



PROGRESSIVE TECHNOLOGY PROJECT

Communicating with Your Base

What we're going to cover:

- Tips for using the mail ckeditor
- Email templates – the nitty gritty
- Strategies for email list management





PROGRESSIVE TECHNOLOGY PROJECT

Email Editor Tips

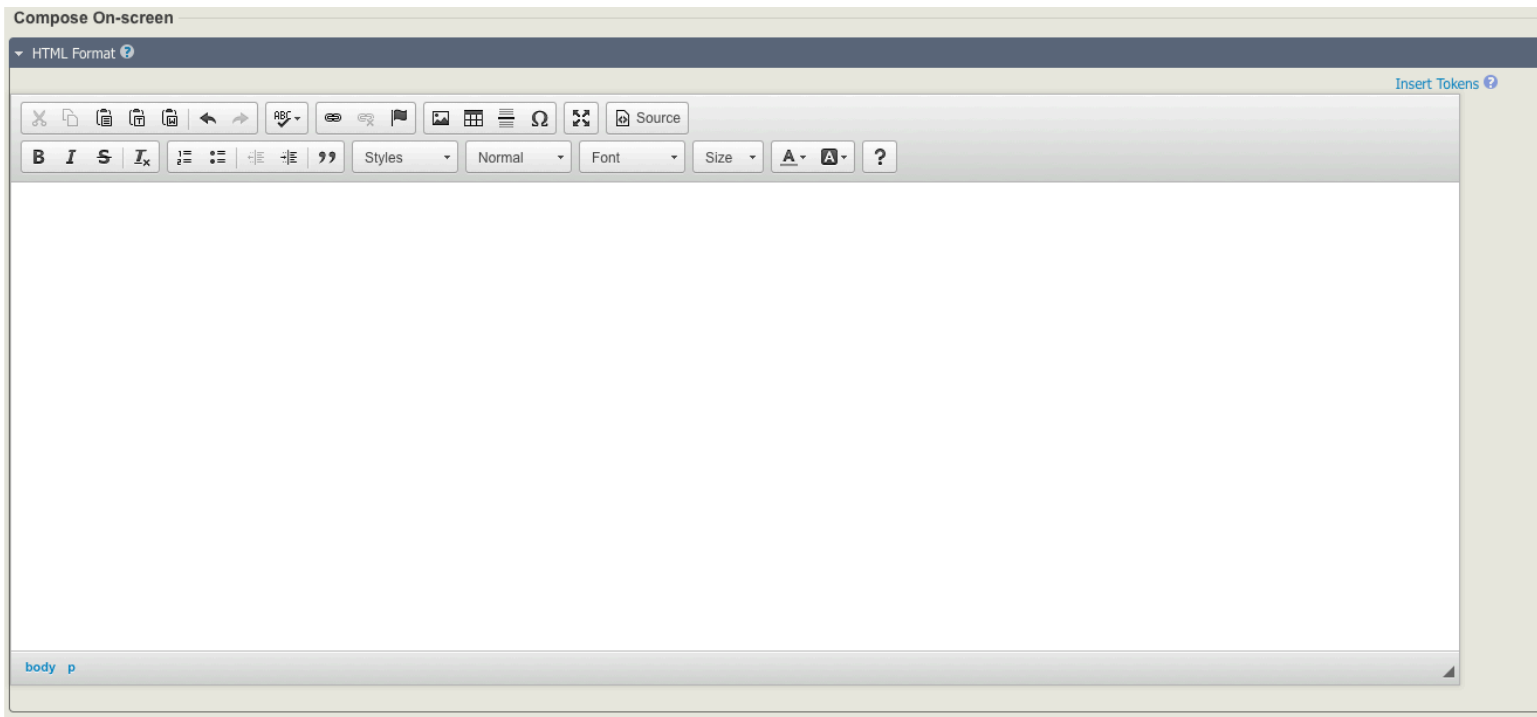
Up for discussion: What makes for a bad email, content aside?



- You can't read it
- Looks bad in your email
- Goes to SPAM
- Other issues?



This is what we mean by the “editor”:

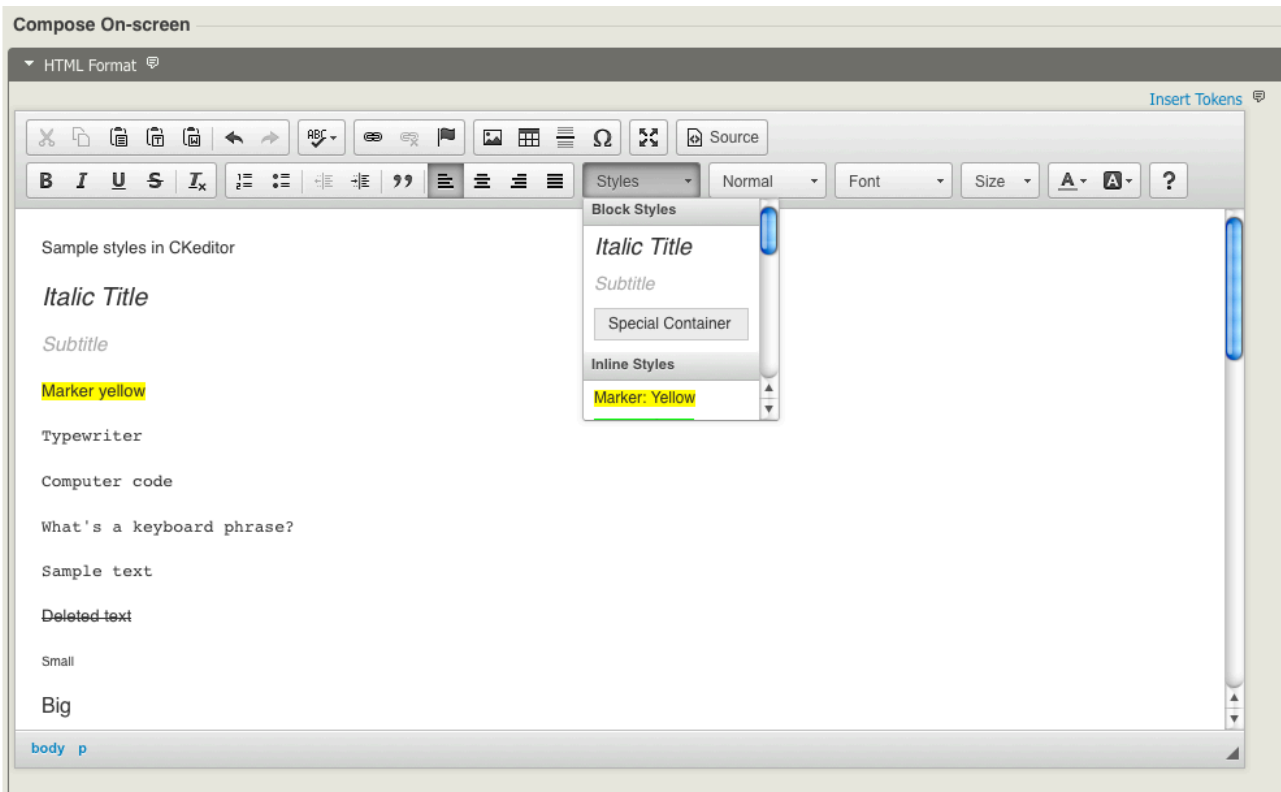


You don't have to know HTML, but here are a couple of tips:

- Where possible, use the toolbar!
- Indent
- Change colors
- Use Styles (accessibility, clarity)
- Demo



Using Styles



The screenshot shows the CKEditor 'Compose On-screen' interface. The main editing area contains several paragraphs of text demonstrating different styles: 'Sample styles in CKeditor', 'Italic Title', 'Subtitle', 'Marker yellow' (highlighted in yellow), 'Typewriter', 'Computer code', 'What's a keyboard phrase?', 'Sample text', 'Deleted text', 'Small', and 'Big'. A styles dropdown menu is open, showing 'Block Styles' (Italic Title, Subtitle, Special Container) and 'Inline Styles' (Marker: Yellow, which is highlighted). The status bar at the bottom shows 'body p'.

Always add plain text
(but we *just* discovered
that if you don't, it will
get added anyway with
links at the bottom)

Compose On-screen

▶ HTML Format ?

▼ Plain-Text Format

Progressive Technology Project

Power On with PowerBase

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam velit tellus, con
neque odio, suscipit vel vehicula in, gravida eu tortor. Aenean consectetur ele
eros. Maecenas auctor accumsan erat. Fusce imperdiet placerat tincidunt. Vivamus
Donec rutrum porta mauris sit amet varius. Sed tortor lorem, suscipit eu porta
nec, accumsan sed est. Aenean at enim vitae orci vehicula viverra. Proin aliquet

Update Template Save As New Template

▶ Attachment(s)

Header / Footer

Mailing Header

You may choose to include a pre-configured Header block above your message.

Mailing Footer

You may choose to include a pre-configured Footer block below your message. This is a good place

<< Previous Next >> Save & Continue Later Cancel

Don't use a single big image.

Having trouble viewing this email? You can [see it on the web.](#)



[RSVP & BUY ONLINE](#) [DOWNLOAD REPLY FORM](#) [DONATE](#)




CADRE parents were told repeatedly that it was too hard to reduce student suspensions and pushout. They were told to focus on being better parents. CADRE has helped parents do both—becoming stronger parents who know how change and monitor LA school district, California, and national policy, who know how to energize a national movement for dignity in our schools.

[Join us for #theCADREeffect](#)

[Purchase your tickets to #theCADREeffect today - \\$40](#)

 **thursday, april 25th, 6-11pm**
live music, food, and awards

- Don't be a spammer!
 - Balance graphics & text
 - Include plain text
 - Keep images on PB server (no copy/paste)
 - Don't paste from Word (or other word processor)
 - Use good HTML design
 - Allow easy unsubscribe
 - Don't send from Gmail
 - Add recipient's name in email so each email you send is different from the others
 - Use SpamAssassin Tests
 - (see handout for more details)
- 

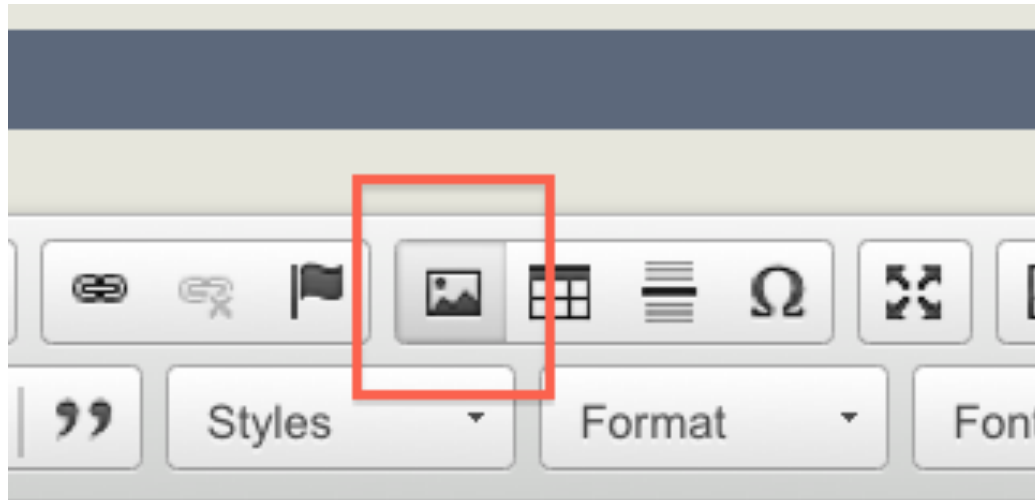
Upload all images to PB server (don't copy/paste)

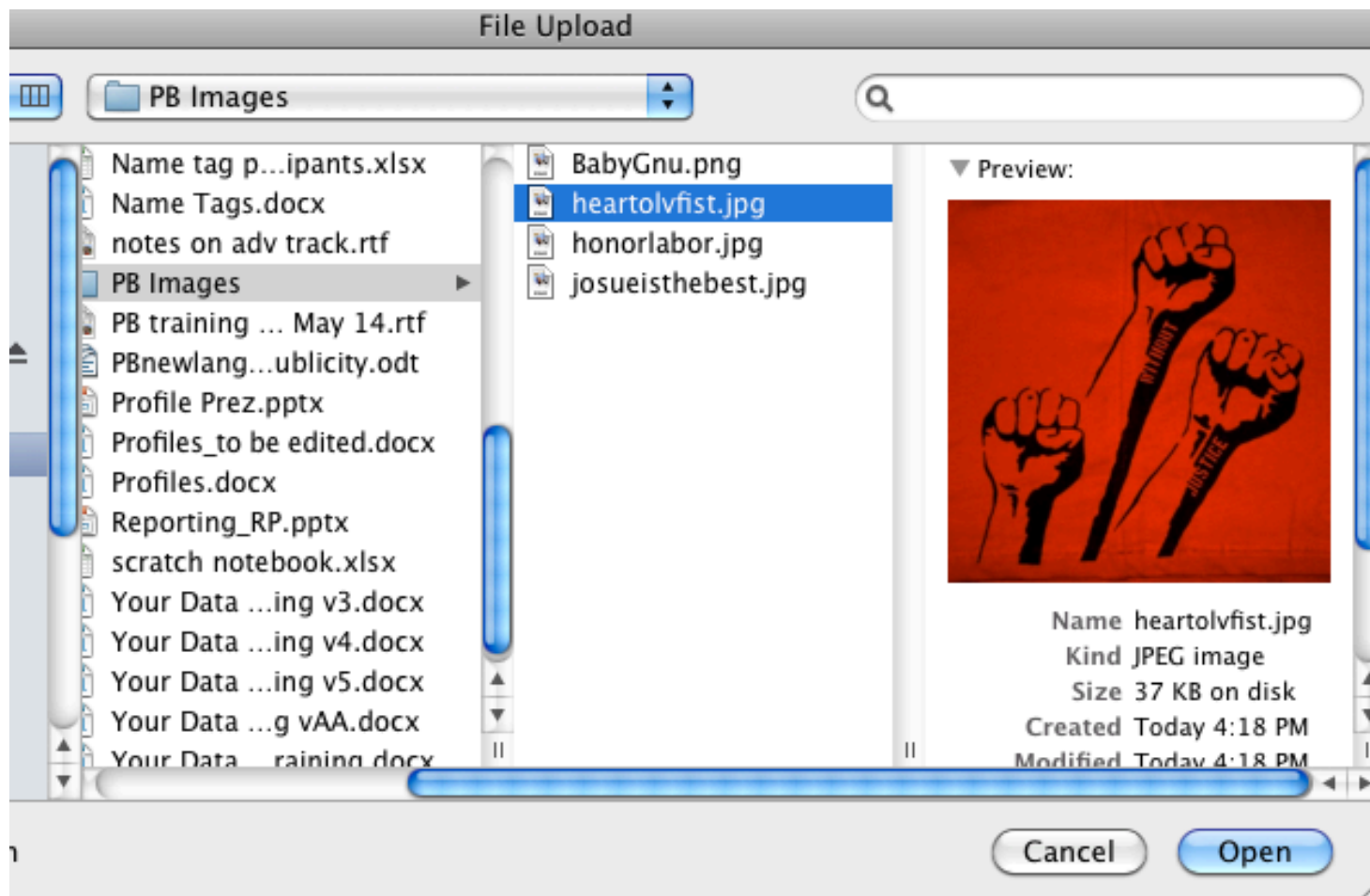


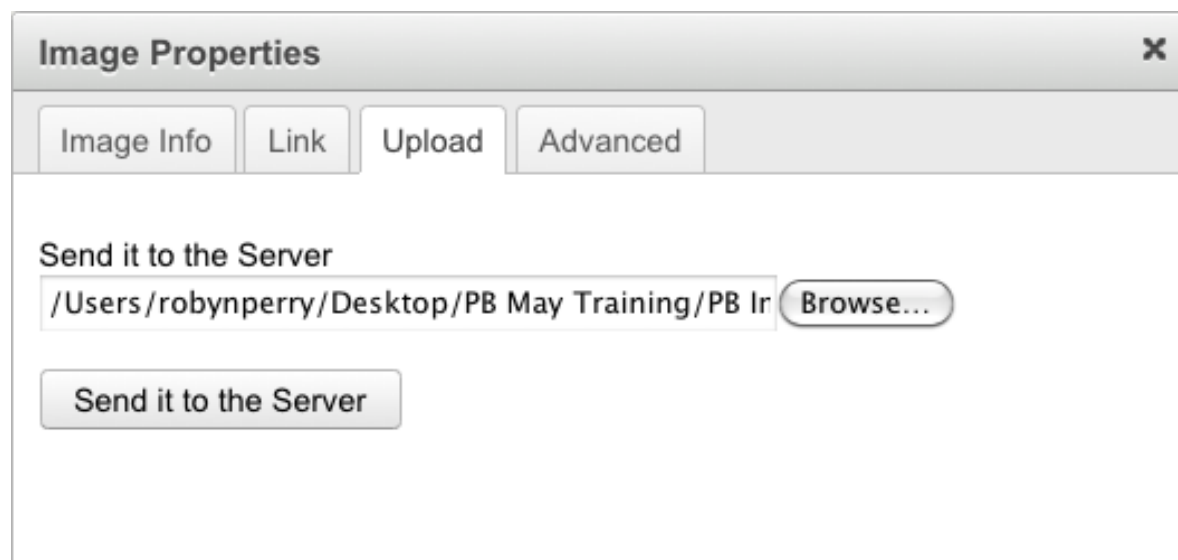
Practice!

Upload an image

1. Click on an image in the email. This is one that was badly copied and pasted. Let's fix it.
2. First, make sure the image is the right size (it is)
3. If not, resize first (Paint.net, Preview for Macs, online resizer like <http://www.webresizer.com/resizer/>)
4. Save to your computer.
5. In PB, click image button and go through upload process.







And...use a good template to save time and energy.

The less formatting you have to do each time you send an email,
the happier you will be!





PROGRESSIVE TECHNOLOGY PROJECT

Email Templates

- Have these email templates on hand
 - A newsletter
 - A “take action” template
 - A fundraising template
 - Any others you need
- And be sure:
 - They are mobile-compatible
- PTP is not a design firm (whew!) but we can help you get your design into PB once you have one


- Get a nice template
- And all you have to do is
 - change text
 - change images

Having trouble viewing this email? You can [see it on the web.](#)

March 15, 2012


WE RUN THE 510

in just 10 days!



Sponsorship Gifts!

Bronze Medal (\$150) receive our All-Star Water Bottle!



It's almost time to RUN the 510!

Dear {contact.first_name},

With 10 days until we RUN the 510, here's some important information to make your 5K, half or full marathon as fun and rewarding as possible. You trained hard for your race and when you cross the finish line, our team will be there to honor your efforts and commitment to building a better Oakland and supporting Oakland Rising.

Race Day

Important information you need for RACE DAY on Sunday March 25th is covered in a link to the [Runner Handbook](#) sent to you by the Oakland Running Festival folks earlier this week. PLEASE READ IT CAREFULLY, it will answer many of your questions.

Single-column “take action” example

NATIONAL PEOPLE'S ACTION



Dear {contact.first_name},

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque fermentum mollis dapibus.

Quisque viverra laoreet tincidunt. Aliquam dictum turpis id urna ornare congue. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Donec varius libero at orci laoreet nec congue justo tincidunt.

Curabitur tristique velit in risus rutrum quis molestie ligula fringilla. Vestibulum mi tortor, pharetra at elementum sed, posuere a tortor. Proin in velit turpis, eget facilisis odio. Ut et nunc orci, auctor placerat libero. Donec commodo malesuada velit sed porttitor. Integer pharetra ullamcorper rhoncus.

Integer mattis tempor mattis. Nulla commodo pellentesque dolor eget placerat.

Nam in enim nec lacus pellentesque adipiscing id ut massa. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Aenean molestie, lorem quis vulputate.

Nulla mollis, felis aliquam fermentum laoreet, felis urna auctor velit, vitae tempor sem turpis a mi. Praesent porttitor dapibus dolor, in fringilla massa vestibulum at. Aenean ullamcorper luctus lacus non porttitor.

In solidarity,

National People's Action ([NPA](#)) &
National Domestic Workers Alliance ([NDWA](#))

connect with us



Demo template editing if needed



- Takeaways:
 - Deal with images like a pro
 - Don't be a spammer!
 - Use nice templates = save time
 - Accessibility: some people read with machines
 - Don't use just an image
 - Alt text
 - Headings/styles





PROGRESSIVE TECHNOLOGY PROJECT

Strategies for Email List Management

- What we're covering here:
 - Differences between bounces, unsubscribes, total opt-out
 - How to regularly clean your list



- Unhold emails “on hold”
- Bounce reasons: invalid/inactive = bad email
- You have to go to the mailing bounce report to find them
- Get them off your list
- Remove people from your list with no email address (search builder – email is null)
- Remove people who say “do not email” (this only works if you’re collect privacy preferences)



Mail Bounce Report

▼ Report Criteria

Display Columns

Contact ID

Contact Name

Contact ID

Phone

Mailing

Bounce Reason

Bounce Type

▶ Core Info

▶ Personal Info

▶ Contact Info

▶ Organizational Details

Filter Mail Bounce Report by Bounce Type

Set Filters		
Contact Name	Contains	<input type="text"/>
Contact Source	Contains	<input type="text"/>
Mailing	Is one of	<ul style="list-style-type: none"> _May212012 Upgrade Schedule batch :: 2012-05-21 22:15:26 1st logistics letter for June PB Face-to-Face :: 2011-05-06 16:30:09 1st logistics letter for September PB NYC Face-to-Face (Partnership PB Co 1st logistics letter for September PB NYC Face-to-Face (PB Users that are
Bounce Type	Is equal to	<div style="border: 1px solid black; padding: 2px;"> Invalid <ul style="list-style-type: none"> --Please Select-- AOL Away DNS Host Inactive <li style="background-color: #0070C0; color: white;">Invalid Loop Quota Relay Spam Syntax </div>
Group	Is one of	<ul style="list-style-type: none"> ics_letter ay_training_all mails since 1/1/2012 d test
Tag	Is one of	<ul style="list-style-type: none">

Core Info

Mail Bounce Report

▶ Report Criteria

▶ Report Settings

Update Report

To save a copy with updated criteria click Report Settings above and update the Report Title. Then click Save a Copy.

Print Report

PDF

Export to CSV

Tabular

View

invalid emails

Add these Contacts to Group

Bounce Type Is equal to Invalid

Next > Last >> Records 1 - 50 of 7232

Page 1 of 145 Go

Contact Name

Mailing

Bounce Reason

Bounce
Type

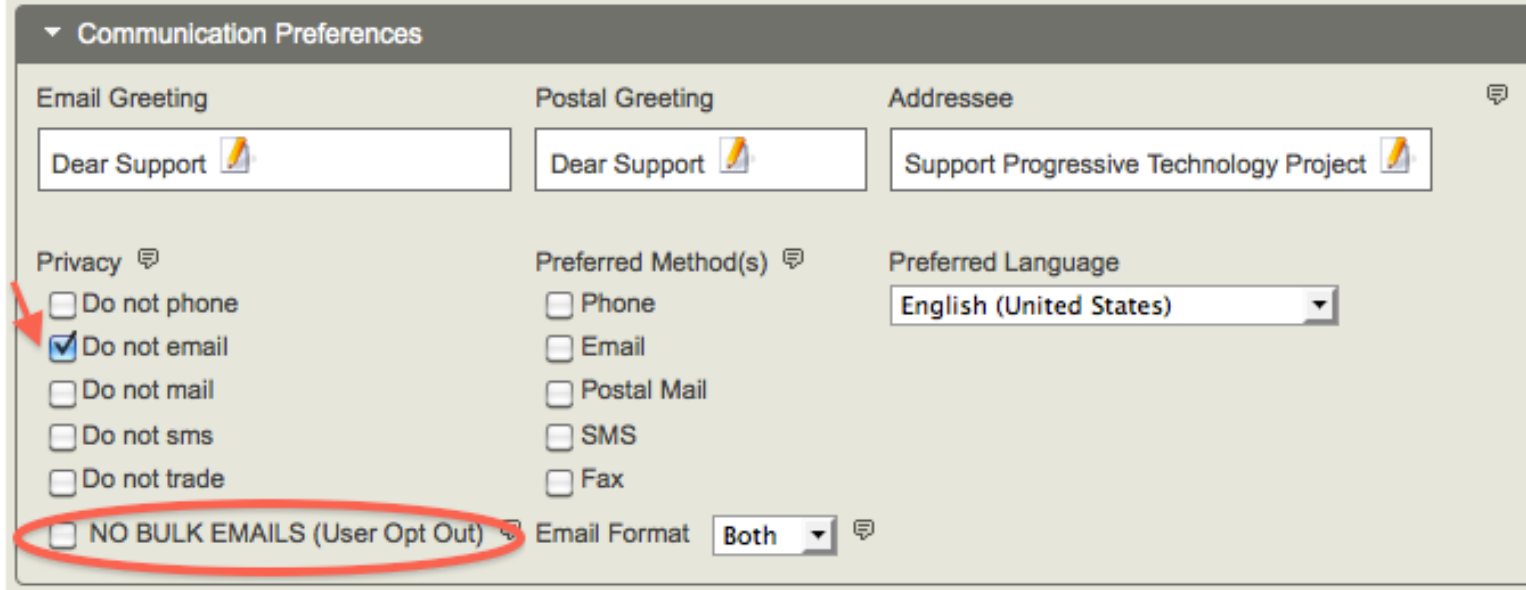
Email

Exclude these from future mailings, or update them, etc.



What's the difference between “do not email” and ‘unsubscribe’?

- Do Not Email = data entered by YOU
- Unsubscribe = recipient opts out from email

A screenshot of a web form titled "Communication Preferences". The form is divided into several sections: "Email Greeting" (text input: "Dear Support"), "Postal Greeting" (text input: "Dear Support"), and "Addressee" (text input: "Support Progressive Technology Project"). Below these are "Privacy" (checkboxes for "Do not phone", "Do not email" (checked), "Do not mail", "Do not sms", "Do not trade", and "NO BULK EMAILS (User Opt Out)"), "Preferred Method(s)" (checkboxes for "Phone", "Email", "Postal Mail", "SMS", "Fax"), and "Preferred Language" (dropdown menu: "English (United States)"). The "Email Format" is set to "Both". A red arrow points to the "Do not email" checkbox, and a red circle highlights the "NO BULK EMAILS (User Opt Out)" checkbox.

Unsubscribe from a group vs unsubscribe from ALL emails?

- Unsubscribe from a group: {action.unsubscribeURL}
- Unsubscribe from everything: {action.optOutUrl}



Mailing Report

- How many clicks/opens? (why opens isn't accurate)
- Surprising number of bounces/unsubscribes?



Review mailing report

Delivery Summary

Intended Recipients	6203	Report	Advanced Search
Successful Deliveries	4096 (66.03%)	Report	Advanced Search
Tracked Opens	686	Report	Advanced Search
Click-throughs	149	Report	Advanced Search
Forwards	0	Report	Advanced Search
Replies	0	Report	Advanced Search
Bounces	2109 (34.00%)	Report	Advanced Search
Unsubscribe Requests	2 (0.03%)	Report	Advanced Search
Opt-out Requests	16 (0.26%)	Report	Advanced Search
Scheduled Date	July 9th, 2012 9:00 AM		
Status	Complete		
Start Date	July 9th, 2012 9:04 AM		
End Date	July 9th, 2012 9:08 AM		

Recipients

Included

Bounce Types:

Bad email

- Invalid
- Inactive

Not necessarily bad – should be unheld

- Quota
- Relay
- Host



Search for bounced emails

▼ Mailings

Mailing Name(s)

Mailing Date

From (Clear From) To: (Clear To:)

Delivery Status
 Successful Bounced (clear)

Trackable Opens
 Opened Unopened/Hidden (clear)

Trackable URLs
 Clicked Not Clicked (clear)

Trackable Replies
 Replied No Reply (clear)

Unsubscribe Requests Opt-out Requests Forwards

Clean up list & repeat

- Unhold all “on hold” emails

Advanced Search

Advanced Search interface showing search criteria and actions.

2010 Contacts On Hold = 1 ...AND...
Contact Type - 'Individual'

Select Records: All 2010 records Selected records only

Next > Last <

Reset all selections

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abad, Lin
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Achane, Charles C
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ackerman, Barbara

- actions -

- Add Contacts to Household
- Add Contacts to Organization
- Batch Update via Profile
- Delete Contacts
- Delete Permanently
- Export Contacts
- Mailing Labels
- Map Contacts
- Merge Contacts
- New Smart Group
- Print PDF Letter for Contacts
- Record Activity for Contacts
- Remove Contacts from Group
- Restore Contacts
- Schedule/Send a Mass Mailing
- Send Email to Contacts
- Send SMS to Contacts
- Tag Contacts (assign tags)
- Unhold Emails**
- Untag Contacts (remove tags)

Practice!

- The demo site doesn't have mailing data but you (probably) will in your own PowerBase site.
- Review a mailing report and look at bounce types
- Search for held emails in
 - Advanced Search
 - Mailing Bounce Report

