Guide to B2B email marketing

PartThree: Building great emails

Experian™

Executive Summary
of Recommendations

Take a look at our guidelines for
building great emails in this quick,
at-a-glance format

Technical

- Email creative should be no wider than 700 pixels.
- Inline stylesheets can be used to format text, but Experian recommends using regular HTML font formatting for guaranteed universal acceptance.
- Do not use JavaScript since most email clients will not accept it.
- Forms are not recommended, but can be used if the mailing doesn't include Hotmail users. Even then, the form should be very basic and not employ JavaScript.
- Creative can be coded using colspans, but Experian recommends using a stacked table structure since it is more stable across all email clients.
- Flash should not be used within an email template. If Flash is required for the campaign, consider directing the user to a hosted landing page to view the Flash piece

Creative

- All featured creative, navigation bars and content that has a high priority, should appear in MS Outlook's Preview Pane area. The average measurement for this area is 300 pixels from the top of the email.
- Featured content should also appear "Above-the-Fold" when using a web-based email client like Gmail and Yahoo! The average measurement for this area is 420 pixels in height.
- The entire template design should be encased in a 1-pixel border. This will "seal-off" the template and present it as a unified design element to the user.
- Consider adding more organic shapes into your template design. Email creative is displayed through applications which have very rigid, box-like layouts. Adding images with people, or designing with curves will make your template work harder visually to attract the users interest.
- Make sure that the featured content in your email exists in HTML text, not only images. With Gmail and other email clients that don't display images by default, the user won't be able to initially see any content that's in an image unless they opt to turn the images on.

Introduction

Why your design matters and how to make it better

Unlike websites and other online elements an email initiates the contact with the user. Typically, online elements like websites and Flash pieces are visited by a user and therefore only have to hold the users attention. Since the user has an interest in the content they are visiting, they will tolerate inefficiencies such as slower loading times and non-intuitive navigation.

Conversely, an email appears in a user's inbox and starts working through the preview pane area and subject line at getting the user to open it. Not only does it have to hold the users attention, it has to make the user open and interact with it when they might not initially have intended to.

A strong design will help ensure delivery, grab the user's attention and encourage them to act. In addition, integrating the email visually with the rest of your online and offline properties will reinforce your brand with the user, which will make them feel more comfortable clicking and interacting with it.

Email design principals are significantly different from those of web page or print design. Although they have similar goals, email designers must take into account other factors such as email client and browser limitations, optimizing for the preview pane and call-to-action placement - just to name a few. Testing has shown that strictly adhering to these best practices doesn't guarantee to raise click through and open rates. It will only ensure your creative is compliant for ISP/email client delivery and browser rendering.

Formatting recommendations: Technical

Discover the keys to coding your emails properly

JavaScript (JS)
Javascript is supported by all web browsers, but not all email clients. Since this is the case, it is recommended that JS is not used so that the email is universally accepted.

Forms
Forms may be used in emails as long as they don't include JavaScript functionality and aren't mailed to Hotmail users since they don't support form functionality. Some email clients, most notably Mac Mail do not support forms that use <form method="post" action="http://....> Because of this, you'll need to use the <form method="GET" action="http://...> approach. This will write all forms content to the query string of the page they are posted to.

Experian can assist you with segmenting these email services.

Background tags and colours
Background tags are stripped by some browsers and email clients, such as Netscape. If the creative calls for a background image, Experian recommends nesting it in a table within the body stretched to 100%.

Define the background color default to white (<BODY BGCOLOR=#FFFFFF>). While most email clients have a white background default, others -such as WebTV-use grey or even black. For example, failure to use a white background may produce e.g. black text on a black background. White backgrounds with dark text also allow for easy printing.

Troubleshooting the HTML
Always check your code on Firefox, Netscape and IE, as well as on both the PC and MAC platforms. Make sure to close all HTML tags as leaving off </td>, </tr>, </table>, </body>, </HTML> tags are the root of most HTML email problems. These errors will cause email clients and browsers to read your email differently. What might look perfect in Internet Explorer may look vastly different on Firefox.

Additionally, a missing section is usually due to a missing </table> tag. Incorrect alignment between sections is often due to a missing <table> or <tr> tag. Experian recommends that a closed </TD> tag be brought up to the preceding line - not left on its own. Otherwise, it can add extra unwanted space.

Also, be aware of browser limitations and use universally supported HTML tags rather than tags that are Internet Explorer or Netscape Navigator specific. Always include both height and width tags to specify images sizes as well as table cell dimensions.

Header tags
Avoid the use of any header tags (any tag above <body>), as web-based emails systems, such as Hotmail and Yahoo!, replace all header tags with their own HTML code. This includes using header stylesheets also.

Avoid:
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">
<html>
<head>
<title></title>
</head>
<body bgcolour=#ffffff">

Instead use:
<html>
<body bgcolour="#ffffff">

Rowspans and colspans

Avoid the use of rowspans when coding your HTML email. They will not be displayed correctly in several email clients, including: Lotus Notes, and Hotmail. Use colspans only, or nested tables instead.

ALT tags

Adding an ALT tag to your image tags will ensure that if, by chance, any images are broken when a subscriber receives your email, your subscriber will have an idea of what is missing. ALT tags also satisfy accessibility issues, conform to W3C HTML 4.01 specs, and allow the disabled to read and receive their emails.

ALT Tag Example
<IMG SRC="http://imageserver/images/footnotes.gif" ALT= "This image is of the page". border="0">

Formatting recommendations:
Creative

Learn the rules to designing emails that achieve maximum visual impact

Preview pane area
Outlook's preview pane window is a commonly overlooked element in email designs. The designer only has, at the most, 300 pixels of height to present the email's main content and navigation to an Outlook user. In this case, since the user doesn't have to open the email to preview its content, this section should communicate the main message of the email quickly and efficiently.

Above-the-fold area
The area that appears above the browser's bottom window bar is called the "Above-the-Fold" area. This is especially important for browser-based email clients such as Hotmail and Yahoo! The "Above-the-Fold" section on a 17" monitor with a resolution of 800 x 600 is 420 pixels in height.

In most cases, these extra 120 pixels of space are used for content that supports the preview pane area design. It is important to note that this area should be visually engaging as well, since this is the first thing Hotmail and Yahoo! users will see when they open the email.
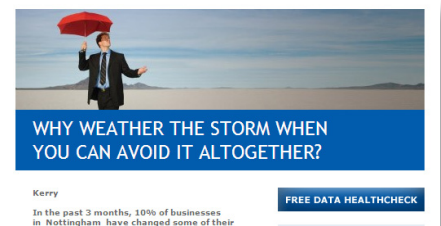
**Technical Note:
When laying emails out using Photoshop and Illustrator, it's always useful to set the guides at 300 and 420 pixels to designate where the preview pane and above-the-fold sections appear.**

Calls to action (CTA)
CTA phrases like "Click here to…" or "Read more…" let the user know what they can click on and what content will be behind the link. CTA's aid users in making content and navigation decisions and generally guide them around the design. Break the phrases out visually using a heavier font weight or slightly different colour.

Email file size and physical dimensions
Experian recommends that an HTML email's width does not exceed 700 pixels. This will leave ample room for elements like Hotmail and Outlook's navigation bars. Anything wider will push some of the email's content off the user's screen and force them to scroll horizontally to uncover it.

Preview pane view

Above-the-fold view

Stylesheets

Experian recommends using inline stylesheets to format text. You can also use regular HTML to control how text in the design looks.

Here's an example of an inline stylesheet: <font style="font-family:verdana. arial,helvetica;font-colour=#000000;font-size=12pt">

Navigation

It is very important to give the user complete control of how they view the email's content and interact with its navigation. For emails that have a lot of content, Experian recommends using "same-page" navigation. This will allow users to jump right to the content they want to read and will not make them scroll down the email to uncover it.

In addition, provide some alternate navigation in the email for the user who doesn't find the content interesting. This navigation could be in the form of external links to a website or a Flash presentation. The more options the user has, the better.

Image usage

Never have important content appear only in an image. If that image fails to load, the main message of the email will be lost. This is important since more and more email clients, like Gmail, won't display images in an email unless the user takes action to do so. Also, avoid spaces in your HTML code between an <img> tag and </td> tag. Some browsers will read this space as an actual space in the overall layout which can lead to "cracked" graphics.

HELP YOURSELF TO HOT, FRESH NEW BUSINESS LEADS

Dear Kerry

Thank you for your interest in building targeted business lists and talking to us about the new leads we can offer you.

If you'd like to build your business leads quickly and easily online-register with Experian B2B Prospector and we'll give you 100 free records on your first order to start you off.

To claim your 100 free leads, build your list then enter promotion code 'NEWUSER' at the payment stage*.

With our great access to the National Business Database (NBD), B2B Prospector truly combines Yell and Thomson data, making it the most comprehensive business database in the UK.

It's quick and simple to use, and to make sure your business lists are never past their sell-by date, we update our our records, and add new ones as soon as they become available.

• **Check the businesses before you buy**
- See the data and get a feel for it before you commit

• **Easily manage your own lists**
- Build your lists when it's convenient for you

• **Immediate updates**
-Our online data is updated as soon as it becomes available, so your leads are the freshest possible

• **Instantly downloadable lists**
-Use your data straight away and get immediate results

• **No minimum order value**
-Buy as few or as many leads as you need

GET YOUR 100 FREE LEADS

The quick, simple way to build marketing lists

Details of over 2m ready to mail records. Data unique to Experian on company activity and performance. Detailed search criteria to help you find the right leads.

Experian
A world of insight

Incorporating
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Email client deliverability

Experian conducted a test across major email clients to gain a definitive understanding of what constraints each were placing on the creative efforts of permission based senders. Below is a detailed accounting of the results.

Gmail:

- Flash does not work and cannot be loaded
- Mailings using colspans AND rowspans rendered correctly
- Mailings using ONLY colspans rendered correctly
- Simple forms like a survey or post code search submit their values correctly as long as there's a script on the main site that will analyse and check the information, and no javascript is used
- Javascript doesn't work and should not be used
- Emails with a file size of 100k will make it to the inbox
- Stylesheets used in the header areas of the HTML document WON'T work
- External stylesheets or referenced stylesheets (.css) file that is located on an external server WILL NOT work
- At the time of testing, image maps appeared to be working properly.
  Gmail has had some issues in the past with the way it handles image maps. Please be sure that image maps are needed before using them
- Inline stylesheets render correctly inside the body of the HTML document but a style should be made for the links in the email so that they don't default to Gmail's link style
- HTML entities (&amp:for &) work correctly in both their text and numerical forms
- Single background images defined in the <td> tag will appear, while background images defined in the <body> tag do not
- HTML email designs can have a 700 pixel width and still be visible on a 17-inch monitor.

Yahoo!

- Flash does not work and cannot be loaded
- Mailings using colspans AND rowspans rendered correctly
- Simple forms like a survey or postcode search submit their values correctly as long as there's a script on the main site that will analyse and check the information, and no javascript is used
- Javascript doesn't work and should not be used
- Stylesheets used in the header area of the HTML document WILL work
- External stylesheets or a referenced stylesheet (.css) file that is located on an external server, WILL NOT work
- Emails with a file size of 100k will make it to the inbox
- Inline stylesheets render correctly inside the body of the HTML document but a style should be made for the links in the email so that they don't default to Yahoo's link style
- HTML entities (& for &) work correctly in both their text and numerical forms
- Image maps function properly
- Single background images defined in the <td> tag will appear, while background images defined in the <body> tag do not
- HTML email designs can have a 700 pixel width and still be visible on a 17-inch monitor.

Hotmail/Windows Live:

- Flash does not work and cannot be loaded (both flash emails were sent to the junk folder)
- Single background images defined in the <td> tag will appear while background images defined in the <body> tag do not
- Mailings using colspans AND rowspans rendered correctly
- Mailings using ONLY colspans rendered correctly
- Forms do not work and will not submit their results
- Javascript doesn't work and should not be used
- Emails with a file size of 100k will make it to the inbox
- Image maps function properly
- Stylesheets used in the header area of the HTML document WON'T work since Hotmail's main stylesheet overwrites the entire head tag
- External stylesheets or a referenced stylesheet (.css) file that is located on an external server WILL NOT work
- Inline stylesheets render correctly inside the body of the HTML document but a style should be made for the links in the email so that they don't default to Hotmail's link style
- HTML entities (& for &) work correctly in both their text and numerical forms
- HTML email designs can have a 700 pixel width and still be visible on a 17-inch monitor.

Lotus Notes:

- Flash does not work and cannot be loaded
- Using too many images that are too large can cause them to be misconfigured
- Lotus Notes does not support forms
- Lotus Notes strips out Javascript (may vary by version)
- Mailings using colspans AND rowspans do not render correctly
- Lotus Notes strips out stylesheets (may vary by version).

Pre-2007 Outlook/MAC Mail:

- Flash will work but the user will need to activate their "Active X" controls in the options menu
- Image maps work correctly
- Background images can be used as long as user clicks to view images
- Mailings using colspans AND rowspans render correctly
- Javascript doesn't work and should not be used
- Simple forms like a survey or postcode search submit their values correctly as long as there's a script on the main site that will analyse and check the information, and no javascript is used
- Emails with a file size of 100k will make it to the inbox
- Stylesheets used in the header area of the HTML document work properly
- External stylesheets or a referenced stylesheet (.css) file that is located on an external server render the emails content correctly
- Inline stylesheets render correctly inside the body of the HTML document
- HTML entities (&amp: for &) work correctly in both their text and numerical forms
- HTML email designs can have a 700 pixel width and still be visible on a 17-inch monitor.

Outlook 2007:

- Flash WILL NOT work. Consider sending users to a hosted page where Flash SWFs will play
- No support for forms regardless of how simple they are
- Background images will not load and should not be used
- No support for replacing bullets with images in unordered <ul> lists
- No support for animated GIFs
- Poor support for table cell background colours
- Stylesheets located in the <head> area of the HTML documents will not render properly. Consider using inline stylesheets or plain HTML text to format fonts.

Deliverability summary:

- Flash only works in Pre-2007 Outlook/MAC Mail
- Emails can have a width of 700 pixels and still be fully visible and still be fully visible on a 17-inch monitor
- Javascript does not work and should not be used within an HTML email
- Email can have a maximum file size of 100k and still make it to the inbox
- Inline stylesheets work accross all major Email Service Providers (ESPs)
- HTML entities (& for &) work correctly in both their text and numerical forms
- Mailings using only colspans render correctly
- Image maps work correctly
- Simple forms like a survey or postcode search submit their values correctly accross all ESP's except Hotmail and Lotus Notes

Email clients that block images by default:

Email Client	Default Images On?	Configureable by Users?
Earthlink	Yes	Yes
Gmail	No	Yes
Hotmail	No	Yes
Lotus 7.1	Yes	Yes
Mac	No	No
MSN	No	Yes
NetZero/Juno	Yes	No
Outlook 2003, 2007	No	Yes
Yahoo! Classic & Yahoo! Beta	Yes inbox No spam folder	Yes

Email clients that use preview panes:

Email Client	Default Images On?	Configureable by Users?
Express 6+	Yes	Off
Lotus Notes 7+	Yes	On
Mac	Yes	Off
Mozilla Thunderbird	Yes	Off
Outlook XP	Yes	On
Outlook 2003	Yes	Off
Outlook 2007	Yes	Off
Windows Live Mail	Yes	Off
Yahoo! Beta	Yes	On inbox Off spam folder

Text email guidelines

Tips for when images aren't a neccesity

Look and feel
With text emails, designers have very little control over the look and feel of the email. This includes even the most basic elements of style such as: font type, font color, bolding, italics, centering, etc. There are a number of ways you can spruce up your text email, they include using:
- Space
- Lines
- Special characters
- Capital letters

Width and length of text emails
The width of text emails should not exceed an optimal width of 70 characters. There are no restrictions to the length of text emails, however the longer the email, the more likely any information towards the bottom will be ignored. The more important the message, the higher it should be placed in the email.

URLs
Long URLs will often break in text emails. When URLs break, they may not work. It is always a good idea to keep the length of URLs moderate.

Importing text content from MS Word
Importing text content from Microsoft Word can lead to a few minor problems all stemming from Microsoft Word's non-ASCII characters. While they may appear okay in Internet Explorer, Netscape users will see strange letters.

For example:
MS Word & IE:
 "Free" Money - Just Click Here...!
Netscape:
0Free0 Money 0 Just Click Here0!

Be especially careful with apostrophes, double quotes and dashes! With its default setup, MS Word will replace apostrophes and double quotes with special characters not supported by many email clients. Dashes, when surrounded by spaces, will be replaced by an "m-dash" which is a special character.

Be extra careful with dashes/hyphens inside URLs. In some cases you can avoid the special character problem by staying away from the INSERT SYMBOL tool, however there are exceptions. Below is a listing of commonly used non-ASCII characters:

Non-ASCII characters
- Ellipsis: ...
- M-Dash: -
- Stylised Double Quotes: "
- Stylised Single Quotes: '
- Bullets: ?, ?, etc.

Always put hard returns after every line of your text copy. Failure to use hard returns may cause users to see extremely long lines. This also allows YOU to control formatting, rather than leaving it up to the recipients' email programs. Lines that do not exceed 70 characters will display correctly in virtually all text-mode email programs. Experian recommends using a text editor like notepad or wordpad when creating text for email.

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Look out for our next guide on effective email reporting