



The Art and Science of Email Survey Invitations

A FRUITFUL WAY TO WORK ON INCREASING
RESPONSE RATES IS TO EXAMINE THE SURVEY
INVITATION AND THE INVITATION PROCESS.

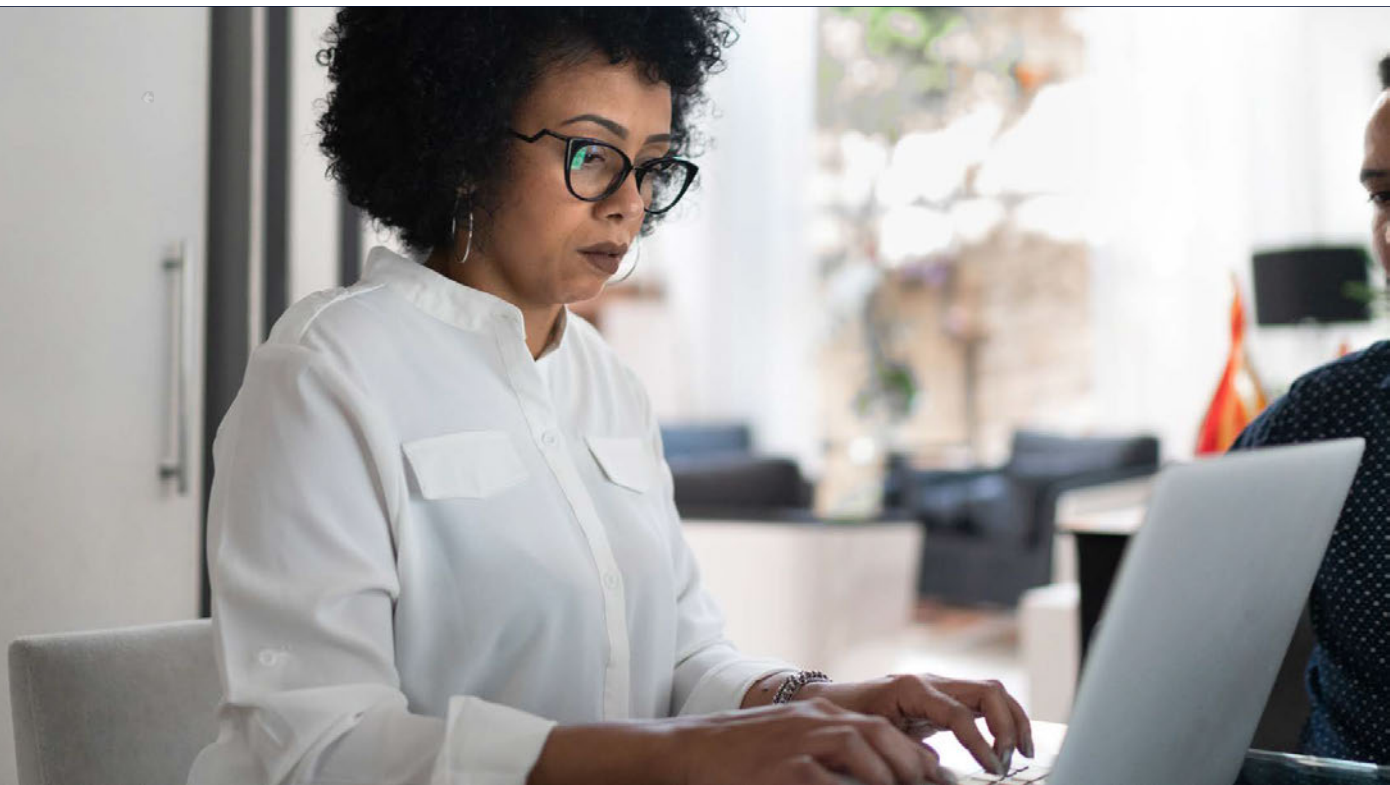
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Introduction

Almost everyone wants to increase response rates to their email-based customer experience (CX) measurement programs, and the first step taken is usually to shorten the survey. However, this is often an ineffective method of increasing response rates because about 90 to 95 percent of respondents who begin a reasonably sized CX survey will complete it. Also, the vast majority of people who abandon a survey usually do so on the first page. Therefore, survey length is not driving most of the abandonments. A much more fruitful place to work on increasing response rates is to examine the survey invitation and the survey invitation process because most non-response is due to people never entering the survey at all.

Sending email survey invitations is both an art and a science. To increase response rates, we need to make invitations as compelling as possible to the customer. There are both nontechnical (art) and technical (science) aspects involved. Here, we will provide suggestions about how to apply nontechnical and technical solutions to accomplish the three invitation-related steps that lead to higher response rates: Getting the survey invitation to the customer, getting the customer to notice and open the invitation, and getting the customer to open the survey from within the invitation.



Getting the Survey Invitation to the Customer

MAKE SURE YOUR EMAIL ADDRESSES ARE VALID

Not only will customers for whom you have incorrect email addresses not get the email, but high rates of undeliverable emails will get your IP address labeled as a spammer. This will cause even your valid emails to be blocked. If need be, services such as BriteVerify are available to check the validity of email addresses without actually having to send the emails.


AVOID WORDS IN THE SUBJECT LINE THAT MAY TRIGGER SPAM OR PHISHING FILTERS

These include: anything to do with money (e.g., earn, free, \$), superlatives (e.g., amazing, incredible, best), financial industry terms (e.g., bank, lending, offer), and salutations (e.g., dear, hello, etc.). It is also important to remember that your email invitation represents your company, is part of your brand, and should appear friendly and professional. Therefore, avoid using emojis and all-capital words in your subject lines.


AVOID LARGE GRAPHICS

There are two reasons to avoid large graphics. First, spam detection devices analyze the text-to-graphics ratio of emails. Those that are primarily graphics often get labeled as spam because spammers often use graphics to prevent spam filters from analyzing text. Second, large graphics increase the file size of the emails, and most ISPs and email clients block emails over a certain file size. Generally, email invitations should be no larger than 80 kilobytes to pass through spam filters.





SENDING EMAIL SURVEY INVITATIONS IS BOTH AN ART AND A SCIENCE. TO INCREASE RESPONSE RATES, WE NEED TO MAKE INVITATIONS AS COMPELLING AS POSSIBLE TO THE CUSTOMER.



MAKE SURE TO SEND FROM A REPUTABLE DOMAIN (IP ADDRESS)

There are three options for setting up a sending domain. First, and most preferred, is to sub-delegate a version of your company's parent domain. For instance, if your domain is "@company.com" you could use the subdomain of "@customerexperience.company.com." Do not just use your parent domain (e.g, @company.com) because you don't want your survey program to interfere with your company's parent domain's digital reputation score. It is also very helpful for your survey program's domain to have its own reputation score so you can manage it.

CONTROL THE SIZE OF YOUR EMAIL BLASTS

Throttle your email blasts so you spread out the volume over the day or week, because ISPs often interpret large hourly volumes as spam. Perhaps more importantly, try to arrange your email blasts to be of relatively consistent size. Consistent email volumes show email inbox providers that the emails are just "business as usual." Inconsistent volumes raise red flags that the emails may be spam.

USE VALID "FROM" AND "REPLY TO" EMAIL ADDRESSES

The "from" and "reply to" email addresses need to be from a valid domain your company controls. Mail servers check to see if the sender's domain is valid. If the domain is not valid, the messages will likely be labeled as spam and blocked.

WHITELIST YOUR DOMAIN IF POSSIBLE

If you are conducting employee research or other research in which you are surveying a company's employees, ask that company's IT department to put your sending domain on their whitelist. This will allow your survey invitations to go through without having to pass through spam filters.

ENGAGE A PROFESSIONAL

There are many other highly technical things that can be done to help emails get to the recipient. These are best implemented by professionals and include elements like use of digital signatures, Gmail postmaster tools, TLS encryption, and others. InMoment can provide expertise here.

Getting the Customer to Notice and Open the Email Invitation

After a customer receives an email invitation, we need that customer to notice and open it. Unfortunately, this can be difficult because the email invitation can be buried among other emails, respondents can perceive the invitations as spam and therefore delete them before opening them (which is one trigger spam filters take into account, thus jeopardizing the entire program), or customers can just ignore them. Getting the potential respondent to notice and open an email invitation is the step where most non-response occurs in most CX measurement programs. Here are some things you can do to increase the likelihood that customers will notice and open your survey invitations.

USE A COMPELLING SUBJECT LINE

The right time will vary by program and the type of customer you are trying to reach, but think about when your customers will likely be accessing their email and plan accordingly. You want

your email to be near the top (most recent) of the email list. For business-to-business and employee research, this usually means sending the emails in the early morning.

TRY OTHER METHODS

One way to get away from being buried in email inboxes is use other methods in addition to or instead of email. Some CX programs are now sending email invitations first and then trying phone calls or a text invitation if they do not receive an email response. Sometimes, text invitations don't achieve response rates as high as email but that may change in the near future. Even so, text invitations can supplement email responses in many cases.

USE AN APPROPRIATE SENDER EMAIL SO THE EMAIL "FROM" FIELD IS COMPELLING

One of the first things an email recipient sees is the "from" field. Choose a compelling sender email name so

customers link it back to the transaction or relationship you are surveying about. For instance, you might use “[Company] Customer Experience Team” or something similar.

CONFIGURE PRE-HEADER INFORMATION

Many email clients display email text after the subject line before the email is opened. By default, the beginning of the email text is shown. Sometimes this

can lead to very ugly displays. However, the information shown can be pre-configured by adding preview text to the appropriate section of the email HTML code. This will make your subject lines more appealing and thus your invitations more likely to be opened.



Getting the Customer to Open the Survey

The final step in our journey is to get the customer to open the survey from within the survey invitation. In general, that means making the survey invitation as compelling and as simple as possible. Suggestions for doing so are below.

KEEP THE INVITATION TEXT TO ONE SCREEN ON A SMARTPHONE

Many of InMoment's email survey responses now come from smartphone users. Therefore, it is very important that the email invitation displays well on smartphones. If at all possible, limit your invitation graphic and text to one screen. If you can't do that, at least make sure the link to the survey is accessible without scrolling.

PERSONALIZE THE INVITATION TEXT

Use pre-populated/sample information such as the customer's first name, the product purchased, the type of transaction, and the retail outlet (if applicable) to personalize the invitation. The more respondents know that you are familiar with them, the more likely they will be to take the survey.

BRIEFLY EXPLAIN HOW RESPONSES ARE USED TO IMPROVE PRODUCTS OR SERVICES

Customers want to know why they should take the time to respond. Briefly explaining how results are used to make improvements will help them to know that their feedback is valuable. The more specific you can get about what improvements were made, the better. Also, some invitations include a link to a short (1-3 minute) video of a company CEO/president thanking the customer, explaining how feedback is used, and asking the customer to respond. This helps response rates as customers know that the head of the company is interested in using the survey information.

MAKE SURE YOUR HTML IS MOBILE OPTIMIZED

Hyper Text Markup Language (HTML) is the coding that determines the layout of your email invitations. It can be written to detect the type of device it is being displayed on and to adjust the text to fit that screen. This makes the email



invitation text much more attractive and readable because it does not display in small fonts or run off the right side of the screen on smaller displays.

DO NOT USE A GRAPHIC AS A LINK TO START THE SURVEY

Many programs use an attractive graphic with an embedded link to have respondents enter the survey. While that is appealing, a major problem here is that some email clients and some customers do not load graphics by default. In these cases, the customer will not be able to enter the survey. The best solution to this situation is to construct attractive survey start buttons using HTML. A less preferred solution is to use a text-based link to the survey or at least to have a text-based link as an alternative to the graphic start button.

EMBED THE FIRST QUESTION IN THE INVITATION TEXT

Allowing the customer to respond to the first question of the survey from within the text of the email has been shown to increase survey open rates and completion rates. This should be done by formatting the question using HTML rather than using a graphic for the reasons previously discussed. However, questions with 10- or 11-point response scales can be difficult to format to display well on a smartphone.

LOOK OUT FOR MICROSOFT

Microsoft Office products (e.g., Outlook, Hotmail, MSN) present a special case because they use their own proprietary means of rendering emails. Therefore, the email HTML script typically needs to be adjusted for proper display and function, especially for survey start buttons written in HTML.

Testing Your Invitations

Finally, the importance of testing your survey invitations cannot be stressed enough. Every email client is different, and every CX program varies in regard to how effective different types of email invitations drive response rates. Below are suggestions for testing.

TEST HOW YOUR SURVEY INVITATIONS LOOK ON DIFFERENT EMAIL CLIENTS

Set up email accounts to test how the invitations look in all of the most popular email clients (e.g., Gmail, Yahoo, Hotmail, Outlook). To see how the “from” field and subject line look, make sure to send actual survey invitations rather than just emailing a copy of the invitation to these accounts. This also allows you to see

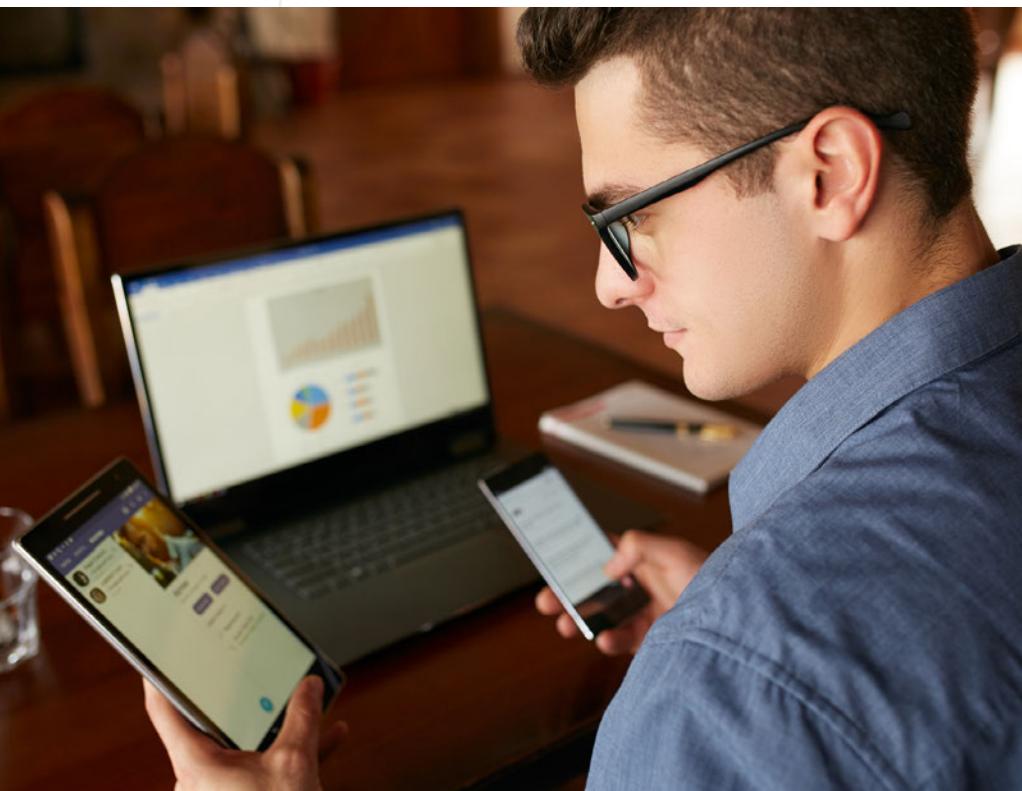
which inboxes your invitations are going into (e.g., primary, promotions, ppam, etc.). Also, make sure to test invitations on both smartphones and computers.

PERFORM A/B TESTS

Develop a few different email invitations using the best practices cited above and conduct an experimental test to see which works best. All you need to do is send each invitation to a random sample of about 1000 potential respondents and monitor response rates. Simple statistical tests can tell you if the differences in response rates are statistically significant.

CONSTANTLY MONITOR YOUR SURVEY OPEN RATES

In the world of email delivery, what works today might not work tomorrow. Email clients are constantly changing their spam algorithms and technology so delivery gets harder every day. For instance, many email clients are now using machine learning and artificial intelligence (AI) algorithms to detect spam and to sort emails into users’ email boxes. Because of this changing landscape it is important to constantly monitor email invitation open rates to make sure new processes are not interfering with delivery of your email invitations.



DON'T FORGET ABOUT DATA QUALITY

It's easy to forget about data quality when trying to improve response rates. When developing survey invitations, make sure they don't appeal more to some customer groups than to other groups. This could bias your data because the size of customer groups will be misrepresented. Finally, think about how your invitation might affect how positively or negatively customers might respond in

their ratings. For instance, personalizing the invitation to say something like "Rate your salesperson Jenny Smith" might drive up response rates, but due to social pressure, it might also cause respondents to rate Jenny higher than they would have otherwise. Analyzing and comparing the data you receive from the different survey invitations should help you determine whether the invitations are biasing the results in terms of who is responding and how they are responding.



Summary

We have discussed twenty aspects of email survey invitation design that should help you achieve higher survey open rates and therefore higher response rates. While there are no silver bullets for increasing response rates for your program, with some analyses of your invitations you should find a handful of ideas that will give you the most bang for your buck. Unfortunately, this is still a partial list of survey invitation best practices because some highly technical aspects are too difficult to explain in a concise way. If you need more information about these highly technical aspects or want to discuss adding these best practices to your survey program, talk to us and we'll be happy to help!

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