

## 18.3: Direct marketing strategy and planning

The first part of any digital direct marketing campaign should involve planning for the goals you need to achieve. Email and mobile marketing can be used as a tool to help you achieve your business and website goals. As with all tactics, direct marketing should be considered in line with your overall business, marketing and digital strategy.

As discussed in the chapters on analytics and conversion optimisation, you will decide on the key performance indicators (KPIs) for your campaign. KPIs are the metrics that indicate how well you are performing.

### Note

Read more about this in the [Conversion optimisation](#), and [Data Analytics](#) chapters.

You have a few options for digital direct marketing:

- Promotional emails
- Newsletters
- Transactional emails
- SMS marketing.

Promotional emails will usually have an immediate goal:

- Users make a purchase
- Users download some content
- Users request further information.



Figure 18.3.1: An example of a promotional email from Joss & Main *Adapted From Screenshots, 2016*

Newsletters tend to focus on longer-term goals and are usually geared at creating and retaining a long-term relationship with the reader so your KPIs are more important here.

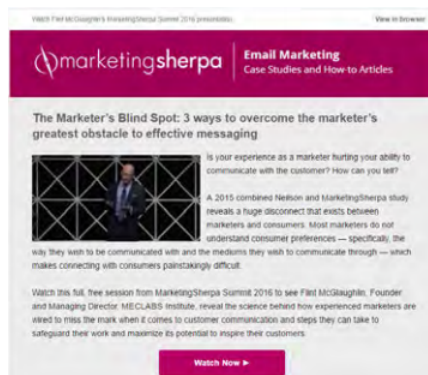


Figure 18.3.2: An example of a retention-based newsletter from MarketingSherpa *Adapted From Screenshots, 2016*

Transactional emails are generally automated emails that inform customers of payments, subscriptions, or changes to their account. This category can also include confirmation email or reminders.

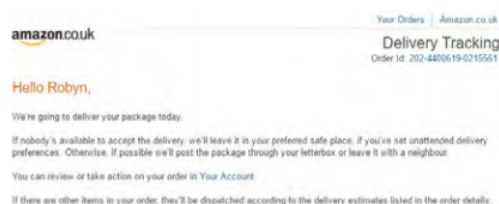


Figure 18.3.3: An example of a transactional email from Amazon UK *Adapted From Screenshots, 2016*

An SMS can be used in much the same way as a promotional or transactional email; to let the customer know about products or specials, deliver coupons, or send transactional reminders.

#### Note

Read more about SMS in the [Mobile channels and apps](#) chapter.

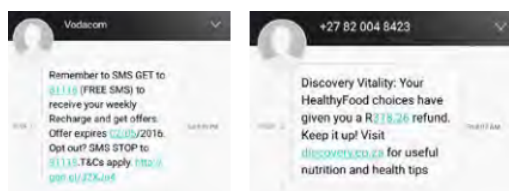


Figure 18.3.4: Left: A promotional SMS from Vodacom. Right: A transactional SMS from Discovery *Adapted From Screenshots, 2016*

## Email service providers

An email service provider (ESP) is a partner who can help manage your email design and send. For bigger organisations, it often makes sense to purchase your own software and server, or partner with an ESP. This is especially true if you are sending more than 50 emails at a time. Most ESPs are do-it-yourself services that do not manage or strategise your campaign, but give you the tools you need to manage it yourself.

#### Note

We have listed some ESPs in the [Tools of the trade](#), section 18.6, at the end of this chapter

There are some important questions to ask when choosing an email service provider.

- How easy is it to use? This is important if you are managing the campaigns yourself.
- Can you upload and migrate the contact list? It's important that you own your lists.
- Is the process self-service or managed?
- How does the reporting work?
- What is their deliverability like?
- Are they endorsed by email and deliverability authorities, such as Return Path or Trust-e?
- Do they adhere to best practices for direct marketing?
- How is the data stored, processed and secured? Who owns it?

## Using mobile for direct marketing

You will remember from the [Mobile channels and apps](#) chapter that users see their mobile as a personal device and can resent intrusions on it. This means that there are certain principles you'll need to keep in mind if you plan to use mobile for direct marketing purposes.

### Privacy and permission

One of the most important principles for mobile is privacy. Users see their mobile as a very personal device; they do not respond well to unsolicited marketing messages invading that privacy. The location-based nature of mobile also presents some challenges to user privacy. No one wants their location published without their permission, and users need to be able to control notifications.

For a business to avoid damaging its brand by coming across as invasive, marketers using mobile need to use permission marketing and make it clear that they will value and respect users' privacy. Users need to opt in to marketing messages, and should be able to opt out at will. A strong database of preference profiles and constant maintenance of consent can drastically reduce the risks and make users feel more in control of their marketing experience

#### Note

Remember that many countries have legislation governing the collection, storage and use of personal data. Make sure that you follow the laws of your country!

Take a look at how Hindustan Unilever targeted low-income consumers to build a permission database in an area with vast basic mobile penetration but relatively little smartphone presence: [http://www.digitaltrainingacademy.com/casestudies/2016/03/mobile\\_case\\_study\\_coffee\\_giant\\_wins\\_loyalty\\_with\\_mobile\\_airtime\\_rewards.php#more](http://www.digitaltrainingacademy.com/casestudies/2016/03/mobile_case_study_coffee_giant_wins_loyalty_with_mobile_airtime_rewards.php#more)

### Value and reciprocity

The best way to avoid coming across as invasive and intrusive for mobile users is to ensure that every message you send them on this personal device is valuable to them. Push notifications from apps, for example, have a high engagement rate, but users won't opt in unless you are offering clear value and have taken the time to build up some trust. Digital consumers have far too many distractions vying for their attention to pay attention to an unsolicited marketing message that gives them nothing.

Offering value to mobile users does two things: It helps to build up relationships, and as a result, loyalty, and, it uses the principle of reciprocity. If you give consumers something, they are more likely to be willing to give something back.

For this reason, any messages you send directly to users should be helpful and set the customer up to remember you in a positive light. For example, a hotel could send a confirmation SMS, a reminder or a way to shorten the check-in process, or a query about whether the guest needs anything upon arrival. None of these would be seen as intrusive.

Offering real value to your consumer won't amount to much if they're not reading the messages you send, which they won't if they don't trust you. To build up that trust, you need to consistently invest in a value exchange; their attention for your message.

### Relationships

If you practice permission marketing and offer value to your mobile audience, you will ultimately build a stronger relationship with your customers. These relationships can result in a higher customer lifetime value as well as positive sentiment, which can be spread by your audience and result in more converts to your brand.

Because mobile's ability to connect you to your customer at their moment of need is unparalleled, so is its ability to help you build a connection with your brand's followers. When used well, mobile devices offer an effective way to build strong relationships, and those relationships should be your primary focus.

### Choosing an SMS/MMS service provider

There are some important factors to consider when choosing an SMS/MMS provider. Here are some key questions to ask about any potential service provider:

- Can you pre-check cell numbers with networks and carriers to find out which numbers are MMS-enabled?
- How does the reporting work? What can you measure?
- Do they optimise the MMS for the screen size of the phone?
- How good are their creative services? Make sure you see some examples of previous work to assess their skills.
- Do they provide and manage an opt-out service?
- What are the personalisation options?

### Email on mobile

You now know that most email is opened first on a mobile device. Users expect an engaging, attractive experience across devices, so an email that isn't formatted for a mobile device isn't going to get a good response and many users will simply delete the email or even opt out rather than opening it again on desktop.

This presents a challenge for email design. The mobile screen is obviously much smaller than a desktop screen, so the way an email is displayed differs as well. Not only that, but different mobile devices have different screen sizes, and they make use of different mobile operating systems. This means that each one has different standards and default settings and renders emails in a unique way.

To make things even more difficult, very few users view an email on only one device. They may switch from their smartphone to their laptop to their tablet and back to their mobile phone during the course of a day. This means that, although sending two versions of your email is an option, one for mobile, one for desktop; it's probably not the best solution. You want an email that displays well across as many different clients and operating systems as possible. One way to achieve this is through responsive email design.

#### Note

Read more about this in the [Web development and design](#) chapter.



Figure 18.3.5: The Marketing Charts email template responds to the screen size of the device on which it is viewed *Adapted From Screenshots, 2016*

Some smartphones do render HTML emails and can auto-fit them to fit the mobile screen, but this can still affect the way the email displays.

The most important things to keep in mind when designing an email for mobile are:

#### Note

Don't worry if some of this sounds a bit too technical. Your web developer will understand and be able to advise you.

- The screen is a lot smaller
- Inputs can vary, with touchscreens being the most common.

So, your content must be easy to skim, with clear calls to action.

Here are some common best practices to follow when designing your emails, to ensure optimal rendering on mobile devices:

- Generally, most emails are designed to be 600px wide to display well in an email preview pane and this scales well on typical mobile screen sizes. On a 320px screen, an email can be zoomed out to 50% and display perfectly; similarly, on a 480px screen it can display at 75%.
- Host your email newsletters online and link to them from your preheader. That way, anyone who opens your email on a mobile can click straight through to an HTML version of your newsletter.
- Design your email in a grid system. This means your content needs to be laid out in vertically and horizontally aligned blocks, with gaps in between. Doing this will make it easier for various operating systems and email clients to scale your email down to fit a mobile screen. This is not a guarantee that the email will display properly in mobile, but it should solve the problem for most mobile devices, such as iPhone and BlackBerry, which auto-fit HTML emails.
- Make sure that you include alt text for your images! Your email needs to convey its message with or without images.
- Mobile devices that don't automatically scale your email down will display the content on the left of your email first. Make sure that your most important content is placed here.
- Button links need to be at least 44px to render well on mobile phones. Smashing Magazine recommends 72px so that users can easily tap buttons with their thumbs and see visual feedback that the button has been pushed.

Something important to remember: design for touch.

Many mobile devices have touchscreens. This means that, instead of clicking on your links with a mouse, users will be tapping your links with their fingers. If your links are placed too close together, it will be difficult for users to click on one link without accidentally also tapping the other. To make the user experience easier, make sure your links are placed in a 30–45px area, with a margin of at least 15px around them. By spacing links like this, it will be easier for touchscreen users to follow through on your call to action.

## Rules and regulations

There are a number of laws across the world to protect users from unsolicited emails and SMSs and stop businesses from abusing these communication channels. While they vary in severity according to the country and we recommend that you do some research into your local legislation, it's important to acknowledge two very important rules.

First, you cannot send communications to someone without their permission. Second, if someone requests to be unsubscribed from your communication, you have to meet their request or face penalties in many jurisdictions. This means including an unsubscribe option for emails and an “SMS ‘stop’ to opt out” option for SMS.

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