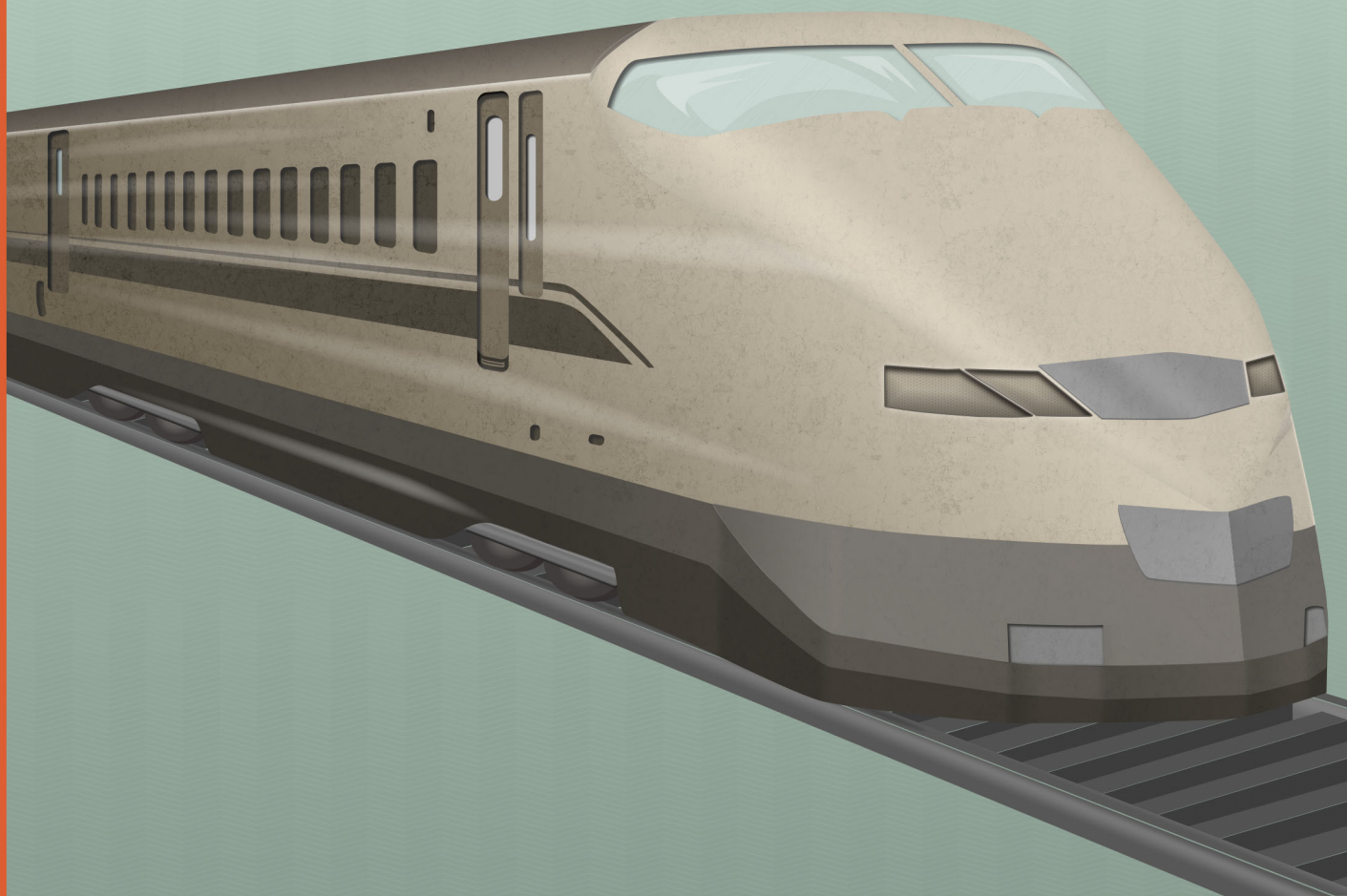*how to use*

BENCHMARK
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How to Use the Benchmark Email Express Guide

▶ INTRODUCTION

Welcome to Benchmark Email!

If you've downloaded this manual it means you're ready to start email marketing with us. We're ready to show you how! This is the Benchmark Email Express Guide: A swift introduction to the main process of Benchmark Email's software.

Inside, we'll cover the following procedures:

1. Uploading your list
2. Creating & scheduling your first email campaign
3. Understanding your Reports

Note: A more exhaustive guide on the advanced features of our software is forthcoming later this year. This Express Guide will take you through all the basic steps you need to know to launch a successful email campaign.

▶ Before You Begin

Before you begin creating your first email campaign, log in to your Benchmark account and verify your email address and physical location. To do this, locate your account name in the upper right corner of the screen. Scroll over your name to view your account options. Under the **My Account** column, click on Email Verification.
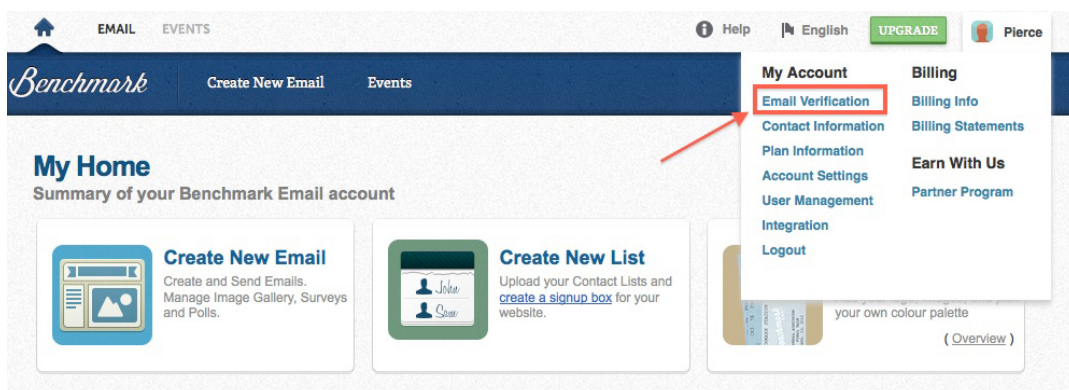
On the **Email Verification** page, enter the email address you will be sending from in the field provided and then click the "Send Verification Email" button.This is to confirm that the email address that you plan to send from is legitimate and belongs to you (this is required by law). Go to your inbox and follow the instructions in the email provided.

Scroll over your account name again. From here, click on **Account Settings**.
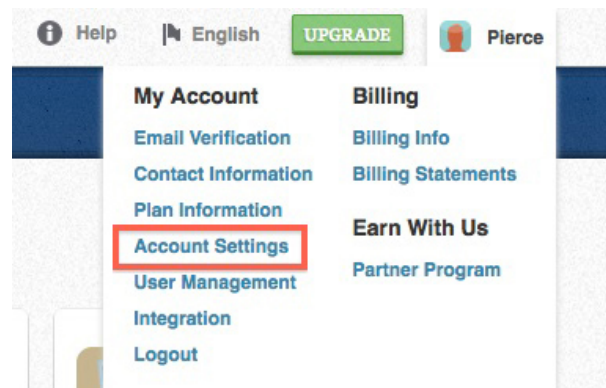
On this page, you will need to enter the physical address of your organization.

This information is vital to your email marketing reputation, and is required by the United States CAN-SPAM Act (enacted in 2004). If you send outside the United States, the laws may differ, but providing a physical address is essential to establishing a professional relationship with your customers, internet service providers and email clients. You must enter this address to send email campaigns from Benchmark Email.

Underneath this field is your **Email Message Settings**. The "From Name" is the name that will appear in your email recipient's inbox when your campaign arrives. The "From Email" can be any email that you have verified (see preceding step). "Time Zone" is the time zone that your campaigns will be scheduled in. Please note that all of these settings can be changed manually from inside the Email Creation process (see Step 2.1 for "From Name" and "From Email" and Step 2.5 for "Time Zone").

Step 1: Upload Your List

A Note on Permission-Based Email

What would email marketing be without anyone to email? Your prospects and customers, clients and partners are the lifeblood of your business. And because of that, you will need to respect them and their email addresses. For many users, this is where they first run into trouble on the email marketing front.

Benchmark Email only accepts "permission-based" email lists. What does this mean? It means that your precious list of contacts is entirely your own, was gathered by legitimate means, and has not been scraped from other websites, stolen, rented or purchased from third-parties. Your email list must be "opt-in": Subscribers have signed up to receive your emails via a signup form on your website, at your place of business, etc.

This may seem unfair if you've been promised that your third-party list is full of customers waiting to hear from you, but such lists will only return high abuse rates and a ticket to the spam boxes and blacklists of internet service providers (ISPs). Don't use them, and your list will be approved. Use them, and your account will be revoked.

So how do you build a permission-based list? For more information, check out our articles on Permission-Based Email Marketing and the 10 Ways to Build a Permission-Based List. We also have a concise guide on How to Build Healthy Email Lists free to download.

Step 1.1: How to Upload Your List

First, log in to Benchmark Email. From the dashboard, scroll over the **Contacts** button and select Create New List.
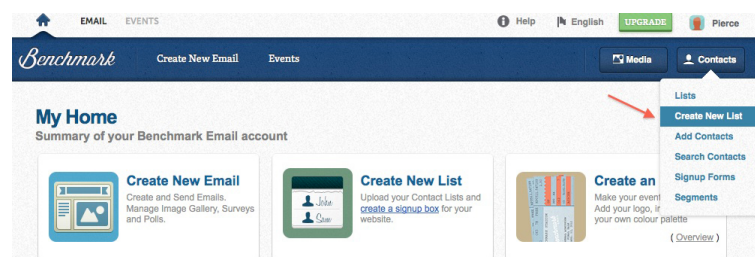
You have three options for importing new contacts into your Benchmark Email account: (1) **Import Contacts from a File**, (2) **Copy & Paste Contacts** and (3) **Add Individual Contacts**.

1) Import Contacts from a File

The **Import Contacts from a File** option is the most involved process, but offers several means of importing your email addresses. If you have your contact list saved as a file on your computer, you can import those contacts in Excel (.XLS, .XLSX), comma separated value (.CSV) or text files (.TXT).

If you choose to Import Contacts from a File, you can take advantage of our several online integrations. If you scroll down the page and click the "Click here" link, you can import your contacts directly from Gmail, Hotmail, AOL, Salesforce, Highrise, Zoho or Zendesk (we're always updating, so check back periodically for new integrations).

After you add your list, you can fill out more information about your contacts on the Field Mappings page.

On the final page of the process, you will explain how you compiled your list and select the date of the last time you emailed to the whole list (e.g. a newsletter signup form on your website, a customer mailing list that they join at your brick & mortar store, etc.). This is necessary to confirm that it is a healthy, permission-based list.

2) Copy & Paste Contacts

You can choose **Copy & Paste Contacts** if you have less than 50 email addresses you'd like to add at once. These

addresses can be added one line at a time or copied and pasted into the entry field.

3) Add Individual Contacts

If you choose **Add Individual Contacts**, you will manually add the email address and personal information for your contact and choose whether they will receive HTML or Text-only emails.

On average it takes about 15 minutes for new lists to be uploaded into the system. After that, it will take 2 - 4 hours for your list to be approved. Make sure to check your inbox during this process, as we may need further information to approve your list.

Step 1.2: List Uploading Help

Benchmark Email has an extensive library of FAQs that cover all our features, and we encourage you to make use of them. Here are some helpful links regarding List Approval and more advanced List options:

FAQ - I'm Having Trouble Uploading My Lists. What Do I Do?

FAQ - What Is List Approval?

FAQ - Why Didn't All My Email Addresses Upload?

FAQ - How Do I Merge Lists?

FAQ - What Happens when a User Unsubscribes?

Step 2: Create an Email Campaign

Once you've uploaded your list(s), you're ready to send your first email campaign. Click on the Create New Email tab.
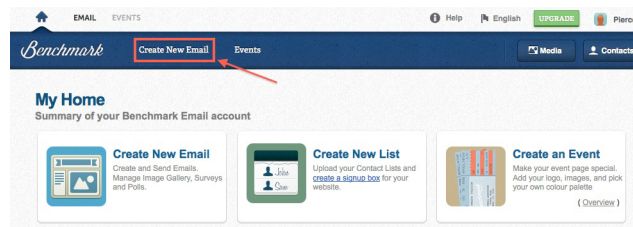
Step 2.1: Describe Email

You have entered Step 1 of the email creation process: Describe Email.

1) Email Name: This is the technical name of your email campaign, and how your email will be titled in your archives. This name will never be seen by your subscribers; it is for your reference only.

2) From Name: This is the name that will appear to your subscribers when they receive your email. You want this name to be professional and familiar (e.g. "Benchmark Email," "Joe's Drywall, LLC").

3) From Email Address: This is the email address that will send the email campaign. (Note: This email address must be verified before you can send any email from it. Follow the instructions in the **Before You Begin** section of the Introduction, or click on the "click here" link under this and the next field to go to the verification page directly.)

4) Reply Email Address: This differs from the **From Email Address** in that this is the email address that will receive the replies of your subscribers. It can be the same address as the preceding field, but you may have specific plans for who you want replying to your campaigns (e.g., if you send from a sales account but you want a customer support rep to receive responses).

5) Subject: Arguably the most important element of your entire campaign. Many emails live or die by the strength of their subject lines. You want something that will grab your subscriber's attention, but is truthful and does not look like spam. Make it a professional call to action. Special characters, multiple typos, asterisks and exclamation marks should 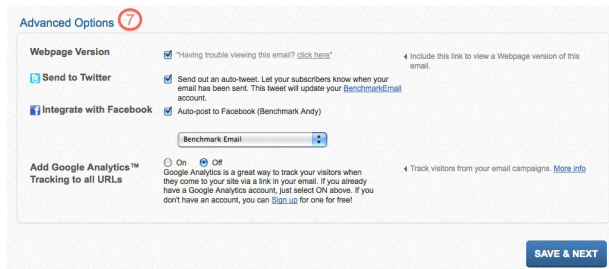never be used. Those characters scream spam and may get your campaign tossed in the junk folder before your subscriber even has a chance to read it. For more information on Writing Great Subject Lines, click the link to download our free manual or read it on our website.

6) Permission Reminder: This bit of code and copy is optional but extremely important. If you set it to "On" then users will see a small disclaimer at the top of their email that reminds them that they have opted in to your list and can actively confirm this fact. This builds a stronger list for you and leads to better open and click-through rates from them in the future. You may switch this reminder to the "Off" setting but the Unsubscribe link will always remain. (The Unsubscribe link is necessary per the 2003 US CAN-SPAM Act, which states that any legitimate email sender must honor unsubscribe requests within ten days or face severe legal consequences.)
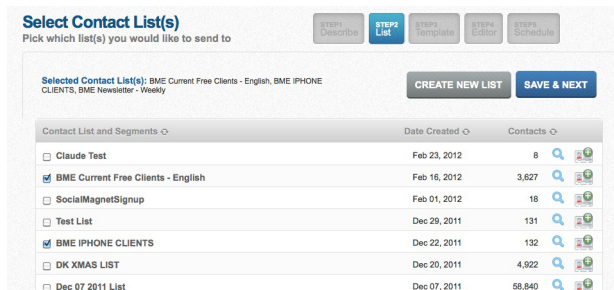
7) Advanced Options: The Advanced Options are located underneath the main panel and are for integrating your social media with your email marketing. (This is an essential feature to modern marketing and will be explored further in the upcoming Total Guide.)

When you're finished filling out this section, click the blue **Save & Next** button.

Step 2.2: Select Contact List(s)

This step is straightforward. Choose the list or lists you'd like to send your campaign to and then press **Save & Next**.

Step 2.3: Choose a Template

When you've created and sent more email campaigns, they will appear in the main window. To view the different types of email templates, click on the Template Categories on the left.
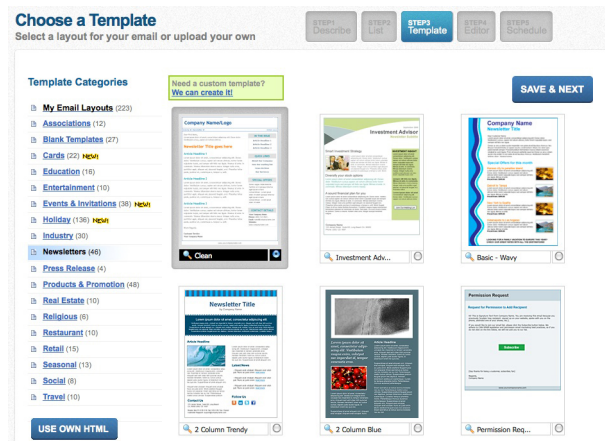
Benchmark Email has over 400 email templates, each with unique arrangements of blocks and layouts. We recommend you experiment with several to learn what has the best look and feel for your particular campaign. Once you've picked your template, click **Save & Next**.

Step 2.4: Build My Email

This is the real meat and potatoes of the Benchmark Email software: The email editor.
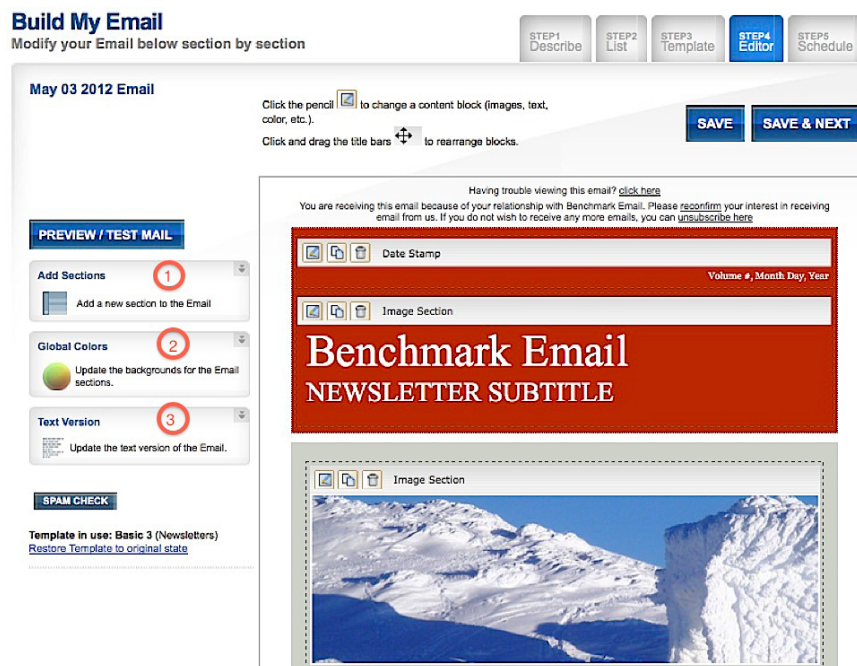
To edit individual blocks, scroll over them and click on the pencil icon ( ). This will bring up the floating toolbar. Before you do that, however, check out the three left panels beside the edit window.

1) Add Sections - When you click on the arrow in the upper right corner of this panel, it will open to reveal the names of all the blocks in this particular template (the number and types of blocks will vary by template). Click the green plus sign to add a new block to your template. It will appear underneath the current block.

2) Global Colors - Click on the arrow in the upper right corner of this panel and you will see the color options for every section of the template. Again, as with **Add Sections**, the type and number of sections that can be color customized will vary with the template. Feel free to experiment with different colors and themes. If you want to start over, the link at the bottom of the panel will revert everything back to its original colors.
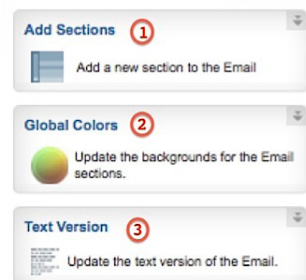
3) Text Version - When you click on the Text Version panel, the screen refreshes to display the text version of your email. This is the email that will be received by your subscribers who have images disabled in their inboxes (so you want to make sure it's formatted correctly). To create the text version based on your HTML version, click "Copy Text from HTML Email." If you want to keep the edits you make, you must click "Save Changes" before you return to the HTML version.

Elements of the Editor

In the corner of each block of your template are three icons:

Click the **Pencil Icon** to edit that block. Once you click the Pencil icon, the left panel will change to the options you see in the example below. It will also bring up the floating toolbar, which can be exited out of by clicking the "Cancel" button. The **Copy Icon** will copy the block. The **Trash Icon** will delete the block.
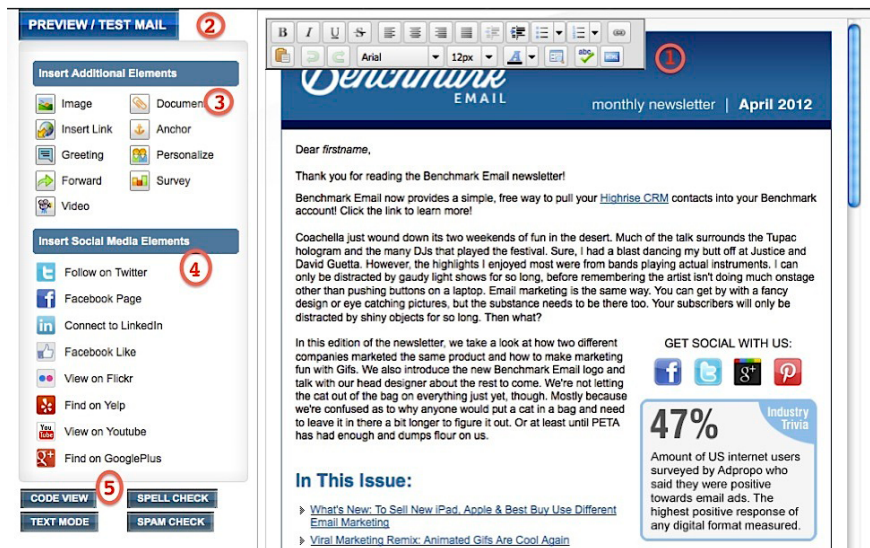
1) Toolbar: Appears when you press the Pencil Icon. It provides formatting and font options.

2) Preview/Test Mail: Click on this to send your email campaign to an email address of your choice. Type a quick message to your recipient to let them know what they're receiving. This feature is great for checking your hyperlinks, image placements, text and, most importantly, how your email looks in different inboxes and computers.

3) Insert Additional Elements: These straightforward icons are exactly what they claim to be. Use them to add images, hyperlinks, videos, surveys or documents to individual blocks. (Images can be in JPEG, PNG or GIF formats; recommended size is 200 kb and the maximum width is 640 pixels.) The "Personalize" icon allows you to utilize code that recognizes individual contacts by the information in your lists and address them by name. The "Anchor" icon creates links between sections of your newsletter (e.g., an anchor link at the top of your newsletter describing a new feature may take the reader to the section where it is explained in more detail). These tools are a lot of fun and add interactivity and value to your campaigns. Their many uses will be elaborated on in the Total Guide.

4) Insert Social Media Elements: These social tools allow you to link your campaign to your social network of choice.

5) Technical Buttons: The four buttons below the **Social Media** panel allow you to work under the campaign's hood. "Code View" is for the HTML-savvy editor who wants to get into the code of the email and work from there (this tool is recommended only for users with HTML experience). "Spell Check" checks the spelling and grammar of your campaign and includes a Thesaurus. "Text Mode" shows you what your campaign looks like with the images disabled (same as the Text Version panel). "Spam Check" searches elements of your email for anything that will be perceived by email inboxes as spam content. This can include but is not limited to: frequent typos or letters replaced with special characters, discrepancies in capitalization and fonts, spammy keywords or phrases, and overly large images.

*A Note on Sample Images & Text: Each template comes pre-loaded with pictures and latin copy in the text blocks to illustrate what finished products will look like. You must replace these images and text before you finish editing your campaign, as the editor will not let you proceed until the sample content is eliminated.

It is recommended that you press the **Save** button frequently while editing. When you have finished editing your email campaign, click on the **Save & Next** button.

▶ Step 2.5: Schedule Delivery

You have chosen an engaging, informational subject line, chosen your list(s), your template, customized your campaign and now it is time to schedule your email. The **Schedule Delivery** screen provides three checkboxes at the top.

1) Adding share buttons will allow your campaign to be shared across social networks (this is highly recommended if you wish your campaign to go viral or reach a wider audience than your subscribers alone).

2) The second checkbox, if checked, will upload your finished campaign to your Benchmark Email Community profile (more info on that in the Total Guide).

3) The final checkbox will add the current campaign to your Newsletter archive (the archive provides unlimited storage and is available at no extra charge).

Note: If you do not check the last box, you will still be able to see this campaign by going to your **Emails** tab. The archive is for your own records, to be customized how you want.

You now have three Email Delivery Options:

4) Save as Draft will save the campaign as-is and will finish the editing process.

5) Send Immediately will send the campaign immediately.

6) Schedule Delivery allows you to choose the date and time that you'd like your email campaign to be sent (a link below the button can switch your scheduled timezone).

Choose any one of these options and you will have completed your first email campaign.

▶ Step 2.6: If Your Campaign Is Not Approved

Email marketing is all about your reputation, and Benchmark Email strives for the best relationships with Internet Service Providers and email clients so that your campaigns are trusted and reach inboxes as intended. To do this, our system has failsafes installed to prevent a campaign from sending if it has a high enough probability of registering as spam.

If you receive a message that your campaign is not approved, it's possible that the problem is minor, such as you uploading an image that is too large for major email clients to process; or perhaps a block of your template still has some latin filler text. To avoid these issues, check out these two FAQs. They'll help you craft even stronger email campaigns:

- FAQ - Why Is My Email Campaign Under Review?
- FAQ - Why Has My Email Campaign Been Not Approved?

Step 3: Understand Your Reports

We come to what is perhaps the most important aspect of email marketing: email metrics. Email metrics are the real-time statistics generated by your subscribers' actions upon receiving your campaign.

Unlike with physical mail, television advertisements, billboards and other traditional forms of advertising, email marketing gives you the ability to actually track the impact your individual campaigns have on your subscribers. Monitoring this information will give you the insight you need to improve your campaigns over time and raise even more user interaction and interest. And Benchmark Email's **Reports** section is easy to understand and even easier to read at a glance.

To view your reports, you must first send a campaign. Once you've done that, scroll over **Reports** and click on Email Reports. Choose a campaign from the Recent Email Reports list. If you have sent several campaigns already, click on the **View All** button to see the rest of your reports.
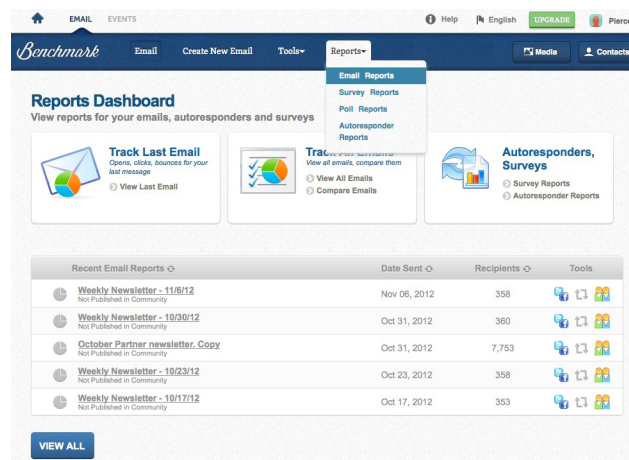
Step 3.1: The Report Console

This is the Report console, where you can view the email metrics for your campaign. This report is updated in real time for as long as your account lasts.
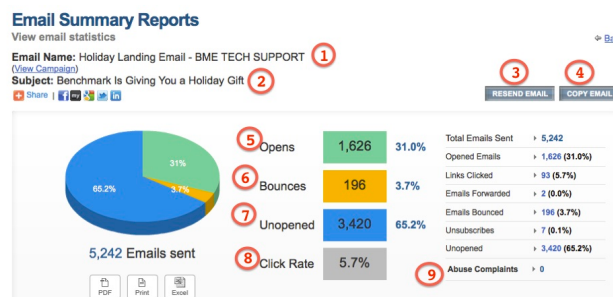
Here is a breakdown of each button and metric:

1) Email Name: The name you have designated for this campaign (only seen by you).

2) Subject: The subject line your recipient sees in their inbox.

3) Resend Email: This button resends your campaign to any subscribers who have joined your email list after the initial campaign was sent.

4) Copy Email: Copies the email campaign exactly and sends you back into the Email Editor (note: because of inconsistencies that can appear in the code after copying an email several times, it is recommended that you always copy from the original version).

5) Opens: Rendered in green on the pie chart, the number tells you how many total recipients have opened your email, with the percentage of opens over total emails sent displayed beside it. Clicking on the blue number next to "Opened Emails" will reveal which particular subscribers opened your email (clicking on the blue numbers next to any metric will show which contacts performed the respective actions). A good way to improve your open rates is to make segmented lists from subscribers who consistently open your campaigns. And remember that open rates vary by industry, so cross reference your opens with a reliable source before deciding on the success of a particular campaign.

6) Bounces: This number tells you how many emails bounced, with the percentage of bounces over total emails sent displayed beside it. Bounced emails can be either hard or soft. Soft bounces mean that an inbox may have been temporarily disabled somehow, such as when an inbox is full or there is a temporary local problem with its server (automatic out of office replies may sometimes trigger this as well). These bounces are not serious, and the system will try to resend to them. Hard bounces, however, indicate permanent issues with a recipient. These can mean the mailbox is no longer active, the domain is incorrect, the user is unknown, etc. Click on the blue number of bounces to see the full list of bounced contacts and use the dropdown menu to sort them.

A user who incurs too many hard bounces will be suspected of spamming, so to protect your reputation Benchmark Email will flag contacts as "Confirmed Bounces" if they are hard bounced in two consecutive campaigns. These confirmed bounce contacts will be excluded from your active contact count and will not be sent any email.

7) Unopened: How many emails have yet to be opened.

8) Click Rate: This percentage reveals how many unique clicks have occurred inside the campaign. A unique click is a click from a single user (duplicate clicks from the same user do not count towards this total). The click-through number is typically lower than the open number, but it is actually a better representation of how effective your campaign is, as it reveals how many users are actually interacting with your email. It's a good idea to include links in your campaign that take users to custom landing pages, coupons, signup forms, blogs and the like. Click the blue number to see which users clicked on your campaign.

9) Abuse Complaints: If a subscriber sees your email and clicks on the Spam button in their inbox - or in the link provided in the email - then you will receive an abuse complaint. This happens when a user believes you are spamming them, though bear in mind that some users will do this automatically. Some abuse complaints are to be expected, though if you receive too many, Benchmark Email will review your account. Benchmark allows one abuse complaint per 2,000 emails.

If you receive one or more abuse complaints, you can click on the "View Details" button that appears underneath it to view your complaint rate (this is the cumulative complaint rate for all your campaigns). Benchmark allows an average complaint rate of 0.5. If your account racks up a higher rate than that, you will be slated for review. To cut down on abuse complaints, make sure that all of your contacts have opted in, that you keep a healthy sending frequency, that you segment your email lists when possible and that you eliminate hard bounces and abuse complainers from your lists.

Step 3.2: Opens by Location

1) The blue buttons at the top will take you to the lists of users who performed the stated actions (the same as clicking the blue numbers in the Report Console above).
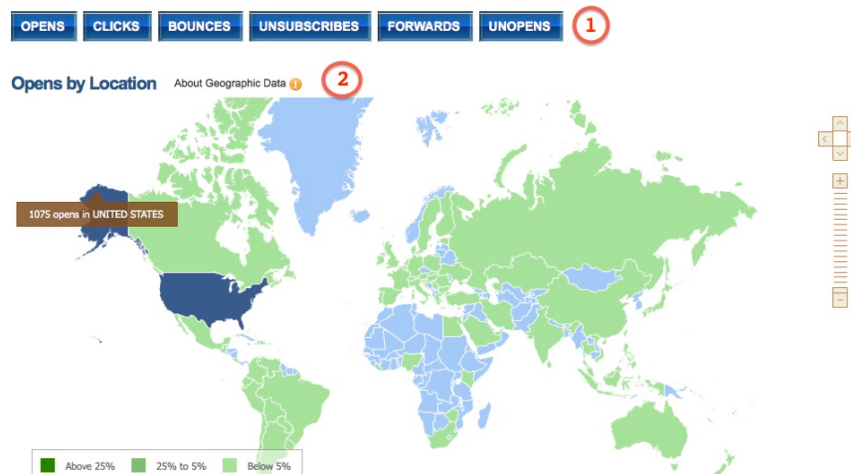
2) The "Opens by Location" map is a handy feature that shows you approximately how many subscribers opened your email in a given country ("approximate" due to IP addresses sometimes being shared across borders). You can scroll with the plus sign in the right navigation controls to get a closer view. Green countries are where your campaign was opened; blue ones are where it was not. Pass your cursor over the countries to see how many emails were opened in that country. Click on a country to see a breakdown of opens by its individual states or provinces.

Step 3.3: Click Performance & Social Stats
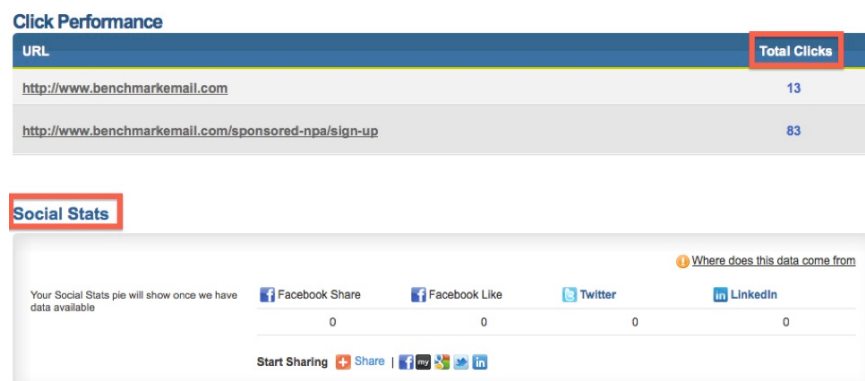
Scroll beneath the Opens by Location map and you will find the Click Performance of each link included in your email campaign. The "Total Clicks" column displays the total unique clicks for each URL.

If you include social sharing in your campaigns, you can view your total Facebook Shares, Facebook Likes and Twitter and LinkedIn shares.

▸ Step 3.4: A Final Note on Email Metrics

It is important to remember that your email metrics will never be 100% accurate. The reason for this is that the information gathered for open rates and click-throughs is relayed by a 1x1 pixel image that communicates an email "open" back to the server. If a user has their images disabled by default, they may read and interact with your email, but it will not register in your report. If a user has an especially stringent email provider, it may automatically send any email with images into the Spam or Trash folder. This is why it is important to have your subscribers add you to their trusted addresses list.

▶ About Benchmark Email

Take powerful features by the dozen, sophisticated list management, hundreds of email templates, ultra-precise reports and dazzling email and video email. Now, package all that together for an extremely affordable price. Sound appealing? That's us.

There's a reason – or 100 – that more than 73,000 users trust us with their email marketing campaigns. With a second-to-none feature set, headache-free tools that make every campaign a snap and extremely reasonable price plans, we're the email marketing service for businesses of all shapes and sizes.

At Benchmark, we're more than email marketing experts, we're innovators. Our main aim is to perfect our email marketing service, but we also follow social networking, search engine optimization (SEO) and Web 2.0 just so our 100% Web-based software is completely compatible with the ever-changing Internet world.

No other service gives you this robust, standard range of features for just $9.95 a month to start. Find out for yourself by enrolling in our free, 30 day trial at www.benchmarkemail.com/register.

CONTACT US

▶ Contact Benchmark Email

We welcome your feedback and would love to talk with you about your email marketing needs. Please contact us at the addresses below.

Website: http://www.benchmarkemail.com/

Call: 800.430.4095

Email: sales@benchmarkemail.com