date records on each contact's permission status is a foundational step in maintaining a clean and legal email list.

HubSpot makes tracking and updating contacts very simple, especially for leads gathered online.

If your bounce rate is higher than 3%, possible causes should be identified and addressed. A [bulk email verification tool](#) like [Mailfloss](#) can be used to quickly clean an existing list of hard bouncing email addresses as well as high-risk addresses and spam traps.

Spam complaints are one of the highest negative ranking signals. Spam complaints or emails sent to spam traps lead to a lowered sender reputation and ultimately lower inboxing rates. Even a small number of spam traps and spam complainers will take a toll on your list making it more difficult to reach engaged subscribers. In fact, [HubSpot will suspend](#) your ability to send email if your spam rate goes above 0.1%.

To avoid future problems, it's important to examine how you're acquiring and verifying new addresses. Some methods of email address acquisition pose higher risks than others. Addresses collected offline tend to be the highest risk, especially when gathered at point-of-sale.

The simplest way to verify new email addresses is by sending a confirmation email and requiring double opt-in before adding addresses to the primary database. Instant verification services can also be used to screen for misspellings, duplicates, known spam traps and hard bouncing emails.

Documented Schedule of Email Sends



If you're new to email marketing, you should have a basic calendar in place for tracking and planning email campaigns. Maintaining a minimum cadence of email is recommended to keep your database up-to-date and your brand fresh on subscribers' minds. While over-emailing is more common, under-emailing can also lead to problems as email addresses churn or go out of date and subscribers will forget about your brand.

The built in [HubSpot Calendar](#) is a good place to start or for a more detailed planner, you can use a template like the free [HubSpot Email Campaign Planner](#).



Email Sending Domain Authentication

Customizing your DomainKeys Identified Mail (DKIM) signature is easy with the HubSpot platform, and provides a couple of important benefits.

- **Appearance** - Having [via.hubspot.com](#) is an immediately visible sign that this is a marketing email even if you personalized the email. Smart consumers will recognize this.
- **Deliverability**: By setting your own DKIM signature, you state to your customers and the internet that you take responsibility for the content of your email. This ensures that your email can easily be separated from other customers who are using the default signature, helping to prevent your email from being flagged as spam or a "Marketing Email". Documentation from HubSpot on how to accomplish this can be [found here](#).



Email Sending Domain Monitoring

Increasingly, email service providers are looking not only at the originating IP addresses of senders, but also the sending domain and even the individual alias of the sender.

Let's say emails from @yourcompany.com are usually deleted without being opened, or worse, marked as spam. Emails marked as spam are a strong indicator that your emails are not a high priority for most people. This means there is little risk that they will be missed if the ESP decides to label them as spam.

On the other hand, if emails from your company are opened, clicked, whitelisted, forwarded, replied too, etc., your domain reputation will benefit.

Several of the large ESP's provide services to check your domain reputation. You can find links to them in the following.

[Gmail's Postmaster Tools](#) is simple to set up, and gives visibility into your current domain reputation, IP reputation, spam complaint rate, and other deliverability statistics. It can have glitches, but overall it is a handy tool for email marketers and is the tool we recommend.

[Outlook's Junk Email Reporting Program](#) (JMRP) feedback loop service gives you the ability to receive copies of messages their recipients have marked as spam. If you are following best practices and still encountering deliverability issues, you can submit a support ticket to Microsoft directly.

You can also enroll in [Yahoo's Complaint Feedback Loop](#) to receive notifications when users mark your emails as spam or complain. If you continue to have issues with deliverability with Yahoo Mail, you can submit your sending IP address to Yahoo directly for review.



Sending From a Real Address

Sending email from your domain using a real email address is a "best practice" all business owners should be following. A real address is not only more personal than a noreply@domain.com, but it leads to higher inboxing rates. You'll be surprised how many people respond to good content sent via a real address. Two way engagement is also a good sign to ISP's and ESP's that you are a legitimate business sender.



Automated Bounce Handling

Having an automated system to track and remove email addresses that bounce is an important part of maintaining a healthy email list. Using an instant email verification service like [Mailfloss](#) or [XVerify](#) should eliminate hard bounces on new addresses but as people switch jobs, are out of the office, or stop using old email addresses; ongoing list maintenance will be needed to keep your list clean and deliverability high.

While Hubspot will automatically stop sending to hard bounces by default, setting up lists for automated handling of bounces will help you with more accurate reporting. More detail on how HubSpot handles bounces can be found [here](#).

There are also tools like [Leadgnome](#) that use AI to identify email replies in the form of out-of-office, real humans and left the company to uncover new leads.



Basic Dashboards and KPI's

For an email marketing program to perform at its best, marketers need to be tracking more than just opens and clicks on individual emails. While HubSpot has basic dashboarding capabilities, to fully understand how an email program is performing, we recommend using [Databox's](#) advanced dashboarding capabilities.

The [Hubspot Email Campaign](#), [Advanced Email](#) and the [Email Performance](#) dashboards are a few of our favorites. These advanced dashboards allow you to track email performance alongside other metrics like sessions and leads converted over time as they relate to email engagement.



Basic Personalization

A [study by Statista](#) found open rates for emails with a personalized message averaged 18.8%, as compared to 13.1% for emails without any personalization. [First name personalization](#) is one of the simplest things you can do to optimize your emails and fortunately, HubSpot makes both first name and [subject line personalization](#) extremely easy.

Additionally, if you're looking for a way to keep your personalization fields clean, we recommend using [Insycle](#).



Subject Line/Preview Text Optimization

“Preview text” is the text that many email clients show in addition to the email subject line. Many email clients populate this field automatically with the first few words/characters of your email. Others leave it blank if preview text has not been set. Either way, this can lead to problems, especially if the first words of your message are “please enable images.”

Setting preview text in HubSpot is simple, and as your subject line and preview text are the only things a person sees without opening your email, taking the time to optimize them is well worth the effort. Ideally, a marketing team should be regularly testing different styles of subject lines, but at a minimum, take note of the importance of subject line optimization and use pre-set preview text in HubSpot.

Keep in mind that while a good subject line may entice a subscriber to open an email, it's sending valuable content that's the biggest factor in whether a person continues to open and engage with future emails.



Branding/Templating

We recommend that all brands have basic templates for commonly sent email types. Establishing basic brand standards will help you not only be more efficient but can lead to increased engagement. Consistency builds trust. Even if you choose to send plain text emails, having consistency in tone, signature and format will ultimately lead to more conversations and conversions.



Basic Segmentation

You don't need to segment your email list initially, but if you keep in mind how you want to segment in the future it makes it possible to easily break down your list when the time comes.

Creating separate content and nurture campaigns for different segments takes more time. However, segmented email campaigns have shown to produce much higher engagement rates. An effective email program can start small but be prepared to grow in complexity to increase performance as time goes on.



Tracking Return on Email Marketing Investment

According to the Direct Marketing Association, email marketing drives or influences, an average of 18% of total business revenue. Many executives and marketers believe email is a free, no-consequence channel, making it hard to get buy-in to invest in the channel. Achieving an understanding of your email program's direct impact on revenue is the first step in getting leadership to commit and make it a more viable and predictable revenue driving marketing asset.

Seventh Sense has two calculators that you can use today to start showcasing how all your hard work is driving higher revenues. These calculators include:

- [Calculate and showcase the ROI of your existing email program with HubSpot](#)
- [Calculate and showcase how using email optimization can drive higher email ROI](#)

Advanced Email Optimization for HubSpot with Seventh Sense

Once the [Basic Email Program Benchmarks](#) are met, your email program is in a much better position to grow and succeed with the optimization techniques you'll be learning next.

- ▶ [Send Time Personalization](#)
- ▶ [Send Time Personalization for Nurture Campaigns](#)
- ▶ [Send Time Personalization for One-off Emails](#)
- ▶ [Send Time Personalization for Reactivation Campaigns and Inactive Contacts](#)
- ▶ [Lookalike Email Sending](#)
- ▶ [Email Throttling for ABM, New Lists, Domains and Dedicated IP's](#)
- ▶ [Email Frequency Personalization](#)
- ▶ [Email Insurance Policy](#)
- ▶ [Deliverability Protection Insight](#)





Send Time Personalization

Integrating Seventh Sense into nurture campaigns is the most powerful and simple to set up email optimization technique you can take advantage of. By using send time personalization in a nurture campaign each email send time will adjust based on learnings from each individual's engagement on previous emails in the campaign and in your overall email program. This increases the likelihood of your emails reaching prospects and customers while they're in a learning mode, just like when they first interacted with your site.

As you do this, you're likely sent through all of these companies' nurture campaigns and then are put on a list for newsletters, events, product promotions, etc. When you engage in this content, if you're anything like me or millions of others, over time you'll continue to read the content that is the highest in your inbox when you happen to be sitting down to go through it. Once you've engaged in the content of the first or second email on the subject, the rest of the emails with similar content go to the inbox abyss. Afterall, we all only have so much time we can spend reading and researching.

Send time personalization is a powerful email optimization that allows you to reach each person for a given email at his or her most probable time of engaging in your email. Just like you invest in search engine optimization, you should also be investing in ensuring your emails have the highest likelihood of being seen and engaged with. By targeting your email delivery time to each subscriber when they're most likely at their desktop and ready to engage, Seventh Sense's system increases not only inbox placement, impressions, opens, clicks, conversions, but most importantly [return on email investment](#).



Send Time Personalization for Nurture Campaigns

Integrating Seventh Sense into nurture campaigns is the most powerful and simple to set up email optimization technique you can take advantage of. By using send time personalization in a nurture campaign, you increase the likelihood of your emails reaching prospects and customers while they're in a learning mode, just like when they first interacted with your site.

To use send time personalization in a HubSpot nurture workflow, you simply insert a Seventh Sense workflow action step before each email in the campaign that you'd like to use send time personalization for. Instructions on using Seventh Sense workflow actions to trigger send time personalization in a HubSpot workflow can be found [here](#).



Send Time Personalization for One-off Emails

Send time personalization for one-off emails empowers you to select a period of time that you want your email delivered and each individual on your sending list will be delivered their email at the highest probable time of engagement within that time window.

One-off emails could include newsletters, webinar and event invites, product updates, promotional offers, etc. Really anywhere that you're sending a single email to a list of recipients. Instructions on how to send a single campaign using Seventh Sense and HubSpot are found [in this knowledge base article](#).



Send Time Personalization for Reactivation Campaigns and Inactive Contacts

One of the advantages of the Seventh Sense is its ability to use years of collected engagement data to increase your likelihood of reactivating dormant subscribers. Reactivation of dormant subscribers is often one of the first ways that you will notice that Seventh Sense is working for you.

If a subscriber is in a different time zone, or works a night shift, it's likely that your daytime email deliveries end up at the bottom of their inbox when they're going through it. Once Seventh Sense is activated, any open and click data you have on a subscriber, even if it's months/years old, may increase your chances of reaching an individual.

For subscribers that continue to remain dormant or have completely disengaged after Seventh Sense has been implemented, [randomized send times](#) can be an extremely useful tool to increase your chances of reaching them. By spreading out your deliveries over a wider window, you will increase your inboxing rate and raise the chances of catching the subscriber at a more optimal time.



Lookalike Email Sending

The term lookalike audience was coined by Facebook to describe a group of prospects that represents your perfect audience. This is an audience that's likely to be more engaged in your content and ads, leading you to higher conversions.

Seventh Sense uses a very similar approach with subscribers who have no historical engagement in an email from your company. Rather than just picking a single or randomized time for these people, Seventh Sense uses a lookalike methodology and predicts times to send your email based on the success of your overall audience.



Email Throttling for ABM, New Lists, New Email Domain(s) and/or a New Dedicated IP

Email throttling is controlling the amount of email messages sent to one ISP or corporate server at one time. ISPs and corporate email systems will sometimes block messages when a high volume is sent by one sender at one time because they might be concerned it's spam.

Throttling email is a natural byproduct of the Seventh Sense system which can have numerous benefits when a company is acquired into your organization, a list of leads is purchased (although, we don't recommend this practice), a new sending domain is set up, a dedicated IP is purchased from HubSpot or you're running an ABM campaign.

Let's look at each of these individually.



You acquire a company:

When acquiring a company, this typically means that you'll be inheriting an email list. This can create all kinds of downstream effects if the company you are acquiring doesn't practice good list hygiene. This could result in significant bounce rates or spam complaints which will not only lower your domain reputation, but could also mean HubSpot suspends your ability to send emails from their system.

By throttling your emails vs. blasting them to the entire list at once, you can gradually deliver emails to this new list(s) and monitor how the list is performing. If you see signs that the list is struggling to deliver results, you can go back to the drawing board and determine the best strategy to deliver emails to this list(s).



You set up a new email sending domain:

When setting up a new email sending domain or are just beginning to send emails from your HubSpot email tool, this can create suspicious behavior with email filters and blocklist operators. By simply throttling your email, you can reduce the chances that these email filters and blocklist operators flag your sending domain.



You purchase a dedicated IP from HubSpot:

For customers who send high volumes of email and want more control over their individual sender reputation, HubSpot offers a dedicated IP address for sending emails.

When you purchase the dedicated IP add-on and once the dedicated IP is live, the new IP address is warmed up gradually to establish a healthy sending reputation.

A sudden change in sending volume can look suspicious to email filters and blocklist operators. So for the first 60 days, your HubSpot email tool automatically splits email sending between your dedicated IP address and some shared IPs. The tool uses an algorithm to gradually increase sending over your dedicated IP during that time.

By adding throttling to your email sending, you increase the odds that you don't appear suspicious to email spam filters and blocklist operators.



Account Based Marketing (ABM) email strategy:

While there are many techniques and tactics involved in account based marketing, nearly all of them involve email. Between salespeople reaching out directly and marketing sending email blasts, a lot of email is going from your server to the account's server.

With so many emails being sent to a variety of people within an organization, B2B companies are running into a problem: their emails are triggering organizations' global spam filters.

When a lead has received several emails from a sender but not opened any of them, additional emails may trigger spam filters. In addition, many corporate email servers simply limit the amount of email they accept from a particular sender during a given period as a measure to prevent "spam." Sending emails above the threshold results in your emails being rejected.

If you're sending emails without a comprehensive deliverability strategy, you may be in for a nasty surprise as your email delivery rates begin to tank. This is where throttling your email or spreading out the delivery of email can help.



Email Frequency Personalization

Seventh Sense also provides a proprietary machine learning system to analyze trends and predict a person's engagement patterns based on their previous history with your email program.

Engagement trends for each person fall under "evaluating", "active", "passive" and "inactive". "Evaluating" and "Active" subscribers should make up the majority of a healthy email list. These are people whose engagement trend has either increased, stayed the same or slightly declined as compared to their own trendline. You can read more behind the science in [this article](#).

Contacts with "passive" engagement are individuals whose open and click rates are dropping below their norm. These are typically people who are beginning to suffer from email fatigue. "Inactive" contacts are contacts that have completely disengaged from your brand.

To maximize subscriber value, we recommend sending only your highest performing offers to subscribers that are either passive or inactive in your email program. Continuing to email these subscribers at the same rate as the rest of your list can have dangerous consequences. It will lower your inboxing rate overtime, damage your sender reputation and lower your return on email investment.

With Seventh Sense, you can also easily suppress (or even dynamically unsuppress) these passive and inactive subscribers from individual emails. This allows you ultimate flexibility to affect a campaign's performance.



Email Insurance Policy

Have you ever blasted an email to your audience only to find it had a broken link, image or landing page, run out of a promotional item, sent the wrong email or overloaded your systems / sales team / call center because of a successful / unsuccessful campaign? We've all been there! In many of these cases, you're left with a decision of whether you should send a follow up email to the effect of "we goofed" which can cause decreases in engagement, heightened unsubscribes or spam complaints, create an unfriendly customer service situation or tarnish your brand.

This is exactly why Seventh Sense has a built in easy button which empowers you to pause an email from sending while you fix the issue, update the promotional item, change the email that is being sent or wait for the demand on your systems / sales team / call center to get back to normal which limit the impact of these challenges. Once you're ready to begin sending again, simply resume the campaign!

With the ability to pause and resume delivery jobs, another risk reduction feature that was highly requested and implemented is Seventh Sense account users receive their email at the start of a mailing versus being send time optimized. The goal with this is to help spot potential challenges before a recipient notifies you of the issue or halfway through the mailing you spot it when you receive your email by way of send time optimization.



Deliverability Protection Insight

Overall engagement with your email sending domain is one of the key factors that Google, Microsoft and corporate spam systems use as the mechanism of where to place your emails (the primary inbox, promotions, clutter or spam folder; or worse quarantined altogether by the email server).

You can track your active audience on the Seventh Sense dashboard which goes far above and beyond just open and click rates. It rather focuses on the percentage of unique people that are engaging with your email(s) in the current or previous month(s).

This provides you with quick insight into email deliverability protection. If your active audience falls into yellow, this should raise some red flags and you should consider your segmentation and suppression strategy. If your active audience falls into the red, you're likely having email deliverability problems (not "delivery" problems, but rather landing in the inbox) or the people you're adding to your email program are not properly vetted.

It can also be used to get a sense of whether you're under or over-emailing your audience.