

Drive up your email-marketing results and increase ROI



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10-Point Email Assessment (Based on FulcrumTech Proprietary Email Maturity)

Email program self-assessment tool

This brief self-assessment tool will help you honestly assess your email program and practices. Once completed, add up your score to see a quick analysis of your email maturity. You'll be able to easily see where your most compelling opportunities to drive email improvement are and how you can quickly make changes that will have a positive effect on your email return on investment (ROI).

Directions: Rate yourself on a scale of 1 to 5, where 1 means "Strongly Disagree" and 5 means "Strongly Agree."

Your Website

1. Your website is designed to align with your overall marketing strategy, and you have well-optimized landing pages for each email campaign.

Strongly Disagree 1 2 3 4 5 Strongly Agree

2. You have dedicated staff supporting website and landing page modifications for updates needed on landing pages, website pages, and metrics integration for your email campaigns.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Your Marketing Strategy

3. Your email-marketing program works in concert with other marketing channels in the organization.

Strongly Disagree 1 2 3 4 5 Strongly Agree

4. You have documented, measurable goals against which to track all marketing channels' performance.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Email Strategy

5. There is a comprehensive strategy for your email-marketing program, and this strategy is clearly tied to ROI.

Strongly Disagree 1 2 3 4 5 Strongly Agree

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- Strongly Disagree 1 2 3 4 5 Strongly Agree

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Design | Editorial | Content

13. Your copy and design are aligned with your email goals. Copy and design are used consistently as strategic levers for improving email performance.

Strongly Disagree 1 2 3 4 5 Strongly Agree

14. Your emails and landing pages are optimized regularly from design, copy, and ROI perspectives. Your calls to action are clear and effective.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Customization

15. Your email service provider (ESP) supports your desired segmentation strategy and allows you to deliver relevant content to those segments.

Strongly Disagree 1 2 3 4 5 Strongly Agree

16. Customizing emails to drive performance improvement is a normal and expected component of your email-marketing program.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Testing

17. You are continually testing email components, such as subject line, copy, calls to action, images, and others, to improve subscriber engagement with your emails.

Strongly Disagree 1 2 3 4 5 Strongly Agree

18. You have a clear, consistent A / B or multivariate-testing strategy in place to drive up ROI.

Strongly Disagree 1 2 3 4 5 Strongly Agree

19. Your ESP's technology supports your testing strategy efficiently and effectively.

Strongly Disagree 1 2 3 4 5 Strongly Agree

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Metrics | Reporting

20. You have established goals for email marketing. You have a dashboard or other mechanism for regularly reviewing data and comparing it with your goals to determine successes and opportunities.

Strongly Disagree 1 2 3 4 5 Strongly Agree

21. Your ESP has reporting capabilities that are adequate for reporting on email performance over an unlimited period of time.

Strongly Disagree 1 2 3 4 5 Strongly Agree

22. You have a comprehensive reporting suite that allows you to easily assess trends, deliverability, email performance by segment, value per email address, etc. You are collecting all of the data you need to support decisions that drive up email ROI.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Types of Email Campaigns in Place

Which types of email campaigns do you have in place?

- ☐ Welcome
- ☐ Promotional
- ☐ Transactional
- ☐ Shopping-cart abandonment
- ☐ Nurturing
- ☐ Newsletter
- ☐ Reengagement

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Scoring

Directions: Add your score for each question and divide by 22 to determine your average score. Then, discover the best next steps for your email program based on the ranges below.

1 to less than 2:

Your email-marketing program is just getting off the ground and runs on an ad-hoc schedule. Your email processes are mostly undocumented and not actively managed. Any changes tend to be reactive rather than strategically focused (e.g., “We need to sell more widgets. Let’s send an email about widgets and see what happens!”)

Now what? A solid email-marketing program is built from the foundation up. First, you’ll need a marketing strategy that clearly identifies what makes your company unique, who your target audience is, what the best ways to reach them will be, and what your goals are (measurable ones, such as “sell 100,000 widgets by the end of this year,” not “sell lots of widgets.”) Build your email strategy on top of that so that you have a roadmap to follow with specific guideposts to help you evaluate your progress on the way. These are just foundational steps, but building a robust email program depends on them being in place. Need help getting started? Give us a call. We won’t harrass you with sales talk; we’ll just give you a straight opinion of what you will need to make your email-marketing program take off and perform beyond your wildest dreams.

2 to less than 3:

Some processes at this level are repeatable in that they are planned and documented well enough to repeat or teach to other employees. They may demonstrate consistent, though not optimized or rigorously controlled, results.

Now what? You have the basics in place, but you’re not sure you’re getting the results you think are possible. Perhaps you’re looking for benchmarks for open or click-through rates or devoting more attention to how deliverability works across different Internet service providers (like the behemoth known as Gmail), and you’d love to know what the “best-in-class”, companies know about what day of the week or time of day is best to send email. Guess what? You ARE best-in-class and the only way to benchmark what’s possible, learn what works, and figure out how your unique audience will respond is to test these things yourself. Now’s the time to test new programs (for example, have you assessed your inactive rates and tried a reengagement campaign or considered how you nurture new subscribers?) and evaluate the results. Not sure where to start? Give us a shout — we’ll help you sort through the conflicting “best-practices” advice out there and give you only straight talk about what will give you the most return for your budget.

3 to less than 4:

You have a fairly well-established set of processes — they are defined and documented, and you operate with documented routines and programs. You are starting to see consistent results, and you can generally predict the outcome of your email campaigns.

Now what? Keep doing what you’re doing. And do more. More testing, more targeting, more customization, more analysis. Why? If you can predict your results, you’re standing still. If you want to move the bar on the performance of your email programs now, it’s going to take some significant effort to analyze your results, model your audience, and identify opportunities to test and adjust, target and customize, and fine-tune continually to drive more and more ROI. There’s gold in the upper altitudes of the email-marketing landscape if you know where to look. Need a guide? Get in touch with us and let us show you the way. No pushy sales pitches — just a clear view forward for your email-marketing efforts.

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4 to less than 5:

At this level, your email-marketing program is well managed in terms of process, metrics, and controls. You likely have sufficient controls in place to effectively manage email programs to drive toward your established goals. You're happy with your results (and so is your executive team), but you suspect there is still more you could be doing to optimize your program.

Now what? First, our hat is off to you. Very few companies we talk to have their email-marketing program humming at this level. Why? Well, you probably know it took a great deal of time, investment, and human brainpower to get this far. Getting that much farther sometimes takes an outside perspective. Start reading case studies, blogs, and anything you can get your hands on that will show you what others have tried and where they have seen opportunity so that you can get ideas for your own optimization efforts. Model your database to find the most active email customers and then mine deeper for others like them to find the biggest opportunities. Pay close attention to setting up statistically significant tests so you can be absolutely sure you are making decisions based on real results, not "directionally interesting" trends. Already carrying a full plate? We can help. We have statisticians, email experts, marketing gurus, copywriters, and designers who rock and are all ready to pitch in. Just give us a call, and we'll help you sort it all out.

5:

You are running a well-optimized email program. Continual improvement now is the name of the game for you. You likely already have a well-defined roadmap of customization and testing combined with robust metrics that drive optimization decisions. You may even be trying innovative new initiatives (real video embedded in email, micro-targeting using "big data") to extract the maximum possible value from a comprehensive email program.

Now what? If you are reading this, you either skipped ahead to see what the highest-scoring group is learning or you are running a seriously well-oiled email-marketing machine. If you're a part of the former group, you can get here, too, but you might need a little guidance. If you are a part of the latter group, congratulations! You probably don't need anyone to tell you how to model your data, construct appropriate tests, ensure maximum deliverability, target and customize down to the customer level, or measure your results accurately. Now it's time for deeper data analysis, segmentation, customization, and retargeting. You might be looking for assistance in integrating your behavioral data or shopping history with your email data to facilitate more-sophisticated nurturing or retention campaigns. Perhaps you need a hand with the heavy lifting or help identifying a better ESP that will meet your needs? Just know that we're here if you ever need anything, ready to lend a hand or even just an ear. We're nice like that!

Ready to drive serious email ROI?
Get in touch and we'll point you in the right direction!



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