everlytic

Transactional Email Guide

How to Get the Most from Your Transactional Communication
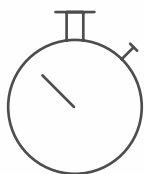
What You'll Find in the Guide

Visit us at www.everlytic.co.za or click here to schedule a chat.
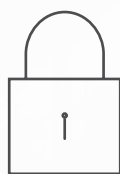
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Introduction

Transactional emails automatically trigger and personalise business-critical messaging to customers when they transact with your organisation. Typically, businesses use these types of emails for things like:

Time-Critical Messages

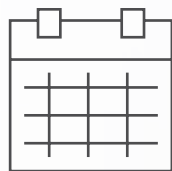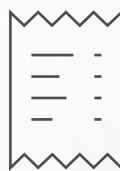**Delivery Notifications**

One-Time Pins (OTPs)
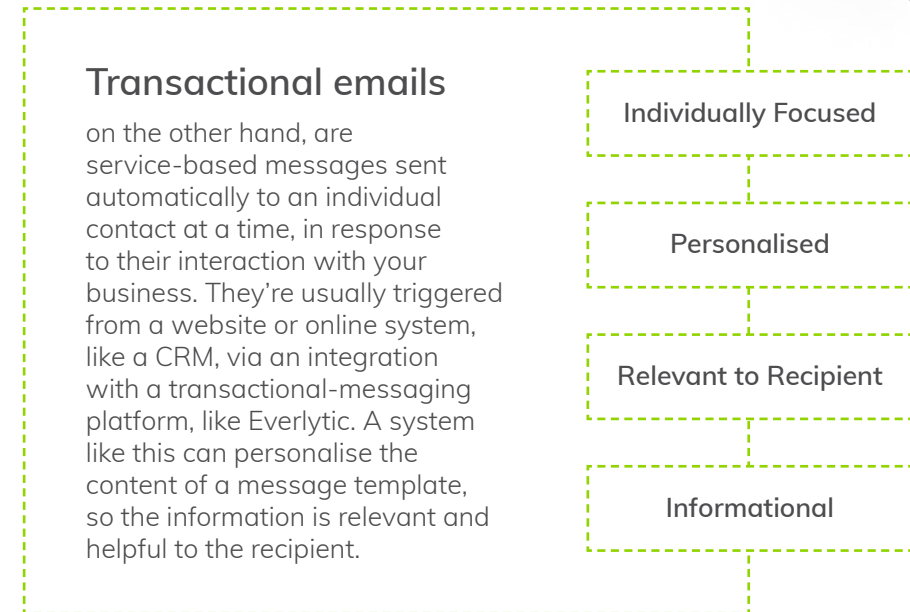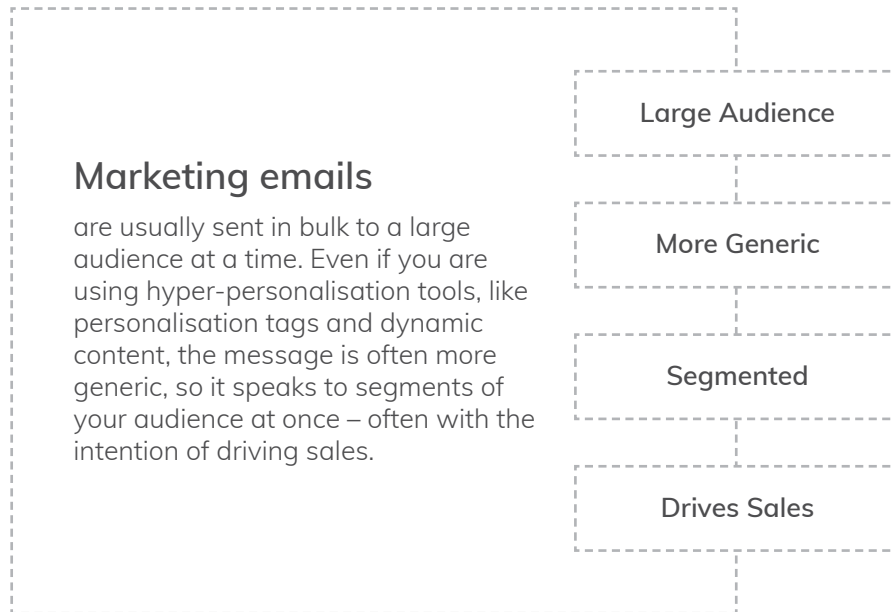
Account Updates

Appointment Reminders

Statements, Invoices & Receipts

But how are transactional emails different to bulk marketing emails, why do you use them, and what are the best practices to make the most of them? Read this guide for a breakdown.

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Transactional vs Marketing Emails

Transactional emails are different to marketing emails in a few ways.

Marketing emails

are usually sent in bulk to a large audience at a time. Even if you are using hyper-personalisation tools, like personalisation tags and dynamic content, the message is often more generic, so it speaks to segments of your audience at once – often with the intention of driving sales.

- Large Audience
- More Generic
- Segmented
- Drives Sales

Transactional emails

on the other hand, are service-based messages sent automatically to an individual contact at a time, in response to their interaction with your business. They're usually triggered from a website or online system, like a CRM, via an integration with a transactional-messaging platform, like Everlytic. A system like this can personalise the content of a message template, so the information is relevant and helpful to the recipient.

- Individually Focused
- Personalised
- Relevant to Recipient
- Informational

In a nutshell, transactional messages are:

✔ **User-responsive:** Sent in real-time, in response to a customer's interaction with you
✔ **Hyper-personalised:** Message info is applicable only to the recipient
✔ **Secure:** Service-supporting messages sent to one client, when needed, often to deliver private information (e.g.: receipts and statements)
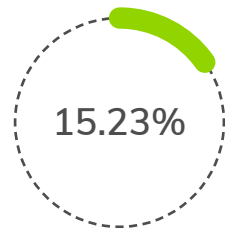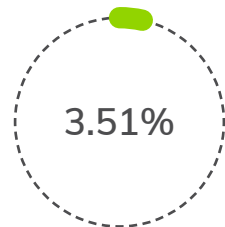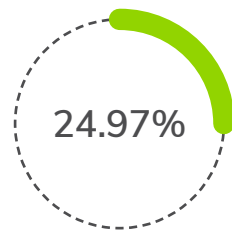
The main difference is that transactional messaging is sent in support of a customer's existing transactions with your business – it's necessary for you to deliver the service. It isn't a sales or marketing tool to get them to buy from you.

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Transactional vs Marketing Emails (cont.)

Benchmarks Comparison

As transactional emails are triggered by a contact's engagement with your business, engagement with the email is typically higher than with bulk marketing emails.

Average Email Marketing Benchmarks   Average Transactional Email Benchmarks

| 24.97% | Open Rate | 37.42% |

| 3.51% | Click Rate | 7.15% |

| 15.23% | Click-to-Open Rate | 20.17% |
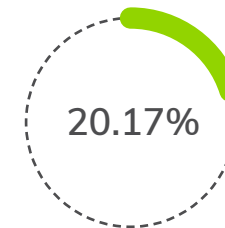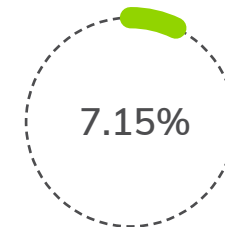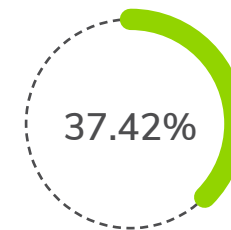
With such a notable spike in engagement, it makes sense to optimise your transactional communication for a superior customer experience.

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Types of Transactional Emails & Examples

Welcome Emails

Read More

Welcome subscribers to your list

Confirmation Emails

200.00

- Order confirmations
- Receipts
- Account statements
- Product refunds
- Account verifications
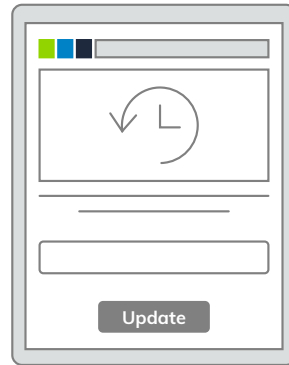
Reminder Emails

Update

- Subscription renewal reminders
- Appointment reminders
- Deadline reminders

Notification Emails

2022/03/15
2022/03/18

Track
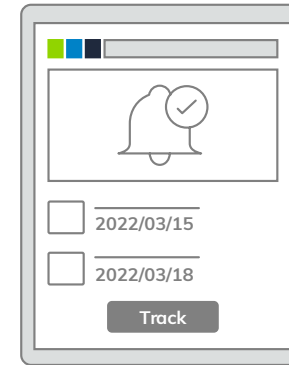
- Shipping notifications
- Account updates
- Business notifications
- Password recovery
- Service cancellations

Request Emails

Review

Feedback / review requests

Transactional messaging keeps customers informed and can improve business efficiency.
Here are six examples of how you can use it.

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Benefits of Transactional Email

Builds Strong Relationships

By sending updates and notifications to each individual customer when they need it, you keep them informed and reassure them that you're trustworthy. This can go a long way in building loyal, long-term relationships with clients.

Simplifies Customer Support

When you communicate key information to specific clients when they need it, you improve customer satisfaction and lessen the load on your customer-support desk. It's also easier to track information when it's sent via email.

Boosts Social Proof & Integrity

The easier your brand is to engage with, the more likely people are to recommend it to others. Transactional emails also reinforce your integrity as a brand because they create clarity and transparency. This demonstrates that you're a brand clients can trust.
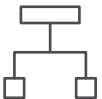
Supports Process Workflows

Transactional communication is often the enabling step between customer actions. Consider password resets, account verifications, and payments. Effective and timeous transactional communication reduces friction, guiding customers or prospects through your process flows.
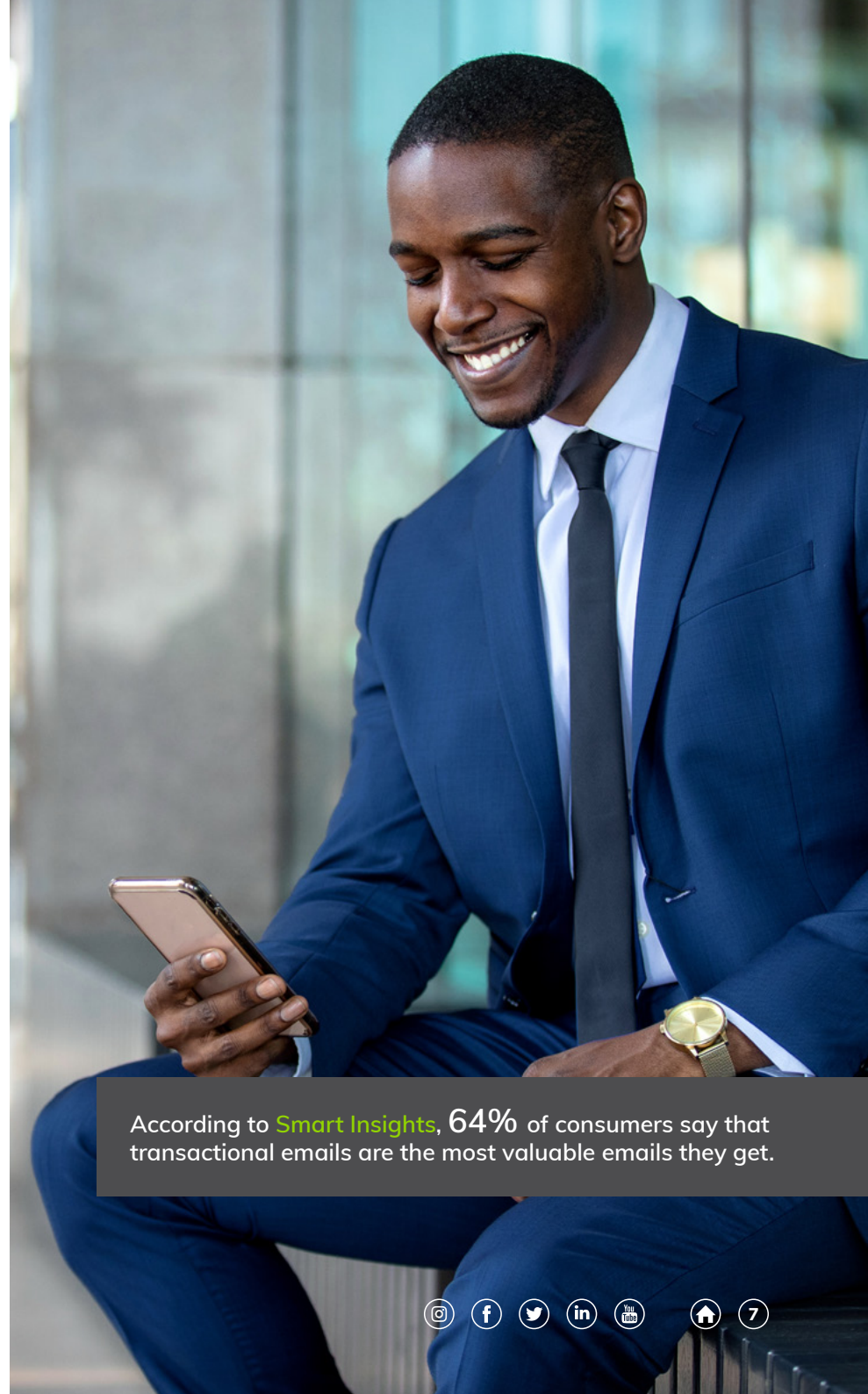
According to Smart Insights, 64% of consumers say that transactional emails are the most valuable emails they get.

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How to Set Up Transactional Emails

The most reliable option for setting up transactional email is to use a platform that specialises in transactional messaging and is geared for optimal message delivery, **like Everlytic**. The consequences of slow or non-delivery of messages that drive process flows are high. It's always best to work with a platform that specialises in and prioritises their delivery.

Many ecommerce CMSs may come with generic transactional messaging installed, and this is great for getting started, but in the long run, they may be missing key support elements like:

Detailed delivery stats:

- How many emails were delivered / bounced / failed?
- Do your contacts open or click in the emails?

Customisable email templates to align your messages to your brand style and tone

Enterprise-grade email delivery to decrease your emails' chances of landing in spam and ensure your messages are delivered timeously

Large message and attachment handling so you can send whatever you need to without risk to your email delivery. Not all service providers are able to deliver large messages timeously and cost-effectively.

Without these, you won't know if your transactional messages are doing what they're supposed to do, they won't look like your brand, and they may not even be getting delivered.

Set Up Transactional Emails with Everlytic

1 **Sign up with Everlytic**.

2 Add and verify your sending domain (e.g.: yourname@yourdomain.com).

3 Configure your API.

That's it! Now just create your email with one of our drag-and-drop templates and go. All your reporting will be available on the dashboard.

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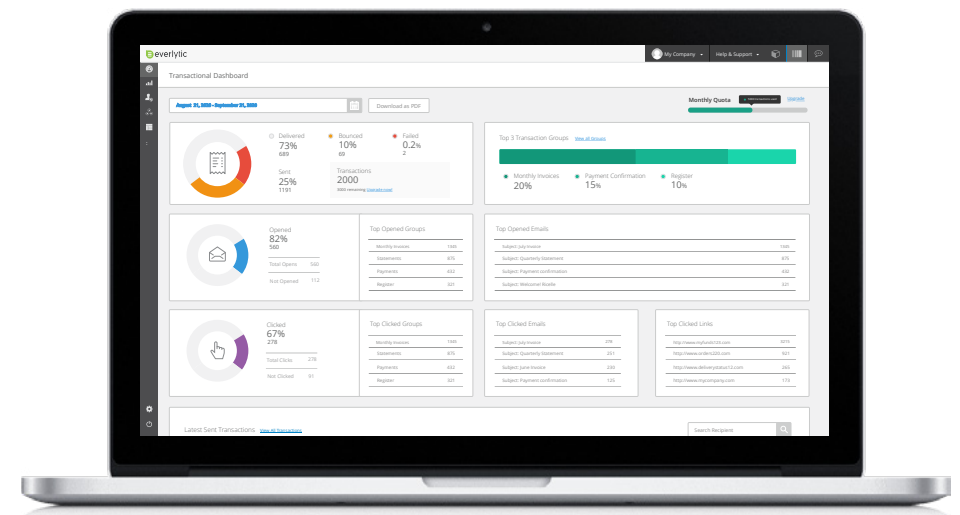
Transactional Email Best Practices & Tips

Check out the next few pages to learn how you can make the most of your transactional emails.

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Writing Tips

| Remember: This is Communication

It may be transactional messaging, but that doesn't mean it shouldn't still be conversational or effectively written. For instance, many transactional messages are written by the development or financial teams, who may not be experienced at writing engaging content. This can cause confusion regarding next steps, lower engagement, and create opportunity costs of not getting the most from these communications.

Here are **the maxims (or principles) proposed by linguist Paul Grice** to make communication most effective:

| Grice's Principles of Conversation

1 Be Informative

- **Make your message as informative as needed.** Provide all the information that is necessary for the current message; don't leave out anything important.
- **Don't make your message more informative than needed.** Leave out any unnecessary details that aren't important to the current message.

2 Be Truthful

- **Don't share what you believe to be false.** Avoid sharing information that you believe may be incorrect. If you do include it, add a disclaimer about your doubts.
- **Don't share information without evidence.** Avoid including information that you can't back up with supporting evidence. If you do, include a disclaimer here too.

3 Be Relevant

Make sure that all the information you provide is relevant to the current communication. Exclude any irrelevant information.

4 Be Clear

- **Avoid obscurity of expression.** Avoid language that is difficult to understand.
- **Avoid ambiguity.** Avoid language that can be interpreted in multiple ways.
- **Be brief.** Provide information in a concise manner, allowing the reader to focus on the key details.
- **Be orderly.** Provide information in an order that makes sense and makes it easy for your recipient to process it.

Keep your brand voice in your transactional messages too (not just in marketing). This will support a smooth, continuous brand experience throughout your recipient's journey with you.

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Writing Tips (cont.)

| Save Readers' Time and Energy

Transactional messaging is functional by nature. The point is to share information needed at the time for a particular interaction. To do this:

- **Clearly identify the reason for the email:** Get to the point immediately by writing a clear and detailed subject line and preview text (if your platform allows for this).

- **Answer your recipient's questions in the message body:** If they're likely to ask specific questions, answer them directly so they don't have to.

- **Keep all calls-to-action (CTAs) button based:** this makes it quicker and easier for them to do what you want them to do.

| Remember to Say Thank You

Sometimes we can get so involved in processing the transaction that we can forget that this recipient has chosen your brand over other competitors. They've seen the value in your brand and taken the time to engage. Thank them for this. Gratitude goes a long way.

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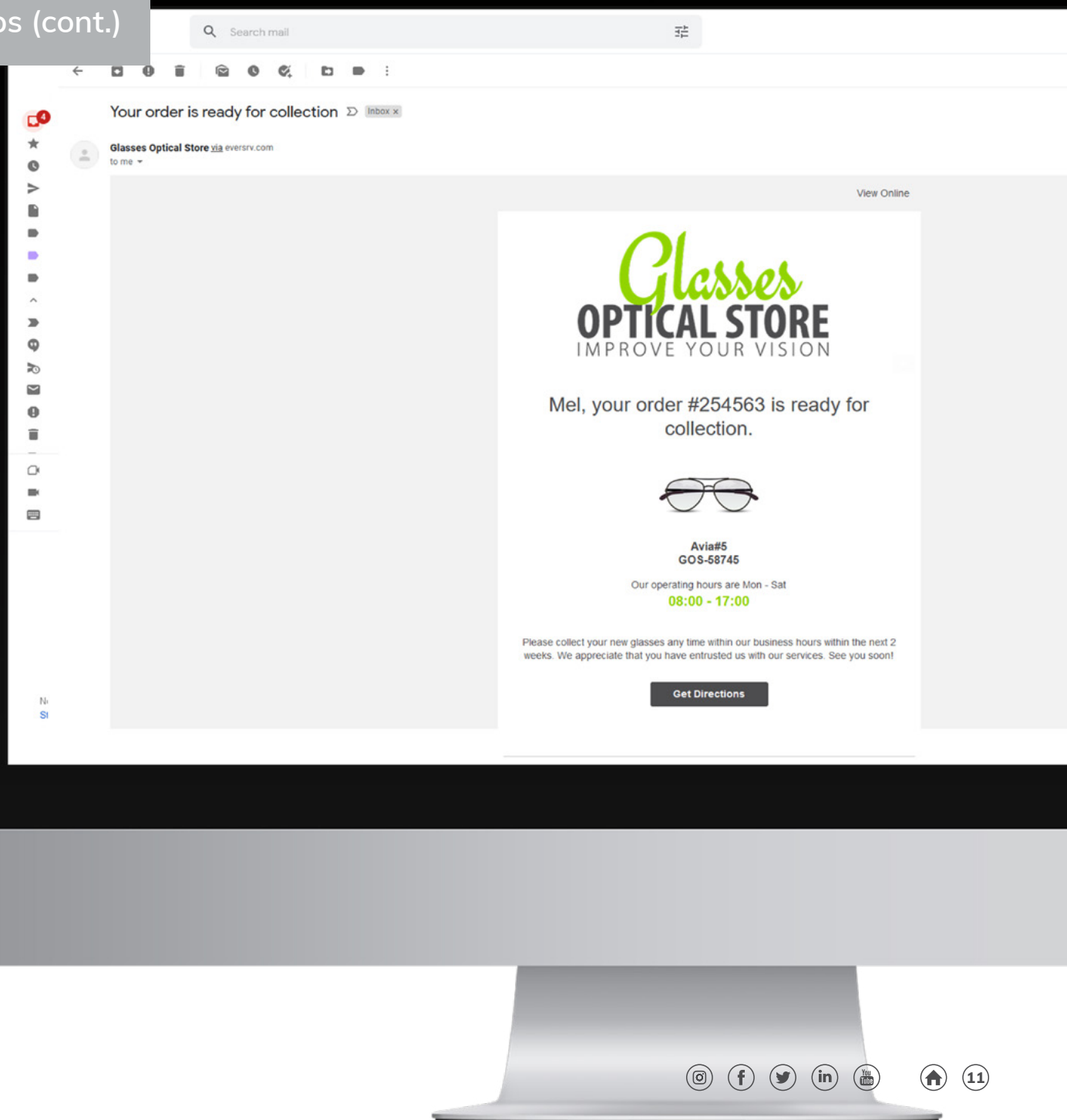
Content Tips

| Personalise Your Messages

Personalisation isn't just nice to have. It's a powerful driver of engagement and can increase client retention as it helps customers feel seen and understood. Platforms like Everlytic can help you personalise every message automatically as it goes out.

If you don't have the tools to personalise each message to the degree that you'd like, make your message memorable and heartfelt. You'll always stand out if you show your customers that you care.

| Add a Cross-Sell or Upsell

Data privacy legislation won't allow much wiggle room when it comes to marketing within transactional messages. But, based on the POPIA guide we created with POPIA expert, Elizabeth de Stadler from Novation Consulting, if the information you share is a logical extension to the transaction, there may be room to add value to the reader by sharing related products and services.

This could include:

- Inviting the contact to subscribe to your marketing newsletter
- This month's / week's top sellers / deals
- Related product recommendations using a product recommendations engine

Make sure you're up to speed with the data privacy regulations that are relevant to you, so you know how much flexibility you have here.
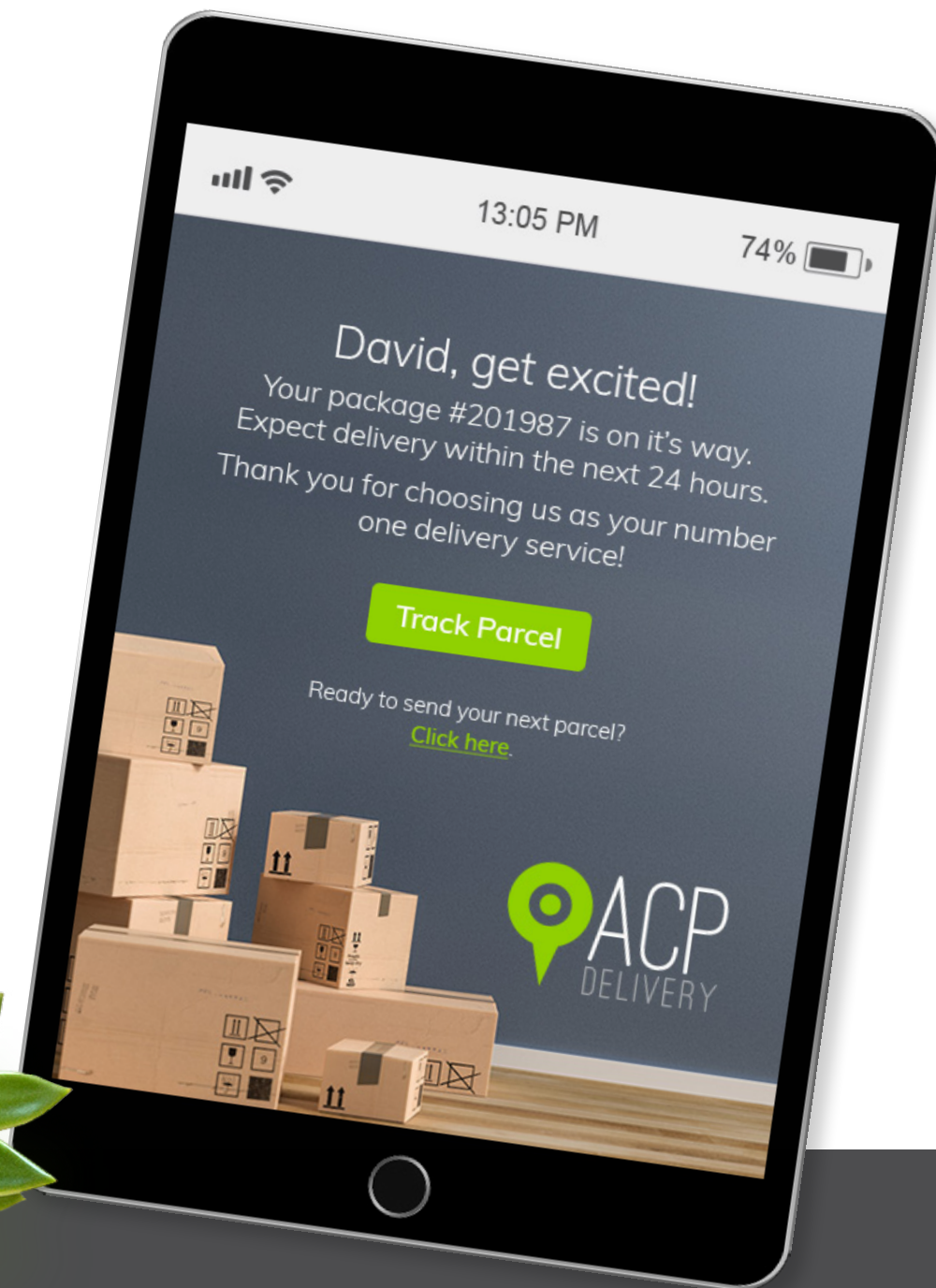
Content Tips (cont.)

Design for Mobile Screens

It's important that all emails, including transactional emails, are optimised to be read on any screen. This is much trickier than you may think. With platforms like Everlytic readily available to you, doing this isn't difficult anymore – in fact, with drag-and-drop templates like ours, screen-responsiveness is automatic.

Other design tips include:

✔ **Keep design in line with your brand**, so the customer experience is aligned across all channels.

✔ **Adapt the design to the frequency of the mailer.** If a customer is likely to see the same transactional email multiple times in a short space of time, keep the design simple, so they can get the information quicker.

✔ **Limit images to 30% or less** and make sure they all have alt text loaded in case the recipient doesn't download the images – this way, they can at least read what the image is about.

✔ **Include well-formatted plain-text versions** of your email in case the recipient can't view rich text.

Anything from **23.72%** to as much as **63%** of all emails are opened on mobile devices. - Email Marketing 2020 Benchmarks & Email Marketing Secrets

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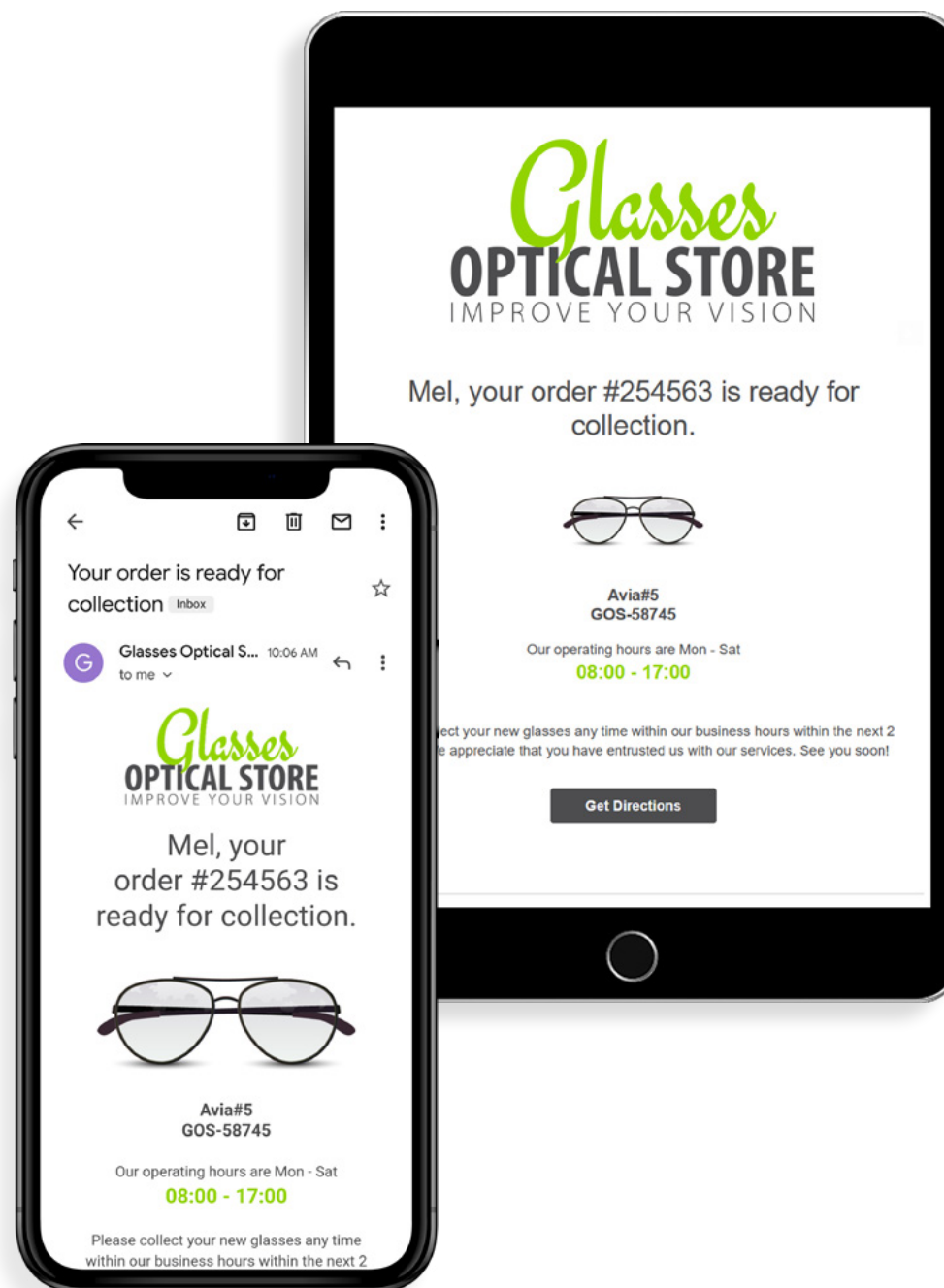
Deliverability Tips

| Improve Engagement, Improve Delivery

An email's deliverability determines how likely your email is to land in a person's inbox rather than their junk or spam mailboxes. In any email you send (including transactional email), the content of the email can have a big impact on whether a recipient engages with the email, which can affect the deliverability of your emails in future.

Some deliverability tips we cover in our **Email Delivery Guide** that also relate to transactional email (not just marketing email) include:

- **Refining Your Email Properties:** Your email subject line, preview text, and from name can impact its open rate. Make sure you choose email properties that are clear and valuable to the recipient.

- **Avoiding Spam Trigger Words:** These can include phrases like 'Be your own boss' and 'Free offer'. **Here's a comprehensive list you can refer to**.

- **Avoiding Embedding Images:** Embedded images make your emails larger and force subscribers to download them. Rather leave it to your recipients to decide if they want to download images.

Send From Dedicated IPs

With Everlytic's transactional email platform, you also have the option to send your transactional emails from your own dedicated IP address, so no one else can impact your email delivery.

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Deliverability Tips (cont.)

| Ensure Your Emails are Secure

There are a handful of extra security measures you can implement to increase the security of your emails, which improves deliverability. These include:

- **Set Up SPF Records:** An SPF record is a record on your Domain Name System (DNS – the 'phone book' of all the domains on the internet) that authorises a platform, like Everlytic, to send emails on behalf of your domain. DNS-enabled SPF records are less likely to land in the spam folder.

- **Sign Your Emails With DKIM:** DKIM protects emails from being tampered with in transit by digitally signing them. This ensures that the message that arrived in your recipient's inbox is the email you intended for them to receive.

- **Set a DMARC Policy:** DMARC enables email senders to instruct mailbox providers on how to handle unauthenticated mail.

These additional security protocols signal to mailbox providers that the email you're sending is coming from you. By securing and legitimising the connection between sender and receiver, your emails are more likely to land in the inbox where you want it.

Everlytic provides SPF and DKIM records that you can implement to amplify your email deliverability via our platform.

Sending Tips

Respond to Lack of Engagement Too

Transactional emails are typically sent in response to an action a customer makes. But did you know that they can be triggered in response to a lack of action too? This is helpful if you have customers who only use a limited range of your products and services, or when re-engaging contacts who haven't purchased from you in a while.

Don't Send from a No-Reply Address

Emails, even transactional ones, are a form of communication – something that must be two-way to be effective and ensure longevity.

Make sure your transactional emails can always be replied to, and that they come from an easily identifiable sender name. This will help recipients feel supported and heard by your business, increasing your chances of retaining them as clients.

Include an Email Footer with Quick Links

Sometimes a recipient will want to read something on your website. Provide easy-access links to your most popular web pages in the footer of your email to make it easier for them to find. Make sure you include contact information for your customer service team too.

Monitor Delivery & Engagement Rates

With the right transactional email platform, you can track email metrics like:

- Sends
- Fails
- Deliveries
- Bounces
- Opens
- Clicks

With information like this, you can see which messages get the best engagement, adapting them as you go to improve your results.

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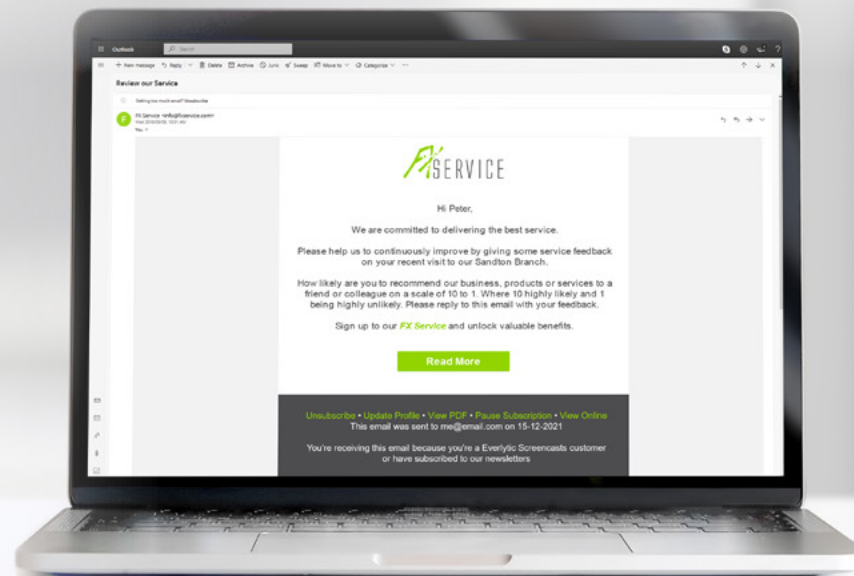
The Recap

To recap on what we've covered, here are some of the ways you can make the most of your transactional emails:

Writing Tips

- ✔ **Use Grice's Principles of Conversation**
  - Be informative (No more and no less than what's needed)
  - Be truthful (Don't share content that may be false or lack evidence)
  - Be relevant (Exclude anything irrelevant)
  - Be clear (Avoid obscurity and ambiguity; be brief and orderly)
- ✔ **Keep Your Brand Voice**
- ✔ **Save Readers' Time and Energy**
  - Identify the reason for the email
  - Answer recipient's questions in the message
  - Keep calls-to-action (CTAs) button based
- ✔ **Remember to Say Thank You**

Content Tips

- ✔ **Personalise Your Messages**
- ✔ **Add a Cross-Sell or Upsell** (but make sure it's data-privacy compliant)
- ✔ **Design for Mobile Screens**
- ✔ **Other Design Tips**
  - Keep design in line with your brand
  - Adapt the design to the frequency of the mailer
  - Limit images to 30% or less
  - Include well-formatted plain-text versions

Deliverability Tips

- ✔ **Improve Engagement, Improve Delivery**
  - Refine your email properties
  - Avoid spam trigger words
  - Avoid embedding images
- ✔ **Ensure Your Emails are Secure**
  - Set up SPF records
  - Sign your emails with DKIM
  - Set a DMARC policy

Sending Tips

- ✔ **Respond** to lack of engagement
- ✔ **Don't Send** from a no-reply address
- ✔ **Include** an email footer with quick links
- ✔ **Monitor** delivery & engagement rates

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Transactional Email with Everlytic

Now that you understand how to get the most out of your transactional emails, check out Everlytic's communication platform. It enables you to automatically trigger, personalise, and track high volumes of transactional messaging relating to client engagements.

Drag-and Drop Templates

Get the look you want using our screen-responsive email templates, the drag-and-drop builder, or the code editor.

Personalise Every Message

Personalise your transactional message content with personalisation parameters and dynamic sections.

Track Messages in Real Time

Access email statistics like delivery, open rates, click rates, and bounces, and SMS status receipts.

High Velocity Sending

Everlytic's infrastructure can handle incredible volumes at high velocity. Get your messages into inboxes and skip the queues for urgent messages.

Large Attachment Handling

We are experts at handling large attachments. Auto-send large, secure attachments via email or SMS with confidence.

Custom Sending Domains

Broaden your sending and receiving options by setting up branded URLs and custom tracking in transactional emails.

Send CC & BCC Emails

Receive copies of important outgoing emails. Specify one or multiple email addresses with a limit of 50 CC, 50 BCC, and a total limit of 500 addresses per request.

Send from Dedicated IPs

Send from dedicated IPs when you know your sender reputation and content is solid. This way, nobody else influences your delivery.

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Why Choose Everlytic?

Local Pricing & Support

We're based in South Africa too, so your costs won't fluctuate based on the exchange rate. Premium client? We'll give you 24-hour technical support, so you never miss a beat.

Switch Seamlessly

Everlytic is the fastest and easiest transactional service to switch to and use. And if we don't meet our SLA on your Premium package, we'll even give you double your money back.

Scalable Infrastructure

Everlytic sends billions of messages and our transactional system is built on a high-availability, automatic / predictive-scaling model within the cloud, so it'll scale with you.

Superior Performance

Our 99.9% uptime and high throughput means high-speed delivery no matter how many messages you send.

Top Data Compliance

GDPR? POPIA? Everlytic's platform and documentation has it covered. We serve many blue-chip brands with confidence.

Developer Resources

Simplify the complexity of developing communication services with resources built by developers, for developers.

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Conclusion

Transactional messaging can work wonders for your customer engagement and retention. Reach out to Everlytic to get your transactional emails set up and rolling ASAP. Then use the tips and best practices in this guide to make the most of your communication.

Chat to a Consultant

everlytic

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