



THE PROS AND CONS OF EMAIL MARKETING

PG CALC WEBINAR

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I. Introduction

According to the 2016 USA Giving report, 2015 was America's most-generous year ever. \$373.25 billion in charitable contributions were given, 9% of which represented bequest giving. That was a 2% increase over the previous year. All the more reason to increase your marketing efforts for 2017, and what better way to do that than to add email to your planned giving marketing arsenal. Email marketing is cheap, quick, easy and a great way to reach out to your donors... or at least that's the buzz.

Is it true?

The purpose of this paper is to discuss email marketing in the context of a planned giving marketing program, and to examine the pros and cons. I will discuss why email is effective, debunk some of the more popular myths that are often associated with email marketing, discuss planned giving newsletters, and how sometimes the best decision is not to publish email to your donors. Lastly, we will discuss how to improve getting your emails opened and touch on the importance of email delivery.

II. Why we use email

Email marketing is popular because email is popular. There are over 4.35 billion email accounts and it is predicted to reach 5.59 billion by 2019, a growth of more than 26%. Here are some other fun statistics on email:

- Over 122 billion (122,500,453,020) emails are sent every hour.
- The average number of emails an office worker receives each day is 121.
- The open rate for email in North America is 30.6%.
- The percentage of email that is spam is 49.7%.

Email marketing is thriving throughout the non-profit and for-profit worlds. It is attractive due to the channel's familiarity, flexibility, and universality. This includes the growing multi-

generational number of mobile users who check email on their phones daily. Statistics like these have convinced many planned giving marketers that email is essential for donor lead generation.

Email allows you to build relationships with donors and educate them on planned giving without spending excessively on direct mail printing and postage. Email is effective because...

It's personal

Email is delivered directly to donors' inboxes. They access it at home or the office and it's a personal relationship with you, and the planned giving office. A well-crafted email makes the donor feel that she knows you, and that the message is not just coming from an institution. In fact, it's coming from a friend that she can call for more information. A relationship is being built electronically.

It's targeted

Email marketing can be targeted to improve results. A targeted group of like-minded donors will respond to relevant benefit-orientated messaging that, to them, comes to them from a friend. Targeting can be by age, loyalty, online behavior, etc. If you target the group, but don't target the message, you are missing an opportunity. Your email content must be specific to the list to which you are emailing.

It's trust-building

Because of its personal nature, email marketing provides you with an opportunity to build credibility and trust with your donors. Your planned giving program messaging should carry over the trust established by your charity. If you lose this trust or it is questioned based on poorly written or off-topic emails, you risk damaging the donor's relationship with your charity.

It's cost-effective

Email marketing is certainly less expensive than direct mail. However, it's not free. And without the proper team in place it can be very time consuming. But the real question to ask is not about money or time, but effectiveness. Is email an effective way to reach out to your donors? In most cases the answer is yes. But if you determine after testing email that it is less effective than direct mail, then email is not worth the cost savings.

It's Measurable

Email is much easier to track than direct mail. We can see it being delivered, opened and track the interest of your donors as they begin the journey on your website. This allow marketers to gain a higher level of insight and accountability than other marketing channels. We can learn the behavior of your donors online and discover it in real time.

III. Debunking myths

Don't believe everything you read.

There are many online email marketing gurus who claim there is a perfect subject line length, time of day to send email, or magic "open" words, etc. Not true. Every donor list is different. What works for one entity may not work for all. To find the proper tack, it is essential to test new ideas. Over time, you will learn the behavior of your donor list and become better at anticipating what your donors will open.

That is why it is important to clear up the many dangerous myths that have been repeated online so often that they are considered "facts." These myths can hurt your email campaigns more than help them. Let's look at the six worst offenders.

1. Tuesday is the best day

Yes, Tuesday is considered the most effective day to send out an email marketing message. But isn't Tuesday the day that you rush past after a busy hectic Monday? The logic is that the weekend, starting on Friday, is bad for email since your subscribers are too busy with social activities. On Wednesday and Thursday your readers are too focused on work. So, it must be that Tuesday is the best day. Well, for some lists it may be. But for all?

No.

I am not saying Tuesday has never tested well in some well-read and publicized online articles, and the results have gone viral. But it never was a good day for me in the for-profit world. No better than average. Friday and Saturday were always my best days, and that is because the weekend is when most personal email is read.

How do we apply this to planned giving marketing? We have to take into account that some of our best donors are retired and they can read email anytime. They don't experience that crazy busy Monday, or the overly focused midweek or crazy social weekend. The logical argument for Tuesday no longer makes sense. Also, keep in mind that if all the online guru "fanboys" are sending on Tuesday that might actually now be the *worst* day to send your marketing emails. Won't that be the day with the most marketing? We should re-name it "Delete day" or the "Day you never want to email."

The point is every list is different, and you need to test and test often to determine if there is a trend showing the best day for your planned giving marketing email.

2. You can send an email only once

If you craft the perfect email for your donors and get an open rate of around 30%, good work. But when you think about it, that is not very many potential donors. You crafted the perfect email, yet 70% of your donor list will never see it. Missed opportunity, right?

Not necessarily.

You don't have to send a well-written and well-received email just once. In fact, in the for-profit world the most successful emails may be sent several times. The idea is to get it out to as many names on your list as possible, so at the end of the campaign over 70% have seen it instead of 30%. How do you do this?

It's as simple as it sounds. Take the same email and send it again. Yes, you can do that. You can send it "as is" with just an editor's note saying, "We are re-sending this due to popular demand." Your readers will not mind. In fact, it's not unusual to receive "Thank you" comments in response. Moreover, some who opened your email the first time, but did not read it, are most apt to read it now.

In the alternative, you can pull a new targeted list and send your email that second time. You take your original list and remove all the donors who opened the email from the first send. You can now send it again with a new subject line. No one will have seen it twice, and you have just, with any luck, doubled your open rate.

3. Use short copy only

Many Internet gurus say that people that respond to email have smaller attention spans and that marketing emails have to be short copy with multiple links. Never make a reader scroll down in an email to read. Well, I do like the traffic that email links can bring, but it's not that simple. The truth is it all depends.

The length of your email depends on your donors and how they prefer to read. Some want all their information in the email and would never click to a website. Others prefer to skim and click to full articles constantly. This is why we test. It's not about picking one length or style based on what an internet publication says. It's about learning who your donors are by testing different layouts and designs. Finding out what format your donors prefer, and *how much they are willing to read*.

Don't fall victim to an arbitrary word count, or design. Write clear and concise copy, but don't be afraid of testing a long-form email. If that is what your donors respond to, give it to them. And the only way to know that is to test.

4. Subject lines must be brief for mobile

Gurus say that due to the advent of mobile marketing, email subject lines should now be shorter. Again, don't fall victim to an arbitrary word count. A well-crafted subject line will get your email opened, be it on a desktop, tablet or mobile device. It's crazy to think you would tailor your creativity to the smallest screen just because some blogger says to customize your subject line to fit for mobile. There are much better ways to increase your open rates. (Read below for subject line writing tips.)

My advice as it relates to mobile is to stay away from subject lines greater than 50 characters. Otherwise, there is a danger of your subject line being cut off.

5. All unsubscribes are bad

For-profit marketers love to brag about low unsubscribe rates. They say it's proof that subscribers are satisfied with the content. In some cases, that may be true. But I want to know if the names open and click. Is there engagement and responsiveness, or are they just inactive email addresses on the list. If you are looking to examine the health of your list, you cannot just take one measurement out of context to prove the effectiveness. The smart marketer will take into account multiple metrics to get a more applicable picture of the content relevance and health of the list.

An unsubscribe is not always a bad thing. It's bad if you send poor content, over-mail, or simply put out a poorly conceived and executed email. It's not a bad thing if you are sending a quality product and the donor is just not ready to listen to your message. They are leaving, yet instantly making your list more targeted. Your response metrics will now be more accurate as the uninterested leave. Your delivery rates and mailing reputation will go up, and the cost for sending email will go down, (Email service providers usually charge on the size of your list). Don't stress over unsubscribes that leave over time. If you see a huge spike, that is a sign of a problem. But it's healthy to let uninterested people go.

6. Emails should always have an image

The general Internet assumption is that an image in an email will always increase content understanding and lead to additional click-throughs. This is not true. Inserting an image for the sake of inserting an image will not help you. If the image has nothing to do with your message it will not necessarily help. Nor will stock photos. Plastic people laughing together, generic buildings, or any images that are not personal to your donors, nor your institution, can hurt you more than help. Do you think images like these will convey your mission or build the relationship of trust needed for a planned gift?

No.

All images must be relevant to the content. If they add to the messaging, then by all means use them. Relevant imagery can help describe a point, or create a more visual understanding. Also, don't be afraid to test removing all imagery. Sometimes a brief message reads better as a letter. Making it look like a "marketing email" may hurt its appeal. It again all depends on your audience. Your donors may prefer the conversational, personal feel.

Bottom line regarding all these myths... test to see what works best for your unique list of donors.

IV. Newsletters

Do you send your donors a planned giving e-newsletter?

When I ask that of planned giving marketers the answer is often that we used to send them, but we've stopped. Some think of them as tedious and often ignored. While others say they are too time-consuming to create and publish. I can understand that. However, don't be too quick to dismiss e-newsletters as being wrong for your donors. When done well, a planned giving newsletter can be a powerful means for driving high quality traffic to your website, and better yet, it will get your phone to ring with interested donors more effectively than any other marketing vehicle.

And the best part? It cost's very little. Relatively speaking, that is. The cost of the e-newsletter is much less than that of a print newsletter and the results are immediate. If you're not publishing a planned giving e-newsletter, you're potentially missing out on leads by word-of-mouth, and depriving yourself of feedback from your donors.

What about those who believe the e-newsletter is outdated or ineffective? Or that email is a dying technology, destined to be crushed by newer and savvier channels? Let's look at these and other issues dealing with newsletters.

Social media is the new trend

When e-newsletters first arrived, publishing them was a one-way street. You wrote a newsletter, sent it to your donors, and they either read it or ignored it. You receive no feedback unless the phone rings. Since then, marketing has changed. Due to social media, communication now flows both ways. If you publish anything via social platforms, readers can respond, leaving comments, sharing with their friends, and the like. The once vibrant newsletter is now considered a dinosaur. And this is true in planned giving marketing, right?

Not so much.

Although, thanks to social networks, it's now easier than ever before for businesses to grow by word-of-mouth with Facebook, Twitter, and the like, this is not happening in our industry. Planned giving marketing has not changed due to social media. Our industry issues and themes are not prevalent on social channels just yet. Word-of-mouth is not being shared on bequest giving or the benefits of a CRT. Certainly not in any large numbers... and they may never be.

Why is that?

One of the main reasons people share on social media is because of value. They find content that they like and trust, and thus, want to share it because it will be of value to their network. They are a "pied-piper" bringing valuable insight on topics of interest. That said, if we want our planned giving articles to go social they also need to be valued. They need to offer new and unique content that is practical and with actionable advice for donors. This should already be

what you are sending in your e-newsletter, right? Donor stories that like-minded readers can identify with and information about gifts that help the donors, their families, and your charity.

The other reason people share on social networks is because it helps readers define themselves. Sharing articles about what to do with your wealth upon death sounds like a popular way to define who you are, right?

Uh-oh.

Thus the problem with planned giving and social media. If what donors share on social is an important indicator of how they define themselves, then your newsletter will not be posted. Good information will be shared privately but rarely would a planned giving article go viral. No one wants to be identified as the “death guy.” That said, it does not look like social will be the go to channel to build awareness or get your phone to ring anytime soon. The e-newsletters remain the best cost-effective channel for lead generation. Rather than try to find the new channel, perhaps we should just try to improve this one. Here are some tips:

Focus your message

The worst thing you can do is send out a planned giving e-newsletter that is cluttered and unfocused. Discussing multiple types of planned gifts in a single issue may seem confusing and hard to read. The preferred method is to give each newsletter a distinct theme. Discuss one topic in full per newsletter, or in the alternative, include only articles that are relevant to each other. Your content will create a better impression if it focuses on one particular area of planned giving.

For example, an e-newsletter that includes a donor story about a bequest, could include two additional articles on estate planning, or related bequest giving. Estate planning articles support the donor story premise. This spotlight allows for increased understanding and comprehension. Don’t underestimate the power of a good donor story in your newsletters. They are effective. Like-minded donors will see themselves in these stories.

Don’t ask

Your donors do not want to be asked to donate in your e-newsletter. This medium is for educational, relevant, and timely information. It should never be used to solicit. Beware that publishing an “ask” in this manner may cause your readers to tune out, stop opening, or worse unsubscribe.

Set expectations when subscribing

If you allow website visitors to subscribe to your newsletter on your website, (this is not very common), make sure you properly communicate what they will receive in clear language on your subscription page. Discuss the topics to be addressed and how often they should expect to hear from you. The more your donors know what to expect, the more likely they are to open and absorb the material. It will also help reduce unsubscribe and spam rates.

Be minimal

Your e-newsletter can easily feel cluttered and overwhelm your donors with too much content. But it does not have to. Give your layout a clean, uncluttered, and minimalist look. Don't be afraid of white space in the design. This will allow for better comprehension and less confusion when reading. Also, don't add links to multiple pages of your website. Stay focused on the articles you are publishing. Less is more.

Test as much as you can

No matter how well your email is performing, it can always do better. If you don't have a goal for constant improvement, you're missing out on prospects who you should be talking to. Sometimes, just a small tweak can lead to a significant improvement in response. Many small and a few big tweaks combined can bring a dramatic increase in your results. Testing allows you to learn and improve with every mailing. Here are two things you can try:

Newsletter Subject Lines

There is never a guarantee that your email will be opened. You need to convince your donors to open with a compelling subject line. Often newsletter marketers try increasing familiarity with their subscribers by keeping the subject line the same each day, week, or month. This can be the kiss of death. There's no incentive from the subject line to click on that specific email. No benefit promised or urgency created. A better approach would be to have a different, creative and engaging subject line for each newsletter you send. What works best? Test and find out. (Read below for subject line writing tips.)

Test the call to action

Your donors may respond to loud, bright colors when you want them to "learn more" or "download a brochure." On the other hand, more of them may respond more to a simple text link that says "click here for more on bequests." The call to action is a perfect item to test. The look and feel, as well as the wording, can make a huge difference.

V. A quality read

It's no secret why for-profit and non-profit marketers continue to use email as a touch point with their target audiences. Your email channel may be the quickest and most cost-effective way to build awareness and have donors reach back to you. Email marketing is growing and so is your audience. There is more of your database using email as a primary communication tool, specifically from mobile devices, than ever before.

So does this mean it's time to increase the amount of email you send to donors?

Actually, no. It just might be that the opposite is true.

The key to successful planned giving marketing is to connect with your donors using relevant content that is a benefit to them. Information that is interesting, educational and entertaining. Sending multiple emails because you think you need to send something will only lead to unsubscribes and spam complaints. The messaging and content must align with your donor's interests.

In planned giving marketing, I often see charities sending donor emails about tax regulations and the minutia out of Washington D.C., and I always ask myself, “Do donors really want that?”

Every list is different, so some donors could really love these updates on minuscule points of law that even some attorneys find boring. As a sender of email, keep in mind that when a donor opens an email there is an expectation of value. That value allows for a fair exchange proposition. You send donors relevant content, and in exchange, the donor will read it. Awareness of planned giving is the result.

How well you, the sender, deliver on your donors' expectations plays a large role in whether they remain loyal to your list and your charity. When you fail to deliver relevant content to your donors, in addition to the unsubscribes, your organizational brand may suffer. Still worse, delivering irrelevant content may make you look insincere, and as a result some may no longer donate to your organization.

So what is the most important question to ask before sending planned giving marketing emails?

It's simple. Ask yourself: “Is this a good read?”

If what you are sending is a benefit to your donors, relevant to their expectations, and is something you would feel proud putting your name on, then push “Send.” If not, take a breath, and go back to the drawing board.

There is another question to ask, “Am I being a pest?”

Over-mailing your list is the number one reason donors don't open, and the number two reason they unsubscribe. Subscribers get annoyed if you send too much or if the email is not of interest to them. A donor may think you send too much “junk” and just ignore it. Others will complain and unsubscribe. Take any comments you get about over-emailing seriously. Each donor on your list has invited you into their home, office, or phone. Don't abuse the privilege. Your donor's inbox is no doubt overflowing, but a message that is a benefit to them is always welcome.

VI. Subject lines

Whenever you prepare a carefully crafted email for your donors, do you have a split second of doubt as you send that anyone will open it?

I still do after almost 20 years of email marketing.

We can't help it. There are too many times we have racked our brains for the very best content, the best starting sentence, the best subject line, only to find the email stats show opens aren't as good as hoped. It happens to all of us, but there are ways to improve the odds of a successful open rate.

But first, for those of you that are new to email statistics, let's define the term "open rate." An email open rate is the ratio of the total number of unique people who opened an email to the total number of delivered emails. If 2,000 emails were sent and 1,800 emails were delivered, and of the 1,800 delivered emails, 540 emails were opened, the email open rate would be 30%. Only those emails that were actually delivered are a part of the calculation. (FYI: The non-profit industry average open rate, according to Mail Chimp, is 22.3%.)

Unfortunately, the tracking of the open rate is not perfect. To track an open email, the industry uses a small transparent 1x1 pixel image that is inserted into the email being sent. Only when that image renders are the emails marked as opened. But this is not always accurate. Any mailing can register both false negatives and false positives.

On the one hand, some internet service providers don't load the pixel in the email when opened (false negative), and sometimes a donor's email preview mode renders the pixel as they delete it (false positive). To be fair to marketers, there are many more false negatives to be found. As such, it is likely that an actual email open rate is higher than reported and what's important is the comparison of your mailing to industry averages and the relative improvements of your open rates as you refine your messaging.

So, how do you go about improving your open rates? The answer is simple... write better subject lines.

A subject line is the first (and maybe last) impression your email will make on your donors. In many ways, the subject line is more important than an email's content. After all, a great email or e-newsletter is worthless if it never sees the light of day.

I know you have heard that before. But since most inboxes today are congested and everyone's email messages are getting lost, it's time to start writing multiple subject lines for each mailing and testing the best of them each time out. This is the key that opens a donor's door to your messaging. Let me show you how simple it is to make subject lines stand out in the inbox.

Please consider these 15 writing tips:

1. **Create urgency.** Imminence will convince donors to take action. It triggers them to want to learn more. But you can't fake it. Never try to use urgency if it is not present. Otherwise you may lose the trust of your donors.
Example: Only 30 days left to give tax-free in 2016

2. **Create uniqueness.** Your donors want to learn new things. A subject line that energizes them with something new or different triggers interest. Don't be afraid to be creative. Your donors will want to find out more.
Example: Can I pay you for life?
3. **Write benefit-oriented copy.** If your donors think your email has useful information they are more likely to open it. Make the subject line express a benefit to your donors.
Example: Tax-wise giving opportunities
4. **Be ultra-specific.** An email that promises a vague benefit remains unopened. But if you are specific with exact numbers it will pull in more donors. Specificity heightens credibility, credibility builds engagement, and engagement equals opens.
Example: Get \$1,450 every year for life
5. **Keep it clear and concise.** Often a shorter and more descriptive subject line can perform better than a clunky creative one. That doesn't mean don't be creative. It means don't be confusing. Don't be too clever by half.
Example: Why you need a will
6. **Use humor.** Funny subject lines can really stick out and catch the eye of donors. But be careful. Make sure your sense of humor is shared by your donors. If you know your audience well and your emails are targeted, a good laugh can get an email opened and earn major reputation points. A bad joke is, well, bad.
Example: The perfect going-away gift
7. **Use numbers.** Digits attract attention. Start your subject line with a number. This tells donors they will get tips or a list that is easy to scan and digest. We can't help that our brains are naturally drawn to digits, and using numbers creates a promise of a quick and easy read. This is why Top 10 lists are so successful in marketing.
Example: 5 gifts that pay you back
8. **Ask Questions.** The use of question marks can make your subject line stand out. It is more engaging than the norm and it begins an instant dialogue with your donors.
Example: Can I really get paid for giving?
9. **Create a list of three.** There is something memorable and readable about lists of three. It can also work well if the third item is overly specific or doesn't fit or is just there to be a third idea.
Example: Stocks, Bonds, and Mutual Funds
10. **Use pop culture.** If you know your donors, you can interject some pop-culture references. Anything from "Pokémon Go" to "Star Wars" can work. Musical lyrics can work as well. The question is... will your donors get it? Is it too clever? Not appropriate? Or worse, will it turn them off?
Example: Always Look On The Bright Side Of Life

11. **A single word.** Go extreme with a minimalist one-word subject line. With an inbox full of junk, the one-word subject line may be the one that stands out. A single word can make an emotional impact. It may be more enticing for your donors.
Example: RSVP
12. **Alliteration.** A subject line repeating the same sound or letter at the beginning of each word can grab your donor's attention more effectively than a simple phrase. It's musical magnetism.
E Example x: How to happily help the homeless.
13. **Keep it conversational.** Don't lecture, and don't try to impress with vocabulary or legal terms. The best email subject lines have a casual, conversational tone.
Example: What will your legacy be?
14. **Be a thief.** Study the emails from non-profits and for-profits that you get in your own inbox everyday. Subscribe to multiple like-minded entities and learn from their ideas. Take the essence of these subject lines and adapt them for your use. It's not really stealing, (the above heading would make a good subject line, right?), but taking an example and making it work for your audience.
Example: Find the legacy within you. (From the Red Cross "Find the volunteer inside of you")
15. **Keep it under 50 characters.** I don't believe in finite rules when it comes to subject lines, but it's always best to have fewer than 50 characters. Otherwise, there is a danger your subject line will be cut off. And that helps no one.
Example: It only takes a minute to change a life

VII. Delivery

Email marketing is about more than just targeting your list, designing great emails, and writing amazing copy. It is also about delivery. It's frustrating to see well-written emails never arrive. Especially since you can increase your email delivery rate by following just a few best practices. There are two main issues all marketers need to address. Avoiding email bounces and spam and content filtering.

Email bounces

A bounce means your email never actually got to your intended recipient. If your list has a high number of bounces it can have a negative impact on your delivery rate, which can lead to you being thrown off your email sender or blocked as a spammer. Thus, it is important to keep your list clean of bouncing email addresses. How can you tell what makes emails bounce?

When you send an email that bounces back, the recipient's server typically includes an "SMTP Reply" that explains why the message bounced. This information is located in the header of the bounced message. Your IT or communications department should have this information if you

send internally. If you use an email service provider, this information will be listed in the delivery report.

If the bounce is marked as “Non-existent email address,” the email address does not exist. This could just be a simple typo or the person with the address may have left the organization. It can often be a faux email address, which was collected from a form on your website if you are offering something online in exchange for an email. These are called “hard” bounces and should be removed from your list immediately.

If bounced emails are marked as “Undeliverable” it means the receiving email server is the cause for rejection. It could be temporarily unavailable, overloaded, or couldn’t be found. (crashed or be under maintenance) This means the email might be correct but the recipient’s technology is not allowing delivery. This is considered a “soft” bounce and need not be removed from the list unless the temporary problem becomes permanent.

Emails also bounce if a donor’s inbox is full and can’t receive more. When this happens, all email will bounce back until there’s space for them. This occurs mostly when a donor is on vacation.

Sometimes an email is categorized “Blocked” meaning the receiving server has blocked the incoming email. This can happen within government institutions or schools, where servers can be stricter when it comes to receiving emails, or if a third party anti-spam DNS blacklist service has concluded that your IP address is that of a spammer.

It's not unusual for an email IP address to end up on a public blacklist, especially on a shared server. It could be due to overall volume of mail coming from that server, a high bounce rate, or if the messages seem to have the characteristics of spam. If blacklisted, contact the organization and request to have your mail server's IP address de-listed. This is a common occurrence in today’s email industry.

Content Filtering

What determines whether your email reaches the inbox?

Achieving optimum inbox delivery has historically been about the content of your emails. Spam filters looked for little signals, (use of the word “free”), and then scored your email based on those findings. A low spam score, and your email made the inbox. Get a high spam score, and it was filtered into the spam box or could be bounced as spam.

Today, filtering is much more sophisticated as Internet Service Providers (ISP) are looking at engagement factors such as opens, replies via the reply email address, moving the email to a file, or to the address book. They also look at negative factors such as the bounce rate of the IP address, moving email to the spam box, and deleting the email without opening.

How can marketers ensure their email campaigns get delivered? Maintain good list hygiene. You must get rid of invalid, non-responsive, and duplicate email addresses every chance you get. Here are some tips on how to protect your list from being blacklisted:

Build a clean email list

Don't ever buy or rent email lists. Focus your efforts on building from your internal database. It is never a good idea to supplement your list numbers with outside names. These users are more likely to hit the spam button first and ask questions later.

Remove role accounts

Only mail to actual people. That means automatically removing non-human responding emails such as abuse@; support@; info@, etc. If these exist on your list, more than likely they have not legitimately signed up. This could have been done by a spam bot, so it is best to remove them before they cause trouble.

Remove bounces

Make sure your system automatically removes hard bounces. You don't want to continuously mail to invalid email addresses. This will effect your marketing metrics, and worse, your IP delivery reputation.

Send relevant and engaging email

Getting into the inbox can come down to a subscriber's engagement. ISPs like Gmail, Hotmail and Outlook are tracking how their customers interact with your campaigns. They are looking for your emails to get opened and engaged with. This is why you must send content that is a benefit to your readers, and not just sending email to send email. The ISPs are watching, so the worst thing you can do is to continue to send email to a list that does not show any signs of life.

Customize your "From" name

You also want to make sure that you use a "From" name your subscribers will recognize. This name, along with the subject line, is one of the few things you can leverage to get people to open their email. This may be the name of the Director of Planned Giving in combination with the charity name. Stay away from a vague description of your institution. It's better to use a "From" name that not only ensures people know exactly who this email is coming from, but also adds a personal touch that makes donors think it is specifically for them.

Use a real reply-to address

ISPs like Gmail, Hotmail and Outlook want a real "Reply to" address to be used. In other words, have the reply address receive responses to your email. This shows donor engagement. A donor will only respond to email she cares about. The odds that someone will respond to a spam message is extremely low. So, a good strategy to distinguish your mailing behavior from that of a

spammer is to ask donors to respond to your email by clicking Reply. This is valuable evidence that you are a legitimate email sender.

VIII. Pros & cons of planned giving email

I would like to close this discussion with some quick “take-aways” on email marketing. I have broken it down as Pros & Cons.

Pros

- **Tracking and reporting**

Email marketing allows for very detailed tracking, reporting, and then follow-up segmenting. Even the simplest email platforms allow for better tracking than some of the most sophisticated website tracking programs. For every campaign, you can track how many donors opened it, how many clicked, exactly where in the email they clicked, what they did on your website, and if they responded to your call to action. This allows you to see what is of interest to your donors, tag these preferences, and strategically plan for targeted follow-up mailings based on this behavior.

For example, if a donor always clicks on bequest articles, you can tag the database with this interest and pull that donor and others similarly tagged for additional awareness on bequest giving and beneficiary designation. This type of reporting and analysis will give you a better understanding of your engaged donors. You can use these insights to improve future marketing campaigns and achieve the goals and objectives of your planned giving program.

- **Drive traffic**

Planned giving email should always direct your donors to your website. Do I need to say more? Your planned giving website can be a great source of information that no one ever sees. To prevent this, you need to push your donors back to the site as much as possible. Send them to read more about a particular gift type, perform a deduction calculation, and perhaps download a planned giving brochure or two. Email is more effective than direct mail for this, as your doorway is a single click away.

- **Quick & inexpensive**

Email is much more cost-effective than direct mail. There are no printing or postage costs. The time from idea to donor is incredibly short. This is best exemplified in past years by the charitable IRA rollover provision, and the wait to see if it would be extended. When Congress would finally act in December it would be too late for direct mail marketing. Email, however, could reach donors immediately after the provision was extended, and then again upon the President’s signature. And these emails produced gifts. They were quick, personal, urgent. and most importantly, effective.

- **Relationship building**

Email allows outreach to donors in a most personable way. Your digital communications should educate and update donors about planned giving but should also share thoughts, opinions, or personal stories. Your donors will not only begin to see planned giving as a viable option to support your mission, but they may also come to see you as a friend. This, in turn, will help you build trust between your program and your donor base. From the donors perspective, it's always easier to reach out to a friend for more information on a complicated subject than to a stranger. Email will help you build such friendships.

- **Custom & targeted**

With email you have complete control. Not only can you control the way your email will look and the message that it will convey, but you can also target that message to certain demographic portions of your list. This allows you to test more often and will result in more responses.

Cons

- **Too many emails**

There is just too much email. We are all inundated with junk email at home and at the office. It's too easy to overlook planned giving messages that are not a high priority. This is why open rates are low and most of these messages are never seen.

- **Spam filters**

If your email isn't lost in the mix of hundreds of other e-mails, it might just die alone in the donor's Junk Mail folder. For-profit and non-profit email face this difficulty equally. Even with the best subject line, your message may never be opened due to being classified as spam, or bulk email.

- **Inconsistent mailings**

Email, specifically e-newsletters, can under produce due to not being published on a consistent basis. Donors may love your estate planning or stewardship articles, but because they receive too many emails, and have access to other media at their fingertips 24/7, your donors may forget about you. A donor may, at first, look forward to hearing from, but if the publication is spotty, she may give up and not look for your email. Inconsistent emailing may reflect poorly on your entity as a whole.

- **The content is not interesting**

In order to stay relevant and keep the attention of your donors, your emails must be of high quality. Too many planned giving e-newsletters, specifically from vendors, are based on articles that only a narrow few might find of interest. Knowing this, some overstep and provide too much

information. The rationale being that one of these 8 articles will be of interest to somebody, so we will send them all. And they keep coming, week after week, or month after month. This results in the content simply being skimmed and then quickly deleted. Or worse, it becomes an immediate delete or an unsubscribe for all future mailings.

- **Unreadable view**

More and more donors are viewing email on a tablet or phone. Often the emails received are not responsive in design, and thus, do not render fully in an email app or phone web browser. If this is the case, your emails are being opened and then deleted. Too many of today's emails are just unreadable unless viewed on a desktop computer.

IX. Conclusion

The marketing buzzword for the new millennium is engagement. All for-profit marketers are scratching and clawing to figure out new ways to get their audiences engaged. All channels are integrated with branded messaging for networking and to build relationships with continual contact.

As a planned giving marketer, you have an advantage of already understanding the power of building relationships. That is what fundraising is all about. But you also need to integrate your message consistently into all your marketing channels for the benefit of your donors. One of the best means to deliver that messaging is by email. If you are not using your email list, you could be making a big mistake. And for those of you that don't have a list yet, start building one now.

We started this discussion asking why email is so popular. Let me answer it another way. The continual and cost-effective influence that email brings will allow donors to get to know you on a more personal level. Staying in touch with donors, and educating them on the viability of planned giving at regular intervals is critical to keeping your donors loyal and engaged. This engagement will lead to more emails and phone calls requesting information. And ultimately more gifts. This should be reason enough to consider email as an important part of your overall strategic planned giving marketing plan.