

# Field Manual For Franchise Email Marketing

a pragmatic guide to success and ROI in email.



## Introduction

If you are a marketer inside a franchise organization, an effective and cost-efficient way to connect with current and future customers is via email marketing. While most consumers love to hate email and claim that they get too much, they are addicted to it. People check email while driving, in bed, on vacation, in the bathroom, and even at the dinner table. Consumer consumption of content is continuing to rise, but retention and patience are starting to decrease. Email is here to stay despite what some critics think, but email marketing is hard, and it's getting more complex as the channel evolves.

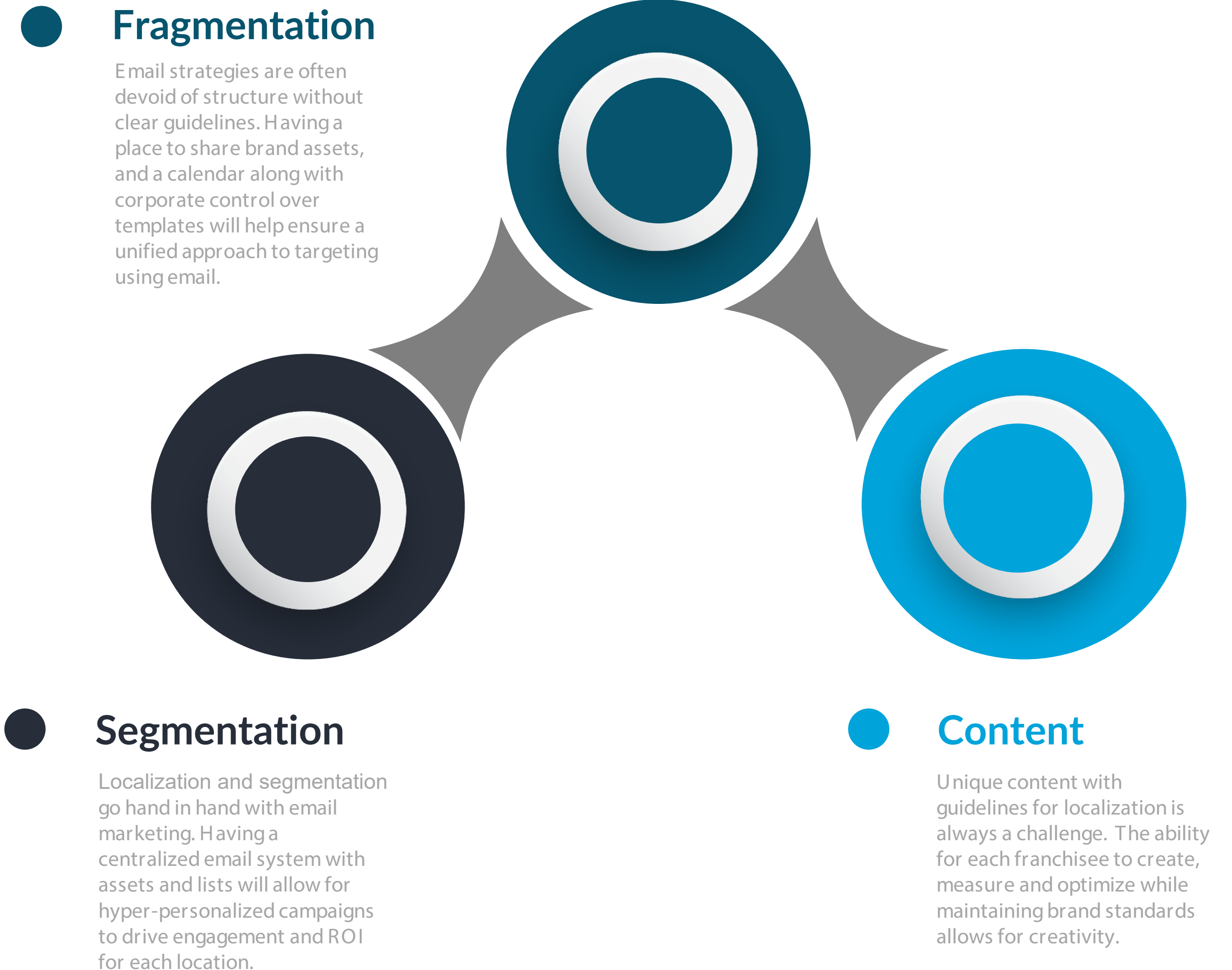
A well-run franchise email program drives incremental value and influenced revenue, and it doesn't matter if your franchise is a single location, multi-location, multi-state, or national. Companies invest in email solutions, resources, and strategies that find themselves ahead of the competitive curve.

However, franchisors such as you, are faced with unique challenges such as brand consistency, maintaining guidelines, producing uniquely relevant content, and ensuring that segmentation is passed down to the local level. While daunting, these challenges are manageable through experience, adaptability, and optimization, along with having a technology partner who understands and solves for your business.

We created this field guide to help you explore the world of email marketing through the lens of a franchise marketer, along with addressing and offering clear guidance on your challenges.

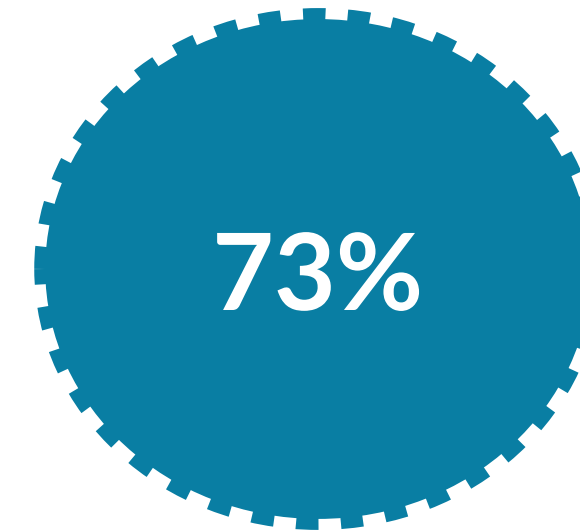
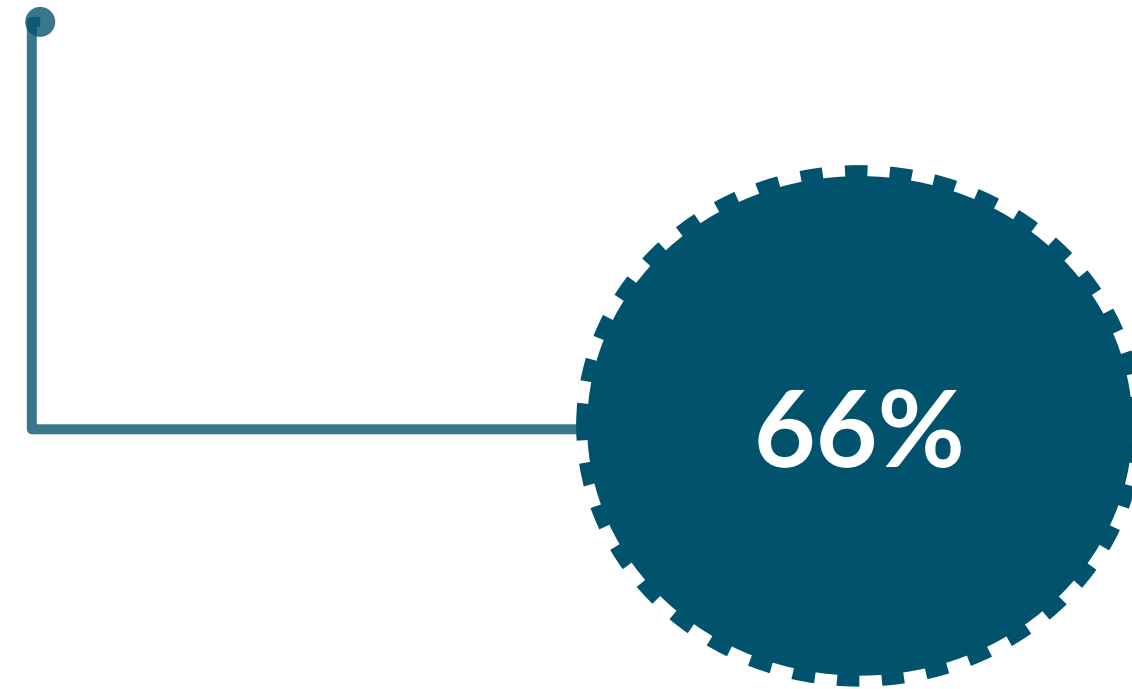
Enjoy.

## Top 3 challenges in franchise email marketing



of consumers rank **email** as their **preferred**  
brand communication **channel**

Source: CM



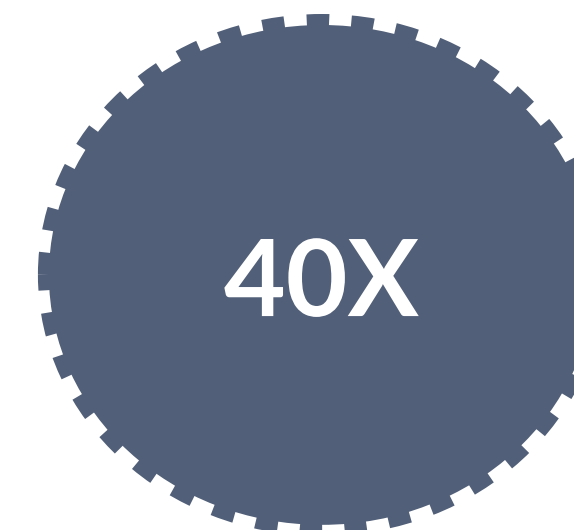
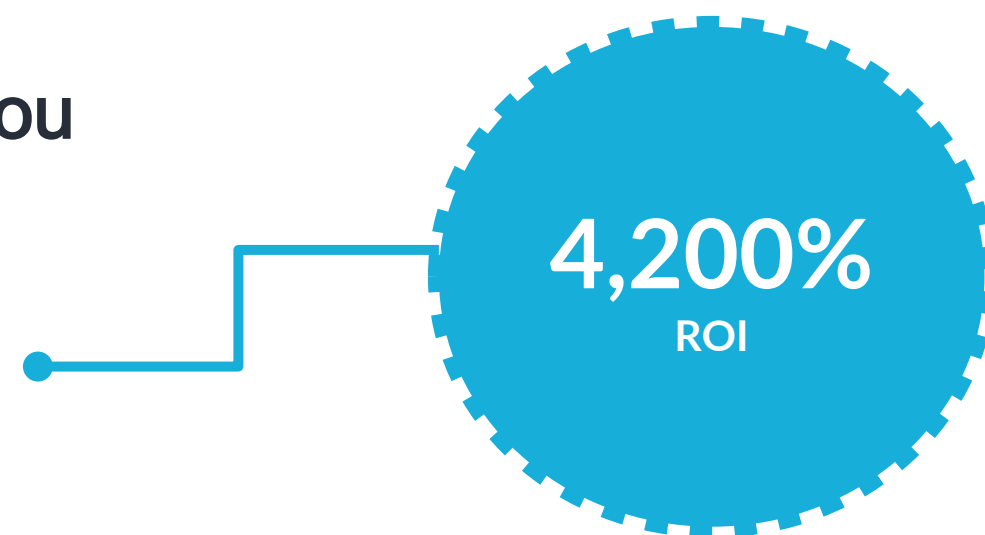
of global marketers consider email marketing  
**as an excellent marketing channel.**  
This is higher than SEO (72%) and paid search (67%)

Source: Ascend2

## WHY EMAIL? IT DELIVERS.

**Every \$1** you spend, you  
can **expect \$42 ROI**  
with email (when done right)

Source: DMA

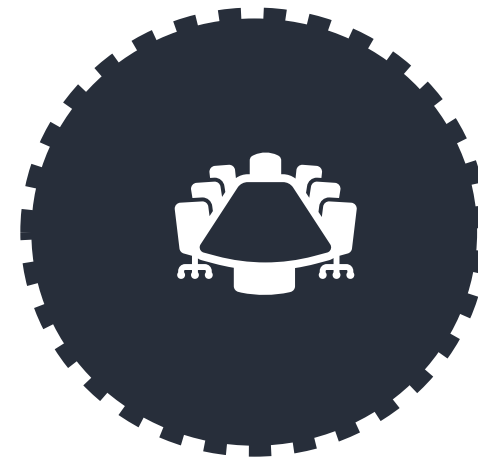


**Email is 40** times more  
effective in acquiring customers  
than Facebook or Twitter

Source: DigitalGYD

# A big question that you may have is what does great franchise email marketing look like?

*It depends on who you are asking.*



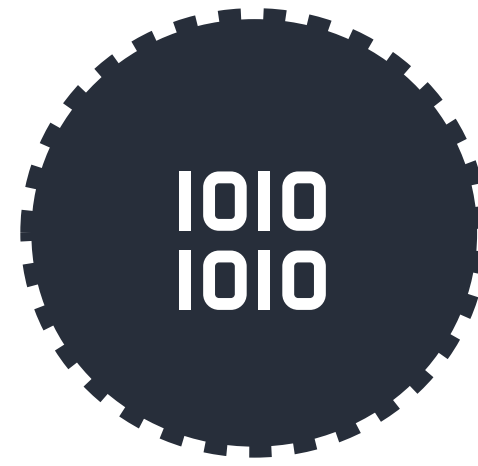
## Franchisor

*"Brand awareness,  
flexibility and control over  
emails sent"*



## Legal

*"Compliance with spam  
laws and privacy"*



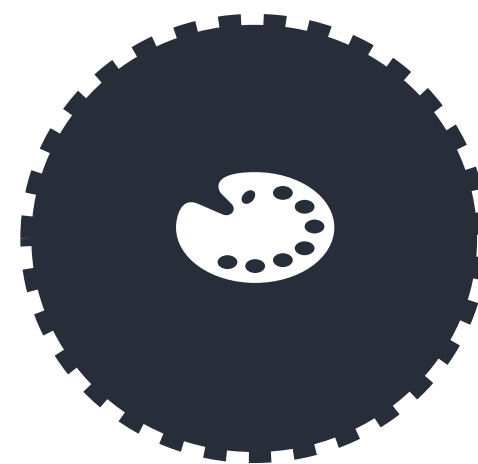
## Technology

*"Selecting and integrating  
the right ESP with our data,  
that is easy to use"*



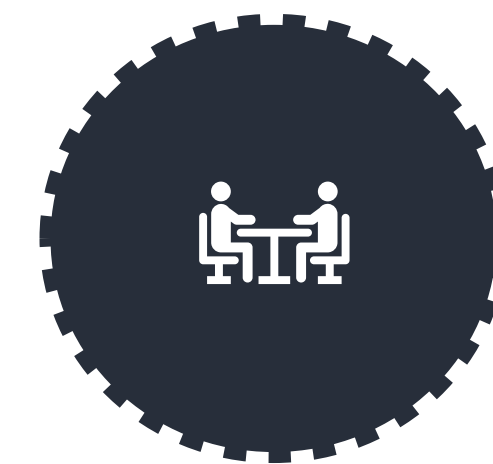
## Marketing Manager

*"Create loyal customers  
with high engagement and  
long-term retention"*



## Creative

*"Great inbox experience  
and recognition"*



## Franchisee

*"More sales with more  
customers"*



## Under Pressure & Lots To Do.

Email marketing is under a tremendous amount of pressure in the digital world. Despite the repetitive drums beating over its imminent death, the channel continues to thrive in many industries. However, marketing rules have changed, and there has been a shift to humanize, harmonize, and empathize with your subscriber lists. Marketing departments at all organizations are spending tens of thousands because they are now required to become more data-driven and customer-centric in their approach. You are now required to be more accountable and be able to show demonstrable results as budgets shift. As consumer privacy becomes increasingly regulated, people are more empowered and are more in control. The challenge is clear, and it's fun; embrace it.

As franchisors, you have the fantastic opportunity to create loyalty and engagement across channels, and email should be the superior force in doing so. If you run an email program, there are at least 157 things (*see figure 10*) beware of. Don't let the big list scare you because iPost has taken that list and made four core areas in email marketing to focus on as a franchisor.

**Let's dig in.**





FIGURE 1.

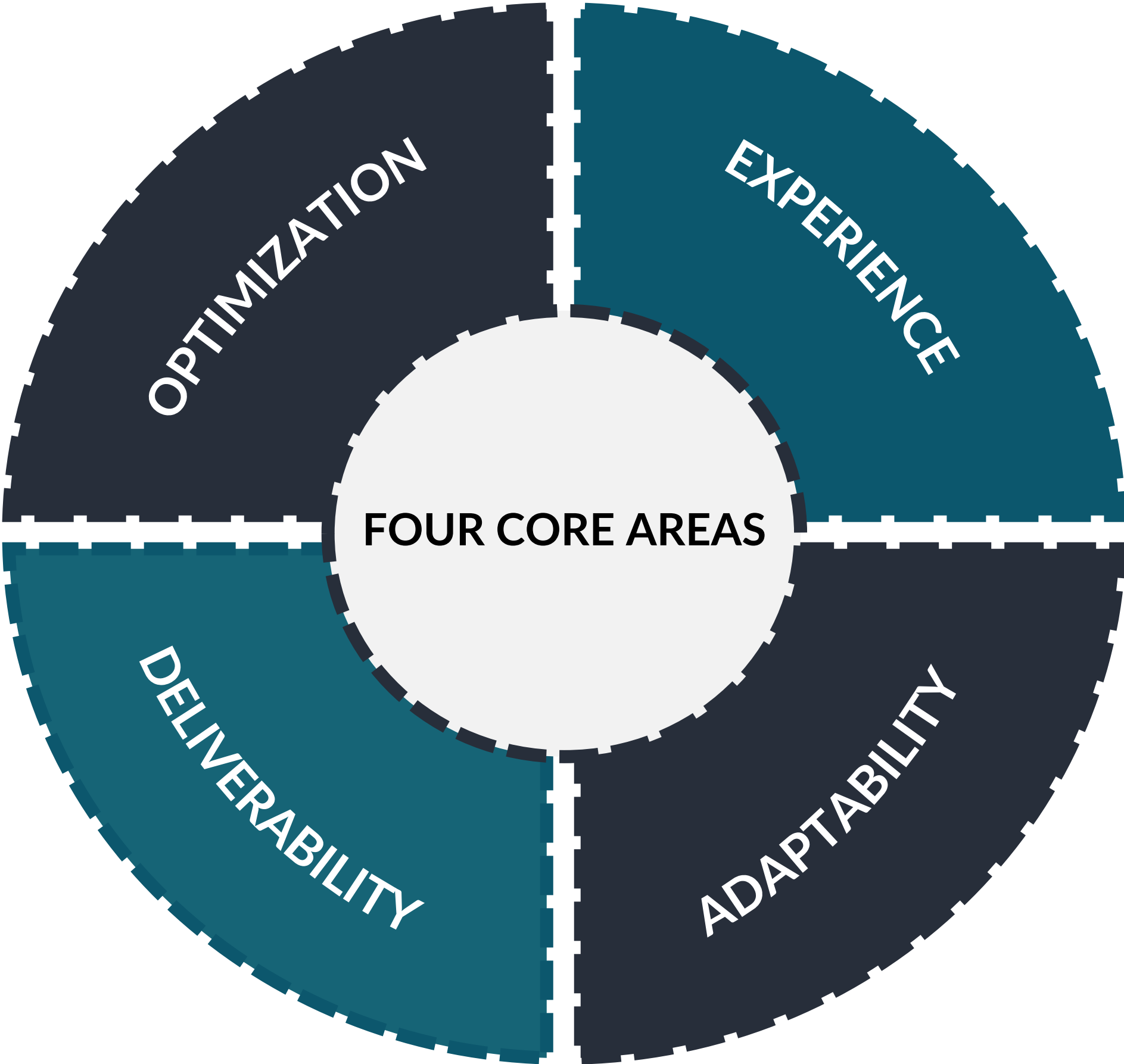
1:1 Personalization	A/B Testing	Abandon Cart Emails	Above The Fold	Acceptance Rate	Acquisition Source Tracking	Affiliate Marketing	AMP	Android Rendering	API Integration	Artificial Intelligence	Attribution	Big Data Integration	Big or Small Header Images	BIMI
Blacklisting	Blogs To Read	Body Content	Broken Links	Broken Site	Buying Lists	Can-Spam	CAPTCHA	CASL	CCPA	CDPs	CTOR	CTR	CNAME	Co-Registration
Coding	Communication Centers	Competitive emails	Conferences to attend	Content	Content filtering	Content strategy	Conversion rates	Coupon redemptions	CPA	CPM	Dashboards	Data warehouse	Dedicated vs. Shared IP	Deliverability
Direct mail integration	DKIM	DMARC	DOE testing	Domain engagement	DOI vs. SOI	DOW optimization	eAppends	ECOA	Email deployment process	Email design	Email filters	Email permission	Engagement reporting	ESP configuration
ESP selection	EU privacy	Event based triggers	External vendor list growth	Frequency	GDPR	Gmail Caching	Gmail Truncating	Gmail changes	Gmail tabs	Hard bounces	Honey pots	Implied preferences	Implied vs. express consent	In-store email capture
Individualization	Insights vs. analytics	Interactive emails	International privacy laws	iOS rendering	IP warmup	Landing pages	Lifetime lost value metric	Lifetime value	List hurdle rate	List hygiene	Long term inactive strategy	Long term ROI	Loyalty program integration	Loyalty program messaging
Machine learning	Managing external vendors	Marketing automation	Messaging strategy	Mobile first design	Multi-Tenant	Multivariate testing	Neural networks	On-premise vs SaSS	On-boarding series	Open reach	Open vs. read rates	Opt-down centers	Order confirmations	Organic list growth
Out of stock emails	Outlook rendering	Pageviews	Paid media	Passive vs. Inactive	Personalization	Pre-header text	Preference center	Priority inbox	Privacy policies	QA	Re-order emails	Re-permission emails	Recovery modules	Renting lists
Replenishment email	Responsive design	RPEO	RPEC	RPECTOR	Seasonal email	Segmentation	Sender reputation	Shipping confirmations	Short term inactive	Short term ROI	Sign-up process	Single Optin	Site capture	Snowshoeing
Social acquisition	Social messaging integration	Social sharing	Soft bounces	Spam complaint rate	Spamcop	Spamhaus	SPF	Sponsorships	Statistical significance	SL Word Count	SL Testing	SWYN	Template optimization	TOD optimization
Transactional IP	Transactional email optimization	Unsubscribe rate	Web browse triggers	Welcome emails	Whitelisting	YOY engagement tracking								

# THE FOUR CORE AREAS AS A FRANCHISOR EMAIL MARKETER.

There are many things to do in email, but essentially you can bucket quite a few of them into four core areas. These areas should be fluid, and careful consideration around the prioritization of each of these areas is essential.

Test and learn, test and learn and test and learn should be your new mantra. This mantra is critical to a testing culture inside your marketing department. While having a vault of historical results, learning what works is the difference between good and great email marketers. You can't learn if you don't test, and you won't grow if you don't learn. Adopt the mindset that the winner becomes the new control.

You can have the best creative with the most personalized messaging, but no one will ever see or respond to it if you can't get to the inbox. Just like regular maintenance is required on your car or house, great deliverability takes effort to monitor and mitigate. Franchisors need to be proactive rather than reactive when it comes to getting your emails into the inbox. Your actions create your reputation, and your reputation is the difference between being seen and the spam folder.



As a franchisor, you must ensure a memorable email experience for everyone that signs up for the program. This experience starts at the point of sign up for the first email or on-boarding series, to ongoing behavioral, creative, lifecycle, personalization email, and even includes offboarding. Optimal experiences take time and experimentation, and the fun never ends.

Adaptability in today's email marketing world is vital, and it starts with the technology vendor that sends your emails. The ability to understand your business, have multi-tenant accounts for brand control, and a relational database for easier segmentation finished off with an interface built for marketers. It has to give you the ability to create on the fly journeys as it makes you nimble, rather than just talking about it. Flexibility goes beyond your vendor. It starts with you and having a nimble and balanced approach to "how you do" your email program.

# EXPERIENCE

It goes beyond beautiful creative, a great welcome email, or a fantastic offer.  
The experience starts when someone wants to sign up for your program till the end  
when someone wants does not want to receive any more communications from you.

Every interaction your subscriber has with your brand might be their last.

**Make it count.**





## EXPERIENCE PILLAR #1 – the sign up.

One of the most critical areas of experience often overlooked by many is signing up for email on a company website. There is a push-pull between those that "own" the site experience and those under pressure to grow the subscriber base. Most often, the email marketer has little to any influence over how people sign up, and in some experiences, it shows.

Some brands have the sign up at the bottom of their website in 4pt font, others have an interstitial that interrupts the web experience, and even worse, some brands have a six-step process capturing every piece of personal information and creating a username and password just to get access to deals or information. It is especially troublesome when none of that information gathered is ever used to "personalize" their experience.

Signing up for email should be developed through the customer's lens and not bias by web designers, site owners, or other marketers. The fundamental premise of signing up for email is intuitiveness, with the customer as the focus.

**Don't ask for information you will never use.**

## Seven tips to maximize the sign up.

- .....● Ask for what you need and will use, not what you "want."  
If you ask for more information, accept that people might abandon the process quickly..
- .....● Pressure test the sign-up experience with people outside of marketing. It might be intuitive to you, but you need to view it through your subscriber's lens.
- .....● Test the location, the copy, the tone, and the sequence of the sign up with your web team. There are lots of tools to help.
- .....● Ensure that once someone does sign up, they are made aware of it on a web page. In fact, please send them to another page indicating that everything is ok and what comes next.
- .....● Try to grab user-sentiment right after the sign-up. Making it a simple thumbs up or down will help with optimization efforts.
- .....● If you require that an account be set up, ensure that you indicate the number of steps people have to take to get there.
- .....● Make the process fun and filled with your brand identity and tone. The individual is spending the time giving you their information, so reward them with your personality

## EXPERIENCE PILLAR #2 – *the first email.*

The first email to land in your subscriber's inbox sets the tone and the impression of what is to come. If someone went through the process to sign up, it is crucial to start the relationship by sending the most effective email.

This email is often the most engaged email you will ever have in your program and there are essentially four best practices for this first email.



Be immediate



Be valuable

### BEST PRACTICES FOR THE FIRST EMAIL



Be unique



Be focused





## Be immediate

People like and expect things to be fast in 2021, and consumers' expectations for every organization continue to rise exponentially. The days of batching the first email to people within 12-24 hours are no longer acceptable, and to be honest, very 2006. The problem is that even with 76% of the people expecting an immediate welcome email, the reality is that only 50% of brands do this.

Your first email should land in the subscriber's inbox in near-real-time and not a minute over an hour. Commit to starting the relationship quickly and efficiently.

**Every moment counts.**

76%

of people expect to receive a welcome email **IMMEDIATELY** after subscribing to your program.

Source: invesp

50%

of welcome emails are only sent **IMMEDIATELY** after subscribing to your program.

Source: invesp

## TIP:

The best time and day to send your first email is to first inform them via the web experience that it's coming and send it as quickly as possible.

Casper

# Hello, dreamer

Welcome to Casper! You're now joining a community of over 1,000,000 well-rested sleepers making the world a little brighter. But not too bright, it's bedtime after all.

Let's get sleepy

Here's what you'll get...

**Latest snooze**

Be the first to know about our latest and dreamiest products.

**Early access**

You'll get first dibs on our sales and special promotions.

**Bedtime reading**

Learn sleep tips and more with the Snoozeletter.

**Free shipping**

Enjoy fast, free delivery on every Casper order\*.

Ice Cream in Your Pocket?

Yes. Please!

With the Baskin-Robbins Mobile App, you can access deals, pay instantly, send gift cards, save events and more. Plus, you'll get a free scoop when you download and sign in.<sup>3</sup>

GET IT ON Google Play

Available on the App Store

WELCOME TO DD PERKS!

# YOU'RE IN!

This is the beginning of a brew-tiful relationship! Enjoy these benefits and start earning today.

MEMORIES MADE FRESH DAILY

Remember when you took your first sip of an A&W Root Beer Float? How about when you enjoyed a Coney Dog and Onion Rings with your grandparents at the drive-in? If you look hard enough, you might even find a once frosty baby mug in the back of your mom's cupboard.

AS A MUG CLUB MEMBER, KEEP AN EYE ON YOUR INBOX FOR:

A celebratory A&W Root Beer Float on your birthday!

Special Offers & Discounts for your favorite A&W items

Sneak peeks at upcoming menu items and events

100 years worth of A&W history and fun trivia

THANK YOU!

YOUR INBOX IS ABOUT TO GET A LOT SMARTER WITH THE HUNTINGTON LEARNING CENTER NEWSLETTER

Your business has a story, and we have everything you need to tell it. From packing services to postcards and banners, you can count on us to give your brand the professional and polished appearance you're looking for.

Build Your Brand

## Be valuable

Value can be subjective to people, but your first email must have the right balance of promotion, education, and evangelization of your franchise.

A great welcome email has several key components to add value for each subscriber.

- A warm and humanized greeting (e.g., Use of the words “happy,” excited” or “thrilled”)
- Setting expectations on what is to come (frequency, the day of the week you usually send, what is next and when)
- A brand promise
- A reminder of the benefits of signing up
- A clear and concise CTA (call-to-action)

You should not load the email with multiple calls to action or a long scroll experience. Attention spans today are as short as ever, and there is always time to expand on other topics such as social or app experiences in future emails.

iPost





## Be unique

Being unique in email doesn't always mean being funny or weird. It means that you should feel free to test your brand's tone, value proposition, and voice through email.

For example, suppose a unique differentiator of your franchise is donating profits to help others or volunteering events four times a year. In that case, this is something that should be highlighted in almost every email you send.

Email has the power to reach thousands or even millions of people, and it is your chance to spread your uniqueness over and over.

Subsequently, you can be unique in your creativity, your landing pages, and even in the Use of personalization. Many organizations have data or conform to what others in their competitive space are doing, and while that isn't necessarily wrong, it's just dull.

The first email for many franchisees is usually the last email before "marketing" or "sales" campaigns kick into high gear. What if you as a franchisor took a unique approach and held out new subscribers to create a series of first emails explaining and educating your subscribers on ideas you are passionate about in the franchise world.

Passion creates uniqueness, and it is up to you to show your franchise's passion in the unique experience you can provide to those that interact in your email program, from the start until the end.



## Be focused

Focus is hard in email because franchises want to concentrate on driving more revenue. While we can't argue that revenue plays a critical role in an email program, so is gaining and keeping loyalty.

The first email is critical for content, but it should not contain everything about your brand and program. As marketers, we know our products and value propositions better than everyone else, but unfortunately, we cannot expect a new subscriber to realize them from just one email.

There are many components to your franchise that will take time for people to learn. Being focused can also create curiosity for what is to come next in email. Curiosity creates desire. Desire makes a willingness to accept what is next.

EXPERIENCE PILLAR #3 – the remainder.

Every single email or touchpoint from an email with your franchise is an opportunity for you to engage or lose your audience. If you have optimized Pillars 1 & 2 and think your program can run on auto-pilot, you would be wrong. The experience beyond the first two interactions plays a vital role in sustaining a relationship that needs to be consistently won using data for personalization and behavioral emails. The creative part of the program, such as templates, tone, subject lines, mobile versions, and even pre-headers, needs consistent optimization.

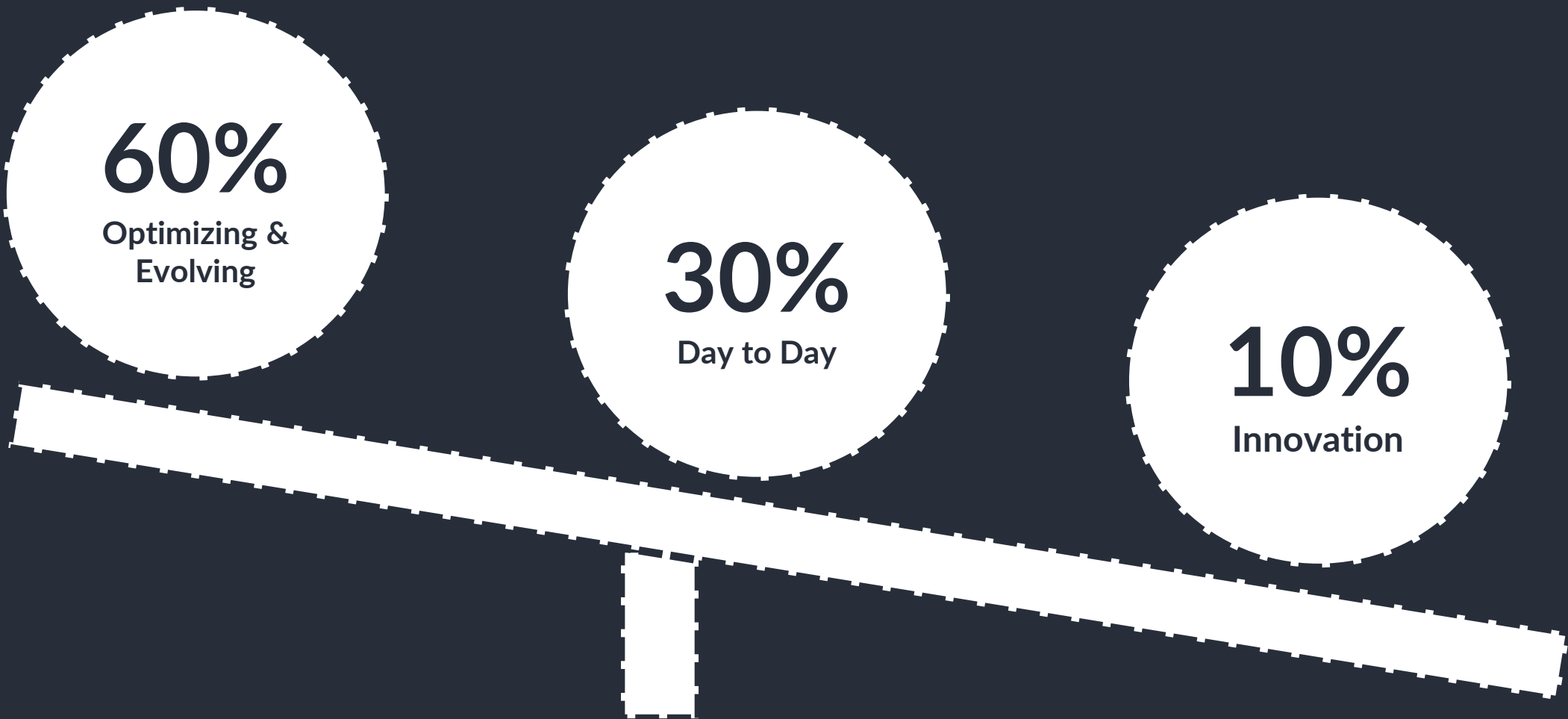
The difference between a good vs. a great email program is the amount of time you spend optimizing and evolving the experience vs. just running it a day today. It would be best if you strive for a 60/30/10 dedication balance.

To illustrate the level of effort and potential impact of franchise email experience tactics, a prioritization grid has been created. This grid should help you decide on where to focus 60% of your efforts.

Later, in this whitepaper, we will be discussing the optimization process and the need for a nimbleness model for test and learn.

TIP:

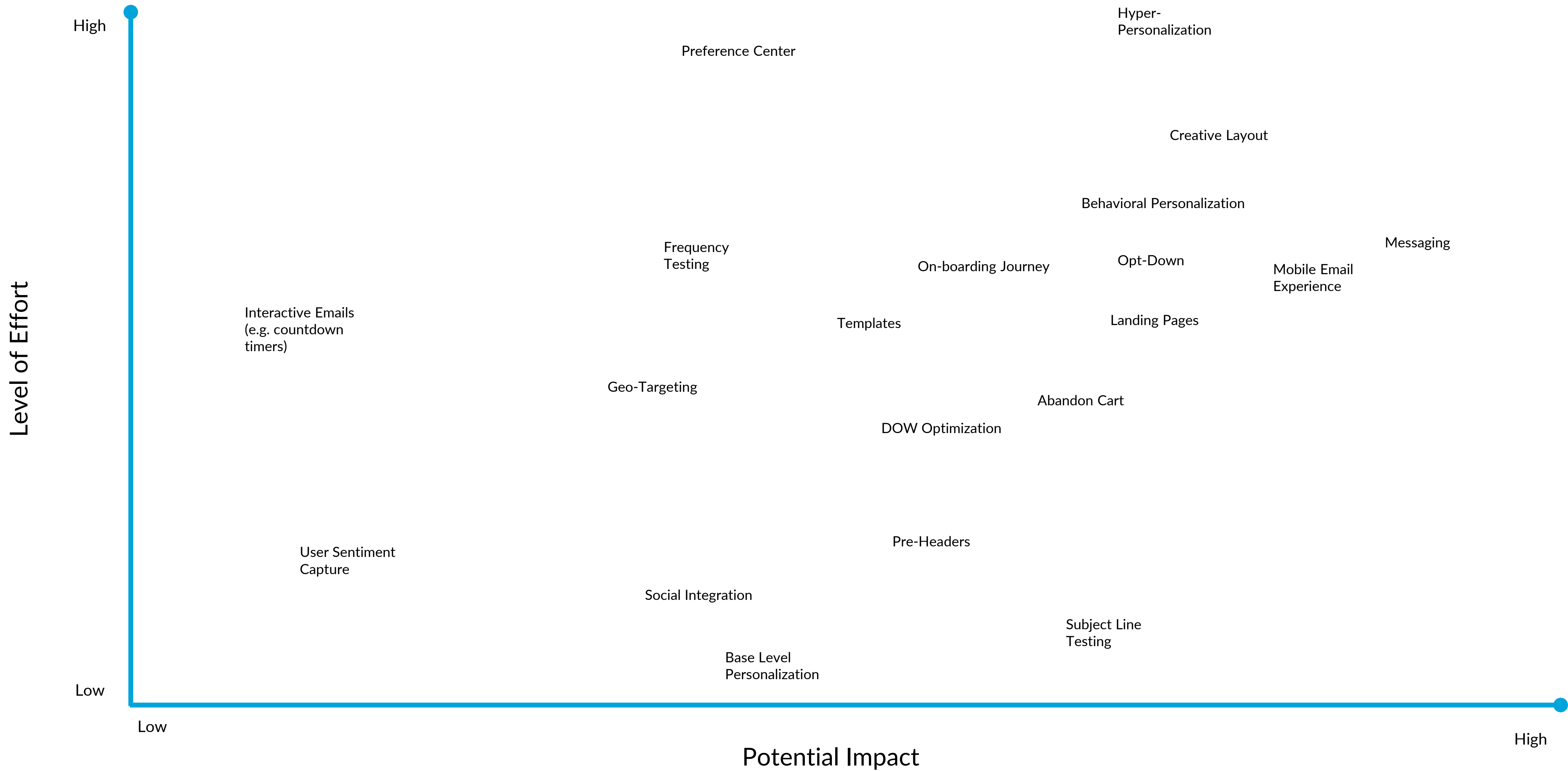
*A great franchise email program centers around you striking a balance of where you dedicate your efforts.*





# Franchise Prioritization Grid

*\*see appendix for definitions*



# ADAPTABILITY

There are many choices when it comes to selecting a provider to send your email. Ease of Use, flexibility, and growth are essential aspects, but one thing that should not be overlooked is if the provider has built it with YOU, the franchisor, in mind. Anyone can send email, but not everyone has the franchisor business model in mind.

**Choose wisely.**



## Built for the franchise

The challenges for franchise email marketing are more significant than that of retail and publishing because of the unique business structure and value proposition. These challenges are time-consuming and include

1. Sharing creative assets
2. Sharing content with locations
3. Share data with locations
4. Brand control
5. Granting and restricting permissions
6. Platform training
7. Creating sub-accounts for your franchise network
8. Granular and roll-up analytics

These eight challenges hinder efficiency and growth, so you must have a technology partner who understands your business and has built a solution that makes the hard things simple allowing you to focus on growth and an optimal experience for your customers.

**Adaptability is not a journey; it's a continuous road aimed at success.**





# DELIVERABILITY

The best creative, segmentation, and offer won't get you into the inbox; neither will your brand or logo. Each ISP has its ways of determining whether your emails get to the inbox or bulk folder. It boils down to your reputation, which ultimately you are responsible for. However, it also helps to partner with the experience and the patience to guide you along the way.

**It pays to deliver.**



## Deliverability vs. Delivery and what matters.

Email delivery and email deliverability are two entirely separate things and should never be used interchangeably when discussing your program's success or issues.

Email delivery is whether or not a receiver accepts your email and does not bounce, while email deliverability refers to where the message ends up after it has been accepted.

Deliverability can be to the inbox, the spam folder, or another folder designated on the recipient's end.

Email deliverability (aka “inbox placement”) is the single most important metric in your email program because all other engagement metrics tied to your plan depend on whether or not your email made it to the inbox. In 2019, Validity reported that the average deliverability rate in North America was 82%, which means 18% of the list never laid eyes on a single email.

Imagine if your list had 500,000 subscribers and you were to increase your deliverability by 8% (from 82%-90%) and 40,000 more people had the the chance to see your message. By taking your current open and conversion rate, how much is it worth to monitor and optimize your reputation?

Spam filters and mailbox providers continue to add complexity to their algorithms, and long gone are the days of trying to circumvent the system to get into the inbox. To be clear, there are no special phones, no tricks to the trade, or a direct line to a postmaster to clear things up if you get in trouble. Filters and providers don't care if you have a recognizable logo or a startup; they only care about one crucial thing; your reputation and the factors that make up that reputation.

“your **reputation** and the **factors** that make up that reputation.”

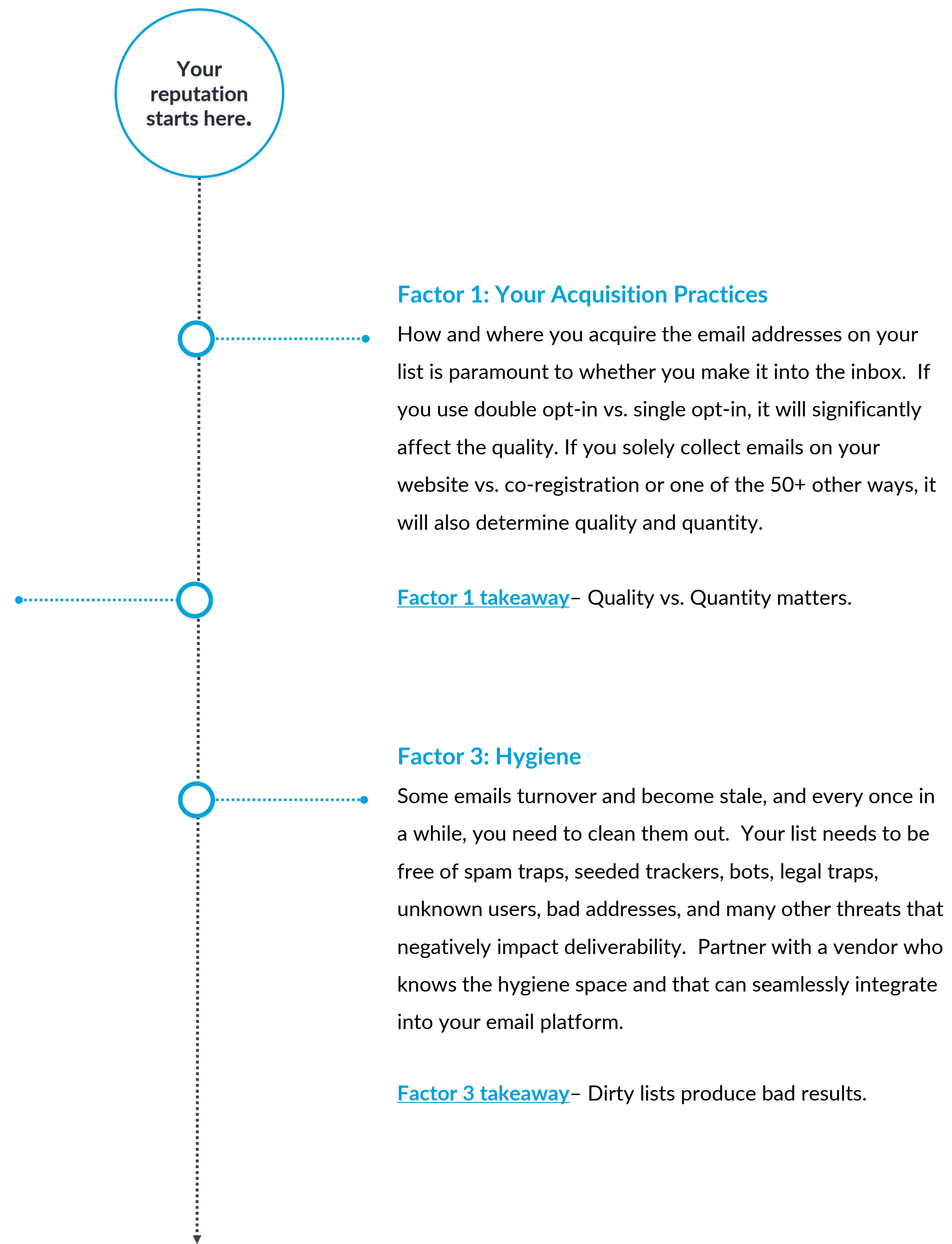
### Factor 2: Authentication

Properly authenticating your emails is a way to indicate that the email you send is not forged. It ensures that you are legitimate and allows for mail servers to do identification checks. If you fail to pass, you run the likelihood of your emails being blocked. There are three main types of authentication:

- SPF
- DKIM
- DMARC

A good technology partner will know how to implement all three, but a GREAT technology partner will help you monitor them as well. Remember, inbox deliverability is your responsibility but having a partner to monitor and mitigate is critical.

**Factor 2 takeaway**– Authentication is like an insurance policy, you need it, but there is no guarantee.





Factor 4: Content

Unless you have been asleep for the last 15 years, content and relevancy go hand in hand. Your franchise needs to align a content strategy and ensure that it carries over to your email program. Franchise content should:

- Be human
- Be clear
- Be actionable
- Be beneficial
- Be personalized
- Be tested

Factor 4 takeaway– Content gets you engagement. Engagement gets you reputation. Reputation gets you into the inbox.

Factor 6: Technology

No technology partner in the world can claim better deliverability than others, because as discussed, your reputation is the deciding factor to great email deliverability. However, having a technology partner that understands the franchise vertical to enable you with the right tools such as multi-tiered accounts and content control that your email program more efficient and manageable is key.

Factor 6 takeaway– At its core, sending franchise email is easy. Sending great franchise email is hard. Look for a partner that invests and designs its product for the franchise model.

Factor 5: Bounces, Spam Traps and Complaints

Bounce rates significantly affect your reputation, and maintaining less than 5% is a best practice. Hygiene will help avoid spam traps but knowing how to mitigate and offer guidance around a grey vs. a pristine trap leading to a blacklisting takes resources and expertise. Complaints happen because subscribers get frustrated with one of the many factors around the emails they receive. The button is easy to find, but it is damaging to you as a franchisor. A best practice is to keep complaint rates below .3% while the gold standard is .1%. Each of these areas takes patience and ongoing monitoring leading to optimization is a specialty.

Factor 5 takeaway– Proactive vs. reactive makes all of the difference.

Factor 7: Compliance

GDPR, CASL, Can-Spam, CCPA are privacy and compliance laws currently enforced and affect the email industry. Over a dozen other states have compliance laws in the works, which means everyone will need to comply. Most of the laws center around consent, identification, personal data, and violations that can cost organizations millions of dollars. Permission is the key to compliance. Ensure you have opt-in permission to send and keep an audit trail of the data you hold on each subscriber.

Factor 7 takeaway– If you don't have permission to send, then every other factor doesn't matter.



# OPTIMIZATION

The background of the slide features a person from behind, looking at a wall densely covered with various sticky notes, diagrams, and sketches. The person has short brown hair and is wearing a light-colored sweater with dark horizontal stripes. The wall is a collage of ideas, including flowcharts, text notes, and small images, creating a creative and analytical atmosphere.

There is a stigma associated with testing in email. It's talked about often, but not many organizations do it consistently. Adapting a test-and-learn mindset is difficult as there are many things to do, but in the end, it's the only way for the program to grow.

**Commit to testing to grow.**



## You need a nimbleness model to get started with optimization

"Just test it" is a phrase that all email marketers have heard one too many times. Every conference, every vendor, and every thought leader has pushed the idea of email testing for years. Some studies in the past show that 20%-40% of marketers do not perform any email testing regularly. Regularly means that you are, at the very least, testing one element on at least 60% of all your email sends. These regular tests can be one-offs, such as subject lines, or something more substantial in time, such as messaging or creative elements.

If you don't have a plan to test regularly, your franchise might be missing out on a few critical areas for your program's optimization. Missed opportunities inhibit engagement, increase the likelihood of attrition, and, most importantly, hinder revenue growth. There is an impact on every email test performed. It starts with the organizational mentality.

If you are a franchise that subscribes to agile methodologies, then a nimbleness mentality when testing should be easily adaptable. The key to a nimbleness testing mindset is to organize your tests into one-week sprints and quickly make decisions based on statistically significant results while looking for ways to revise the plan to beat the new control fast. There are four elements in a nimbleness mentality for email testing.

- Prioritization
- Fluidity
- Decisioning
- Vaulting

A nimbleness model does not happen overnight, even in the most progressive of organizations. You have to give careful consideration to each element and ensure that everyone involved is aligned.



**Prioritization** in a nimbleness model means that you must weigh the test outcome with a potential impact on the program as you rapidly develop your plan. For example, some tests, such as one-off/one-time of day tests, are easy to pull off but offer little to any long-term programmatic impact. Prioritization will separate the nice-to-have tests from the need-to-haves.



**Fluidity** is hard. Organizations like the feeling of being comfortable and don't like it when things change rapidly. In email testing, we need to be prepared to change and ensure that the test plan or calendar changes based on prioritization or results. For example, if we were running a COI (Confirmed Opt-In) subject line test but found out that CTOR (Click-To-Open-Rate) rates were still underperforming, we might want to change the next test in our COI plan to do several words/characters in the copy to images.



**Decisioning** is about empowerment. In a nimbleness model, a small group of people must have the ability to make decisions quickly based on data from the tests. Long gone are the days where a monthly review of tests is presented to the broader marketing group where many people weigh in on the next steps, which have little to no closeness to the email program. This small group should consist of the email program owner, an analyst, an agency, an ESP strategist (if available), and one other representative from the marketing department.



**Vaulting** is the act of creating an on-demand library of all your test results. The key to vaulting is to look at proposed tests and historically look at the outcomes around those tests. The statement of "we have already done that" should always be backed up with that test's categorical results. For example, if we wanted to test an urgent vs. humanized tone in our holiday kickoff campaigns, having a vault of how critical or humanized tones in subject lines performed in the past might change our decision to do so. We can then decide to either repeat or modify this test in a multitude of ways.

- ✓ **Step 1:** Create a testing charter
- ✓ **Step 2:** Download the testing calendar from iPost.
- ✓ **Step 3:** Create a hypothesis
- ✓ **Step 4:** Determine the LOE (level of effort for each test)
- ✓ **Step 5:** Prioritize impact
- ✓ **Step 6:** Decide on KPI's or metrics
- ✓ **Step 7:** Find a statistical significance calculator
- ✓ **Step 8:** Fill out the calendar (reasonably)
- ✓ **Step 9:** Execute and track
- ✓ **Step 10:** Keep results in a "library"

## Your checklist to start testing and optimizing

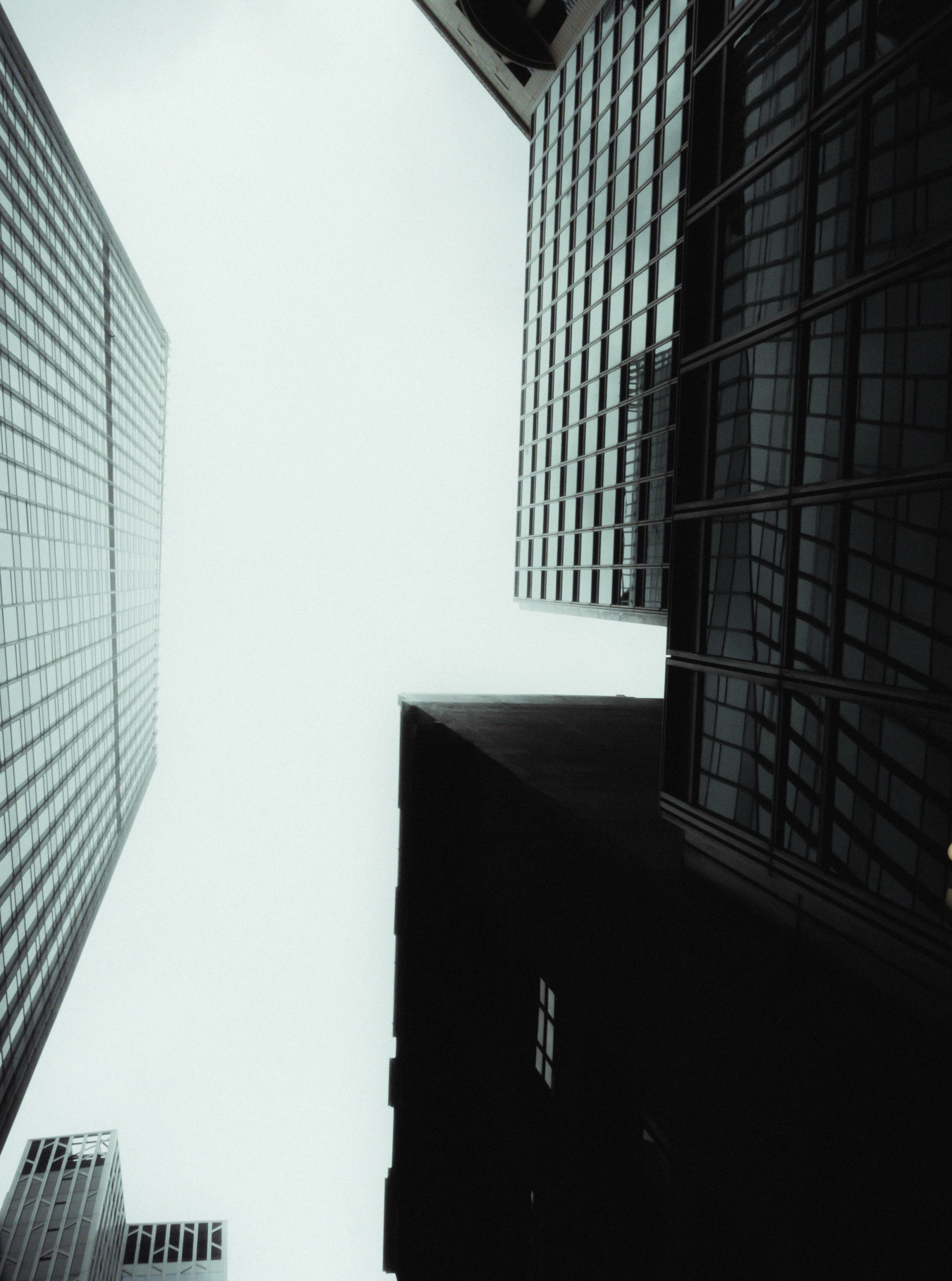
One of the most wellknown marketers of the last century, David Ogilvy, said this of testing: "Never stop testing, and your advertising will never stop improving." I think it is fair to say that most people believe that email testing will improve engagement and revenue, but many are confused about where to start. iPost has created a checklist for you and your franchise to get started in email testing.

First, the testing charter sets the foundation on why testing in email is vital in the program and how outcomes influence the other channels. Second, iPost has created a specific email testing calendar with an example that helps your franchise with steps three thru six. The importance of understanding the LOE vs. the impact is critical because some organizations execute tests with little to no effect on the program, which in turn causes frustration at all levels that sometimes leads to abandoning testing.

It is recommended that you start testing slowly, minimize the level of effort while maximizing impact, and limit tests to 1-2 a month to avoid burnout. The calendar plays an essential role in franchises because it allows you to localize and socialize testing among various marketers. The results should be kept separately outside of the calendar for reference and ideas for future testing.

The idea of testing in email can be daunting, but once you start and work with a partner or organization that knows your business and you see results, it can become addictive and fun.





## Testing by the numbers.

Email testing works, and to illustrate that point, imagine your current subscriber list is 500,000, and you were to execute a simple 50/50 - a/b subject line test.

- Subject Line Test A to 250,000 subscribers yields a 22% unique open rate.
- Subject Line Test B to 250,000 subscribers yields a 28% unique open rate.

Subject line B would yield you an additional 15,000 openers, and depending on your call-to-action, conversion and average order could result in a substantial lift in ROI. Numbers and results never lie.

Imagine if you did this on every send and were able to get more and more complex (10/10/80 or hybrid multivariate testing) in your test and learn culture and see even greater results!

**Testing works. Period.**





**iPost is an Advanced Email Service Provider (ESP) built for the Franchise.**

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# APPENDIX

# Prioritization Grid Definitions

## Preference Center

A preference center is a hosted web page where subscribers can add personal information that would influence what type of content they would receive. It can also be used to change the amount of emails received as well as add or delete subscriptions to various email programs.

## Hyper-Personalization

This type of personalization is commonly called 1:1 personalization where the content, offers or anything inside the email is meant for that one subscriber. One email can contain thousands of personalized content and it typically driven by data.

## Interactive Emails

Interactive emails allow the subscriber to interact or view parts of the email without leaving the inbox. Examples include hamburger menus, product or content carousels, social media feeds and even countdown timers.

## Frequency Testing

The amount of email a person receives is tested for list attrition. The goal is to arrive at an optimal frequency for each subscriber using data and insights.

## User Sentiment Capture

Allow the recipient to indicate of the email or web experience was optimal. Typical ways to capture are with thumbs up/down or a variety of emoji’s with emotional “faces”

## Templates

A email template is a reusable HTML file that is used to build email campaigns. Templates can be reused to build multiple campaigns and contain various layouts.

## On-Boarding Journey

A series of emails that are sent over a period of time to introduce the brand and its value proposition. Typically a journey is automated and is timed based on the users opt-in date.

## Opt-Down

Acts either independent of a preference center or embedded into a preference center which allows for the subscriber to chose the frequency of email sent to them.

## Landing Pages

A single web page that is designed to convert from an email. Landing pages are effective for very specific calls to action in an email campaign.

## Creative Layout

The creative layout of email refers to how copy or CTA buttons are positioned in the email. There are tens of thousands creative layouts that can be created in order to maximize conversions.

## Social Integration

Social integration is NOT placing your social media icons in the email. It is about integrating both messaging and specific campaigns where the channels work together.

## Base-Level Personalization

Junior to hyper-personalization, base-level is typically the use of first/last name, location or gender and is considered a gateway into the more complex forms of personalization inside the email.

## Pre-Headers

A short summary text that follows the subject line when viewing an email from the inbox. Modern email clients (mobile, desktop and web) show them as a way to tip off the reader on what message is all about. It is a complement to the subject line.

## Subject Line Testing

Subject lines can be tested in A/B or A/B/C format where the franchise can see what subject line performs better based on opens or clicks with the email. A valid SL test would involve testing elements such as tone or the use of characters to encourage engagement.

## Mobile Email Experience

How the email looks when the subscribers opens and engages with it on a mobile device. There are several types of emails for mobile experiences, each with pros and cons.

## Messaging

How you say what you want to say can affect how people react to it. Messaging involves the use of language and tone to everyone.

## Geo-Targeting

Using data acquired at sign-up or appended data, targeting individuals based on their location can be beneficial for franchisors, especially those that have many locations.

## DOW Optimization

There is no best practice around what day of the week to send an email. Your franchise needs to test engagement metrics around each day to determine this. However, certain vendors might have a send time optimization tool (STO) built into their platform.

## Behavioral Personalization

Targeting subscribers using email based on their behavior is extremely effective when done right. An example of a behavioral email would be a website browse abandon email with content recommendations or relating to what they viewed.

## Abandon Cart

An email or a series of emails sent to those subscribers who leave items in their cart. It’s main purpose is to get the recipient to go back into their online profile and shopping cart to convert.