SocketLabs®
the science of hitting the inbox

StreamScore™

EMAIL REPORTING SUITE

An Email **Best Practices** Whitepaper

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Introduction

In today's digitally-driven business world, the ability to send high volumes of email is essential. To succeed and maximize ROI, it is essential to drive consistent and successful email performance.

While many companies think that they can sit back and relax once they've selected a reliable email service provider (ESP), the reality is quite different. Choosing an ESP with rock-solid infrastructure, robust sending technology, and intelligent delivery strategies is certainly a critical first step. But beyond these foundational needs, there are equally critical email performance factors that are dependent on the email sender and their adherence to email best practices.

The key revelation for many high-volume businesses is that email performance is a function of many other qualitative and quantitative factors which combine to influence the willingness of mailbox providers to accept and deliver mail to an inbox. Further, even after a message successfully reaches a recipient's inbox, there are important user engagement considerations that must be mastered in order to build and maintain a strong domain reputation that is well-respected by mailbox providers over time. Collectively, these concerns should be thought of as a set of constantly changing rules that email senders must honor, or else they face a downward spiral of poor performance statistics and sender reputation woes.

The silver lining in this story is that senders are in complete control of their own destiny. Beyond the infrastructure issues handled by the ESP, they are in complete control of the variables that are so important for email performance. For the ease of discussion, these variables can be condensed into three basic categories:

Important Variables for Email Performance

1. ***The quality of the recipient list,***
2. ***The construction of the email content, and***
3. ***The relevance of the message to the recipient audience.***

As these categories illustrate, the key business driver for all email senders is simply the choice of "who" they send messages to and "what" types of messages they send. Because the rules

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Data that Drives Performance

SocketLabs has been helping clients optimize email performance for more than a decade and began capturing email quality data for clients in 2011.

defined by mailbox providers and the algorithms that automatically judge incoming emails are constantly changing, it is essential that the sender evaluate more than just typical performance tracking statistics. SocketLabs® believes that truly understanding email performance requires the ability to evaluate and analyze email delivery at a level that is granular enough to allow the isolation and correction of problems. More specifically, armed with an empirical, in-depth understanding of the relevant variables, it becomes more possible to identify, critique, and remedy the issues that are weighing down performance.

Consequently, we have implemented a systematic process that measures the impact of list, content, and relevance. **SocketLabs' StreamScore™ reporting suite provides a simple real-time dashboard through which clients can easily see how their email is performing across a variety of qualitative variables.** This data provides the transparency that allows clients and SocketLabs' technical consultants to conduct ongoing performance optimizations and to maximize email ROI.

As a pioneer in the ESP marketplace, SocketLabs has been helping clients optimize email performance for more than a decade and began capturing email quality data for clients in 2011. This paper shares insights from our experience analyzing and leveraging this data to create success for our clients. It provides a unique statistical vantage point that illustrates how organizations can purposefully manage their email quality variables to control and elevate their business performance. The analysis includes the real-world data of high-volume senders from a variety of industries, demonstrating how the range of circumstances and responses can differ greatly depending upon the nature of each organizations' business objectives and use cases.

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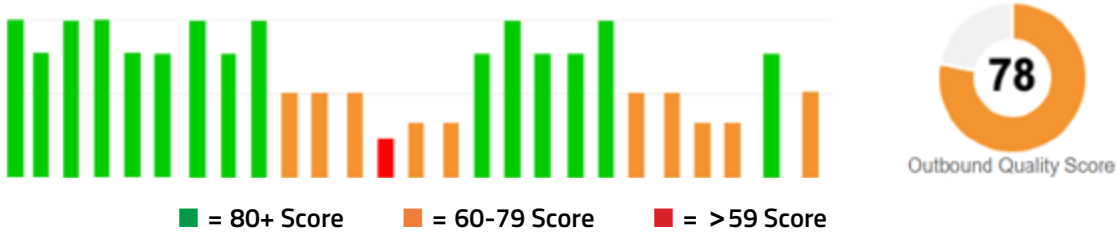
What is StreamScore™?

StreamScore is the quantitative system that allows SocketLabs to evaluate how the email is performing with respect to the myriad of rules established by mailbox providers, spam detection software, and industry watchdog groups. The analysis is based primarily on sender-controlled factors that can be measured and actively managed to improve email performance. SocketLabs isolates and tracks these factors for each stream of mail that is sent through a client's account, facilitating an in-depth level of analysis and awareness.

The aggregate score is strongly correlated to the deliverability and success rate that a client experiences – the higher the score, the better the results are. The score reflects how the world of receiving mailboxes (the largest members being Google, Yahoo, and Hotmail) is judging the quality of a sender's email approach on a regular basis, and how it is constructing an opinion about that sender – known as their "reputation". A strong reputation indicates that the sender is following best practices and is therefore avoiding the "red flag" issues that negatively impact performance.

AGGREGATE QUALITY SCORE | **Evaluates Your Outbound Email Performance**



StreamScore breaks down email quality scores into several component parts to help identify the specific elements of their email content and understand which elements are causing disruption. Once the problematic areas are identified, SocketLab's delivery consultants can diagnose a client's mail lists and content to evaluate and recommend performance enhancements.

The StreamScore process isolates specific delivery questions such as:

- ✔ How often a specific email stream is sending messages to invalid addresses
- ✔ How often email in this stream is marked as spam by the end recipients
- ✔ How often messages in this stream are rejected by receiving mail servers due to their content
- ✔ How often SocketLabs' custom-designed content analysis engine identifies messages from this stream as "possible spam"
- ✔ How relevant is the content and how "engaged" or interested recipients are with the client's messages
- ✔ How clients' different mail streams compare to one another
- ✔ What specific stream characteristics are in need of review or revision to improve performance

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Understanding StreamScore Components

Spam complaints are the most commonly mentioned and understood issue for most people, but they are only a single point of measurement about a stream of email messages. A full analysis of the messages includes looking at type (marketing vs. transactional vs. person-to-person), content, volume, failure rate, opens, clicks, and other factors to determine what's really happening. If your mail messages are scoring poorly, then your email will suffer, and so will your ROI.

Below is a description of each of the specific StreamScore detail components that together comprise the overall score and an explanation of why each is relevant. These components are:

- **Hard Failure Score**
- **Blocked Message Score**
- **Spam Score**
- **Complaint Score**

Hard Failure Score

Hard failures are a direct reflection of the quality of your mailing list. Specifically, these failures are situations where the receiving mailbox rejects the incoming message because the address information is invalid, outdated, or the message fails a filter. A high percentage of hard failures is typically an indication that the sending organization is not following best practices with regard to list acquisition, hygiene, and/or management.

SocketLabs' Hard Failure Score metric is based on the rate of hard failures that are observed for any given number of sent messages. For transactional mailings, the hard failure score is typically strong. This is because transactional recipient lists are composed primarily of active customers who have a clear business incentive to provide accurate address information and they tend to keep their address information updated over the course of their relationship with the sender. By contrast, marketing lists and older client lists are more likely to contain address errors that lead to more hard failures. Purchased lists or second-hand lists (those not acquired created directly by the sending organization) that are not opt-in are notorious for having outdated names, which is why these types of lists are disallowed by most reputable ESPs, including SocketLabs.

Even lists curated by the sending organization can have significant quality issues depending on the method by which the lists are acquired. Some common examples of poor list acquisition practices are:

- Online opt-in lists that do not confirm accurate typing of the email address upon entry
- Marketing offers which don't require that a correct address format is followed
- Manually entered lists that are transcribed from tradeshow business cards and hand-written notes

These and many similar situations lead to data entry errors and low quality lists and ultimately result in hard failures when outbound marketing messages are sent.

While the goal is to maintain high quality lists, it is inevitable that some degree of bad or outdated addresses will accumulate. The fact that hard failures may happen does not preclude an organization from mailing to the list. However, it is important for the sender to keep the list as clean as possible to protect their domain reputation. You want to start with a clean list and then use a suppression list to remove any hard-failed addresses from the list. For example, the first campaign to a marketing list will typically have a high rate of hard failures of 5% or more. With failures from the first mailing suppressed, the second and subsequent mailings send should see failures go down to 2% or less on an ongoing basis.

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Understanding StreamScore Components

(continued)

Blocked Message Score

The Block Score is based on the Block Rate which is SocketLabs' analysis of the failed and bounced messages that are rejected due to content-related issues. The term content in this context refers to the entire email header and message. The analysis looks at the error codes returned by recipient mailboxes that explain why they chose not to deliver the message to the addressee's inbox. The block score is based on the rate of "content-driven" failures that are observed over a period of time.

Since each mailbox provider uses a different set of content filters and establishes their own set of rules, there are a multitude of reasons why messages can be blocked. In general messages can fail because of what they do contain, or what they don't. For example, an email that contains "spammy" looking copy regarding free offers or promotions may be rejected. Similarly, a message may be rejected if its content does not include sufficient authentication credentials, such as SPF or DKIM. Typically, less than 1% of failures are content related, so organizations experiencing block rates greater than this will see their Block Score negatively impacted. Once identified, issues causing blocks can be often be corrected.

Spam Score

The Spam Score is an estimate of the degree to which a senders' messages are being classified as spam by receiving mailbox systems. SocketLabs calculates an approximate spam rate via a proprietary methodology that evaluates each client's mail streams.

The underlying factors driving spam classification are very similar in concept to those driving the Block Score. Each looks at the message content to make a determination of a message's worthiness. The difference between the two is really how the receiving mailbox chooses to handle it. In the case of a block, the message is rejected by the mailbox provider and notification is sent back to the sender. In the case of spam, the message is 'accepted' by the mailbox, but it is placed into the spam folder without generating a response back to the sender. Each mailbox provider chooses their own methodology and filtering strategy by which to make this determination and can judge the same exact message differently. Beyond looking just at the message content, mailboxes are very sensitive to a sender's domain reputation. As a result, if a sender is continually using bad email practices or they had an email account somewhere get suspended, they may develop a poor domain reputation that can drive mail streams to be placed in a recipient's spam or junk folder.

Complaint Score

The Complaint Score is calculated based on the number of complaints generated by your mail streams. Data is directly available from certain mailbox providers regarding the complaint rate, however many mailbox providers, including Google, do not share this information. Data that contributes to SocketLabs' Complaint Score calculation is based on data received back from Yahoo! and Microsoft. Complaint data is available only when B-to-C communication is taking place, so many clients, especially those that send exclusively transactional mail, will not generate complaint data. If no complaint data is available, this component is removed from the StreamScore calculation.

For accounts where complaint rates are measurable, the ability to achieve a high score is determined by two interrelated factors: a) the content of the outbound message, and b) the frequency with which those messages are being sent. The message content affects the frequency because recipients are only willing to tolerate a certain message so many times before they become annoyed and begin complaining. For example, if you are sending out a coupon to your entire list every day, this message/frequency combination is very likely going to generate complaints. If, however, you are sending important alert messages – alerts which are deemed important and valuable by the recipient – a daily frequency may be perfectly ok. The bottom line is that your approach should be thoughtful and appropriate so as to not to annoy people – it's that simple.

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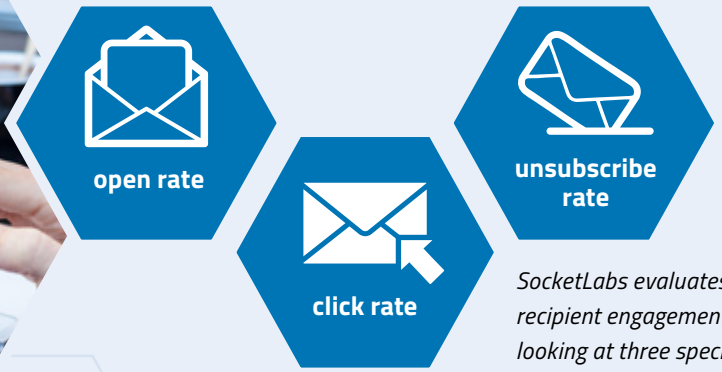
The Importance of Engagement

Strong engagement can compensate for and overcome other possibly negative sender reputation metrics.

The engagement is the qualitative measure of how well recipients are reacting to a sender's messages once they reach the inbox. SocketLabs also evaluates recipient engagement by looking at three specific metrics: open rate, click rate, and unsubscribe rate. Recipient engagement is quickly becoming more heavily relied upon, especially by mailbox providers like Gmail. The most valuable data that any email sender can collect to determine positive engagement is the open rate (based on how many recipients open your email) and click rate (based on how many recipients click on links within your messages). Strong performance in these categories indicates that recipients are very interested in the messages they're receiving. Conversely, high rates of unsubscribes is a clear indication that a sender's messages are unwanted.

Mailbox providers understand the value of engagement data for giving a more personalized experience to users and for helping to fight off spammers. They give significant weight to strong open and click rates in the email filtering process because the recipients themselves – the most important judges of quality, relevance, and value - are saying that the messages are desirable. As such, strong engagement can compensate for and overcome other possibly negative sender reputation metrics like spam complaints, hard failures, and message content concerns.

SocketLabs offers engagement tracking on all of our plans. This feature is optional, and an Engagement Score is only calculated for clients who choose to configure and use it. **Due to the tremendous value that engagement data provides, it is a highly recommended feature.**



SocketLabs evaluates recipient engagement by looking at three specific metrics: open rate, click rate, and unsubscribe rate.

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About SocketLabs

SocketLabs is a B2B technology firm that provides flexible SaaS and on-premises solutions for solving a variety of complex email delivery challenges for both transactional and marketing messages. We are a pioneer in the Email Service Provider (ESP) market with a decade-long track record of excellence. Our unique, proprietary mail transfer agent (MTA) technology is trusted by clients around the globe who invigorate their SaaS platforms, mobile apps, and custom applications by "plugging in" to an unmatched email experience. Our founders have been creating cutting-edge email solutions for over 20 years and have built a customer support organization that considers responsiveness and client satisfaction as our key performance objectives.

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