

# Email Marketing – Meeting Notes

Wednesday, January 15, 2015

## **RMNSUG Meeting Minutes 1/21/2015 Marketing**

### **Membership News**

- New NetSuite user session coming possibly January
- User group discount code coming soon

### **Upcoming Meeting Topics**

- **March: NetSuite presenting advanced PDF forms & free marker editor**
- **May: custom records & fields**
- **July TBD**

## **Feature Presentation – Marketing Automation Cory Anderson**

- Features to enable
- Marketing automation
- Related suiteapps - campaign assistant
- CRM tab
  - Online forms
  - Subscription categories
- Marketing preferences
  - Unsubscribe to marketing by default
    - Prevents new customers from automatically opt in
  - Default from email addresses
  - Campaign domain
  - Opt in message
  - Opt in confirmation message
- DKIM - domain keys identified mail
  - Digitally signed emails to build trust with service providers
- Cannot send over 10,000 messages in a campaign
- Campaign email domains
  - CNAME records setup with your DNS provider
  - If you send over 10k then you need to setup a campaign domain

### **Lead capture**

- Online customer forms
- A great way to capture new lead information directly into your netsuite account

### **Online form templates**

- Custom forms that can look any way you want but it requires HTML and CSS knowledge
- Setup>marketing>online customer forms>new
  - Custom HTML online form templates or Default form (preset options)
- **Default form**
  - Looks more like an internal netsuite page but is very simple to configure
  - Add CRM fields to the form that you would like to capture when a lead submits
  - Lead source to associate submissions with a campaign

- Once saved go to the external tab to find the publishable external URL that you can post a link to from your web site or via a campaign email
- If you want to do more customization to the appearance of the form, you may want to use the HTML form instead of the default where you can tailor the appearance in any way using HTML and CSS.

### **Subscription management**

- Configured under setup>marketing>manage subscriptions
- You cannot re-subscribe a customer who has opted out of a subscription
- You can send customers an opt in invite mass update>marketing send subscription message to...
- Good for a first time opt in.
- Avoid emailing leads that have not opted into a subscription to avoid bounces and spam complaints

### **On a customer record**

- See the marketing tab to find subscriptions and.
- Subscriptions are not accessible via workflow.

### **Email campaigns**

Four things you need

1. Create a campaign
2. Group - a group of customers that you want to send the campaign to
3. Saved search - to define the group
4. Email templates - html creative message that is to be sent

Easiest to work backwards because the campaign requires all of the other components

### **Email templates (global search: marketing templates)**

- Lists>marketing>marketing templates>new
- Now in 2014.2 you can select from a premade template
- Add a subject line,
- If you already designed an HTML file for the message you can upload the HTML file or use the text editor
  - You can also click "Source" to view or edit in HTML
  - Add dynamic fields from records like customer First name, using the free marker field tags just above the editor
  - Cannot source in sublists
- Under the marketing tab, set the from and reply addresses and the campaign domain if configured.
- The subscription is linked to the template so when you add the email to a campaign, it defaults the subscription
- It also can will use this subscription regardless of the group that is configured in the email campaign event

To learn some html use <http://www.w3schools.com/html>

### **Create a group to send the email**

- Create a customer or contact saved search. filter out customers that you do not want to send the message to

- Remove hard bounced contacts
  - Add customers who are opt in or soft opt in
- After 3 hard bounces, they are moved to hard opt out  
You could use a search alert
- The campaign will send only to the primary email field on contacts and customers
- Once the search is defined, create a group under lists>relationships>groups
  - Dynamic or static
  - Dynamic will include anyone from your search and any new customers that meet the search criteria
  - Static is for a specific list of customers that do not change
  - Choose the record type that you searched on (customers/contacts)
- Create the group
  - Select your saved search which will populate the group members
  - Then save

### Create a campaign

- Lists>marketing>campaigns>new
- Or use the campaign assistant (external bundle that must be installed)
  - Once installed, find it by global searching campaign assistant
  - Use the wizard to setup campaign information
  - Select your group on the next page
  - Choose the email template that you would like to send
  - Select the email event details, and set it to planning if you are not ready to schedule
  - If you want to schedule, select "**execute**" and set the time that you would like to execute
  - You can change this in the campaign record until after it has executed at the time that you've specified
  - Review details and create campaign.
  - Now on the campaign record, you can view your email event under Events>email
- Customers can only receive the same campaign events twice.

### Lead nurturing

- **Campaigns that react to a customer action. (requires suiteflow workflow tool)**
- Configure your email templates
- Create a campaign not using the assistant
- Set your email templates under the lead nurturing tab as separate event
- In the workflow state create a new action "send campaign email"
- **Note: the event does not show up sometimes unless you log out and back into netsuite**

Now configure your workflow to send campaign emails when the customer does something or meets specific criteria

(example: First time buyers get a welcome email and 10 days later they receive a follow up.)

**Note:** customers can only receive a campaign event one time. If they re-enter the same workflow, they will not receive the campaign event again because they had already received it in the past.

**Campaign analysis**

- On the customer record under the marketing tab, you can see all campaigns, online form submissions and response information that that customer has been involved in.
- On a campaign you can analyze click through, open percentage, unsubscribes, bounce percent
- sometimes bounces occur because of NetSuite's server email reputations

**Reporting**

- Campaign response analysis
- Click through summary - shows links in your email that were clicked through
  - Who clicked and what time

**Some known limits**

- Lead nurturing emails sometimes take an hour to send
- Beware of bounces and delivery issues. NetSuite server trust issues with ISPs. You share the same reputation as other netsuite customers.
- 3rd party smtp support in 2014.2 now lets you set up your own smtp so you don't share with other NetSuite users. Takes time to build a reputation if brand new. Send small campaigns at first to avoid spam complaints

**Note:** If you reply unsubscribe to a marketing email. they need to unsubscribe in lower case instead of uppercase, otherwise this may not register.