

Email Newsletter Diagnostic

Objectives

- Clarify the purpose and approach for the organization's newsletter(s)
- Identify high priority metrics and opportunities for optimization
- Assess current newsletter practices relative to standards of quality

Outcomes

- Scorecard of current newsletter practices

Estimated Completion Time: 20-30 minutes

Despite growth in social media and other emerging platforms, the tried-and-true tactic of the email newsletter remains the way that much of Washington sends and consumes information today. Associations and think tanks lean on the channel—perhaps more than any other—to disseminate timely updates to members, advocates, and supporters. And according to the 2015 Washington in the Information Age survey, nearly 90% of Washington Insiders rely on email newsletters at least once a day to get critical Washington-focused information.

The Email Newsletter Diagnostic tool developed by National Journal's Communications Council allows our Members to perform a rigorous self-assessment of their email efforts, by rating 40 different newsletter practices encompassing its full strategic life cycle—from planning, to execution, to integration, to process. The assessment will reveal opportunities to make incremental progress against the metrics that have been identified as most important, as well as potential areas of investment in systems or skill development.

Part One: Clarifying Purpose

Whether you're beginning an email newsletter from scratch, or refining an existing newsletter, it is essential that your efforts be guided by an overall philosophy or approach. The choice of approach is a crucial one; it ultimately guides not only the content and design, but how you measure success.

Most newsletters can be categorized as following one of two core approaches: the newsletter as a **marketing tool**, or the newsletter as a **standalone product**. Both approaches can be embraced by organizations of all shapes and sizes, from media and publishing, to nonprofits, associations, and advocacy organizations. The choice of which approach to pursue is a function of audience characteristics, content and branding goals, and bandwidth considerations.

The following questions are meant to help guide a discussion among you and your team to arrive at the approach that is most appropriate for your organization's situation and needs.

- 1) How is the audience for your e-newsletter different than (or similar to) your audiences on other channels? To what degree do they overlap?
- 2) How engaged is your e-newsletter audience with your organization already? Is that engagement uniform across all channels, or do certain channels perform better/worse?
- 3) How familiar is your newsletter audience with your overall organizational brand? Is the brand the higher priority, or the information contained within each edition?
- 4) Is your newsletter content largely self-created, or do you curate and link to many other sources of content?
- 5) How nimble is your team when it comes to creating visuals and/or multimedia? Can you create content quickly in-house, or do you rely on outside consultants?

With your answers in mind, you can use the chart on the next page to assess which approach is best suited to your current situation and needs.

	COLUMN A	COLUMN B
Audience Characteristics	<input type="checkbox"/> Newsletter audience overlaps with audiences of other channels, but engagement is not optimized	<input type="checkbox"/> Newsletter audience overlaps with audiences of other channels AND they're already highly engaged on each - OR - <input type="checkbox"/> Newsletter audience does not overlap significantly with other channels
Content Goals	<input type="checkbox"/> To drive action off-platform	<input type="checkbox"/> To inform, engage on-platform
Branding Goals	<input type="checkbox"/> To build/reinforce brand to those who may be less familiar	<input type="checkbox"/> To deepen brand value to those already familiar
Content Considerations	<input type="checkbox"/> More multimedia-heavy; need bandwidth for creating & optimizing visuals, as well as creating and formatting content on other channels (e.g., the website)	<input type="checkbox"/> Tends to be lighter on multimedia, but more time invested in writing, smart curation, and adding editorial value / points of view to others' content
Sounds Like...	<input type="checkbox"/> <i>"Our main objective is to drive traffic to content hosted elsewhere. The newsletter is a distribution mechanism, not a product in itself. It's part of a web of communications, and our website is the hub."</i> (Pew Charitable Trusts)	<input type="checkbox"/> <i>"People should only click links if they...find it really interesting--not because we left something out."</i> (Buzzfeed)

Tally up the total number of boxes you checked in columns A and B. If column A has more checks, your newsletter is primarily a **marketing tool**. If column B has more checks, your newsletter should be considered a **standalone product**.

Part Two: Choosing Priority Metrics

With your newsletter's core purpose and approach in mind, you can now focus on the metrics that more accurately measure success against that purpose. For example, if your newsletter is a standalone product, you may be more concerned with overall list size or growth than you are with click-throughs, since the purpose of your newsletter isn't to drive traffic off-platform.

The list on the next page includes both the most common metrics for each approach, as well as some that can be categorized as "emerging"—embraced by some progressive organizations, but not yet fully in the mainstream (denoted with "☆"). While this list is by no means meant to be exhaustive, it serves as a both starting point for the must-have metrics, as well as an inspiration for some outside-the-box thinking.

Marketing Tool	Standalone Product
<p>Open Rates: The number of people receiving your email who open it</p> <p>Click-Through Rates: Proportion of individuals who open your newsletter who proceed to click on a link which directs them to external content</p> <p>☆ Web Engagement: How long do individuals spend on the website when accessing it through the newsletter vs. accessing it via web browser or social, and are they taking different actions?</p> <p>☆ Call-to-Action Success: How often do people follow through on sharing, watching, or learning more?</p> <p>☆ Audience Subset Performance: Do targeted segments of the audience perform better or worse, and do you value them equally?</p>	<p>Open Rates (see definition at left)</p> <p>List Growth: Increases in your subscriber base can indicate that forwarded emails and social shares are propelling new engagement; patterns in decreases can indicate reasons for unsubscribes</p> <p>☆ Screen Time: How much time is someone spending reading your newsletter in their email client?</p> <p>☆ Email Forwards: How many times (or what proportion of) your newsletter gets forwarded to others by subscribers?</p> <p>☆ Return Engagement: How many readers are repeatedly opening newsletter days or weeks later? Is repeat engagement happening on a weekend? (indicating that content was worth a deeper read)</p> <p>☆ Reader Loyalty: Are the same subscribers consistently reading your newsletter or are opens inconsistent?</p>

With your core metrics identified, you can now begin to test, understand—and optimize—the relationship between your current newsletter practices and your targets for improvement.

Part Three: Assessing Current Practices

A number of factors—ranging from strategy, to execution, to process—can help or hinder your efforts to optimize performance against the metrics identified in Part Two. The remainder of this workbook is dedicated to an extensive audit of your current newsletter practices, encompassing 40 different factors that can be rated against common standards of quality.

Use the following rating system when assessing your current level of performance:

- 0 = We don't do this
- 1 = Ad hoc; we do this, but not particularly well, and not consistently
- 2 = Routinized; we do this fairly well, most of the time
- 3 = Optimized; we've got this down to a science

Each section and sub-section(s) will present an opportunity to pinpoint and assess where any potential individual weaknesses may be.



Directions

- 1 Rate each practice, either individually or as a team, according to the quality and consistency of your adherence to the stated standard of quality (0-3).
- 2 Tally up the totals for each sub-section (e.g., 1.1 Audience, 1.2 Goals); then, add these together to get the section total (e.g., 1.0 Strategy).
- 3 Compare your scores to the ideals for each to identify potential opportunities for improvement.

Function ID	Standard of Quality	Rating
1.0	STRATEGY	/ 15
1.1	Audience	/ 6
	▶ Newsletter audiences are specific (e.g., not “the general public”)	
	▶ Clear understanding of characteristics/personas, including information needs and engagement preferences	
1.2	Goals	/ 9
	▶ Newsletter goals and objectives are clearly articulated	
	▶ Newsletter is integrated into broader communications strategy, and its role in supporting broader communications goals can be articulated	
	▶ Objectives can be measured	
2.0	EXECUTION	/ 57
2.1	Content	/ 21
2.1.1	Copy	/ 12
	▶ Tone: Writing style is on brand but suitable for more personal email medium	
	▶ Length: Text is concise and edited in a way that supports newsletter goals (e.g., driving traffic off-email, or informing within the email)	
	▶ Quality: Content is informative, insightful, and/or helpful to target audience; free of grammatical errors	
	▶ Mobile-Friendly: Writing is simple, straightforward, and can be easily consumed and understood by readers quickly skimming on a mobile device	

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Function ID	Standard of Quality	Rating
2.0	EXECUTION (cont'd)	
2.1	Content (cont'd)	
2.1.2	<i>Visuals</i>	/ 9
	▶ Purpose: Visuals serve a clear purpose and are tested/analyzed to ensure they are meeting that purpose (e.g., to drive clicks/engagement)	
	▶ Size: Images are appropriately cropped and sized within design, and resolution is optimized for viewability and minimal load times across platforms and devices	
	▶ Quality: Visuals are unique (e.g., not stock photography or clip art), complement content, and add urgency to calls-to-action	
2.2	Design	/ 27
2.2.1	<i>Branding</i>	/ 6
	▶ Design incorporates appropriately scaled elements of organizational brand, including colors, fonts, imagery	
	▶ Newsletter is visually consistent with family of other online and offline channels	
2.2.2	<i>Organization</i>	/ 6
	▶ Prioritization: Content is logically organized to place visual and textual emphasis on the most important information or calls-to-action	
	▶ Consistency: Layout remains similar across subsequent editions	
2.2.3	<i>Ease of Reading</i>	/ 6
	▶ Differentiation: Fonts, spacing, and other design elements are appropriately sized to differentiate headers, sections, and links	
	▶ Absorption: Design is “skimmable,” allowing for quick visual assessment of main points (e.g., white space, short text blocks, line heights)	
2.2.4	<i>Technical</i>	/ 9
	▶ Design has been tested across browsers, platforms and devices, prioritizing those used most by audience	
	▶ Header/footer includes necessary contact and unsubscribe/update options	
	▶ Design renders easily on mobile devices and preserves hierarchy/organization	

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Function ID	Standard of Quality	Rating
2.0	EXECUTION (cont'd)	
2.3	Distribution	/ 9
	<ul style="list-style-type: none"> ▶ Optimization: Timing, sender, and subject line have been tested to determine the most effective 	
	<ul style="list-style-type: none"> ▶ Consistency: Newsletter is regularly sent on the same day, at the time of day 	
	<ul style="list-style-type: none"> ▶ List Management: Email list is regularly culled to maintain integrity 	
3.0	INTEGRATION	/ 33
3.1	Website	/ 24
3.1.1	<i>Sign-up Experience</i>	/ 15
	<ul style="list-style-type: none"> ▶ Accessibility: Sign-up call-to-action is prominently displayed and easy to access from homepage and subpages 	
	<ul style="list-style-type: none"> ▶ Simplicity: Sign-up experience minimizes information subscribers need to enter and any follow-up steps they must take 	
	<ul style="list-style-type: none"> ▶ Specificity: Type of content, purpose of newsletter are clearly communicated to subscribers prior to and/or during sign-up process 	
	<ul style="list-style-type: none"> ▶ Reliability: Frequency of newsletter distribution is clearly communicated to subscribers prior to and/or during sign-up process 	
	<ul style="list-style-type: none"> ▶ Reassurance: Subscribers receive immediate confirmation of successful sign-up; establish expectation of arrival of first newsletter; receive sample content and/or links to further engage in the interim 	
3.1.2	<i>Archives of Past Editions</i>	/ 9
	<ul style="list-style-type: none"> ▶ Accessibility: Archive of past editions is prominently displayed and easy to access from homepage and email sign-up page 	
	<ul style="list-style-type: none"> ▶ Format: Archived editions are searchable text (e.g., not pdfs) 	
	<ul style="list-style-type: none"> ▶ Labeling: Archive navigation utilizes descriptive links/headers that provide information on the topics contained within (e.g., not a simple list of dates/editions/volumes) 	

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Function ID	Standard of Quality	Rating
3.0	INTEGRATION (cont'd)	
3.2	Social Media	/ 9
	▶ Linking: Newsletter features calls-to-action to engage on the organization's social media platforms	
	▶ Sharing: Individual content within the newsletter contains calls-to-action to share on social media	
	▶ Promoting: Social media is used to promote newsletter content in a complementary way; newsletters are not automatically cross-posted to social channels upon sending	
4.0	PROCESS	/ 15
4.1	Roles & Responsibilities	/ 3
	▶ Individuals have a clear understanding of expected contributions across the email planning, creation, testing, distribution, and measurement processes	
4.2	Collaboration	/ 3
	▶ Organization has a documented system in place to coordinate and track individual progress against contributions	
4.3	Approvals	/ 3
	▶ Necessary approvals are held to a strict timeline, allowing for any subsequent edits; individuals with approval power are regularly briefed on strategy and purpose	
4.4	Efficiency	/ 3
	▶ Process enables accountability and productivity, and minimizes redundancy	
4.5	Coordination	/ 3
	▶ Internal efforts ensure awareness across departments and functions of access to any shared audiences, frequency and nature of outreach	

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