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QUICK GUIDE TO MOBILE EMAIL

9 tactics for a mobile-friendly email strategy

Quick Guide to Mobile Email

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Author
Bobbi Dempsey, Editor, *Quick Guide to Email*
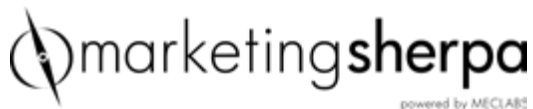
Contributors
Adam T. Sutton, Senior Reporter
Jeri Dube, Reporter

Editor
David Kirkpatrick, Manager of Editorial Content

Production Editor
Erin Hogg, Copy Editor

TACTICS YOU CAN LEARN OVER LUNCH

Welcome to *Quick Guide to Email* – a resource from MarketingSherpa featuring bite-sized tips for busy marketers.

In this report we provide ideas to quickly start a mobile email strategy – or improve the one you already have.

We live in a mobile world. These days, many of us seem to do everything on the go, juggling a smartphone and perhaps several other electronic devices and taking them with us wherever we may be.

This is something that marketers need to keep in mind as a top consideration when designing emails along with landing pages and Web content in general. Many marketers are indeed realizing the critical importance of incorporating mobile into their email strategy.

As shown by research in the *MarketingSherpa 2013 Email Marketing Benchmark Report*, more than half of marketers ranked the pervasiveness of smartphones and tablets as the factor that will most affect their email marketing strategy in the next 12 months.

However, if you've been slow to jump on the mobile bandwagon, the idea of suddenly converting all of your marketing content to a mobile-friendly format can be very intimidating. So it's best to use a carefully planned strategy in which you make the transition gradually, while testing and adjusting your tactics along the way.

In this report, we'll show you:

- How to decide where to start
- Tips for achieving internal buy-in
- Ways to improve the mobile user experience
- Why a responsive design should probably be your long-term goal

We know you're in a hurry, so let's begin. We're eager to share these tips on how you can make your emails mobile-friendly.

Bobbi Dempsey
Editor, *Quick Guide to Email*

About *Quick Guide to Email*

MarketingSherpa's *Quick Guide to Email* is designed with you, the busy marketer, in mind. We provide quick, simple tips you can use right away. For each Quick Guide, we scour the vast MECLABS library of marketing research, from MarketingSherpa case studies and Benchmark Reports to MarketingExperiments optimization tests and analyses. We highlight tips to help improve your marketing performance right now – or at least by the time you're done with lunch.

Tactic #1. Choose your battles

In an ideal world, you would be able to invest unlimited resources and man hours into doing a full-fledged conversion, transforming all of your emails and landing pages into optimized versions that look perfect on every possible mobile device.

In the real world, you will likely have to start very small. You will be restricted by budget and staffing limitations, and may face some resistance from within your organization. In our research, marketers consistently say one of the biggest barriers to implementing an effective marketing strategy is inadequate staffing resources and expertise, along with insufficient budget for mobile initiatives.

So, this is something you will likely need to implement gradually. Figure out where you want to start. Look for places where you can get the maximum impact for your effort. Not only will this provide maximum benefit to the most readers, but it will also help you gather some important (and impressive) data that will help you get internal buy-in.

The MarketingSherpa video, "E-commerce: How Verizon and REI integrate mobile and email marketing," features a session from MarketingSherpa 2013 Email Summit in which Laura Velasquez, Marketing Program Manager, REI, and Jason Jennings, Associate Director, Digital CRM, Verizon Wireless, discussed lessons learned in optimizing emails for mobile devices.

"Pick one program – I suggest starting with smaller programs, but ideally ones that will have a big impact," Velasquez said. "Our team started with our promotional emails because they have a wider reach and we felt they would have a bigger impact."

Jennings echoed that advice, suggesting you pick your starting points wisely: "Go where you'll get the most bang for your buck."

He said this is less overwhelming than trying to convert all of your campaigns at once, and it also gives you some test cases to analyze.

You will need to decide how you will prioritize copy in the smaller amount of screen real estate provided by mobile devices. Velasquez warns that this will likely involve sensitive and possibly challenging discussions with stakeholders to help establish priorities and ensure everyone is comfortable with how messages will be presented.

Tactic #2. Don't try to do too much too soon

In the MarketingSherpa article, "Mobile Email Marketing: 5 tactics to engage and convert smartphone users," several experts weighed in on some tips on how you can best engage mobile users.

One of their tips is to strategize your move into mobile emails. R.J. Talyor, Vice President, Mobile Products, ExactTarget, has found that marketers either ignore the mobile audience, or convert everything to mobile at the expense of the desktop experience.

You should avoid either extreme. Even if very few of your subscribers currently access email with smartphones, the growth trend indicates this won't always be the case. If your audience is predominantly smartphone users, they still use a desktop for a second look at emails that interest them.

Talyor's colleague Chris Studabaker, Regional Manager, Global Services, ExactTarget, said, "Mobile isn't a broad initiative that we have to do everywhere simultaneously."

Marketers can start slowly, implementing mobile for specific campaigns where it makes sense, and then grow from there.

Studabaker suggested looking at the content, purpose, and goal of your messages. Some of them are clearly useful for people on the go, including "day-of" travel confirmations and tickets, "welcome to your mobile app" introductory notes, and daily deal coupons that require no printing.

Tactic #3. Study your analytics to find out what devices your visitors use

In general, marketers across the board are finding that their mobile traffic is growing with amazing speed. In the session from Tactic #1, the speakers noted that both REI and Verizon are seeing roughly 40% of email opens occurring on mobile devices. Velasquez said that for REI, this is a jump of more than 10% over less than a year – and it continues to increase rapidly.

She noted that if you don't have the numbers as to what device your list is using to open their emails, it's really difficult to optimize your email campaigns.

Keep in mind, these days your audience may be using any one of a wide variety of devices, including:

- Desktop PC
- Mac
- Tablet
- Phablet (a phone/tablet hybrid)
- Smartphone (which can then be broken down into more specific categories, such as iPhones and Androids)

In addition, having access to this data will also help you make the case for mobile integration to the rest of your marketing team and other areas of the organization.

While general stats and data can be useful as a general benchmark, the most important thing to your company is what your particular customers are doing – and which devices they are using. This is especially true if your budget and resources are limited, or if you need to ramp up your mobile strategy on a gradual basis. In that case, you'll want to be sure that your top priority is designing emails with your recipients' most popular devices in mind.

In the MarketingSherpa article, "Mobile Email Marketing: iPhone-targeted landing pages boost conversion rate 40% for Ritz-Carlton Destination Club," the team at Marriott Vacations Worldwide wanted to boost the conversion

rate for emails sent by its Ritz-Carlton Destination Club brand. After evaluating these pages using a smartphone, the team immediately spotted a problem – the pages were unattractive and difficult to navigate.

Alex Corzo, Manager of Digital Strategy and Services, Marriot Vacations Worldwide, realized the team must improve these pages quickly before visitors went elsewhere, but the budget was limited. So his team launched a pilot project to build internal support for more investment in order to push forward.

In studying their analytics, the team discovered that 90% of their mobile visitors were using iPhones, so they decided to focus their efforts on that segment as a test to try and prove whether mobile-optimized landing pages could produce better results.

With this in mind, the team designed a bare-bones landing page that fit the budget, rendered cleanly, and was easy to use.

Custom page for a specific segment

The team's landing page was tied to an email campaign that promoted memberships to The Ritz-Carlton Destination Club. The initial email encouraged subscribers to learn more about an exclusive membership offer.

Once clicked, it sent subscribers to the team's website, which detected their device type. Any subscribers using an iPhone were shown a [custom landing page](), and all other subscribers were shown a [standard landing page]().

Corzo's team often uses rich imagery and copy on landing pages, but it designed this page to be much simpler. This kept the project within the budget while improving the experience for iPhone users.

The page included :

- Company logo
- One sentence of copy
- Online form fields, arranged vertically
- Button to send

EXAMPLE: RITZ-CARLTON MOBILE PAGE
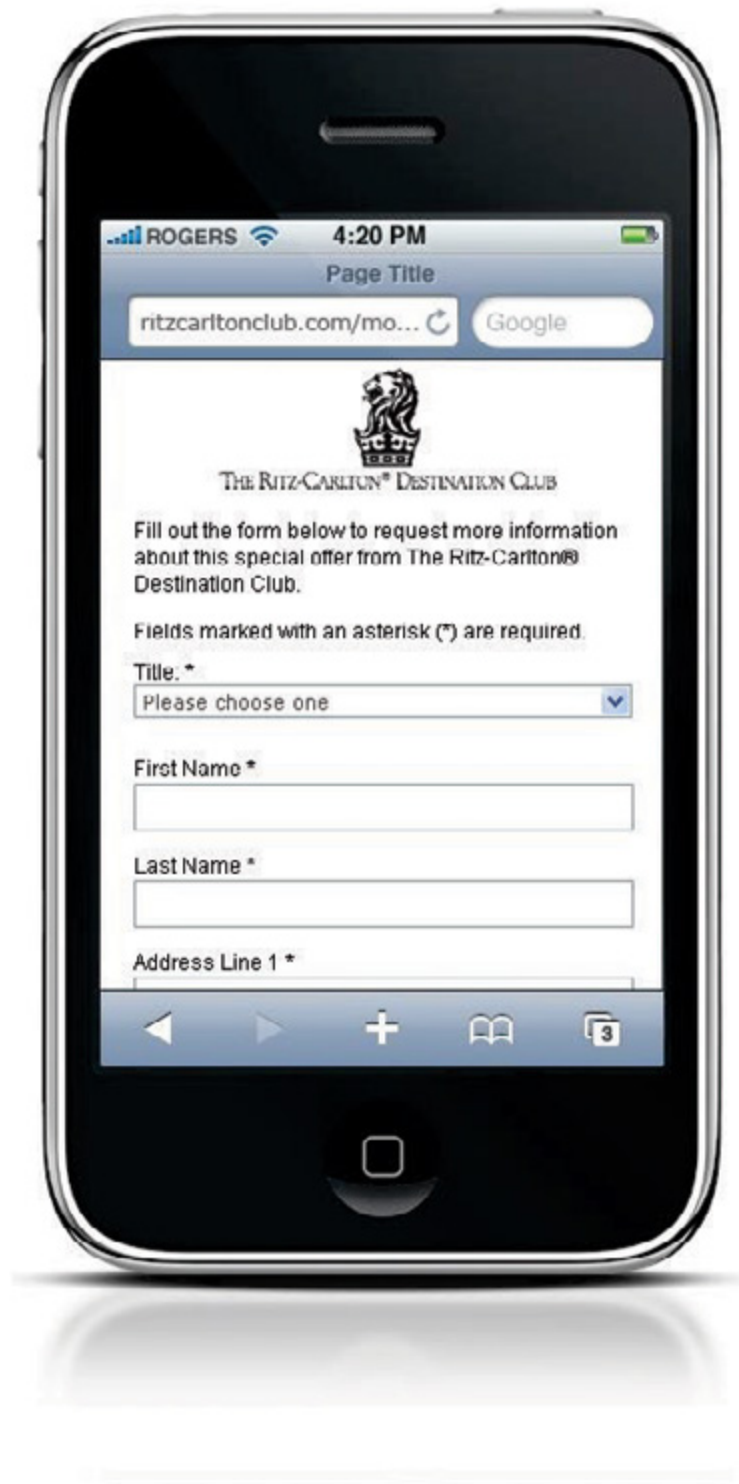
The team was excited by the campaign's results. The iPhone page had a starkly higher conversion rate than the standard page. To ensure this was not an anomaly, the team launched similar landing pages in four subsequent email campaigns and hoped for similar results. They were not disappointed.

"We saw a huge lift in the traffic and actual conversion," Corzo said.

The team could now prove that custom landing pages could increase conversion rates for mobile subscribers. With that insight, the team prepared a slide deck outlining results and presented it to the management team. After the deck made its way through the chain of command, top-level managers approved further investment.

Check out this video in which Corzo explains his team's challenges and solutions to handling mobile email campaigns.

Tactic #4. Identify some basic design guidelines

In the MarketingSherpa article, "Mobile Email Marketing: 53% higher clickthrough rate for mobile-optimized newsletter," the team at Medscape described how and why they adjusted their email newsletter strategy based on an increase in mobile users.

Medscape, an online resource for physicians and other health professionals, offers free email newsletters on more than 30 topics. The company earns revenue through advertising and sends about one billion emails each year. Needless to say, Medscape makes it a priority to stay on top of any trends or developments that affect email design or delivery – and adjust quickly.

By monitoring site traffic in 2011, Medscape realized a growing portion of its audience used a mobile device. Smartphones and tablets have different Web browsers than PCs, so it's easy to measure mobile visitors by tracking the browsers accessing a website. The team at Medscape went a step further by investing in a tool that could tell them exactly which subscribers were mobile and what device they were using.

Segment lists to focus on mobile users, if possible

Medscape's team then created a separate database segment for those mobile subscribers, and worked on creating mobile-friendly newsletters just for them. The team researched best practices in mobile email design and used the company's extensive technology and design expertise to create the emails.

Key features of Medscape's mobile email newsletter designs include:

- **Narrow, vertical format:** Articles are listed one by one down the page, which makes it easy for mobile users to scroll the message with a flick of the finger. The message is also narrower than a regular email, which prevents readers from having to scroll sideways to read a line of text.

- **Above-fold content**: One article is emphasized with a larger link and image at the top of the email. The image, description and link to view it are above the fold (visible without scrolling). This gives readers instant content without forcing them to dig for it.
- **Fast and adaptable**: The email is designed to render well across a variety of devices, and it uses images sparingly to speed load times.
- **Large fonts**: The email text is larger than the original newsletter so readers do not have to zoom in to read.
- **Room to click**: Links and buttons are large and clearly marked, which makes them easy to tap with a finger.

EXAMPLE: MEDSCAPE MOBILE EMAIL NEWSLETTER

Tactic #5. If mobile is the priority, begin with a mobile-friendly design

Once you've decided which pages will be your first priority for mobile email users and identified the number of mobile users and their devices, it can make the process easier and the user experience better, if you make mobile design your starting point for those particular pages.

In the panel from Tactic #1, Jennings said his team at Verizon always begins designing for mobile and then thinks about desktop design, whereas other companies often work in the reverse order.

"Designing for mobile first actually makes us better marketers. That's because it makes us think about what the most important message is that we need to get across, where it should be placed, and how we can get and keep the attention of the reader," he explained.

Jennings continued, "If you start off with the full [desktop] version and try to force-fit it into the mobile version, you're not going to get all of those messages into that email. I would urge everyone to start off initially thinking of the mobile version instead, and then work from there to expand for a desktop version."

While that may not always be possible for each campaign, Jennings suggested that you at least pick a few campaigns to approach from that standpoint.

Tactic #6. Plan content for its context

Returning to the article, "Mobile Email Marketing: 5 tactics to engage and convert smartphone users," the experts advised marketers to consider the environment in which the email may be read when crafting content.

People reading emails on their phones are most likely in the midst of another activity. Email is filling a gap while they are waiting for, or can take a break from, their primary focus at the moment. This understanding should drive your approach to content.

Tighten the focus and the copy

One way to optimize the presentation of your message is to rein yourself in. Don't try to accomplish too much in one email. For a mobile audience, pick one idea, one concept or one offer. This not only limits the amount you have to explain, but also prevents you from obscuring or confusing the message.

While crisp writing is always an asset, it's especially important when trying to attract a mobile audience. Only convey what's essential. Keeping emails short and succinct doesn't just make sense in terms of the context, it's also appropriate for the small screen size.

Get the subject line and "from" field right

Since mobile email apps do not have a preview capability, you have only the subject line and the "from" field to

capture a reader's attention – a total of 60 characters.

For the subject line, succinctness remains important, but order and placement are also factors to consider.

Studabaker said, "When you start looking at how mobile devices actually display subject lines, *usually the first 35 characters* are the ones that you are certain are going to show up across just about any device."

The key to the "from" field is not getting it wrong. You want it to align with your subscriber's expectations. For example, to create a more personal feel, companies send emails from a specific person. The "from" field doesn't indicate the company, only somebody's name. If it's not familiar to your audience, this will work against you.

Tactic #7. Match the email and landing page experience

Velasquez said that when checking on some of REI's mobile email messages, she was shocked to realize that one email message – which had been carefully optimized for mobile – was directing users to a landing page that involved a 2,000-product search. In another case, there was no landing page at all because the email was linked to an outdated URL.

Keep things consistent to maintain the flow. If you're engaging the reader with your email, you want that to continue on your landing page. This will lead to lower bounce rates. Use the email to capture the reader's interest, then leverage the landing page to give them more information and help move them through the process while maintaining a consistent user experience.

Also, make sure you monitor your emails and their corresponding landing pages frequently so you can spot any issues and correct them quickly.

Tactic #8. Work toward a responsive design

Most marketers seem to agree that the best approach to mobile email and Web content is responsive design. This approach to website design can detect the device a reader is using and adjust accordingly – eliminating the need to create a bunch of separate pages or messages for different users.

While this may not be possible to implement across the board immediately, it is something you should strive toward as the ultimate goal. It is also the strategy that Google recommends to developers in creating smartphone-optimized websites, citing both the better user experience and the SEO benefits.

The MarketingSherpa article, "Email Marketing: 24% higher CTR for CareerBuilder's responsive design," demonstrates the significant benefits that can result from making your email campaigns more mobile-friendly.

The team at CareerBuilder, the largest employment site in the U.S., has considerable experience with re-evaluating and redesigning emails. They never view their emails as "finished." They are tested constantly, and every 12

months or so, the marketing team scraps them and starts over.

"Every year, we kind of throw out everything and do a new template test," said Scott Burdsall, Senior Email Marketing Manager, CareerBuilder.

When it came time to redesign the email campaign's "relationship emails" in 2013, the team noticed a surprising trend in the program's readership. The percentage of people who opened the emails on a mobile device was almost twice the company's average. The team knew this was something they needed to address in crafting and designing their emails.

Because they wanted to be sure their email functioned well and looked nice no matter what type of device a visitor was using, the team focused on using responsive design.

Here are the steps they followed:

Step #1. Pick a responsive style

Responsive emails automatically adjust to a reader's device or software when opened. For example, a person can open an email on a smartphone and see one layout, then open the email later on a desktop and see another layout. The goal is to deliver a better user experience on each device and hopefully garner better clickthrough rates.

A way to make an email responsive is to have it automatically adjust its width to match the reader's screen, Burdsall said. "It doesn't give you as much control over the creative elements in the body, but it's still responsive," he explained.

The team wanted to give mobile readers a better experience. They chose to design the email to adjust its entire layout to match a reader's device. This was done in coding with the "@media" rule in the cascading style sheets language, or CSS.

Step #2. Design the email

Since CareerBuilder's relationship emails had a large mobile readership, Burdsall envisioned subscribers reading them on the go.

"I had in my head someone on their way to work checking the email on a bus or a train and only having one hand available to look at it," he said.

With this in mind, the team incorporated the following elements into the new template:

- **Easy to scroll:** Zooming and scrolling in all directions is not easy with one hand. To simplify navigation, the email used a one-column layout when opened on a smartphone or tablet and a two-column layout when opened on a desktop.

- **Easy to click:** The calls-to-action in the new design were larger and brighter, Burdsall said. This made them more "tapable," or easier to tap with a thumb as opposed to click with a mouse. The team also cut the number of calls-to-action.

"We cut out a lot in order to really make room for the calls-to-action that we wanted to highlight," Burdsall said.

- **New preheader:** The preheader of the older email had a view-in-browser link and a small batch of HTML text, which "wasn't the most mobile-inbox-friendly," Burdsall said.

  The updated preheader complemented the email's subject line. For example, a subject line of "We have new jobs in Chicago" might have a preheader that states "come search for new jobs," Burdsall explained.

Step #3. Run an A/B test

The new design applied to what Burdsall called the company's "relationship marketing emails." These messages are sent to registered users who recently visited the site or engaged with an email. The buttons and links highlight jobs and articles, some of which are dynamically personalized for each recipient.

The audience is segmented into five groups ranging from the newest members to the least-engaged recipients. To test the new design, the team ran a 50/50 split, A/B test across all of the segments for three weeks.

"I really wanted to see the value of having this updated design and also this responsive element," Burdsall said.

CareerBuilder's new responsive email received great results with each of the five segments. The improvements ranged from:

- 21% to 24% higher clickthrough rates
- 15% to 17% higher open rates

Those results helped the team make a strong case for implementing responsive-based changes on a wider scale.

"That [design] then became our control for that particular program, but it also allowed us to open the door to adding a responsive element to existing templates for other programs," Burdsall said.

He added, "It allowed me to go to other groups and say, 'Hey, we saw this kind of increase as a result of incorporating this new design tactic in our emails, and we recommend you guys do the same.'"

Tactic #9. Challenge current practices and test

One thing the experts from Tactic #2 stressed is the importance of testing – and not assuming your current practices, likely tailored to the habits of desktop users, will carry over to the mobile realm. An area to consider for

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making adjustments is send times for email campaigns. Mobile and desktop users have very different habits.

You may learn more about your customers' behavior through testing and segmentation of your audience between mobile and non-mobile users. For example, if you're marketing to business professionals in cities with good public transportation, you may find sending during their commute works best. You may also spot trends when your mobile users are most likely to be using their devices to read your messages.

Other areas where mobile users may show distinct differences from their desktop counterparts is in their increased likelihood to share content via social networks and their comfort level with, and enjoyment of, online videos.

Useful Links and Resources:

MarketingSherpa Webinar: Mobile Marketing: Optimizing the evolving landscape of mobile email marketing

MarketingSherpa Marketing Research Chart: Customers interacting with mobile email messages

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4315 Pablo Oaks Court
Jacksonville, FL 32224

meclabs.com