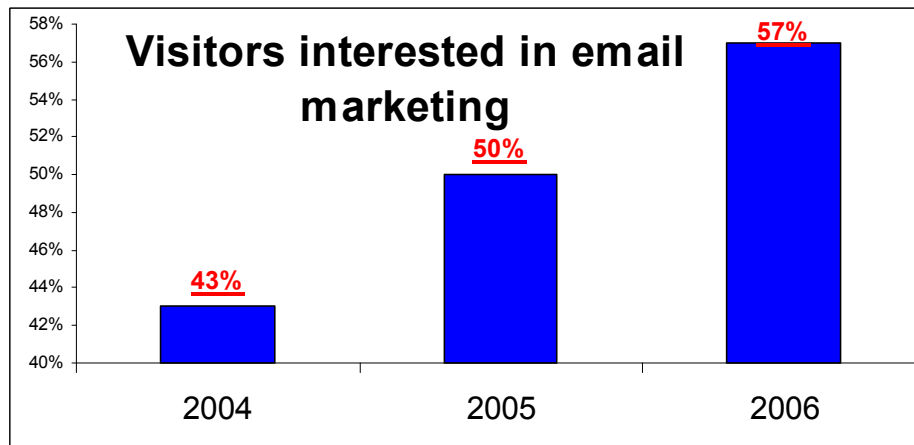




How to choose the right email marketing partner for you

Over the past 3 years, there has been a **15% year on year increase** in visitors who are interested in email marketing at the Technology for Marketing show.



Source: Technology for Marketing, www.t-f.m.co.uk

With the emergence of increasingly complicated spam filters, marketers need to work with an email service provider (ESP) who is able to get their messages delivered and also support their marketing objectives.

In this white paper, we provide a practical checklist of questions for marketers looking to appoint a new email marketing partner. Whether it is for the first time, or switching from an existing supplier, it is essential that you select the right partner

At Adestra, we've been selected as the first choice marketing partner by multinationals with over 200 users through to small organisations with only a handful of staff. We've been asked many questions, and the most important ones that highlight differences between different suppliers are in this whitepaper. I hope you find it useful.

Paul Crabtree, Marketing Director, Adestra

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The selection process

When choosing an email marketing partner, there are 6 steps to complete:

1. Define your requirements

It is important to carry out a number of steps before approaching vendors. Decide on what you are hoping to do with your email marketing. The features needed to support a company just publishing a monthly newsletter are different to marketers looking to push out timely product promotion to targeted segments.

Things to consider are:

- **Expected volumes:** How many emails will you need to send each year?
- **Expected number of campaigns:** How many individual promotions will you send?
- **Design:** Do you need fresh creative every promotion or is it a consistent lay-out?
- **Decision-makers:** Who needs to be involved to appoint the correct partner? Do you need to involve IT teams?
- **Timelines:** When would you be looking to deploy the system?
- **Users:** How many members of your team will be using the partner's services?
- **Budget:** How much realistically can you afford to spend whilst still guaranteeing an ROI?
- **Justification:** What business metrics are needed to evaluate the success of your email marketing program?
- **Experience:** How confident are that you know what you are doing with your email marketing? Will you want your partner to provide best practice and guidance?

2. Vendor Selection

Review the potential email service providers. Some of the best ways to build a list of potential partners is to:

- **Attend industry events:** shows like Technology for Marketing (www.t-f-m.co.uk) allow you to build lists of potential partners and collect appropriate literature
- **Read industry buyer's guides:** there are a number of independent publishers who publish 'buyer's guides'. In the UK these include eConsultancy and Net imperative. In the US, they include Marketingsherpa and Forrester Research.
- **Association web sites:** Organisations such as the Direct Marketing Association (DMA) include lists of members who provide these services
- **Industry Press:** reading relevant industry press will allow you to build a list of the more active email marketing companies.

With these lists, evaluate their offering against your requirements to build your short list. The key questions you must ask to do this are detailed in a later section.

3. Build your short list

With your short list, approach each vendor and provide them with an RFP (Request for Proposal) outlining your requirements and asking for a response by a certain date. Each vendor who is interested in doing business with your company will provide a proposal that details how they will provide services to meet your needs.

From these proposals, it is possible to refine your short list. We would recommend selecting up to 3 companies to take to the next stage.

Please be aware, that if a vendor has taken the time to complete a detailed proposal, they will be grateful of feedback and the opportunity to clarify and refine any points.

4. Shorter List

With your list of 3 companies, the next stage is to invite them in to provide a demonstration and to explore your needs. This will allow you to evaluate their suitability and allow you to determine next steps.

It will also allow the vendor to refine their proposal and provide a final document

5. Contract Negotiation

When you have selected your preferred partner, it is essential that you negotiate a contract that provides value to both partners. When an agreement is reached and the contract is signed, the implementation stage begins.

6. Roll-out

As implementation begins, some key things to work through are:

- **Set-up:** getting accounts created.
- **Back office:** establish feedback loops to export data into marketing databases
- **Training:** organise training of all users

If you are switching from one supplier to another run both systems in parallel so that you have an alternative in case of any teething problems

Different types of email marketing partner

Understand the different types of service provided by email marketing partners and decide which service is most appropriate for your business:

✂ Bureau / managed services

Similar to a marketing agency, these companies manage all aspects of the email production process from campaign creative through to post-broadcast reporting. These companies are best suited to clients without the skills in house who intend to send a low number of campaigns a year and can afford to pay a premium.

✂ In-house software solutions

This is software that you install either on your desk-top or on your own email server. A cheap option, these packages often have limited reporting but more importantly require significant maintenance and additional investment to ensure high deliverability rates.

✂ Outsourced self-service ASPs

This is the most popular option. Accessed online from anywhere, users manage all aspects of their campaign through a web interface. You broadcast using the email marketing partner's servers allowing a high degree of deliverability with no technical investment by the client. It also means deployment is very quick and easy.

When deciding between the in house and outsourced options, there are some things to consider:

	Outsourced	In house
Technical resources	<ul style="list-style-type: none"> Use partner's servers, hardware and bandwidth 	<ul style="list-style-type: none"> Client must invest in additional servers, hardware and bandwidth
Deliverability	<ul style="list-style-type: none"> Partners responsibility 	<ul style="list-style-type: none"> Client's responsibility
Control	<ul style="list-style-type: none"> Partner hosts your data 	<ul style="list-style-type: none"> Client hosts own data
Expertise	<ul style="list-style-type: none"> Able to use partner's expertise and best practice 	<ul style="list-style-type: none"> Can only learn from own campaigns and paid for training
Integration	<ul style="list-style-type: none"> Work required to integrate into internal systems 	<ul style="list-style-type: none"> Easier integration into internal systems
Costs	<ul style="list-style-type: none"> More expensive over time 	<ul style="list-style-type: none"> Cheaper short run option, but in long term investment is always required

Things to consider when evaluating ESPs

Every ESP is different. The key is discovering these differences and the below is a checklist of factors to consider:

1. Pedigree

Ensure that your potential partner is credible and will be in business for the long run. Things to consider are:

- How long has the company been established?
- How much experience has the company employees?
- Are they a member of any trade associations e.g. DMA?
- How many members of staff do they have?
- Are they profitable?

One of the biggest indicators of vendor pedigrees are their client lists:

- Do they work with your competitors? If they do, are there any conflicts of interest?
- Do they work with companies that lead the way in email marketing? Can you benefit from the partner's experience with these companies
- What is their non-disclosure and client confidentiality policy?
- Are they selective in who they work with? Do they work with spammers?

Ask to be put in contact with some of their clients. These testimonials provide an independent insight into the company. Particularly useful people to speak to are clients of similar size and complexity to your organization to give you confidence that the partner has proven skills at deploying the solution with a similar company to your own.

2. Deliverability

With the increasing complexity of spam filters, one of the main differentiators between different ESPs is their investments to increase the deliverability of client's emails:

- How do they ensure they do not appear on blacklists?
- What relationships do they have with ISPs for whitelisting?
- What authentication policies are in place- do they employ SPF records? Do they belong to relevant bonded sender programs?
- Can they provide different IP addresses for clients?
- Are they involved in industry bodies working in the field of deliverability?
- What protection policies are there should one of their client suffer problems? Will all clients be 'guilty by association'?

(or more information on deliverability please see our deliverability white paper. Request your free copy at moreinfo@adestra.com)

3. Commitment to the future

Understand what the companies long term plans are. Do they plan to evolve in their offering to keep it market leading in the long term? Things to consider are:

- **Product Roadmap:** how are they intending to improve their products and what timelines are in place?
- **Staffing:** who develops the product? Are they full-time members of staff? Are they based in the UK? Are they able to implement small improvements for you?
- **Feedback loops:** do they survey existing clients to understand any individual development requirements?

Discover whether email marketing is their core business. If they are part of a large multi-national, often investment is not forthcoming, whereas if email is their primary operation, you can be confident that all efforts will be spent on product enhancements.

4. Client Services

If they provide a customer services operation, investigate:

- **Access methods:** How can you contact the support team? Many providers offer email, instant message and dedicated client hot line.
- **Timing:** Between what hours can you use the support team? How often can you use them? What out of hours provision is there? This is a key question if your potential partner is not based within the UK.
- **Response times:** what is their process for dealing with your questions? Some companies slot your request into a queue and respond to it in order. Others operate strict SLAs guaranteeing certain turn-arounds
- **Expertise:** How knowledgeable are their support teams? Can you use them for more than product training? Can you bounce strategy ideas off them? How proactive are they? Do they ever call you if they have suggestions about your promotions?

Finally, and in our experience, most importantly, can you get on with the people in that organisation? After all, you will be working with these people continuously and you must feel confident that you can build a good working relationship.

5. Product Features

It is important that your proposed partner's product is comparable with those of other providers. Check their promotional literature and see product demonstrations at industry events, to build a list of the ones most important to you.

We recommend you ensure they have the below features:

- **Database:** Can it manage de-duping, suppressions and the import and export of data sets? Ensure that you maintain all ownership rights to the data and it will never be used by your partner.
- **Design:** How complicated are any editing tools? Can they personalise emails with merge fields and conditional content? Can you create messages in different languages?
- **Broadcast functionality:** Can they broadcast multi-part emails? Do they provide scheduling and immediate broadcasting of mass sending?
- **Deliverability & Checkers:** What pre-send checking functions are included? Spam filters and link checkers? Any preview tools to show what your emails look like in different email systems? What deliverability features are supported – can you use your own IP address and implement sender IDs?
- **Reporting and testing:** Are you able to get the information needed to measure your email program and justify the ROI?
- **Inbound:** can they filter and manage replies?
- **Roll-out & training:** what training is required and any technical deployments needed?

Overall, be confident that their products are user-friendly and intuitive to use. This is the single most important aspect of any product- there is nothing more frustrating than a badly designed product!

6. Security

Most ESPs employ online ASPs. One of the key features of these services is that they host your data. This means the vendor is responsible for the security of your data. It is essential that the vendor has robust security and testing policies:

- **Hardware:** Vendors must regularly upgrade relevant servers, ensure there is sufficient spare capacity and implement redundancy procedures to avoid system failure
- **Testing Procedures:** there must be a robust testing protocol and notification procedure to ensure that new features and functionality do not cause problems when launched
- **Security:** ensure regular penetration tests and servers are held in secure facilities
- **Disaster Recovery:** ensure back-up procedures (including off site storage) are in place

7. Try before you buy

Are you able to trial their offering? This is the best way of understanding the differences between rival vendors and allowing you to really understand which offering is best for you.

Indeed, if the company declines to provide a test run, it indicates a lack of flexibility and willingness to accommodate clients and perhaps more importantly, they may have doubts about the quality of their offering when directly compared to some of their rivals

8. Pricing & Value

There is a vast difference in quality between the offerings of the various email marketing companies. It is fair to say, that the cheapest is not always the best. To launch new product functionality and to ensure high levels of deliverability requires investment. If you are offered a cheap price, ask yourself whether this reflects a lack of intended investment.

When trying to understand whether you are being offered a good deal, benchmark prices with the other vendors on your short list. However, make sure you have a full understanding of all costs involved in working with the partner- check to see if any additional charges will apply. Key things to look out for are:

- Do they charge for support?
- Is training charged at extra rates?
- Are there any extra charges for email design and form creation?
- Do they charge extra to belong to authentication schemes?
- Any charges for additional users?

Typically, different charging structures are employed:

- **Transmission charge:** a straight per email broadcast cost allowing pay as you go.
- **Bulk buy to be used up:** a discounted purchase of a set number of emails which are used up over a number of campaigns
- **Monthly fee:** a set fee every month which allows the client to send up to a certain number of emails. If the threshold is breached, often a cost per email 'overage' charge is applied. This method means the client is liable to pay the fee even when they do not use the system.
- **Set-up charges:** often training and user set-up is covered by a one off set-up cost.

Your own budget structure will allow you to decide on which charging structures are most relevant to yourself.

When confident that the different vendors' offerings are comparable, many clients distil pricing to a per email charge. With this information, and your evaluation of their pedigree, deliverability, commitment to the future, people, product and security, you are ready to make your decision.

Good luck!



About Adestra

Client Support

no one works closer with you



"Over the past 5 years, my team and I have enjoyed working with many email marketers, with different levels of experience.

I'm looking forward to continuing to work closely with our clients over the coming years to ensure they get the most out of their email marketing program"

Steve Denner,
Director, Adestra

Working closely with our clients to help devise, execute, measure and refine their marketing campaigns, our solutions are helping marketers exceed their marketing objectives including prospecting, brand-building, eCRM (customer relationship management), direct response, market research, and eZine newsletters

We work with marketers operating within both B2B and B2C industries including publishing, event organising, leisure, financial services, entertainment, retail and many more.

Adestra's Message Focus is *today's best email marketing system* and the only one designed for advanced email marketers.

Manage your entire email marketing program using Adestra's Message Focus including email contact database management, message creation, sending, reporting and refinement.

Adestra also provide Fax and SMS broadcast services.

For more information about our fax, email and SMS broadcast services, please contact us on:

Web: www.adestra.co.uk
Telephone: +44 (0) 1865 24 24 25
Email: sales@adestra.com

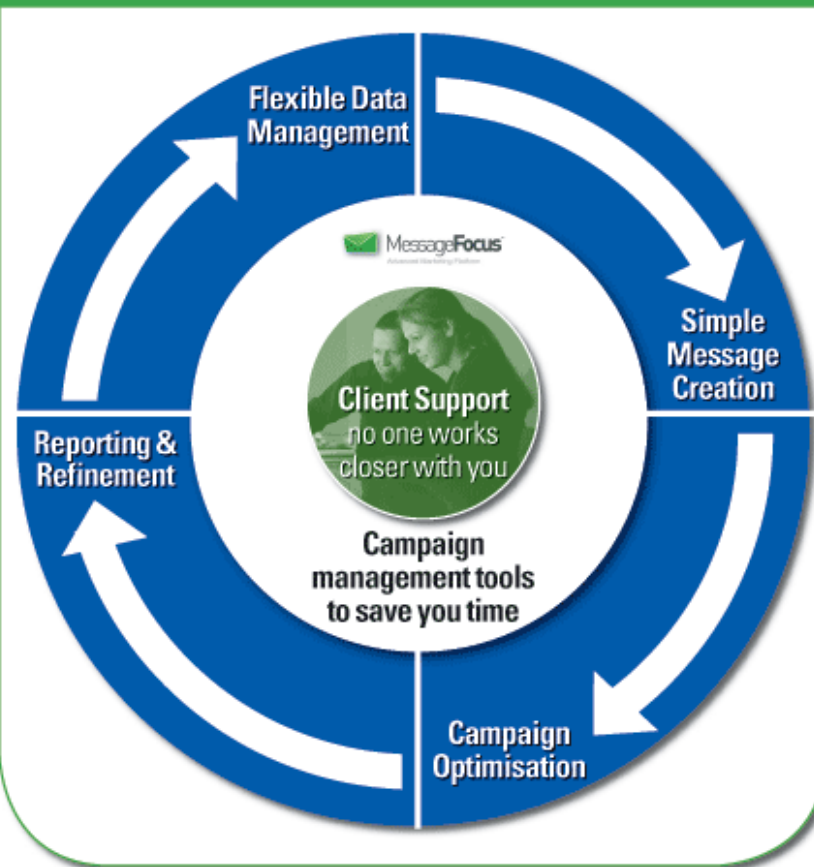


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FAST, RESPONSIVE AND KNOWLEDGEABLE

Today's best email marketing system

The only service designed for advanced email marketers



Manage your email marketing program with Adestra's Message Focus. Simple to use and web based, this email marketing tool is the only service designed for advanced email marketers.

What our clients say:

"Working closely with key members of the Adestra team for almost 5 years, my loyalty is testimony to their user friendly product, their excellent email marketing expertise and their willingness to work with me to address my individual needs"

*Global Marketing Manager,
Jane's Information Group*



"Adestra act as an extension to my marketing team, advising and aiding the implementation of our email marketing strategy. Their user friendly product combined with their team's expertise, guarantees that our email marketing program continues to be a success."

Database and Mailings Manager, Oxford University Press



"Adestra have developed a unique understanding of our complex business, and within this our varying needs. Staff from functions across our group with varying technical understandings now use their tool to manage communications with the market. With Adestra's responsive and knowledgeable support at the end of a telephone line for everyone, I am positive our relationship within Adestra will continue to flourish."

*Marketing Manager,
telecoms.com*

