

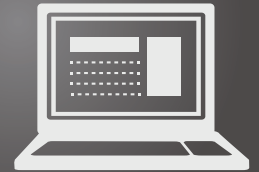
optify

THE COMPLETE AUTORESPONDERS EBOOK

FORM



THANK YOU
PAGE



AUTO-
RESPONDER



EMAIL



CADENCE

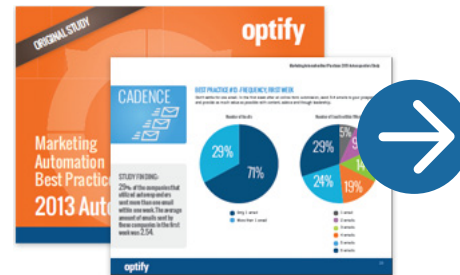
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ABOUT THIS EBOOK

This ebook is written for B2B marketers who want to learn how to best use one of online marketing's neatest tools—the autoresponder.

It's a handy companion to [Optify's Autoresponder Study](#), which set out to discover how B2B marketers are using this technology today. The study uncovered some very interesting facts about autoresponder usage (or lack thereof) among 500 B2B companies in the business services and technology arena. You'll see little snippets of the study sprinkled throughout this ebook, and we encourage you to [download your own copy](#) to get the full results.



SO WHAT EXACTLY IS AN AUTORESPONDER?

Before we launch into the meat of the content, let's state up front what we mean by an autoresponder so we're all on the same page. An autoresponder is a system for automatically sending an email (more likely a sequence of emails) in response to someone completing an online form and giving you their email address. We're not talking about the 'out of office' feature that you set up in your email account that tells someone you're on vacation.

The autoresponder killer app for B2B marketers

There are of course a lot of ways you can use autoresponders, but this piece focuses on using autoresponders to nurture leads that are not 'sales ready'—these represent the majority of raw leads (anywhere between 75%-96% depending on your business model).

The hope is that by keeping your brand top of mind and providing useful content, a percentage of those leads will become customers at some point down the road.



The anatomy of an autoresponder

The first part of this ebook is organized around the four core elements of any autoresponder system:

Form

The starting point for your autoresponders system is the form that someone submits on your website. Data collected usually goes into your CRM or marketing database.

Thank You Page

As the name suggests this is the web page that your prospects see immediately after submitting a form. It confirms that their form was submitted successfully and thanks them for their submission. It can also do a whole lot more, as we'll see later in this ebook.

Email

This is everything about the actual content of the emails that get generated in your autoresponder flow.

Cadence

This is the frequency and timing of the email(s) sent.

SECTION 1



FORM



SECTION 1

THE FORM

We could devote an entire book to the subject of how to create and optimize marketing forms and the pages they sit on to improve your lead conversion rate. But for the sake of brevity, we've distilled some of the key how to tips and best practices in this area.

How to add forms to your web site

There are four basic things you need to do in order to add a form to your web site: design the form itself; tell the form where to 'post' the data that's submitted; add the form code to the web page that your form will sit on and then publish your web page. Sound simple? If all of this has you reaching for the aspirin take heart—there are some tools that make this much easier than it sounds. Here are a few options:

COMMON USE CASES FOR B2B ONLINE FORMS:

- Content offers (whitepapers, guides, ebooks etc.)
- Blog or newsletter subscriptions
- Online way to 'contact us'
- Demo request
- Free trial signup
- Webinar signup

- » **Use a plug in** – If your site is on an open source CMS platform like WordPress, you can use an 'off-the-shelf' plug in to develop your form. [Gravity Forms](#) is one company that offers such a plug in. They also support 'posting' the data collected by the form to your CRM of choice.
- » **Use a form-building tool** – There are a lot of tools that make it easy for the HTML challenged to develop great looking forms. Some of these tools like [Wufoo](#) can save the data to their own database as well as 'post' the data to third party apps.
- » **Use a standalone landing page solution** – There are some tools whose sole purpose is to help you create landing pages, and include both the form and page design.
- » **Use a marketing automation tool** – sophisticated marketing platforms like Optify give you the ability to do everything in one spot. You can design your form, and then either take the form code and embed it on one of your web pages, or use Optify to design and publish a landing page. Because Optify also supports autoresponders the data you collect is automatically available to kick off your auto responder sequence.

The brave among you can of course code the form by hand in HTML and post the data to your autoresponder tool of choice.

FORM



First Name *

Last name *

Company *

Business Email *

Title *

Phone *

* Required

Download Now

Edit content:

Form Fields

Appearance

Actions on submit

Field	Field label	Required
First name	First Name	<input checked="" type="checkbox"/> *
Last name	Last name	<input checked="" type="checkbox"/> *
Company	Company	<input checked="" type="checkbox"/> *
Email	Business Email	<input checked="" type="checkbox"/> *
Title	Title	<input checked="" type="checkbox"/> *
Phone	Phone	<input checked="" type="checkbox"/> *

Need more fields? [Add or Edit Custom Fields.](#)

Actions once form is submitted:

On submit: ☒ Take visitors to a target URL
<http://www.optify.net/thanks-for-requesting-our-white-pap>

☒ show confirmation message
Click the link below to get the essential guide o B2B lead generation campaigns

☒ Link to a document [Optify's_Essential_Guide_to_...](#) [View Document](#)

Link Text: [Click here to begin your download.](#)

Need more fields? [Add or Edit Custom Fields.](#)

Done cancel

Here's how you create a form using Optify.

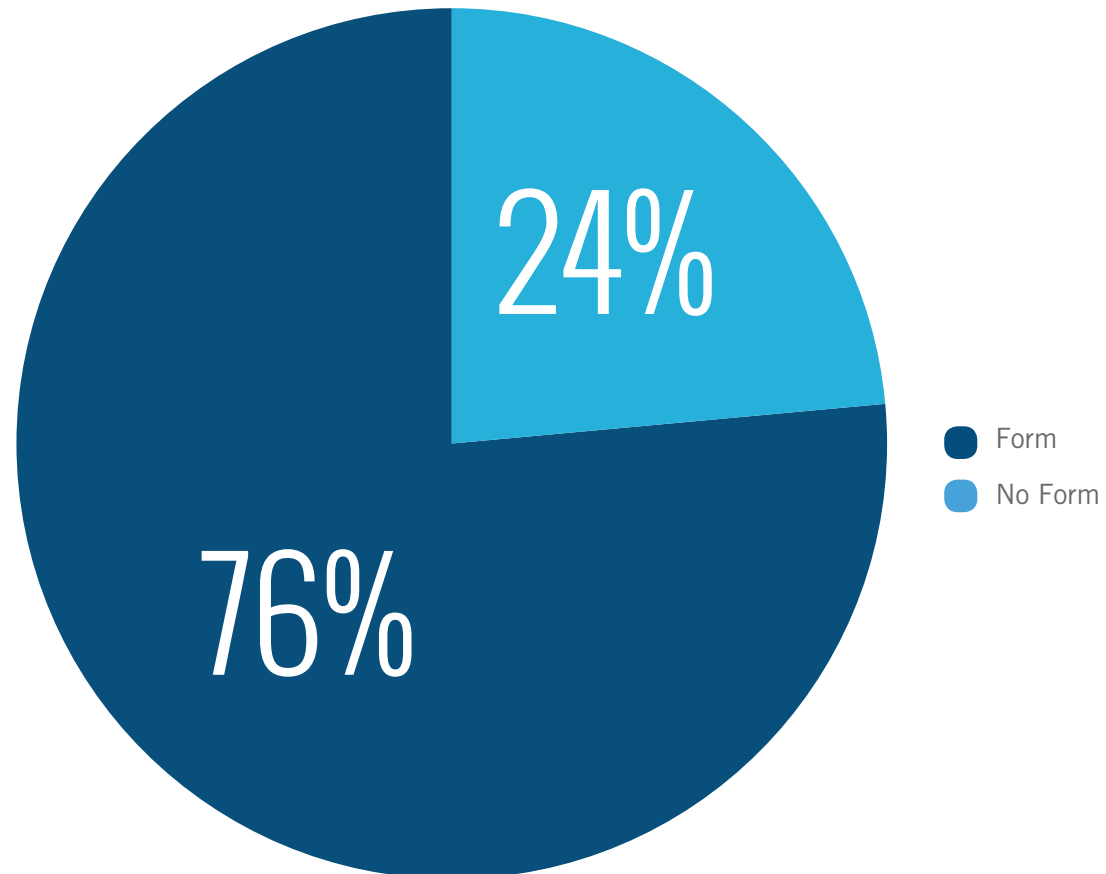
FORMS BEST PRACTICES

You now have a form sitting on a web page. Now what? Apply the following best practices to improve your conversion rate.

BEST PRACTICE: Have a form, any form

This best practice may be obvious, but it's worth stating because of a stat that we uncovered in our study. We found that almost a quarter of B2B sites had no form at all. If you want your web site to generate leads (in addition to phone leads), you need lead capture points.

The percentage of B2B sites in our study that had any kind of form



FORM

**BEST PRACTICE: Have as few fields as possible**

There is a direct (and negative) correlation between the number of fields on your form and your visit to lead conversion rate—as a rule, the more fields you have the lower the conversion rate. This fact has been proven time and time again by multiple studies, so as much as you would like to ask everything you could ever want to know about your prospects—keep your forms limited to ones you need to facilitate lead routing and follow up.

Purists might say that you just need to capture email address, and that's definitely one tactic—but one that doesn't allow you to collect the data you need for personalization and segmentation (more on that later).

Most organizations can get what they need to route leads and follow up effectively with these five fields: first name, last name, company, email and phone number. Digital marketing software like Optify can append industry, company name, web domain, geography and other cool data points for many of your visitors, so you can get that information without having to ask those questions.

Now that's not to say that you can't ask more questions, especially if your offer is a really, *really* valuable piece of content (think expensive analyst report or exclusive study), or something like a free trial, but don't go overboard.

Here are some more words of wisdom that can help improve your conversion rates:

- » **Explain why you're asking for something**—for example, email address is needed so you can deliver content.
- » **Remember that prospects don't always tell the whole truth**—so avoid questions that encourage them to be less than honest (timeframe to buy is a classic example of this—most people enjoy an interrupt-driven sales call like a trip to the dentist, so they don't indicate that they're ready to buy imminently—even if they are).
- » **State your privacy policy**—tell them what you will and will not do with their information right on the page, with a link to the fine print of your privacy policy.
- » **Remember you don't need to ask for everything up front**—you can always gather more data later in the engagement cycle. Use hidden fields to capture things like area of interest, or use a tool like Optify to append data.

STUDY FINDING:

Companies use an average of **7** fields on their forms. The vast majority (**61%**) had **4-7** fields.

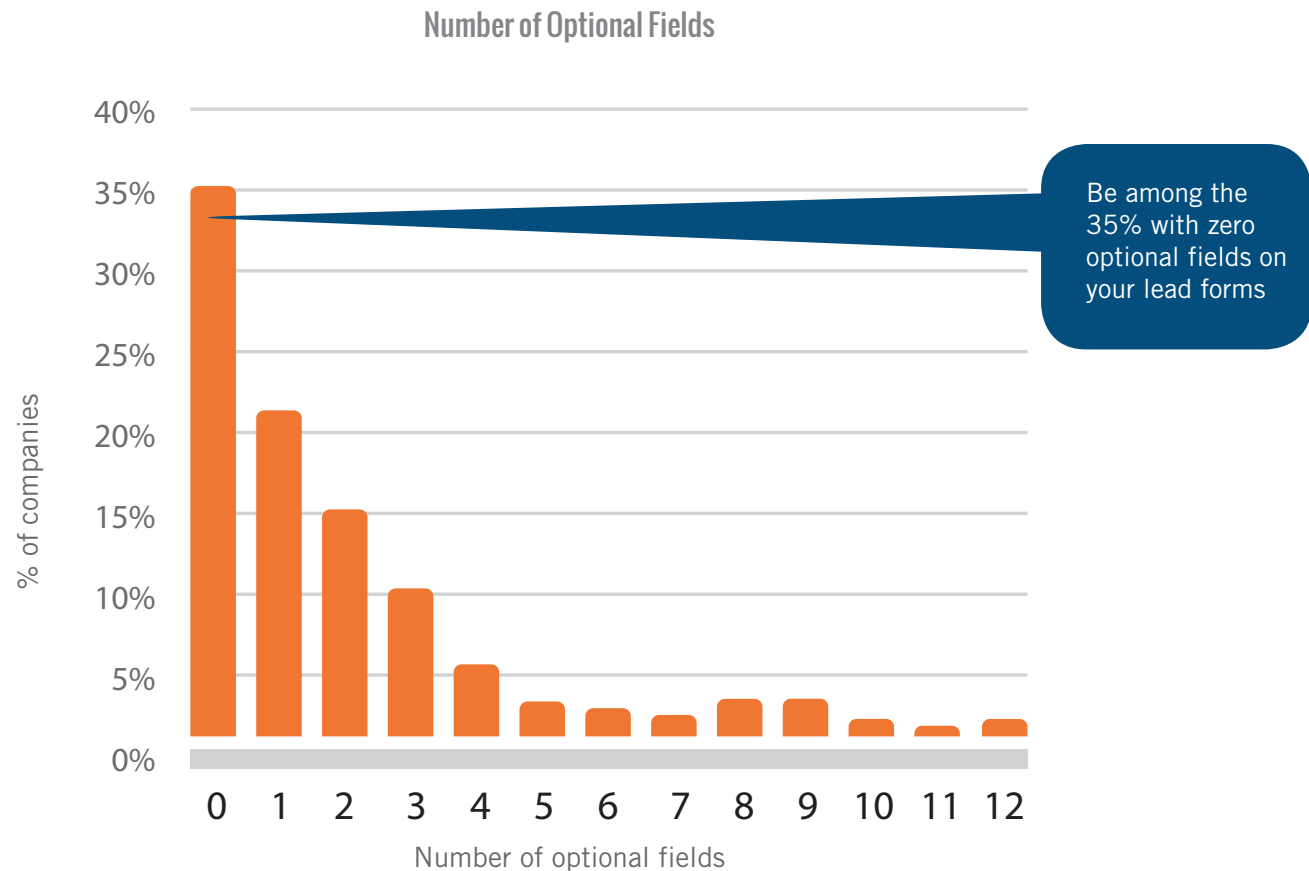
FORM



BEST PRACTICE: Get rid of 'optional' fields

Don't make the distinction between required and optional fields—if a field is on your lead form it's required, and that's that! Remember, we're talking about someone taking that first crucial step and sharing their information. We're not talking about a customer satisfaction survey, product feedback or other types of forms where it's entirely appropriate to have optional fields, like the classic optional "comments" field.

This point is closely related to the one above, but is worth singling out given that our survey revealed that 57% of companies had optional fields on their lead forms.



FORM



BEST PRACTICE: Test your forms and analyze results

To really understand how the number of fields and other form attributes affect conversion rates, you need to test your forms and analyze the results—and not just once, but on an ongoing basis. You'll be surprised how even small changes can dramatically affect conversion rates.

Remember that the form is only one part of the web page with which your prospects are interacting, so you need to test and optimize all aspects of your page.

Here are some ways to test your form pages:

- » **Use heat maps** – Use a solution like CrazyEgg, ClickTale or AttentionWizard to quickly analyze the design and structure of your landing pages. These solutions can predict and track how visitors interact with your page, giving you the information you need to optimize the design.
- » **A/B testing** – This is where you have your existing page (A) and then test that against a page where you have made a change or changes (B). To get the most accurate read, it's best to use a tool that splits incoming traffic to the A and B version of the page during a particular time period. You can also run version A/B tests serially (first A and then B) if you have to. A/B testing can be used to see what difference changing one factor like number of fields makes, or to test multiple changes to your existing page. Doing the latter however, makes it impossible to determine cause and effect.
- » **Multivariate testing** – This testing methodology is like A/B testing on steroids and allows you to test multiple versions of a page at the same time, and figure out which one has the best conversion rate. This can save a lot of time, but you need a large volume of traffic to get statistically meaningful results.

THE MAIN FACTORS THAT AFFECT CONVERSION RATE

For the form itself

- » Number of fields
- » Field labels
- » Field layout

For the page as a whole

- » Form placement
- » Headline
- » Copy length and content
- » 'Hero' image
- » Whether the page has distractions (like navigation)
- » Design factors like page layout, fonts, colors etc.
- » Credibility images (customer logos, privacy link, security logos)

Forms and landing pages showcase

FORM



Punchy headline and concise copy with easy-to-scan bullets

B2B Marketing Benchmark Report

How does your website stack up? Are you investing in the right digital marketing strategies for 2013?

Complete the short form on the right to get the **B2B Web Marketing Benchmark Report** and learn key findings including:

- Which sources drive the most traffic to B2B sites
- The most efficient lead generation sources
- The best-performing social media channel
- Important trends in SEO and paid search

Get the report today, compare your results and get practical ideas on how to improve your digital marketing performance in 2013.

2012 B2B Marketing Benchmark Report

Partner with the Best

First Name

Last Name

Company

Job Title

Phone

Business Email

[PRIVACY POLICY](#)

Are you an agency? ☐

Get the Report

Nice short form, with no optional fields

Clear call-to-action button, strong color with copy that applies to offer

“Organic search was the number one driver of traffic to B2B websites in 2012”

FORM



content rules™
the global content experts

Download our eBook Today

Sure content is king. Everyone knows that. But what a lot of companies don't know is how people, processes, and technology can be used together to make all your content producers more efficient.

- Understand what it takes to make all your content producers more efficient at creating content

our ebook will introduce you to the key concepts you need to know

Learn what technology can and cannot do when it comes to making content creation more efficient

think differently about the benefits of consistency

significantly improve the quality of your content

Companies that are set up to efficiently produce content increase the value of their brand and increase customer engagement. The same tools that are used to drive efficiency also result in global-ready content, enabling companies to reduce the time it takes to get to market.

Shepherding Your Content for Operational Efficiency

Get More Efficient!
Read the eBook that we're offering. It's free to download, just fill out our form below.

FREE!

First name *

Last name *

Company *

Title *

Email *

Phone

* Required

We will never sell your email address to any 3rd party or send you nasty spam. Promise.

select clients
Some of the world's best brands rely on us for content expertise.

Adobe **PayPal** **CISCO** **Whirlpool** **hp** **EMC²**
where information lives

Small, relevant image, not random stock photos!

Short form embedded on the right, clear instructions

Good credibility content

Phone is optional. Wonder what their completion rate is?

Nice way to explain privacy policy

SECTION 2



THANK YOU
PAGE

SECTION 2

THE THANK YOU PAGE

Any time someone submits a form, you should present them with a ‘thank you page’. This page has the following two key functions:

- » It lets the responder know that the form was successfully submitted and thanks him/her for filling out the form.
- » It lets you easily track conversions (form completions) with your web analytics software, so you can calculate your visit-to-lead conversion rate.

Your thank you page is an incredibly valuable piece of online real estate, which many B2B marketers don’t take full advantage of. So here are some best practices you can use to make sure your thank you page gets used to the maximum effect:

- » **Tell them what to expect next** — Example: “you’ll get a follow-up email with a link to the content you requested”.
- » **Tell them when it’s going to happen** — Example: within 5 minutes
- » **Give them something to do right away** — Keep the momentum going by suggesting immediate ways they can engage with your brand—such as visiting specific web pages, getting related content or signing up for your newsletter.
- » **Make it easy for them to contact you** — In the same vein as the point above, someone who filled out your form is very engaged, so don’t make them have to hunt for ways to contact you if they’re ready to take the next step. State all of the possible ways to reach you right there on the thank you page—phone number, email address, chat, social media profiles etc.

Thank you page showcase

THANK YOU
PAGE



Nice, clear calls-to-action

Lots of options to engage with this company

Clear call-to-action

Thank you page showcase

THANK YOU PAGE



Thank You

Alright, the ball's in our court...

Thanks for reaching out! One of our representatives will contact you shortly to explore your online market needs and help you choose from our selection of internet advertising services.

What can you do now?

- Learn more about your company's online potential at our [Search Engine Marketing Resources](#) page.
- Check out Ajax Union online on [Facebook](#), [LinkedIn](#), and [Twitter](#).
- Stay up-to-date with industry news on our [Business Marketing Blog](#).

Clear message as to what to expect next. Adding a more accurate timeframe would make this even better.

Really good example of how to set expectations

Clear instructions on how to whitelist their email address.

Thank you for your interest in The Launch Pad's Services.

A response will be sent to you within 24 hours. If you have any questions or need additional assistance, please contact Megan Meisner, Client Services Manager at 888-920-3450 x210 or mmeisner@launchpadonline.com. If you require immediate assistance or technical support, please contact our support line at 813-920-0788 x1.

Please feel free to continue shopping or exploring other areas of our website.

Please enjoy a complimentary whitepaper:



The Right IT Stuff: Finding & Working with the Best IT Partner for Your Small Business
Featured White Paper [download now](#)

NOTE: Be sure to allow email from campaigns@launchpadonline.com and mmeisner@launchpadonline.com at the email address you entered on the previous page. You may need to add campaigns@launchpadonline.com and mmeisner@launchpadonline.com to your safe list or address book. By submitting this form you are agreeing to receive email from The Launch Pad at the email address above. If you use a challenge-response authentication system to avoid spam (SpamArrest, Earthlink, etc), please add campaigns@launchpadonline.com and mmeisner@launchpadonline.com to your whitelist.

If you do not receive a confirmation email within the next ten minutes, please check your spam or junk mail folder.

Nice related "next steps" offer.



SECTION 3



SECTION 3

THE EMAILS

Here's where we get into tips and best practices for the actual emails that go out from your autoresponder system.

There's lots of great content on the web about email best practices, and all of these apply to your autoresponder email content. The reference section has some of our favorite picks. The best practices below are the ones most applicable to autoresponders.

BEST PRACTICE: Have a great subject line

Email experts would argue that this is the most important part of any email. After all it doesn't matter how great your email content is if the subject line doesn't convince them to open it. In the context of an autoresponse email, the subject line should directly relate to the prospect's form action.

For example – Subject line: Here's the how-to-guide you requested

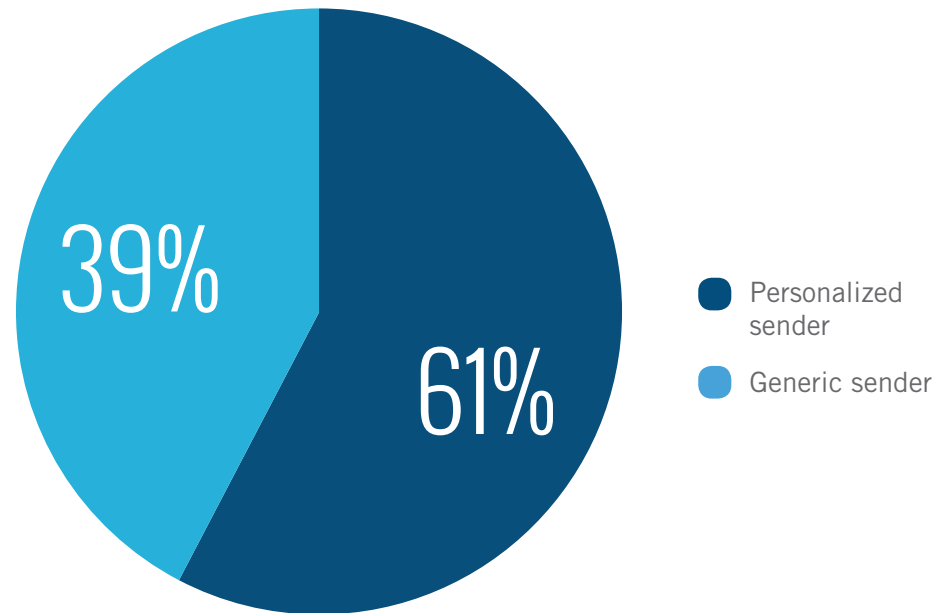


BEST PRACTICE: Personalize your company

Have your emails come from a person to give a 'face' to your company. Even though your prospects probably know that "Dave Foster" the client services manager didn't sit and type out the email himself, people are still more likely to respond to a named person rather than a faceless corporation. Ways to do this are:

- » **Use the "from" line** – For example, make this "Dave Foster, Widgets Inc.".
- » **Use the signature area** – Have the email come from a specific person. You can even include a small headshot photo of the sender.

Personalized From Line



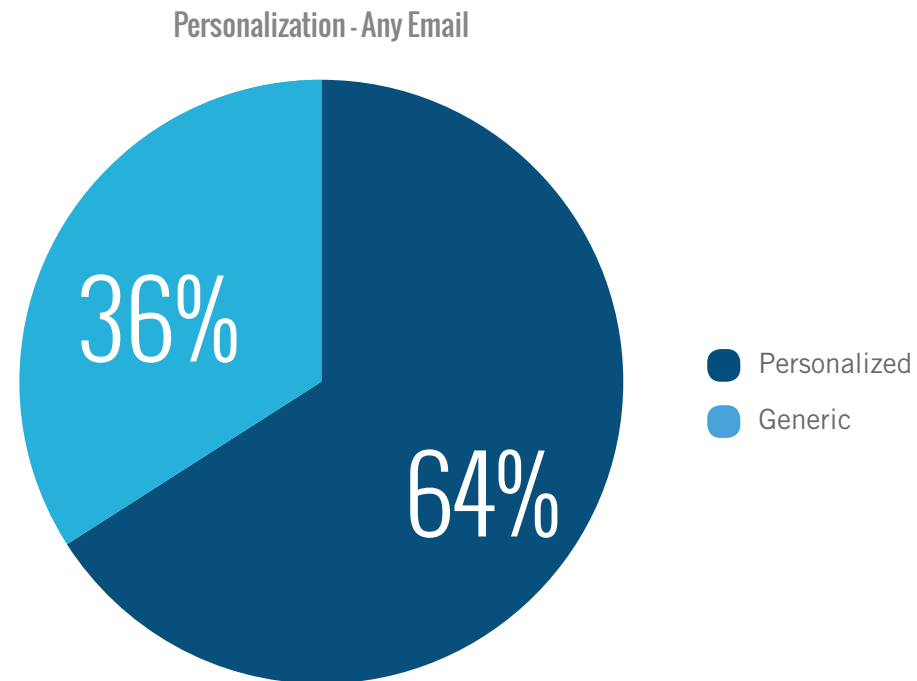
STUDY FINDING:

Only **39%** of companies are personalizing the "from" line.



BEST PRACTICE: Personalize the email with recipient data

Another proven way to increase engagement is to personalize the email with information you collected from the form (first name, company name, etc.), but tread carefully here as too much personalization can come across as robotic and tacky.



The majority of companies in our study use some kind of recipient personalization in their autoresponders, which is great to see.



BEST PRACTICE: Clearly state why they're getting email from you

This goes hand in hand with the subject line best practice, but applies to the actual content of the email. Connect the dots between the form the prospect originally completed, the first email and then subsequent emails in the series and it will go a long way to increasing engagement and decreasing opt outs.

BEST PRACTICE: Set expectations for future emails

Let people know what they can expect from you in the future, whether that's a phone call or a follow-up email with a new content piece. Tell them when they're going to get the next email and what it's going to be about. This will do a lot to improve engagement, reduce annoyance and the bad things that this leads to (marking you as spam and unsubscribing, to name just two).

BEST PRACTICE: Be relevant, useful and not pushy

So how do you make sure the content in your emails is relevant to your audience? The more you know about them, the more tailored and relevant you can make your autoresponders. And that means using the data your prospects submit and other intelligence that you've collected to segment your audience and put them into the right autoresponder.

Just sending a stream of emails asking for the sale isn't going to get you anywhere, except in someone's spam folder. That being said, you should always give them a way to contact you or actively move through the sales cycle, but that shouldn't be the only call to action in the email.

3 WAYS TO GET SMARTER ABOUT YOUR LEADS:

- » **Use hidden fields** - Assign an area of interest to each of your forms as well as a stage in the sales cycle. Those two data points can then be passed into lead records using hidden form fields.
- » **Append data automatically** - Use digital marketing software like Optify to automatically add fields like industry or location to the lead record.
- » **Ask more questions** - Engage your prospects in a conversation to uncover more about them. People will fill in more forms if you ask nicely, make the questions relevant and give them something in return.



BEST PRACTICE: Have clear call (s) to action

This golden rule of direct marketing holds true for all of your autoresponse emails. Make it clear and easy for your prospects to take the next step that you'd like them to take—download more content, see a demo, tell you a little more about themselves etc.

BEST PRACTICE: Go easy with the pictures, but don't forget your brand

A simple letter format generally works better for B2B buyers, so avoid big flashy images that scream 'sales', trigger spam filters, and push your copy and calls to action further down the page. It's okay to use little images that support your copy, but don't overdo it.

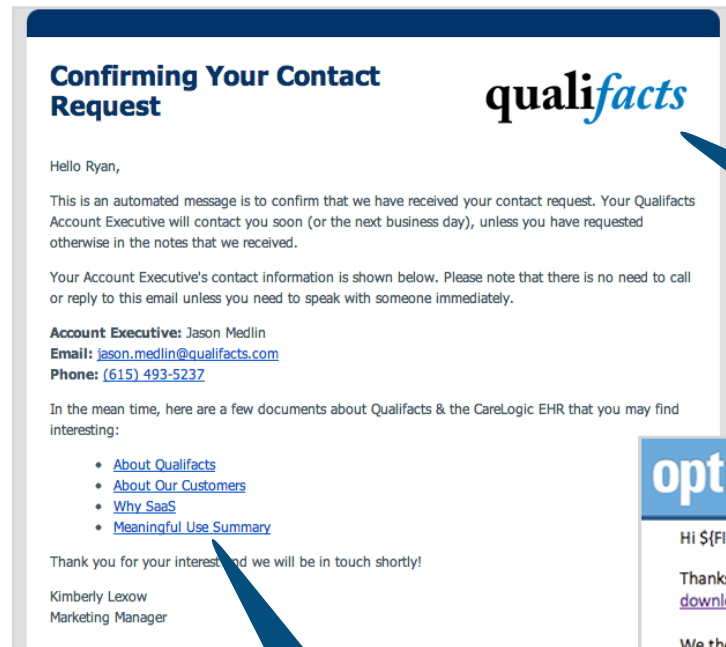
Make sure the email is in keeping with your brand guidelines and include a small logo to visually reinforce your brand.

BEST PRACTICE: Use tried and tested offer content

Got some whitepapers, case studies, blog posts or FAQs that are getting great traction with your audience? Make sure you put your best foot forward by using these proven pieces as offers in your autoresponse emails.

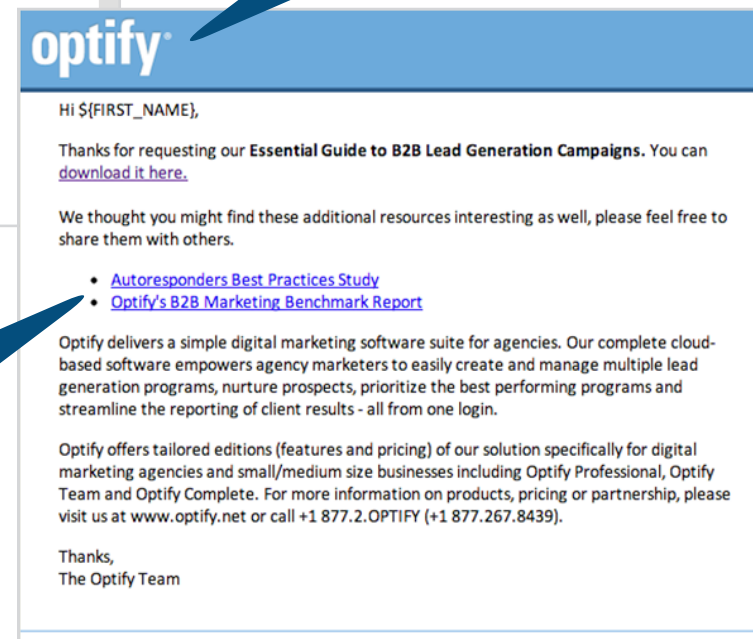


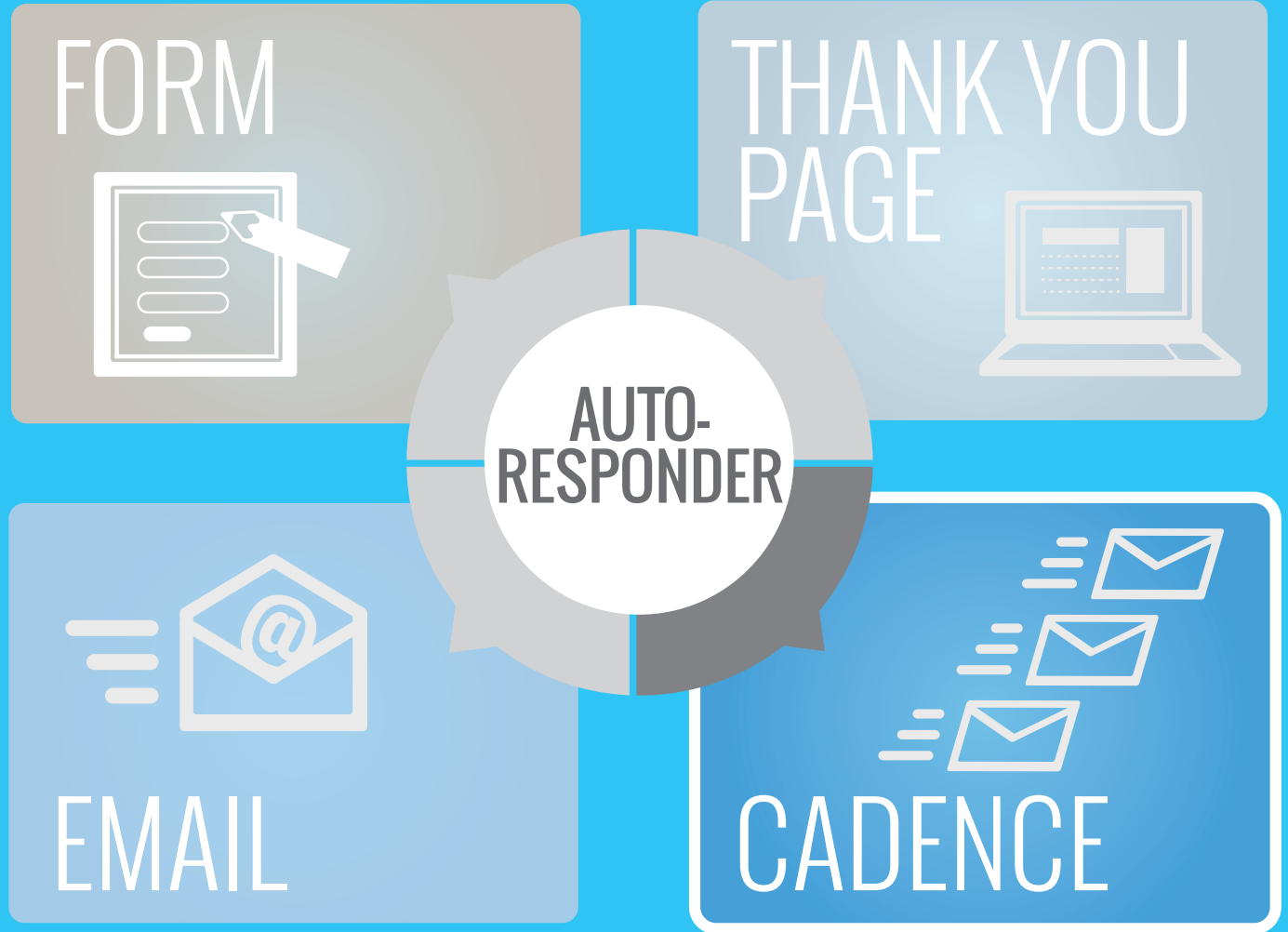
Email showcase



Two nice examples of a simple HTML "letter" email. A small logo reinforces the brand.

Both emails clearly 'connect the dots' between the prospects last action, and offer immediate calls to action.





SECTION 4

SECTION 4

CADENCE

This section of the ebook is all about the timing and frequency of the emails in your autoresponder.

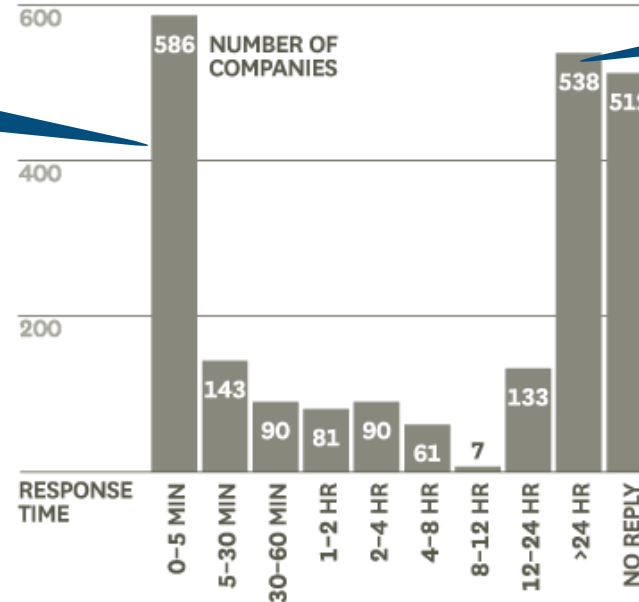
BEST PRACTICE: Get your first email out ASAP

Experts agree that the first autoresponse email should come immediately (or as soon possible) after your prospect submits the form.

There's lots of data around to show why immediacy is a good thing.



Many Firms Are Slow to Respond



Be here

Don't be here

“Firms that tried to contact potential customers within an hour of receiving a query were nearly seven times as likely to qualify the lead.”

Harvard Business Review



DREAMFORCE 2011 RESPONSE AUDIT RESULTS

1. Immediacy of Response

ATTEMPT TYPE	AVERAGE RESPONSE TIME
Phone Call	1 Day, 18 Hours, 15 Minutes
Email	19 Hours, 14 Minutes
Overall Average Response Time	42 Hours

#FAIL
#FAIL
#FAIL

We were glad to find that the companies in our study perform better (for the most part), in getting their first emails out.

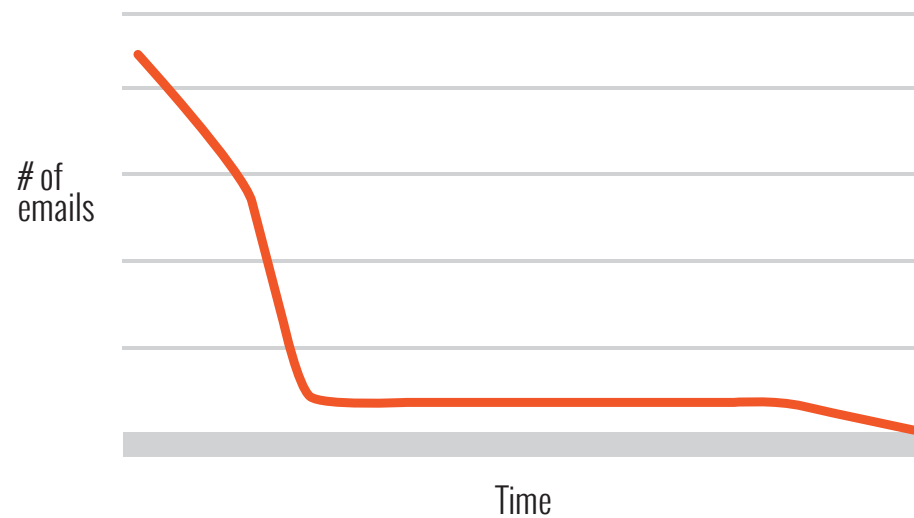
RESPONSE TIME	% OF COMPANIES	AVERAGE RESPONSE TIME
up to 15 minutes	70%	00:00:25
15 minutes < 1 hour	8%	00:29:12 (00:03:04)
> 1 hour	22%	8:14:00
Average		9:35:13

Remember to set expectations as to when the email will come on your thank you page, especially if your autoresponder software can't send that first email out immediately.



BEST PRACTICE: Front load your emails then tail off

So we've established why the first email in the sequence should come immediately, but what happens next? The answer will vary somewhat based on your business case, but most experts agree that you should send emails closer together at the start of the autoresponder cycle, then decrease frequency over time.



STUDY FINDING:

29% of the companies that utilized autoresponders sent more than one email within one week. The average amount of emails sent by these companies in the first week was **2.54**.



THE BEST PRACTICE AUTO RESPONDER TIMELINE

So we've established why the first email in the sequence should come immediately, but what happens next? The answer will vary somewhat based on your business case, but most experts agree that you should send emails closer together at the start of the autoresponder cycle, then decrease frequency over time.



BEST PRACTICE: Know when to stop

How many emails should be in your autoresponder sequence? Again you have to be smart about this and tailor your flow to the business case you're dealing with, but evidence suggests that between 12 and 15 emails is a good number to aim for. This number strikes the balance between keeping your brand top of mind without inundating the recipient.

Include **12-15** emails per campaign. On average, it takes **5-9** contacts with each prospective lead before they become a buyer.



SECTION 5



SECTION 5

SETTING UP YOUR AUTORESPONDER

STEP 1: Tailor your autoresponders by type of lead

It's important to create different autoresponders based on the action your prospect took. It's obviously not appropriate to put someone who filled out your contact us form into the same autoresponder flow as a lead who downloaded an early stage 'how to guide'?

STEP 2: Map out your flow

You know which form someone completed, and so it's easy to think what content makes sense for the next email. But what about the one after that? What should the 5th or 12th email contain? It's important to take the time to devise the flow of your autoresponder so that it marries the needs of your audience with your marketing goals.

A great way to do this is to actually sketch out the sequence noting the time interval between sends, offers / calls to action, exit points, etc. It doesn't matter if this process is low tech with paper and pencil, or beautifully executed in PowerPoint—the point is you need to devote some thought ahead of time before diving into your autoresponder tool putting in content. This will actually save you time in the long run.



STEP 3: Write your emails

Actually writing the emails should be fairly easy, given the work you did in steps 1 and 2, and all of the knowledge that you've extracted from email best practices.

STEP 4: Setup your autoresponders

Finally you get to dive into your tool of choice armed with everything you need to build a great campaign. You have a map to guide your way, and lots of well-written email content, packed with stage-appropriate content. Now all that's left to do is actually put all of that together, hit the go button and sit back and relax. If that were only true, but of course it doesn't stop there.

The screenshot shows the Optify autoresponder setup interface. On the left, there's a sidebar with the following sections:

- Title your email:** A text field containing "Thank You Email".
- From:** Fields for "Name" (The Optify Team) and "Email Address" (marketing@optify.net).
- Autoresponse form:** A section with a dropdown menu for "Send to anyone who fills out this form" (The Essential Guide for B2B Lead Generation Campaigns), a dropdown for "Delay before responding" (Send Immediately), and a checkbox for "Exclusions".
- Subject:** A text field with a placeholder "This is what your email recipients will see in their inbox".

The main area shows a preview of the email content. It starts with the Optify logo, followed by a personalized greeting "Hi \${FIRST_NAME}.". The body text reads: "Thanks for requesting our [Essential Guide to B2B Lead Generation Campaigns](#). You can [download it here](#). We thought you might find these additional resources interesting as well, please feel free to share them with others." Below this are two bullet points: "Autoresponders Best Practices Study" and "Optify's B2B Marketing Benchmark Report". The text continues: "Optify delivers a simple digital marketing software suite for agencies. Our complete cloud-based software empowers agency marketers to easily create and manage multiple lead generation programs, nurture prospects, prioritize the best performing programs and streamline the reporting of client results - all from one login. Optify offers tailored editions (features and pricing) of our solution specifically for marketing agencies and small/medium size businesses including Optify Professional and Optify Complete. For more information on products, pricing or partnerships, please visit us at [www.optify.net](#) or call +1 877.2.OPTIFY (+1 877.267.8439). Thanks, The Optify Team".

A detailed inset on the right shows the "Autoresponse form:" settings:

- Autoresponse form:** A section with a dropdown menu for "Send to anyone who fills out this form" (The Essential Guide for B2B Lead Generation Campaigns), a dropdown for "Delay before responding" (1 Day(s)), and a checkbox for "Exclusions".

Here's how you setup an autoresponder in Optify.

STEP 5: Track & optimize

There's a lot you can learn from your autoresponder campaigns, and because they're always working away in the background, optimizing them can make a big difference. So what key metrics do you have to pay attention to? Here are the basics:

- » **Open rate** – As the name suggests the percentage of people opening the email.
- » **Click-through rate & links clicked** – These two go hand in hand. You want to know which calls to action are getting most traction and what the overall click-through rate is.
- » **Unsubscribe rate** – Hopefully yours will be tiny, but this is the percentage of people who ask to be removed from your list.



Search:

View:

All (15)

✓ Sent (6)

Draft (5)

Scheduled (0)

↩ Autoreponder (4)

Last Update (PDT)	To	Title & Subject	Sent	Opens	Clicks	Soft Bounces	Hard Bounces	Unsub	Visits	Optify Connects	Conversions (Form Submissions)
↩ Autoreponder by Uri 3/12/2013 2:17 pm	The Essential Guide for B2B Lead Generation Campaigns	Thank You Email Thank You For Requesting Our Essential Guid...	42 100.0%	39 92.8%	25 59.5%	0 0.0%	0 0.0%	1 2.3%	38 90.0%	13 30.9%	5 11.9%
PREVIEW SEND EMAIL CLONE EXPORT DELETE											
↩ Autoreponder by Uri 3/12/2013 3:43 pm	The Essential Guide for B2B Lead Generation Campaigns	New Playbook: Autoreponder Best ... New Playbook: Autoreponders Best Practices	38 100.0%	12 31.6%	18 47.4%	0 0.0%	0 0.0%	0 0.0%	5 13.2%	1 2.6%	4 10.5%
PREVIEW SEND EMAIL CLONE EXPORT DELETE											
↩ Autoreponder by Uri 3/12/2013 2:56 pm	The Essential Guide for B2B Lead Generation Campaigns	Autoresponders Study [New Study] Optify 2013 Autoresponders Study	29 100.0%	13 44.8%	9 31.0%	0 0.0%	0 0.0%	1 3.4%	8 27.6%	9 31.0%	7 24.1%
PREVIEW SEND EMAIL CLONE EXPORT DELETE											
↩ Autoreponder by Uri 3/12/2013 4:12 pm	The Essential Guide for B2B Lead Generation Campaigns	Optify Demo 5 Reasons to Try Optify's New Autoresponders	21 100.0%	7 31.6%	6 84.2%	0 0.0%	0 0.0%	0 0.0%	6 30.3%	5 23.8%	4 19.0%
PREVIEW SEND EMAIL CLONE EXPORT DELETE											

This Optify report shows some key email metrics as well as the conversion rate if the email led to another page that contained a form.



Closed-loop reporting

Above and beyond the basic metrics, what you'd really like to know is if these autoresponders are actually leading people further in to the sales funnel and generating opportunities and sales.

You can do this in Optify by adding tracking parameters to the links in your autoresponder emails. Thanks to Optify's integration with Salesforce.com, you can then run a report to see if any opportunities or sales resulted from these emails.

Keep a close eye on all of these metrics so you can fix poorly-performing emails and spot winning strategies and offers so you can replicate success in other autoresponder campaigns.

A parting best practice: Review and refresh your autoresponder campaigns regularly

It's not enough to just analyze the numbers; you need to review your content on a regular basis—at least every six months, but preferably quarterly. This will give you the opportunity to refresh your emails and add new offers.

REFERENCES

General email best practices

- » [Marketing 101: Email Marketing Best Practice](#)
- » [8 Best Practices for Setting Your Email Strategy](#)
- » [Email Marketing Framework for Nurturing Your House List](#)

ADDITIONAL RESOURCES

- » [Optify's Lead Generation Blog](#)
- » [Optify Frequently Asked Questions](#)
- » [Pontiflex: Lead Generation Best Practices: Designing Auto Responders](#)
- » [Kiss Metrics: How To Catapult Your Email Campaign To The Next Level](#)
- » [Kiss Metrics: The Science of Social Timing Part 2: Timing and Email Marketing](#)
- » [Kiss Metrics: How to Make Your Email Open and Click-Through Rates Skyrocket](#)

GLOSSARY

Autoresponder - A marketing software tool that automatically generates an email or sequence of emails after an online form has been submitted.

B2B- Business to Business

Cadence- The timing and frequency of sending emails to clients.

Conversion Rate – The number of leads that completed a form divided by the number of visits to a page.

Call to Action- An item such as a link, button or graphic, meant to prompt a user to click on it to take a next step.

Click-through rate - The total number of clicks on single or multiple links divided by the number of emails sent.

Email campaign - A series of emails designed for a specific promotion.

Form fields - Sections in a form that require user data input.

Online form - A place where a user enters data on a web page.

Open Rate - Indicates how many people view sent emails—calculated by dividing the number of emails opened by the total number of emails sent.

Opt in - An action taken by a user requesting to have their email address added to a specific mailing list.

Opt out - An action taken by a user requesting to have their email removed from a specific mailing list.

Spam - Unsolicited commercial email, or commercial email a user no longer wants to receive.

Subject Line - A title, or description of an email that can be seen from the user's inbox as well as the header inside of the email.

Text email - An email formatted using plain text.

Timeless - An email that does not reference anything that is time sensitive, such as the season or an upcoming holiday that would prohibit it from future use.

Unsubscribe feature - The option to stop receiving correspondence from a particular email campaign or sender.

Whitelist - An email filter that lists approved contacts and allows emails to be delivered to the inbox.

NEXT STEPS

- » [Learn More](#)
- » [Contact Us for a Demo](#)

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ABOUT OPTIFY

Optify is a simple digital marketing software suite and the industry standard for agency marketers. Our complete cloud-based digital marketing platform eliminates the need for standalone tools and empowers agencies to easily create and manage demand generation programs across multiple websites, nurture and score the hottest prospects, prioritize the highest performing programs and streamline co-branded reporting of client results - all from one login.

Our award-winning software suite includes search engine optimization, email marketing, social media marketing, landing pages, lead scoring and tracking, contact management as well as our industry unique Optify Connect. In addition, large clients and advanced implementations utilize the Optify API and deep integration with Salesforce.com for delivering custom reporting and integrated lead generation using CRM.

Optify's agency-friendly product and pricing model enables our agency customers to quickly transition more clients from projects to retained engagements, expand the breadth of service offerings, deliver more consistent and higher quality program execution across clients and dramatically reduce the amount of time spent on data aggregation and client reporting.

OPTIFY DIGITAL MARKETING SUITE

