Marketing Cloud Email Marketing Quick Start Guide

for Alumni Leaders

Georgetown University
Office of Advancement

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a. BEFORE YOU BEGIN

Welcome to email marketing! Before you begin this guide, you'll need to request access, and get to know some basics about email marketing and our system-specific terminology.

Request access to Marketing Cloud

1. Fill out the Advancement Web Applications Request Form and select "Create and send club/class emails" under the E-mail Marketing ("Marketing Cloud") section on the form.
2. Your request will be reviewed for accuracy and completion.
3. If your request is approved, the GO Desk will contact you with more information about necessary email training.
4. After you complete the training, you'll receive login credentials for Marketing Cloud.

You can begin at step 1 after you've completed training, and when you're ready to set up your first email. Set aside at least an hour so you have enough time to read and understand every step.

You must complete email training to begin sending your own emails in Marketing Cloud.

If you have an urgent broadcast email but you haven't yet completed training, get in touch with your Advancement liaison to have them submit a broadcast email request on your behalf.

Email marketing 101

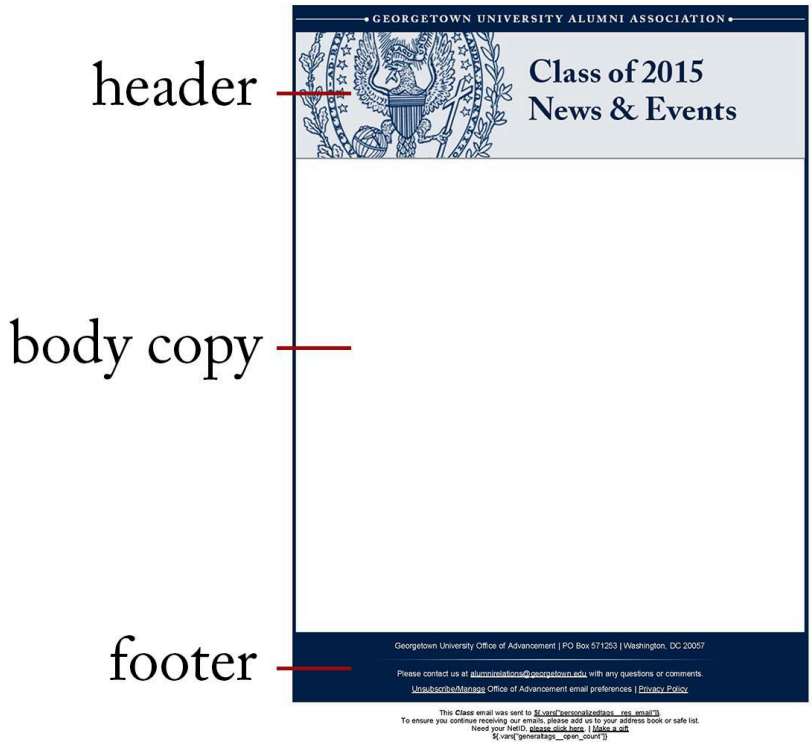
Every email you send should have a very specific goal, which could be to drive RSVPs, inform of a change in the event location, or encourage future engagement. Keep your goal in mind when you compose your email - this will help keep your copy brief and direct.

Keep your subject line short and snappy. Include the recipient's name if appropriate, but don't overuse this feature - recipients might find it annoying to see their name in every subject line.

Email design and composition 101

Advancement's standard template format

Advancement uses a standard template with a header, body copy, and footer.



This template format works best for invitations, brief announcements, or letters. Currently, this is the only template format available for use.

Composing your email in Microsoft Word

If you opt to compose your email in Microsoft Word (or a similar word processor), you must create a plain-text version before pasting the content into Marketing Cloud. Word adds hidden tags to the content, and when you paste it into Marketing Cloud, those hidden tags make it nearly impossible to format your email properly. Creating a plain-text version strips out all of your formatting and links, but strips out those annoying hidden tags as well.

The best way to compose content for email marketing is within the tool itself, which is explained in step 6.

Creating a plain-text version

Highlight all of your text (Ctrl + A) and copy (Ctrl + C).
Open Notepad (or TextEdit on a Mac) and paste (Ctrl + V). Save. This is your plain-text version.

Things to keep in mind while you're designing

Your email's design can determine whether recipients receive the information you intend to deliver.

- If your email is text-heavy and lengthy, you won't have many recipients who can find the RSVP link buried at the bottom, or sign up for your event.
- Use **bold**, *italics*, and links to call attention to relevant information, but use these sparingly to preserve their role as attention-grabbers.
- Consider how the design might affect click-through rates: will recipients actually click, or is there so much information that the recipient stops reading and abandons the email after 10 seconds?

Things to keep in mind while you're writing copy

In email marketing, brevity is the goal.

- Never use a big word when a diminutive one will suffice, and shorten your phrasing so that the point is clear. Use direct language.
- Avoid "here" or "click here" terminology for links; instead, use Register for Reunion, RSVP, or link relevant text.

  Example: Worried about construction during Reunion? View the campus construction map.

- Keep in mind that readers often scan an email rather than reading it word for word. Self-descriptive links that visually stand out from the text make the purpose of the link immediately clear, and don't require the reader to read the surrounding text.

Training Video Playlist

While you read through this guide, you can also watch the videos in the appropriate playlist below to be trained in "Content Builder."

- Club Volunteers
- Class Volunteers

Terminology

Before getting started, you'll need to be familiar with a few terms specific to email marketing and the Marketing Cloud platform.

Business Unit - functional or business area that roughly corresponds to Advancement team structure. Examples include Annual Giving, Career Services, and Law Center.

Campaign - a method of grouping emails, images, and templates together for tracking and reporting purposes.

Data Extension - Marketing Cloud's name for a recipient list, or the group of people to whom you send an email.

Marketing Cloud - Advancement's email marketing system.

Publication List - the group of people who have opted-out of receiving a certain type of email, and also functions as a category for your email. Advancement has several dozen Publication Lists (examples include Career Services, Class, Club, Annual Giving, Medical Center, and Alumni Association). The Publication List appears in the footer of your email: "This ***Publication List*** email was sent to [email address]".

Sender Profile - the name and email address the email is sent from (also shows up in email inboxes at the top of the message), plus the name and email address that appear when you click "reply".

Example
From name: Georgetown Class of 2015
From email: classof2015@advmail.georgetown.edu
Reply-to name: Georgetown Class of 2015
Reply-to email: alumnirelations@georgetown.edu

Can't get enough terminology? Check out the glossary for a complete list.

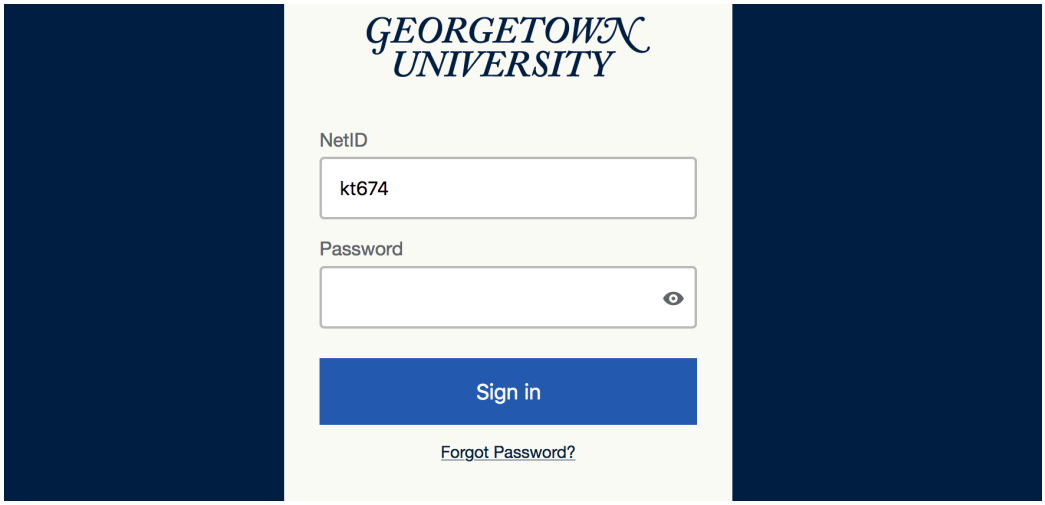
1. EMAIL

Schedule

The first step is to reserve a spot for your email on the calendar in Marketing Cloud.

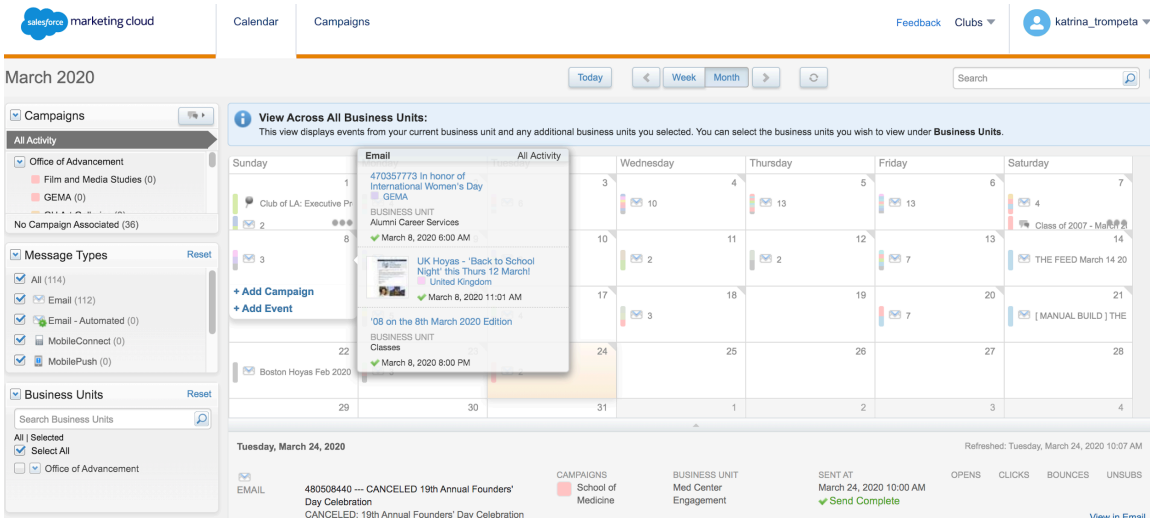
1. Log in to Marketing Cloud. *NEW as of 3/02/21*

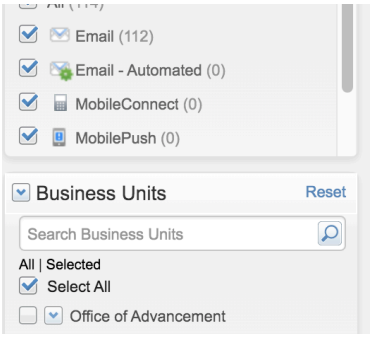
Go to the login page and use your **NetID username and password** to log in.



Don't remember your NetID or NetID password? Click here to find more information on how to recover them.

2. Check the calendar for an available send time.





At the bottom left under Business Units, check **Select All** to view all activity across Advancement.

Now you can see all the events and emails that other teams have scheduled.

Tips for choosing a good send time

- **Avoid** scheduling your email on the same day as other emails.
- If you must schedule your email on the same day as another email, **do not schedule it for the same time of day.**
- Hover over an email on the calendar to see the time it's scheduled for.

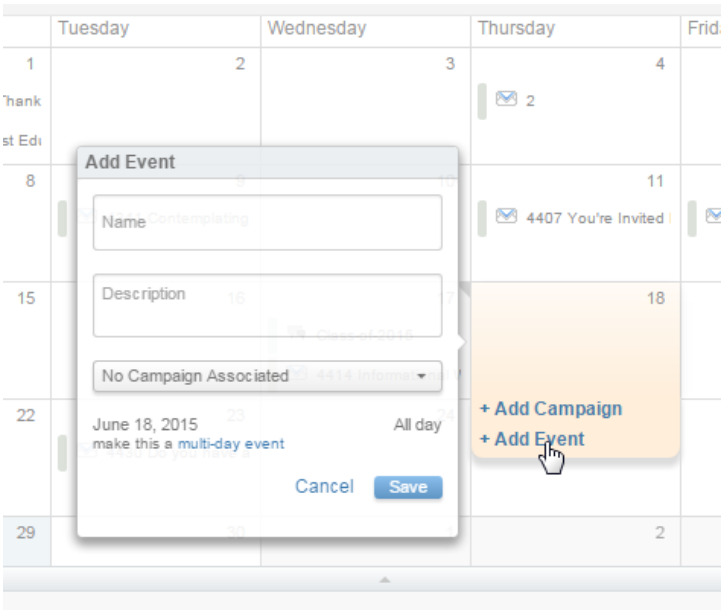
3. Reserve a spot on the day you plan to send.

Hover over the day and choose **+ Add Event.**

Name: your email's subject line
Description: your club or class name, the time of the send, plus a brief description of the email content

Select the campaign associated with this email. **Not sure which campaign to select?** Read more in the FAQ.

You must select a campaign in order to enable staff to gather reports on email activity.



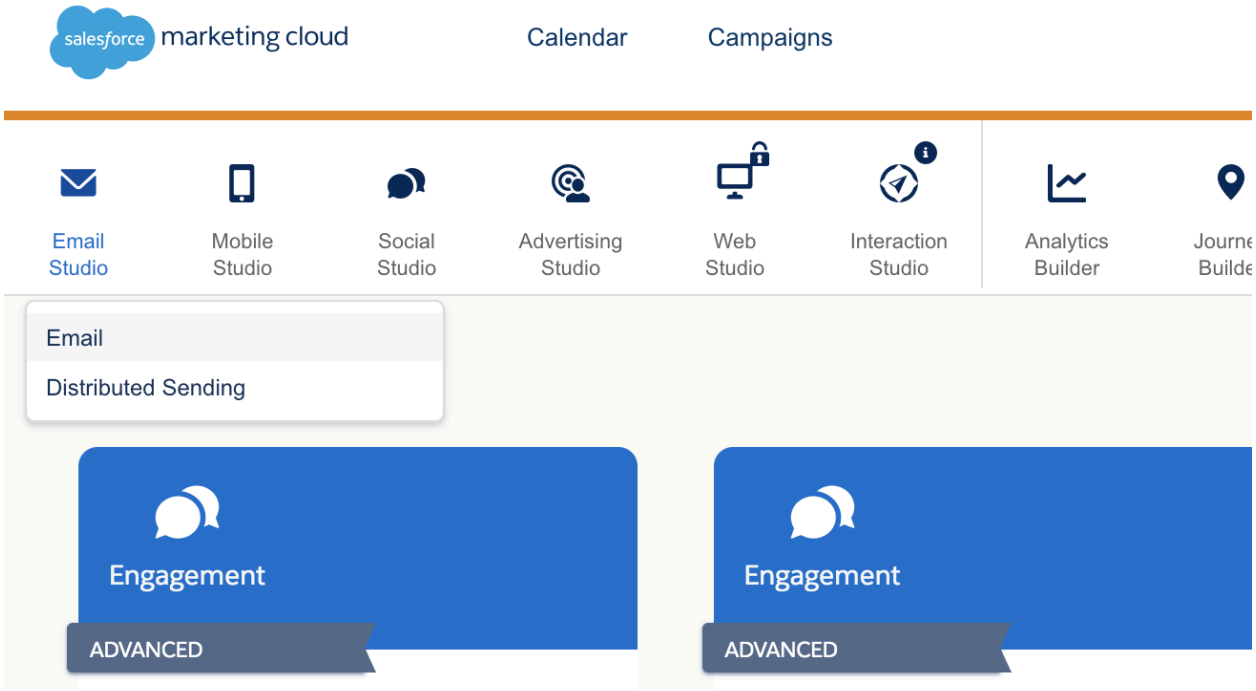
Click **Save**. A pin will appear to indicate the day has been reserved.

Creating/duplicating an email

Now that you've secured your spot on the calendar, you're ready to create your email!

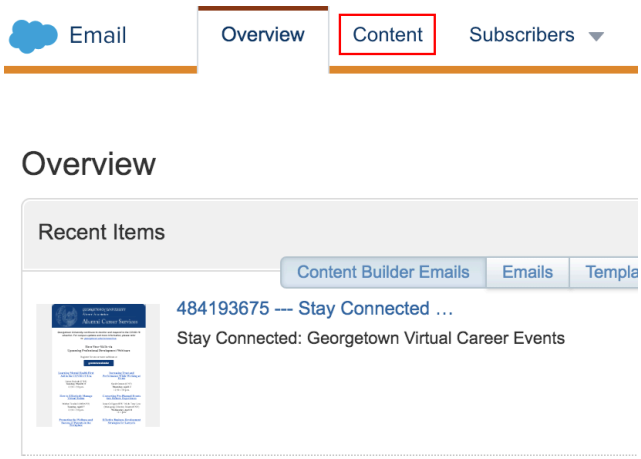
4. Open the email module.

Hover over **Email Studio** and click **Email**.



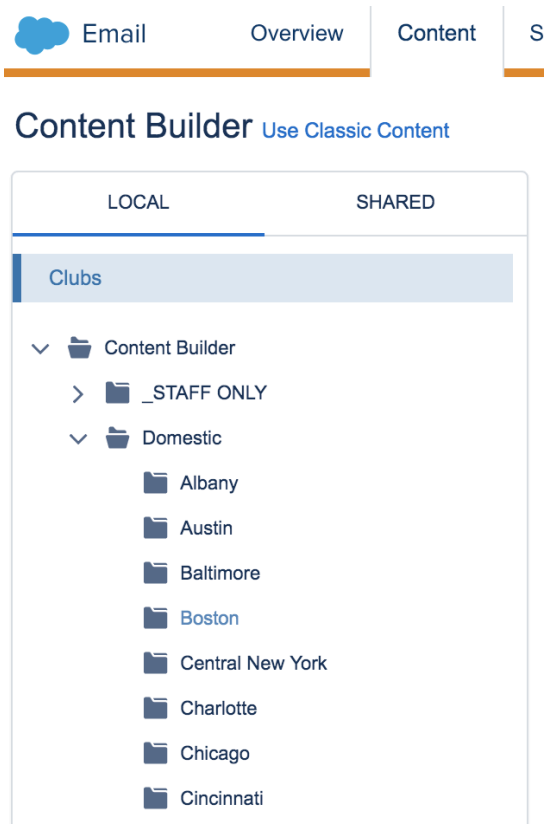
5. From the Overview page, select the Content tab.

This will take you into **Content Builder**.



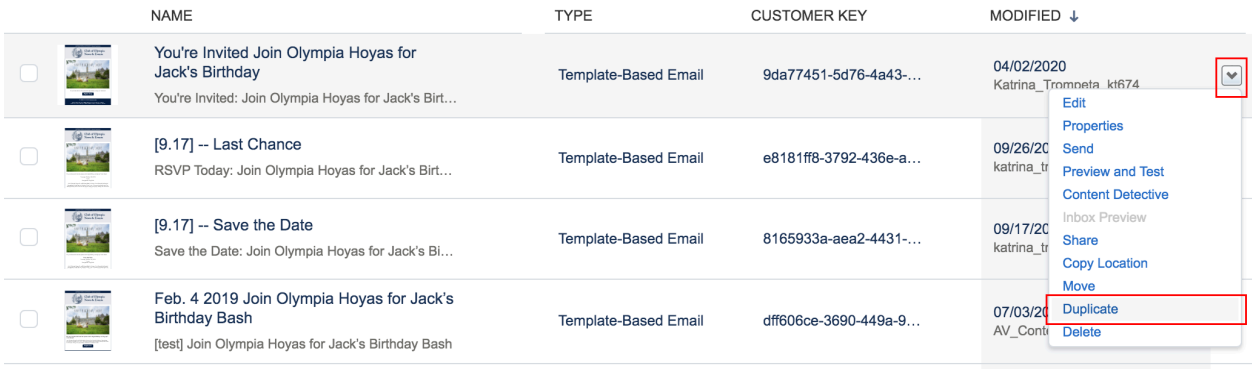
6. Locate your club/class folder.

Expand the Content Builder folder. For clubs, expand either the **Domestic** or **International** folder. Locate and select your **region-specific** folder. For classes, locate your **class year** folder.



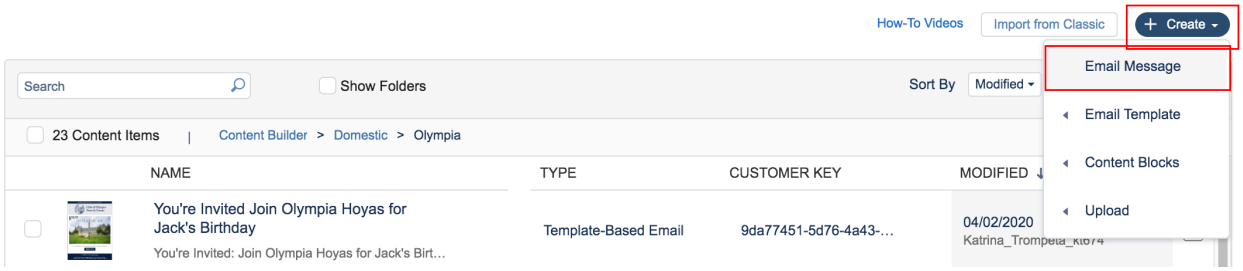
7. Duplicating an existing email.

Select the email you want to duplicate and click the drop down button. Click **Duplicate**. You'll now have a copy of the email.



8. Creating a new email.

To create a new email, click **+ Create** on the upper right-hand side. Select **Email Message**.

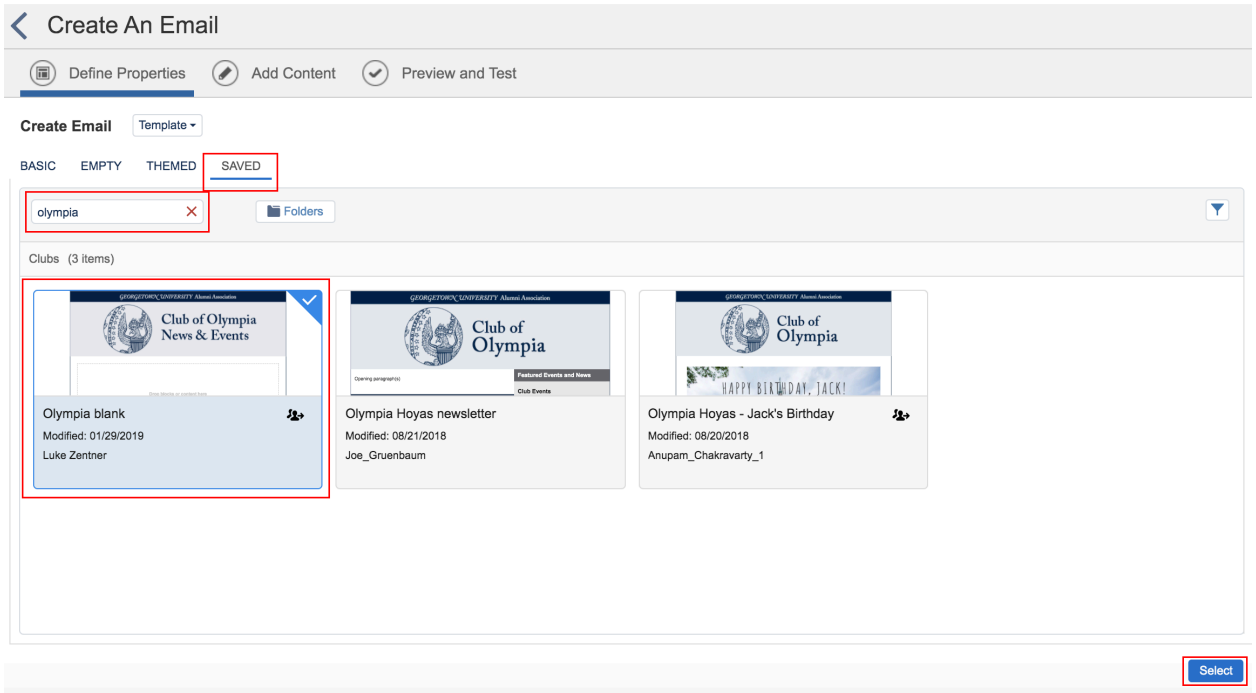


9. Selecting an email template.

This will take you to the **Create An Email** page. Check that the **Saved** tab is selected then search for your club/class-specific template in the search bar.

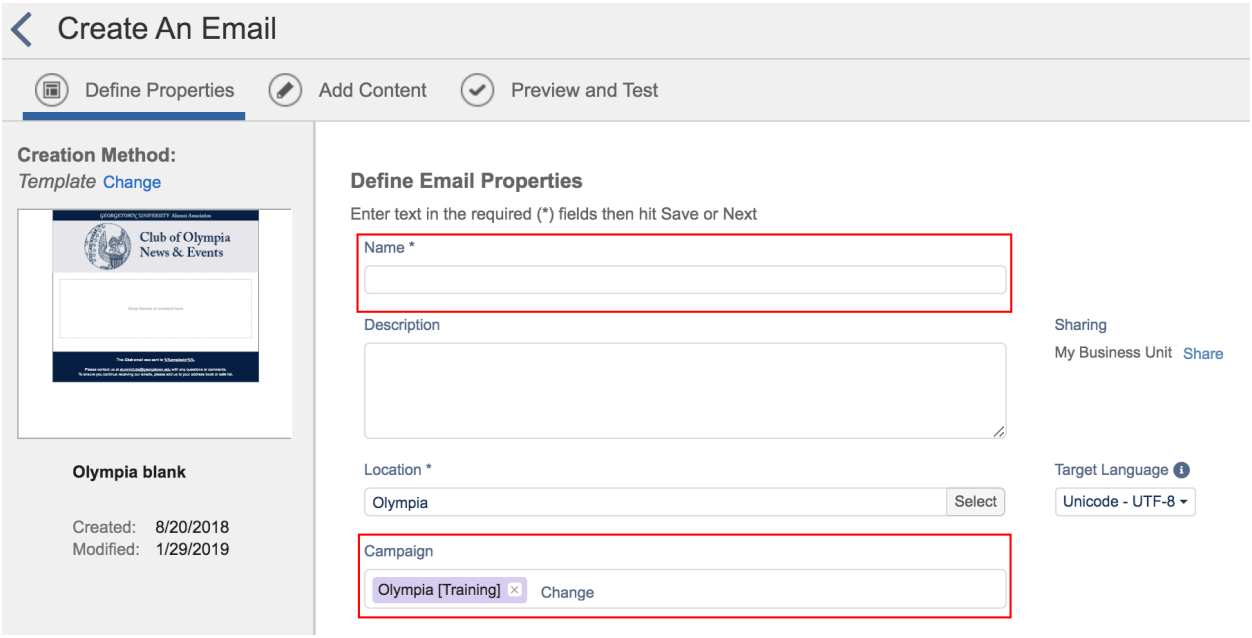
The default template name for clubs is **[city/country of club] blank**. For classes, it's **Class of [class year] Blank**.

Click **Select** once you've selected your template.

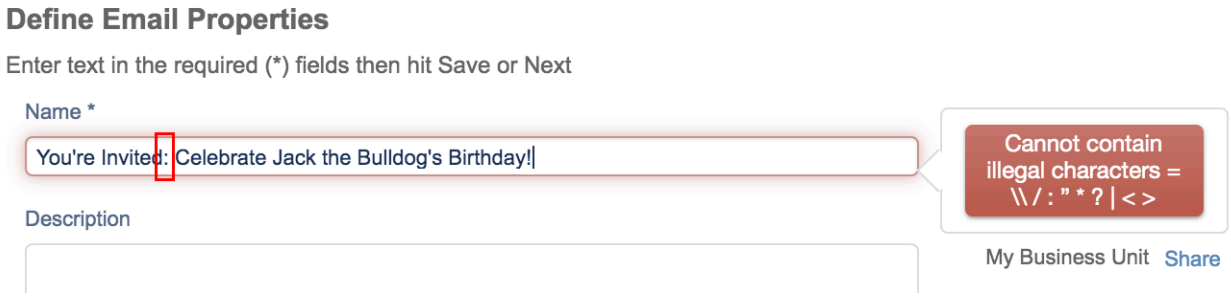


10. Defining email properties.

On the Define Properties page, enter the subject line of your email under **Name**. Under **Campaign** search for your club's name/class year to tag it to a campaign.
It is important to select a campaign in order to enable staff to gather reports on email activity.



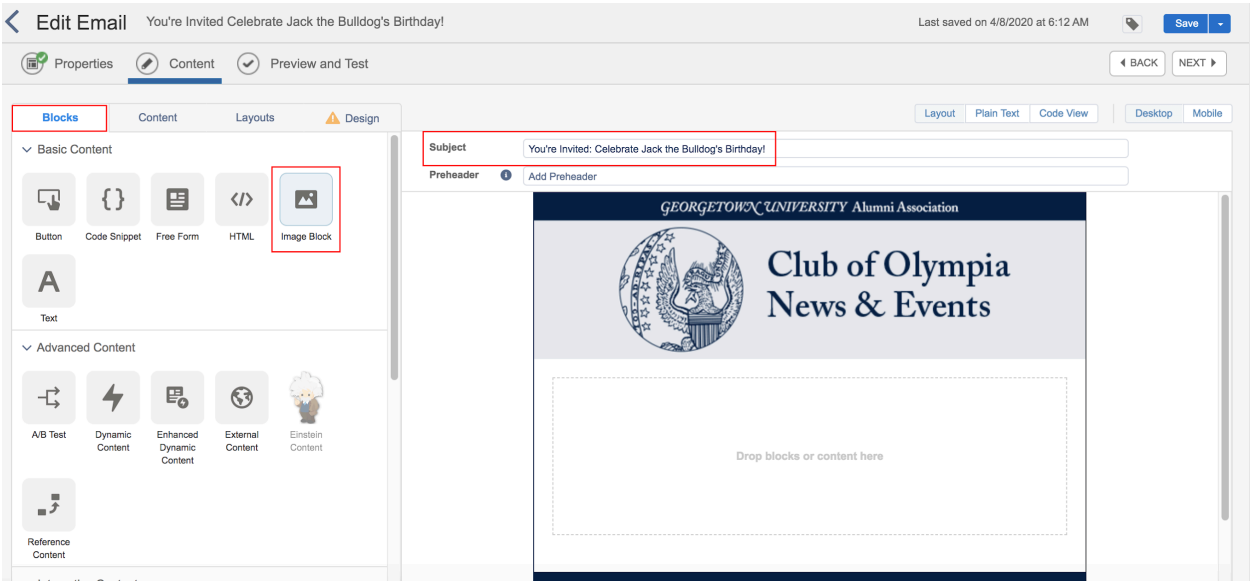
Note: Certain characters are not allowed when entering the subject line under **Name**. This part of the process is for back-end purposes, simply **removing the illegal character** will allow you to proceed to the next page where you can enter the subject line without issues.



Once you've added the **Name** and **Campaign**, click **Next** on the upper right-hand side of the screen.

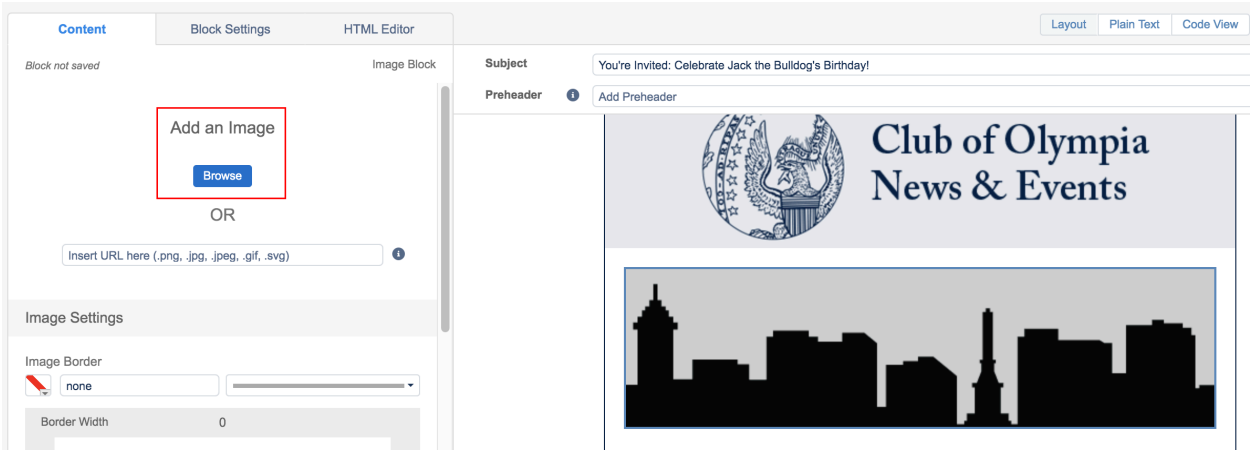
11. Adding the subject line and content to your template.

Add the subject line in the **Subject** field (you can now enter characters such as : /\ without issues). To add content to the template, drag and drop the content block to the body of the template where it says **Drop blocks or content here**.

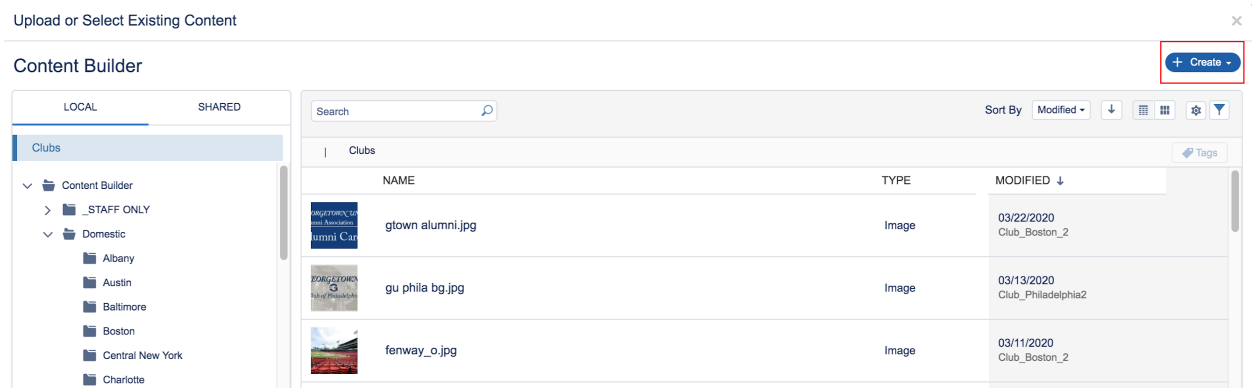


12. Content block example, adding an image.

In this example we are adding an **Image Block**. Drag and drop the Image Block to the template, then upload an image by clicking **Browse**.

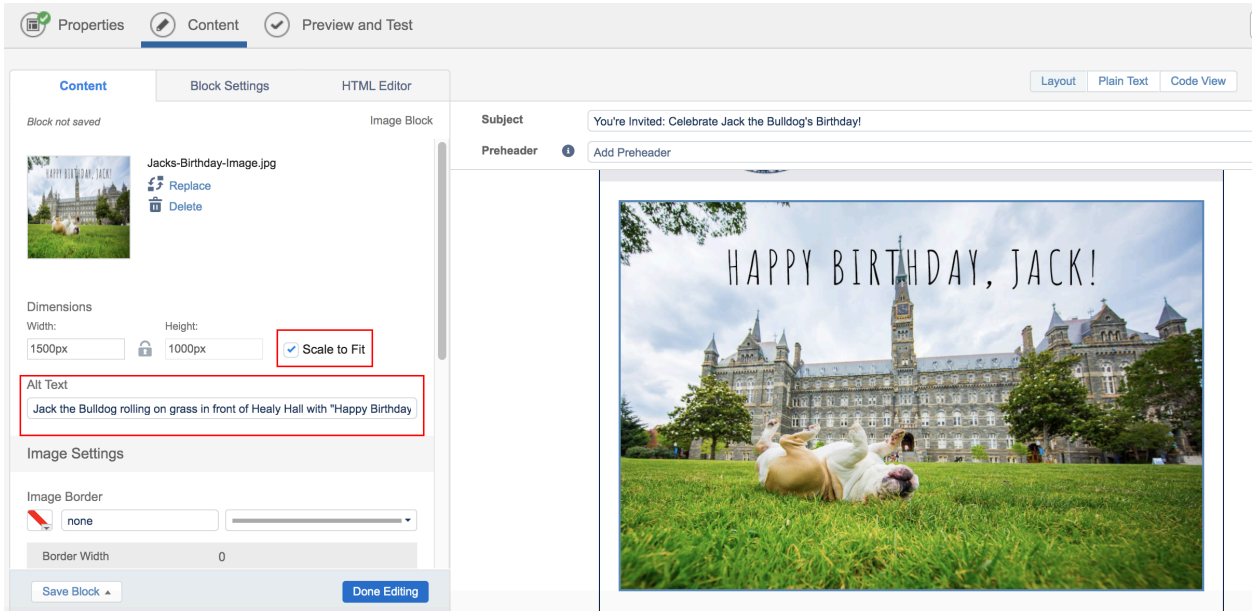


Upload an image from your computer by clicking **+ Create**. Images already uploaded into the system will be displayed below. Select the image you want to use.

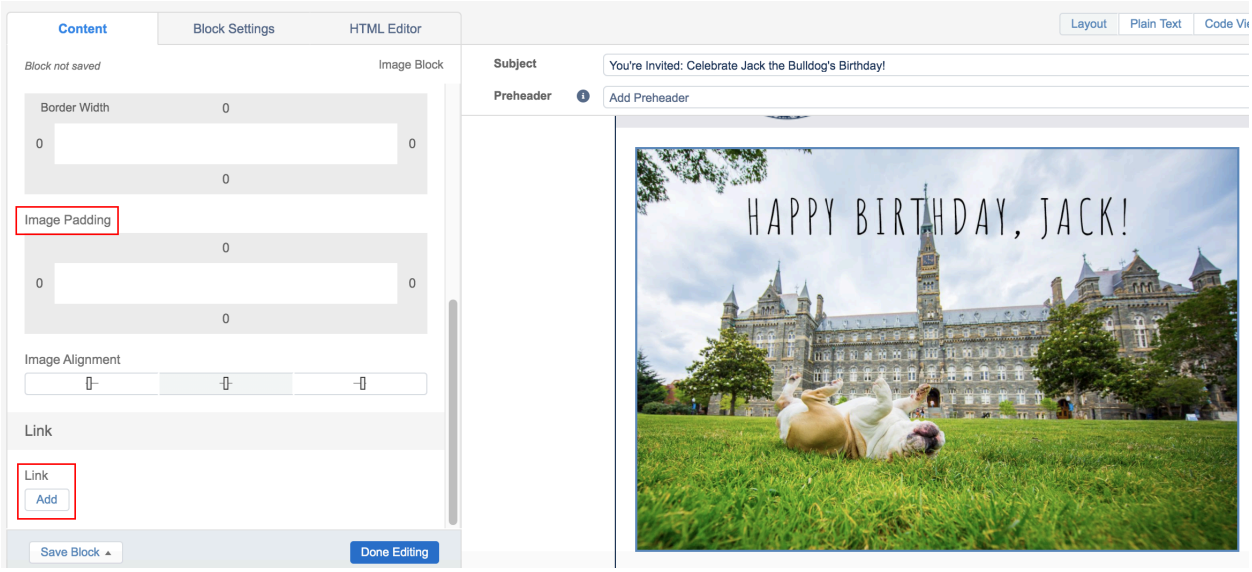


Note: When uploading images, the **Scale to Fit** box will be checked by default to automatically resize the image. To manually resize an image, uncheck this box. ***Always add Alt Text to describe the image for optimal email accessibility.***

* The purpose of Alt Text is to describe images to visitors who are unable to see them. This includes screen readers and browsers that block images, but it also includes users who are sight-impaired or otherwise unable to visually identify an image. *Ex.)* Jack the Bulldog rolling on grass in front of Healy Hall with "Happy Birthday, Jack!"



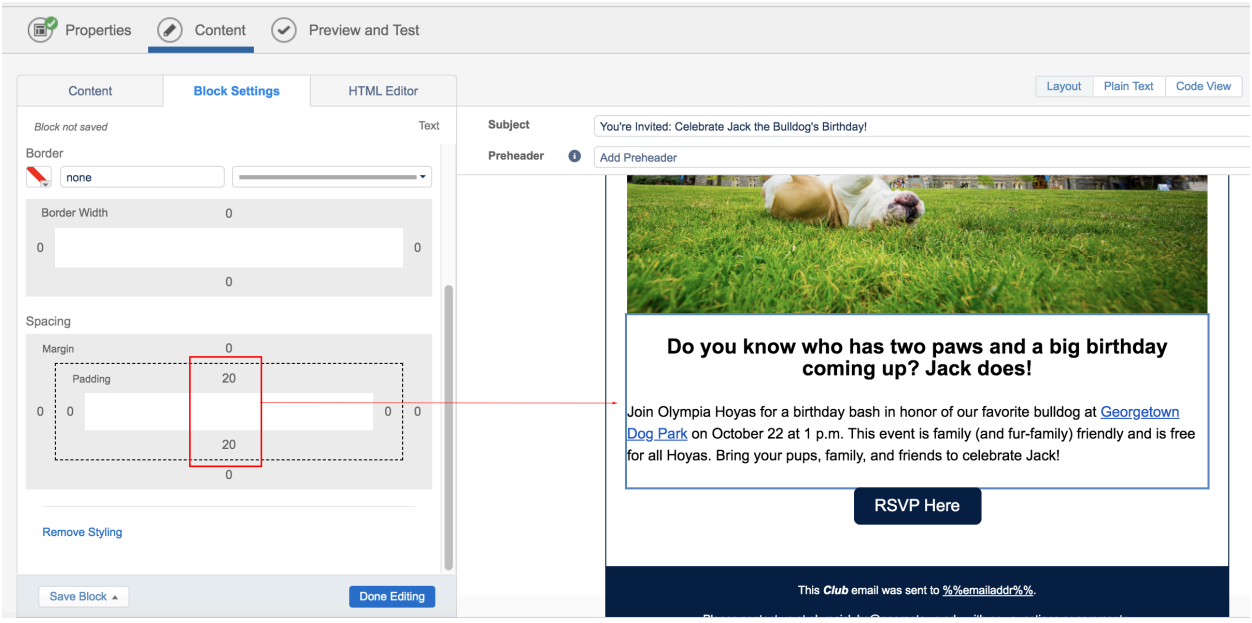
Scroll down to add **Image Padding** (note: padding is already built into the template by default). You can also **add a link** to hyperlink your image.



13. Formatting content and padding.

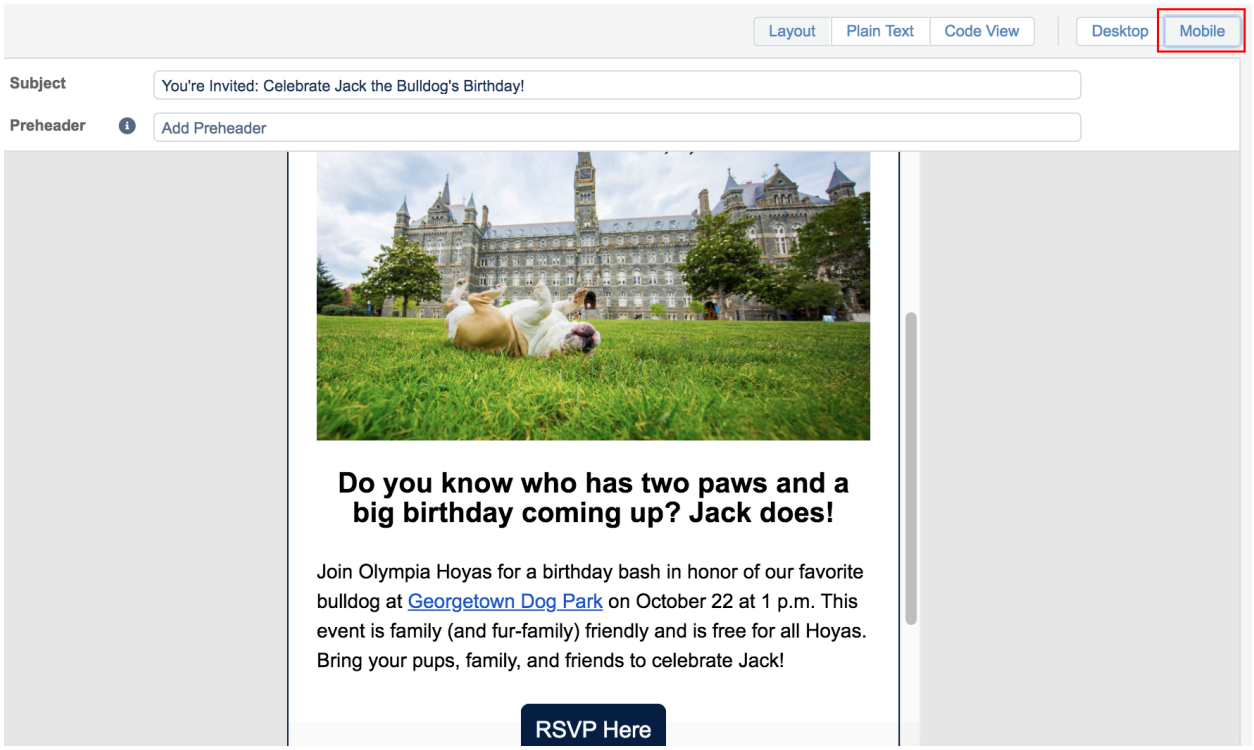
Once you've added all your content blocks (here we've added an Image Block, Text, and a Button) **add padding** so the content blocks have enough spacing between.

In this example we've selected the **Text block**. Navigate to **Block Settings** and add **20px** of padding to the top and bottom of the Text block.



14. Previewing your email on Mobile vs Desktop.

Toggling between **Desktop** and **Mobile** will allow you to preview how your email will look on a desktop versus a mobile device.

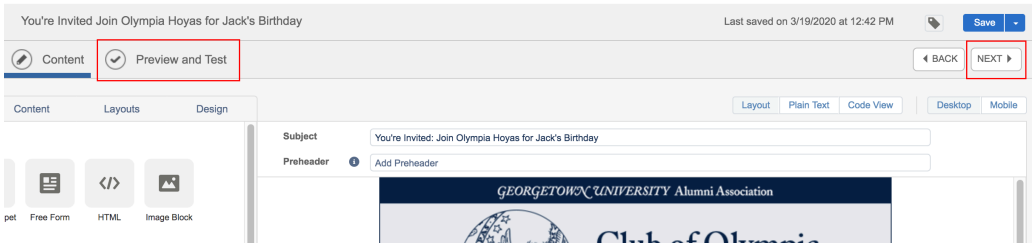


Send a test email *NEW as of 3/02/21*

Before you schedule your email, send yourself a test to make sure the email looks the way you expect when it arrives in people's inbox.

15. Send a test email.

Once you've gotten all the content into the body of your email, click Next to proceed to the **Preview and Test** page.

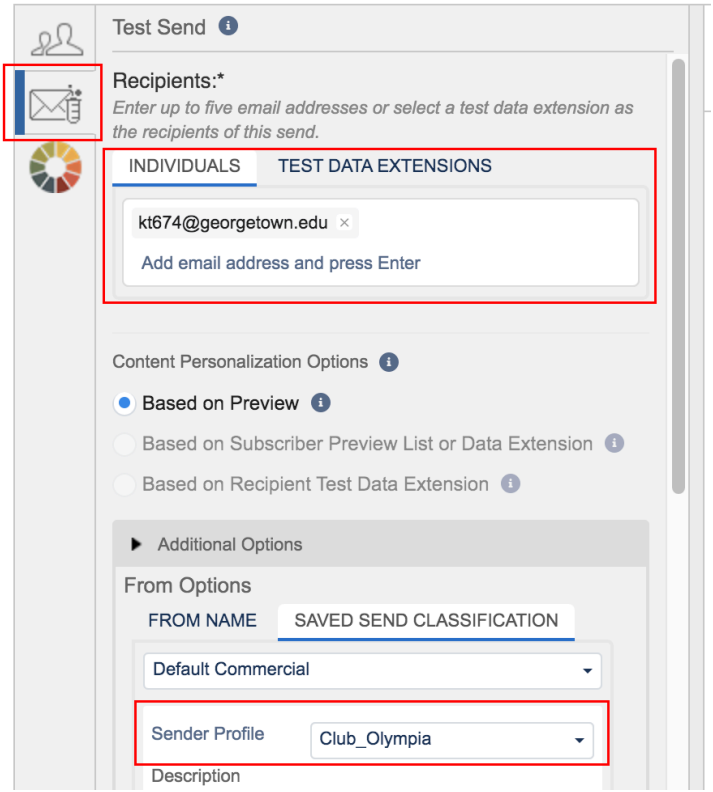


16. Sending test to stakeholders, selecting the Sender Profile, and Delivery Profile.

Click the icon of the **envelope and test tube**. Make sure the **Individuals** tab is selected and enter email addresses you want to send a direct test email to. *Your email address will be there by default, so feel free to send yourself a test and forward it to others.*

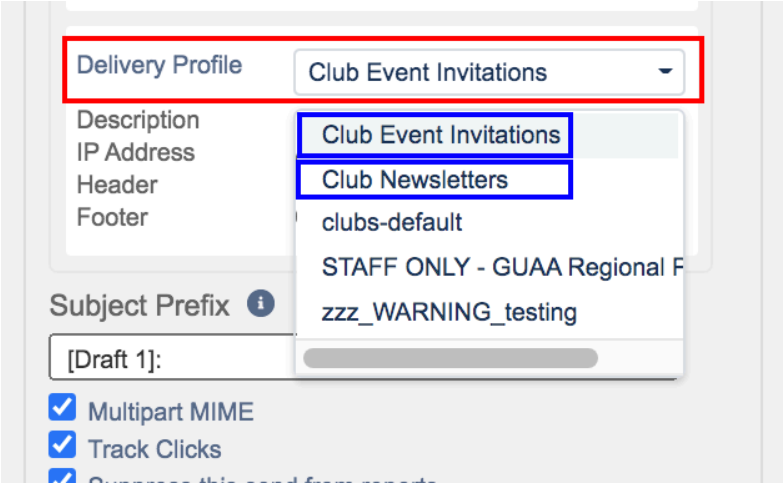
Scroll down and select the correct **Sender Profile**.
Your Sender Profile will be **Club_[your city/country]** for clubs and **Class_[class year]** for classes.

* This step is crucial to ensure the email will display the from-name as: **Georgetown Club of [your city/country]** or **Georgetown Class of [class year]**



Continue to scroll and select the correct **Delivery Profile**.

Delivery Profile Options for CLUBS:

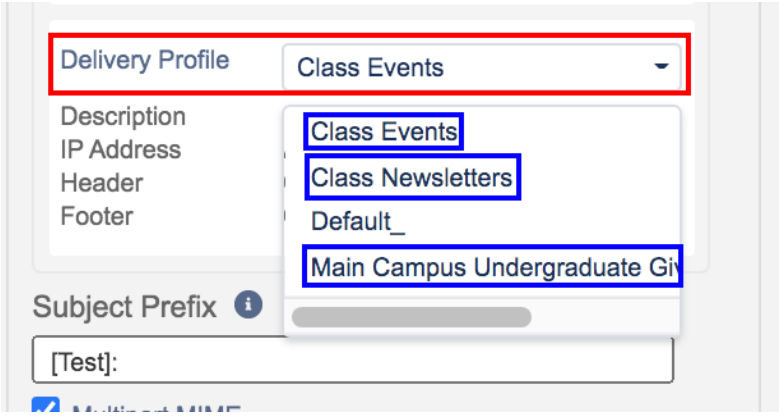


* * * You will need to determine, for each email that you send, if your email content is more accurately described as a **"Club Event Invitation"** or a **"Club Newsletter."**

In order to allow our recipients to more easily manage their email subscription preferences, we've nested smaller categories of email into larger groupings. As a result, we distinguish between these two types of emails, and you'll need to make selections corresponding to the type of email content in the two steps noted below.

Club Event Invitations: Emails about your Georgetown regional club events
Club Newsletters: Emails about your Georgetown regional club and opportunities to connect with local Hoyas

Delivery Profile Options for CLASSES:



* * * You will need to determine, for each email that you send, if your email content is more accurately described as a **"Class Event"**; **"Class Newsletter"**; or **"Main Campus Undergraduate Giving and Solicitation."**

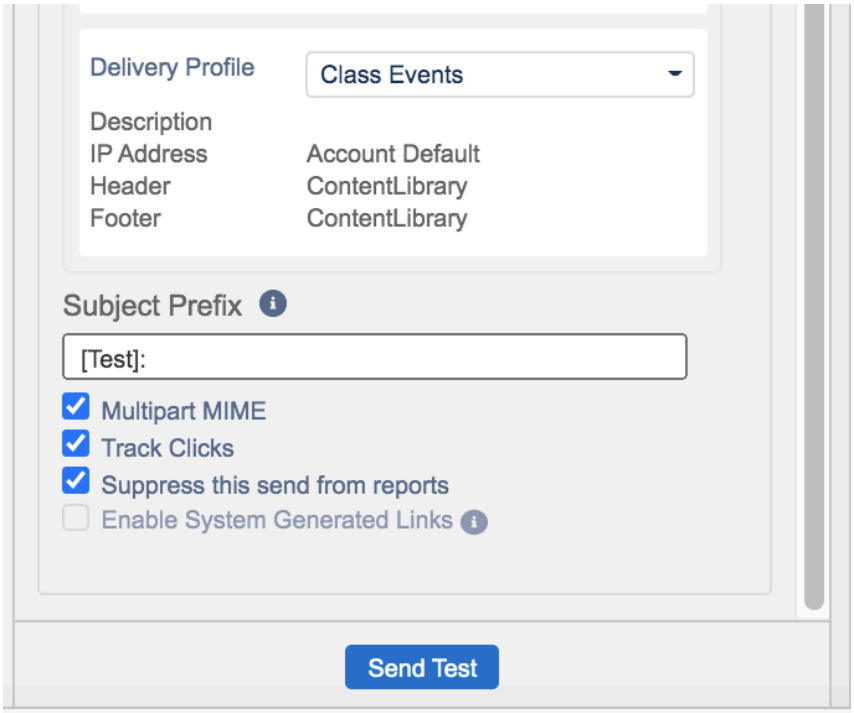
In order to allow our recipients to more easily manage their email subscription preferences, we've nested smaller categories of email into larger groupings. As a result, we distinguish between these three types of emails, and you'll need to make selections corresponding to the type of email content in the two steps noted below.

Class Events: Emails about your Georgetown class events
Class Newsletters: Emails about campus news and opportunities to connect with your Georgetown class
Main Campus Undergraduate Giving and Solicitation: Emails about giving opportunities in support of Georgetown main campus undergraduate education

17. Subject Prefix and sending a test email.

After selecting your Sender Profile AND Delivery Profile, you have the option of editing the Subject Prefix. This prefix will display before the subject line when received in your inbox (eg. **[Test]: You're Invited: Celebrate Jack the Bulldog's Birthday!**)

Click **Send Test** to send a test email.



Troubleshooting

- **Your name doesn't appear in your class or club folder?** Email the GO Desk to add it: theGOdesk@georgetown.edu
- Your test email should arrive within 5 minutes. If you don't receive it, wait another 10 minutes. If it still hasn't arrived, contact theGOdesk@georgetown.edu for help.

18. Forward your test to any stakeholders, and make any last-minute edits.

Forward the email to your team and anyone else who needs to review.

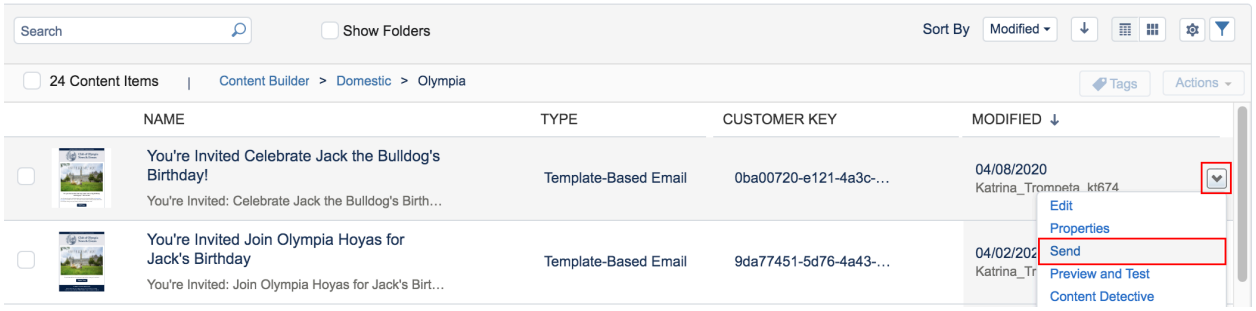
If you need to make any edits, go back to your email in Content Builder and **click on the email → Edit → Edit Content**. Make any edits and send a new test as necessary.

Final send and canceling a scheduled email *NEW as of 3/02/21*

After you get approval from your stakeholders, you're ready to schedule your email.

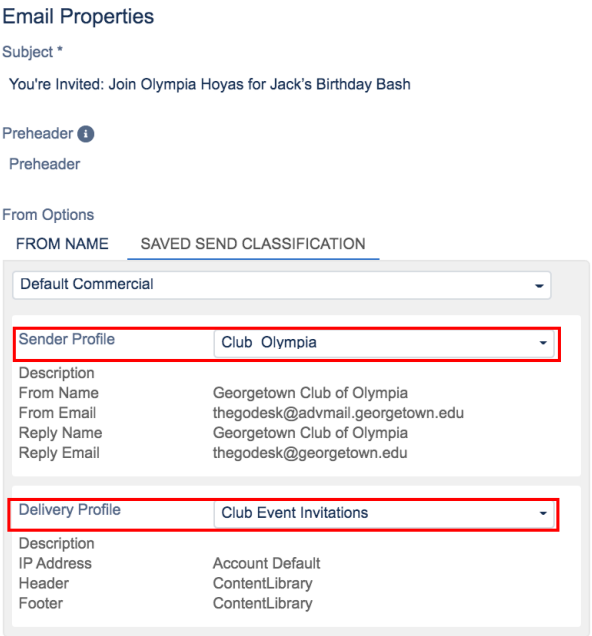
19. Select email to send, set Sender Profile AND Delivery Profile.

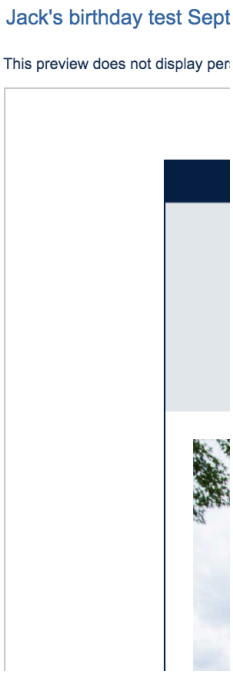
Select the email you want to send and click the drop down button. Click **Send**.



Make sure the **Saved Send Classification** tab is selected.
Remember to **set your Sender Profile** to Club_[your club city/country] or Class_[class year] and the **Delivery Profile** based on the content of the email you're sending.

Click **Next**.

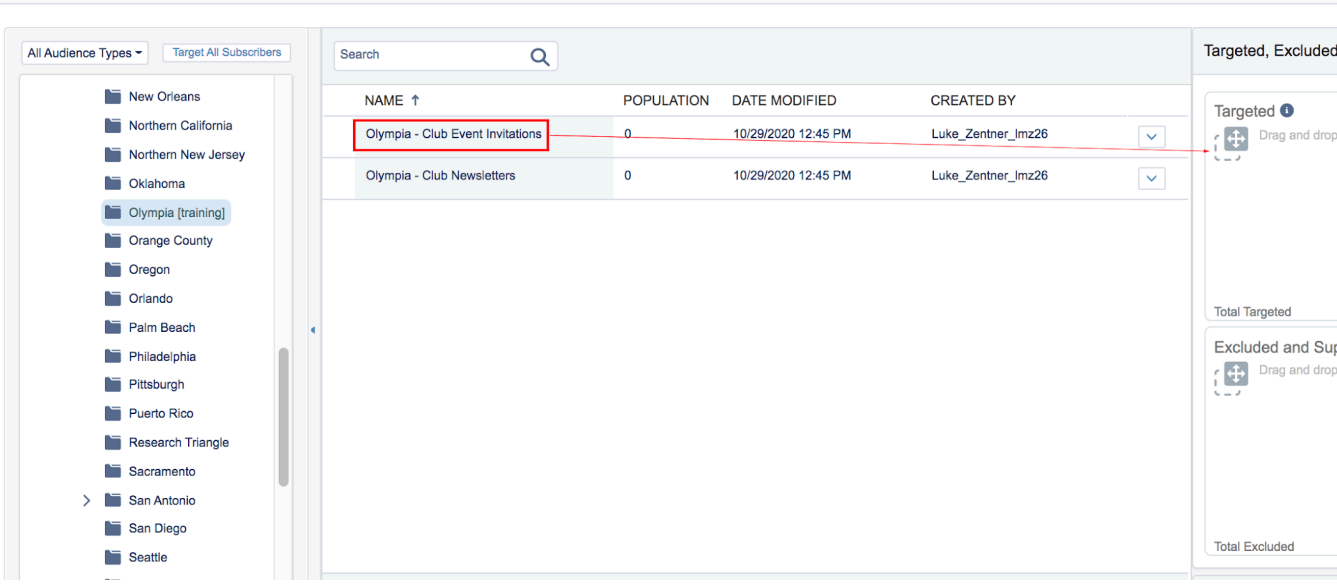




20. Choose your recipients, DO NOT select a Publication List.

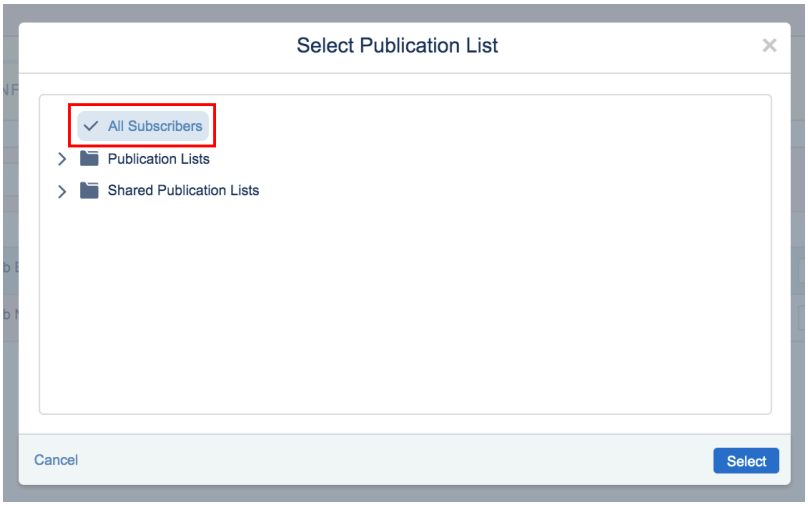
Choose your recipients corresponding to the Delivery Profile you selected.

1. Under the **Data Extensions** folder, find your class or club folder and select the recipient list matching your Delivery Profile.
2. Drag and drop the recipient lists to **Targeted**.



3. Under **Shared Publication List,** DO NOT select a publication list. Leave "All Subscribers" checked.

[!] Leave All Subscribers checked in order to respect subscription preferences and comply with the CAN-SPAM Act.

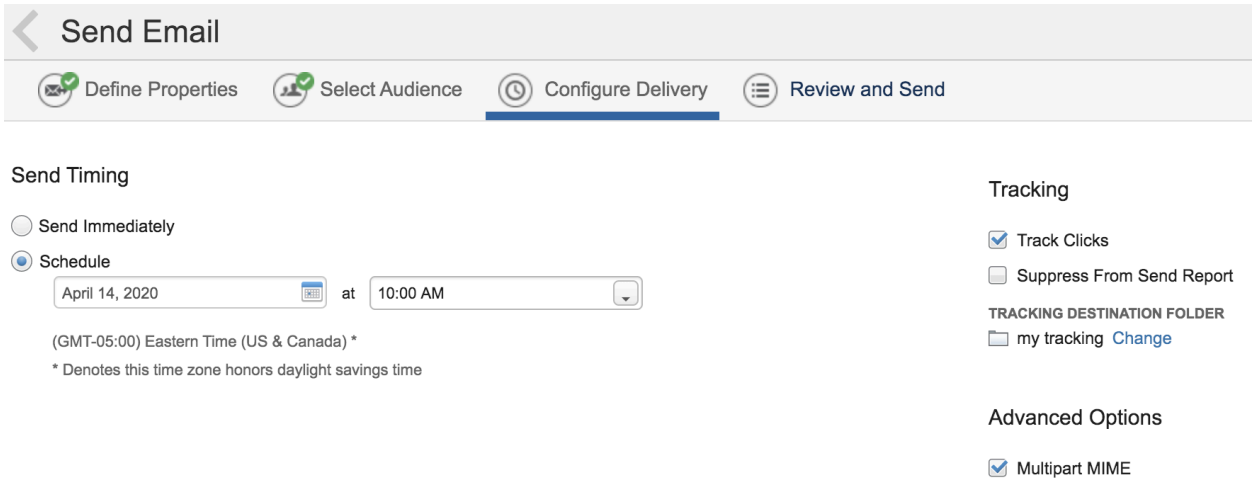


Troubleshooting

- **Your name doesn't appear in your class or club folder?** Email the GO Desk to add it: theGOdesk@georgetown.edu

21. Schedule the email.

Enter the date and time you reserved on the calendar. Click **Next**.



Do NOT send immediately, even if you missed your reserved send time. Schedule the email at least an hour in the future, just in case you need to make any last-minute edits.

22. Confirm the details and send.

Scroll through the information to verify everything is correct: the **Sender Profile, Delivery Profile,** and **Recipients**.

Verifying the Sender Profile

- The Sender Profile for clubs follows this pattern: Club_[city/country].
  Example: Club_Olympia
- The Sender Profile for classes follows this pattern: Class_[class year].
  Example: Class_2015

Verifying the Delivery Profile

- CLUBS ONLY: Club Event Invitations ***OR*** Club Newsletters
- CLASSES ONLY: Class Events ***OR*** Class Newsletters ***OR*** Main Campus Undergraduate Giving and Solicitation

Verifying the Recipient List

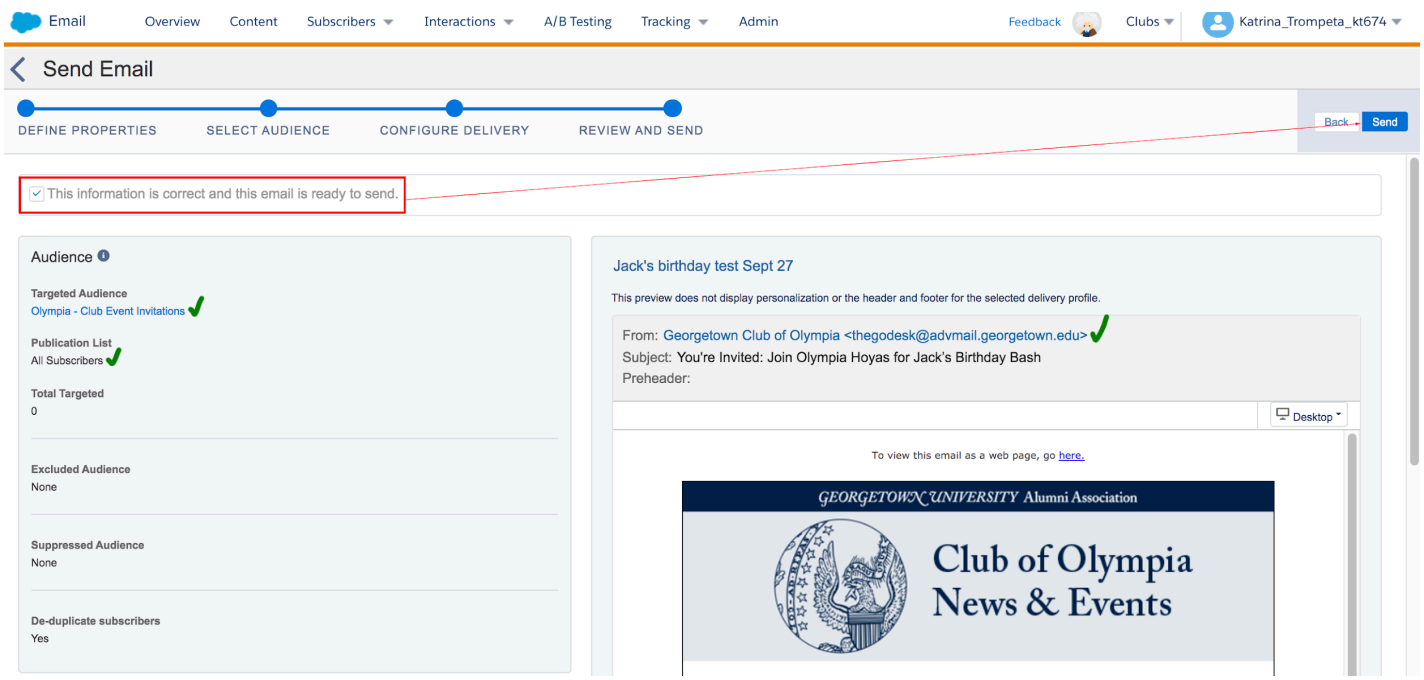
- Make sure the recipient list corresponds to your Delivery Profile.

Verifying the Publication List

- Make sure it says “All Subscribers”

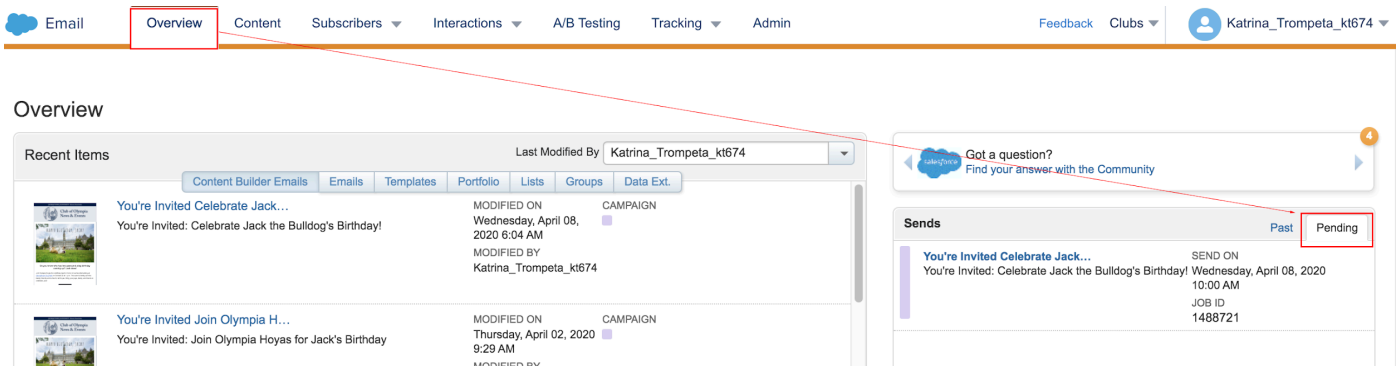
[!] Triple-check All Subscribers is listed under Publication List and confirm your Targeted Audience before you click Send

If everything looks good, check **This information is correct and this email is ready to send** and click **Send**.



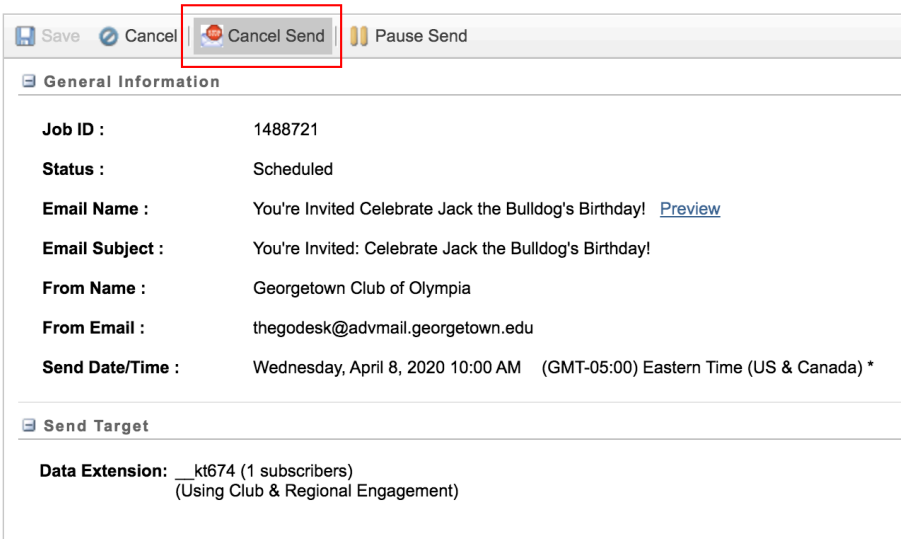
23. View your pending send.

Navigate to the **Overview** tab. Toggle from the **Past** to **Pending** tab on the right. There you’ll see your email queued up.

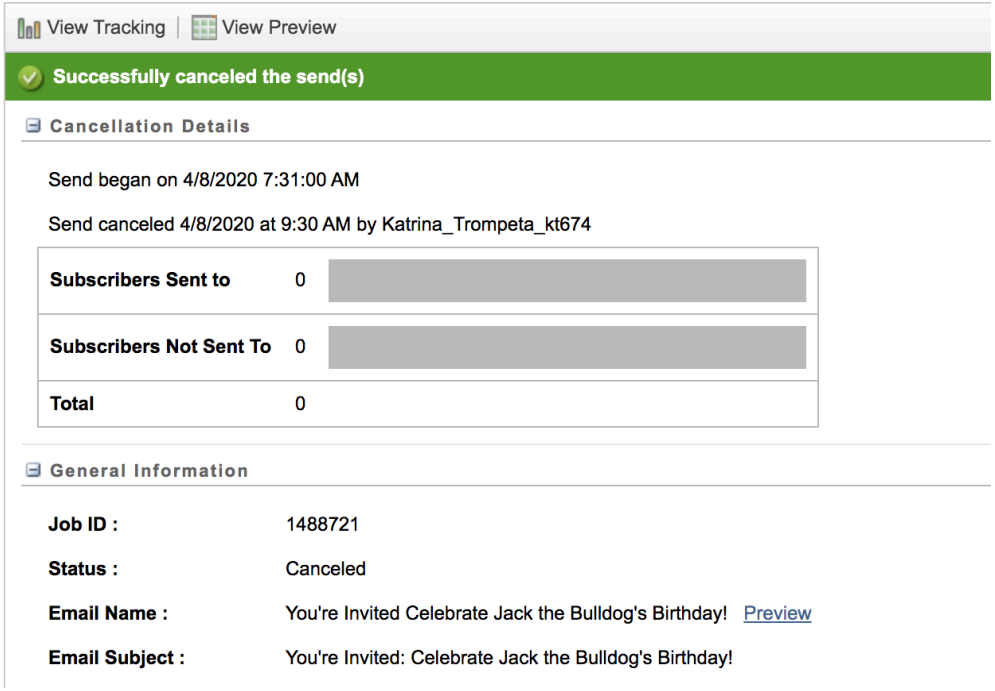


24. Cancel your pending send.

Click on your email under **Pending** sends. Click **Cancel Send** and then **OK** in the pop-up window.



You have successfully canceled your email.

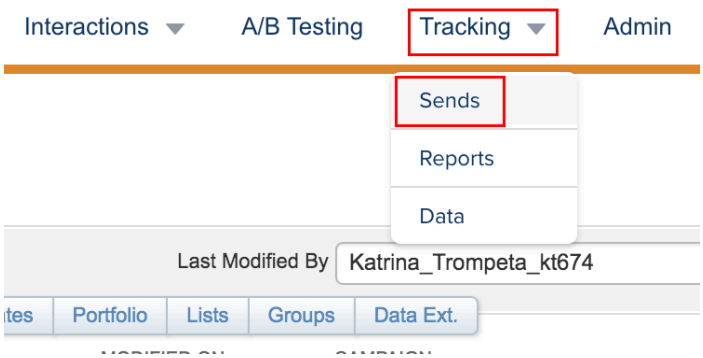


2. REPORTS

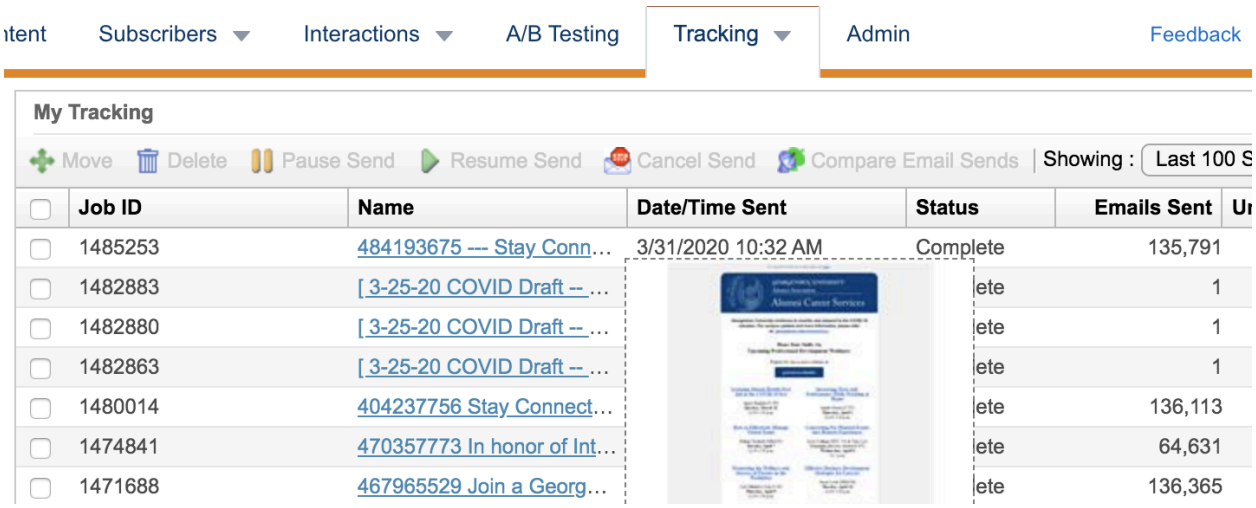
Email Performance Report

About 30 minutes after you send your email, you can check the tracking report to see if your recipients successfully received your email.

- On the top navigation bar, click **Tracking**, then **Sends**. We'll use an example email from Alumni Career Services.

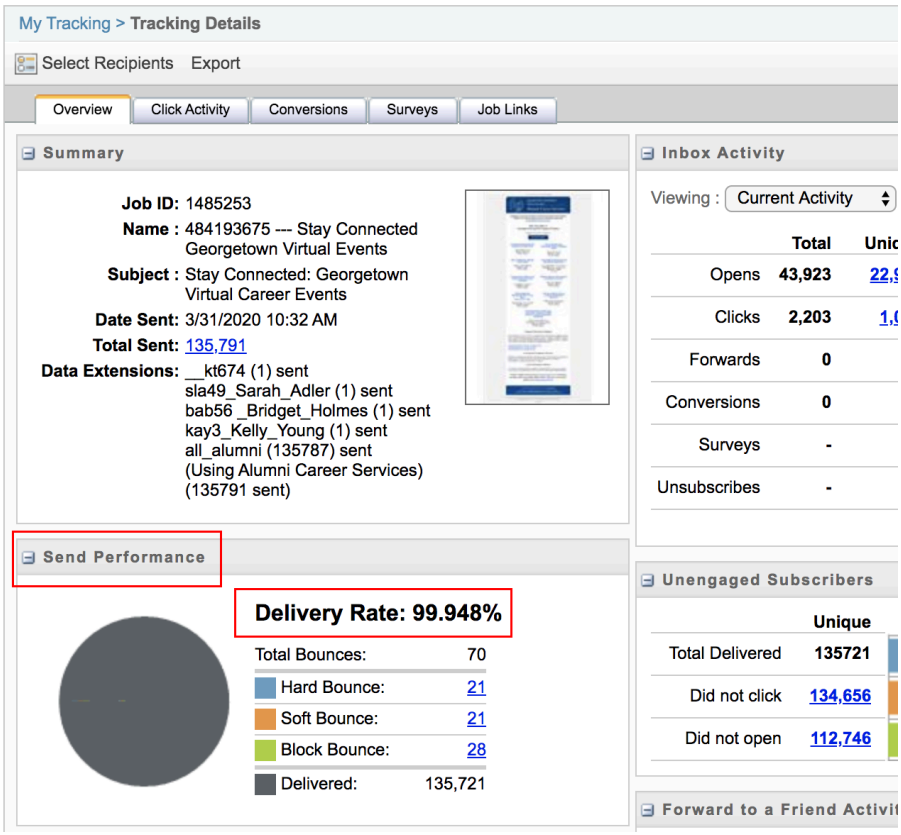


- Hover over the email name to see a preview.



- Click the email under **Name** to view the report.

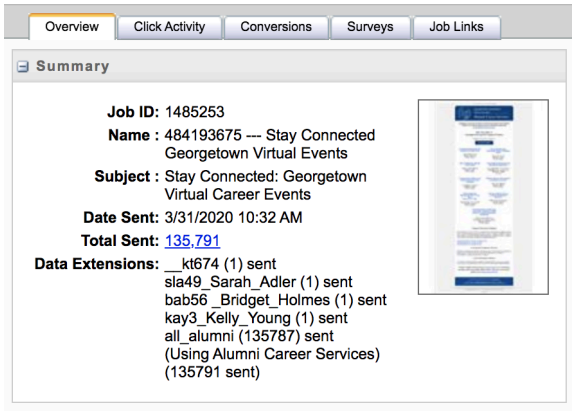
- Look at the **Send Performance** box to see your delivery rate. If it's higher than 90%: great, you sent the email correctly!



Now wait about 5-7 days before looking at this report again. You'll have more accurate data if you give your recipients a few days to open and read your email.

The individual report sections are explained below.

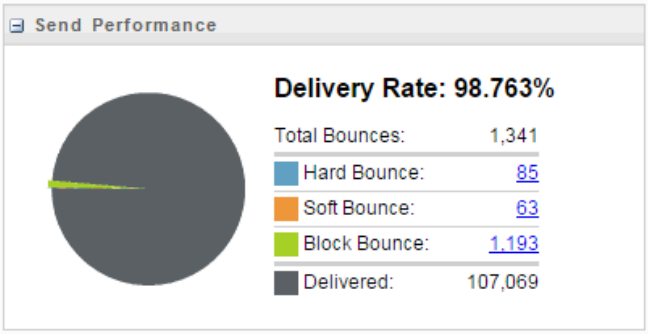
Summary



This area lists high-level information about your email send.

- Click the number by Total Sent to see a list of email addresses the email was sent to.
- Under Data Extensions, you can see the Data Extensions you selected. The Publication List is indicated by the parentheticals; in our example: (Using Alumni Career Services).

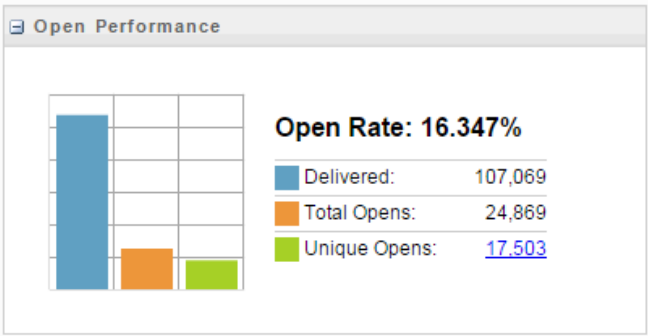
Send Performance



The **Delivery Rate** is calculated via dividing the total delivered by the total sent.

Not all bounces result in an undelivered email. For more information on the different types of bounces, consult Marketing Cloud's documentation on bounces.

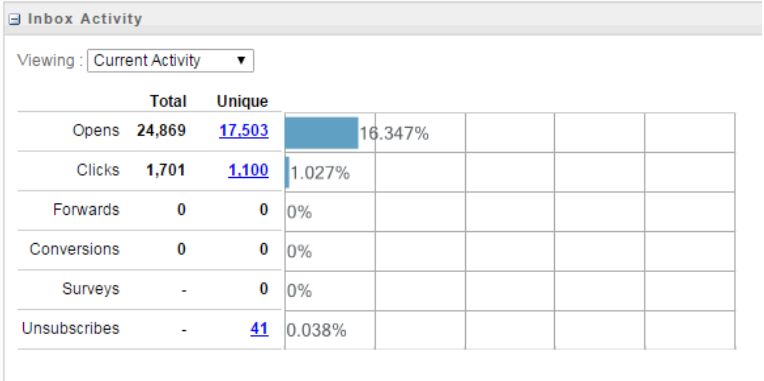
Open Performance



The Open Rate is calculated by dividing the Unique Opens by the total delivered.

Pay attention to Unique Opens rather than Total Opens because email clients can sometimes skew the total open rates (for example, Gmail refreshes every few seconds in the background, and if you have an email open, each refresh counts as a new open).

Inbox Activity

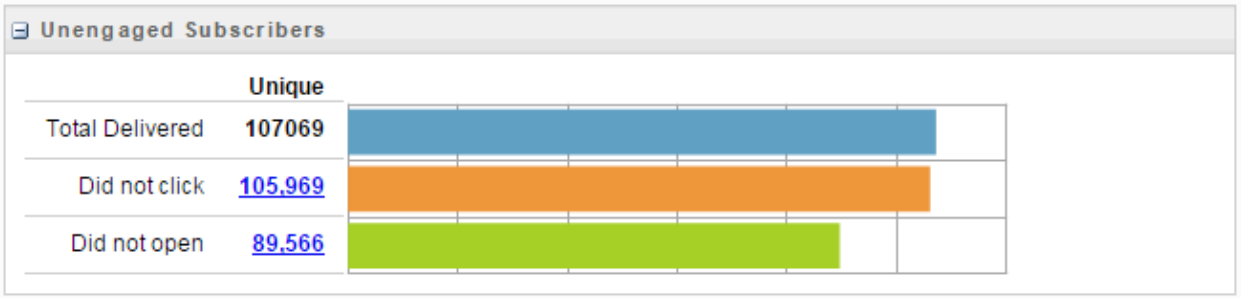


Total and Unique Clicks are shown here, and the Click-through Rate is the percentage to the right (1.027%).

The number of recipients who unsubscribed via this email is shown here.

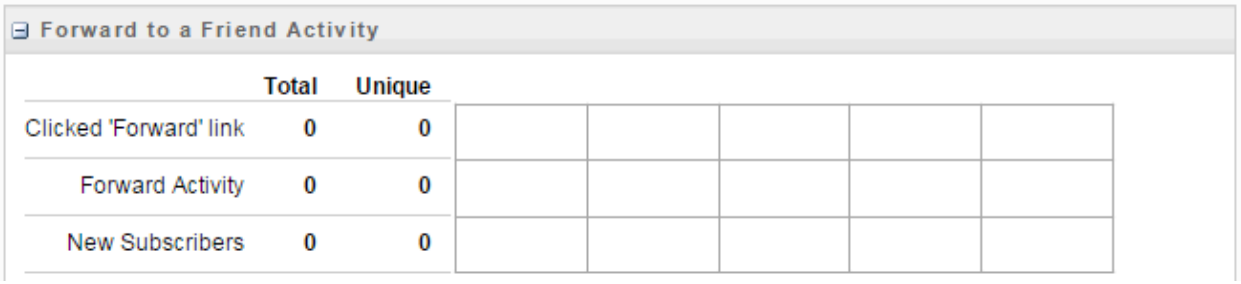
Click on each number to see the recipients who opened, clicked, or unsubscribed.

Unengaged Subscribers



This box shows the total number of recipients who didn't open or click on your email. Click on the numbers to view a list of email addresses.

Forward to a Friend Activity



This box shows the number of recipients who forwarded your email, and the new subscribers you gained from forwards. At present, Advancement's email marketing practices do not include the ability for a user to subscribe to a mailing list in this way, so the bottom row will always be 0.

Wait at least 5-7 days after your email send date to get the most accurate data.

3. FAQ

I don't have login information for Marketing Cloud. How do I request access?
Fill out the Advancement Web Applications request form and select the access you need under the E-mail Marketing ("Marketing Cloud") section on the form.

How do I choose a campaign for my email?
Choose the campaign associated with your audience. For example, if you're sending an email to the Club of Chicago, choose the Club of Chicago campaign. If you're emailing the Class of 2012, choose the Class of 2012 campaign.

You must select a campaign in order to enable staff to gather reports on email activity.

How do I create an email?
Start at step 5, provided you've completed steps a-4 (requested access to Marketing Cloud, gone through training, and scheduled your email on the calendar).

My email isn't quite ready, but I want to reserve a spot on the calendar. Is this ok? How do I do this?
Yes; in fact, you must reserve a spot on the calendar, regardless of the state your email is in! Step 3 explains how to reserve your spot. If you decide to cancel your email later, make sure you remove the event pin on the calendar.

How can I get help composing a high-quality email?
Email the GO Desk (theGOdesk@georgetown.edu) for help.

How do I create a new recipient list (data extension)?
Email theGOdesk@georgetown.edu.

How do I cancel a scheduled email?
You can do this in Pending Sends. See step 17 for details.

Help! My email to is sending now, but I need to cancel it. How?
You can cancel an email in Pending Sends. See step 17 for details. You can't retract the emails that have already gone out, but any remaining recipients won't receive the email.

If you need to issue a correction (for example: date/location change, misinformation, or misspellings), send the corrected email as soon as possible after noticing the error. Use the same subject line, but add "CORRECTION:" at the beginning.

If you need help issuing a correction, email the GO Desk: theGOdesk@georgetown.edu

What is a Publication List? How do I choose the right one?
A Publication List is the group of people who have opted out of receiving a certain type of email, and it functions as a category for your email. By federal law, recipients must be provided the option to opt out of receiving emails.

Choosing a Publication List is simple:

- If you're sending an email to your class, choose the **Class** Publication List.

- If you're sending an email to your club, choose the **Club/Regional Engagement** Publication List.

4. GLOSSARY

Business Unit - functional or business area that roughly corresponds to Advancement team structure. Examples include Annual Giving, Career Services, and Law Center.

Campaign - a method of grouping emails, photos, and templates together for tracking and reporting purposes.

Click-through Rate - the rate at which recipients click on any link in an email. Calculated through dividing unique clicks by total delivered.

Data Extension - Marketing Cloud's name for a recipient list, or the group of people to whom you send an email.

Marketing Cloud - Advancement's email marketing system.

Open Rate - the rate at which recipients open an email. Calculated through dividing unique opens by total delivered.

Publication List - the group of people who have opted out of receiving a certain type of email, and also functions as a category for your email. Advancement has several Publication Lists (examples include Career Services, Class, Club, Annual Giving, Medical Center, and Alumni Association). The Publication List appears in the footer of your email: "This ***Publication List*** email was sent to [email address]".
See the FAQ for how to choose a Publication List.

Sender Profile - the name and email address the email is sent from (also shows up in your inbox at the top of the message), plus the name and email address that appear when you click "reply".

Example
From name: Georgetown Class of 2015
From email: classof2015@advmail.georgetown.edu
Reply-to name: Georgetown Class of 2015
Reply-to email: alumnirelations@georgetown.edu