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CASE STUDY

10/14/2003

Shell Oil Tests Email to Influence Distributors, Truckers & Farmers: Uses 5 Best Practices Rules

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CHALLENGE: Every quarter, Shell Oil Products US used to send a glossy printed magazine to its distributors and end users such as farmers and professional truck drivers.

"It was a beautiful magazine, but things at Shell were changing so rapidly that by the time it was published, things were out of date," says e-Business Manager Chris Guerrero.

One of the biggest changes in early 2003 was the fact that Shell's joint venture with Texaco had been dissolved, so the former partners were now scrambling to compete for distributor accounts they used to share.

Guerrero felt it was critical to switch from a relying on a printed magazine to email communications. However, as a \$50 billion Company, Shell wasn't going to toss out an email campaign to see if it worked. He had to launch extremely carefully, relying on best practices.

CAMPAIGN: First Guerrero had to decide who would actually handle sending the email. His choices were his in-house IT team or an email service provider who did nothing but focus on list maintenance and delivery.

The latter won, simply because email is complicated and important enough that you want to rely on a service that specializes in it, rather than hoping your IT team can handle it on the side. (Note: This is a best practice we advise most mailers to use.)

Next, Guerrero researched and developed five rules for Shell to follow:

Rule #1. Double opt-in and no address sharing, ever, period.

"Those were principles we believed in," says Guerrero.

No names were to be added to a list by sales reps or anyone else besides that actual individual themselves. Plus, to make sure the people who signed up for email had indeed done so (instead of perhaps co-workers putting their name in a form) every new name got a confirmation message they had to personally reply to prior to being added to the list for good.

In addition, the email addresses of people who signed up were not shared with outside "partners" nor were they to be shared internally with

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sales or other departments. Shell would not take the chance that anyone was sent any broadcast email they were not explicitly expecting.

Rule #2. Ask for only pertinent information from sign-ups

"When we first got started in this process, we asked for first name, last name, mother's maiden name, do you have a pet," laughs Guerrero.

After reviewing best practices, he quickly changed this, asking that marketing only request information they absolutely needed from new subscribers. "Now required fields are only first name, last name, and email address."

When the marketing team yearned to collect more information, Guerrero explained to them, "If I had treated my first encounter with my wife the way you're expecting me to encounter my customers, we would have never gotten married."

Rule #3. Write email in a conversational tone

While Guerrero asked his agency and marketers to contribute ideas for email newsletter articles, he decided to handle the actual writing himself so he could give it a conversational tone that wouldn't vary too much from issue to issue.

"It's coming from a person, and it should sound like it's coming from a person," he says.

He adds, "Legal had some learning to do on that." (Ah, the perils of working for a very big company.)

Rule #4. Message size was limited to 20k

Recipient's inboxes are crowded these days, so if you send a very big email it may bounce or simply annoy people with a slow download time. So, Guerrero made a flat rule that every message had to weigh in at 20k or less.

"We discovered that a size limit was a good idea when our ad agency tried to help us out by creating a banner for the top of the email," he remembers. "It was beautiful, but it was 150k."

In addition to reducing images so they "weighed" less, Guerrero also decided that if an email was going to have multiple articles, they'd need to be hotlinked summaries instead of presented entirely in the body of the text.

This also kept the emails visually short, which is appealing in these days of information overload.

Rule #5. Test prior to sending

Guerrero set up test accounts at Hotmail, Yahoo, in the two most-used versions of AOL, and in Outlook so he could see how emails looked before they were sent. This also meant test-time was built into the production schedule.

With these five rules nailed down, Guerrero supplemented the single quarterly magazine with two very different newsletters, each created to appeal to a particular key audience:

Newsletter #1: "Momentum" for Shell Distributors

The goal was to convince distributors to continue carrying Shell products, rather than switching solely to those from Texaco, and to sell more. Guerrero mixed three different types of information in each issue:

- o Ideas and tools, such as spreadsheets, to help distributors promote Shell products to their customers. "It would have been easy to just give them a product sheet, but we wanted to help them sell it, not just send marketing materials."

- o Distributor success stories, including photos and real-life stories of Shell distributors who were doing well. "It's not enough to say a product is great. It means so much more to show their peers and capture that success from them."

- o Sales-related surveys - Guerrero asked distributors in each issue to let him know what their marketing problems were so he could do a feature in the next issue addressing them.

"For example, if we heard complaints that people weren't buying a product, we asked distributors, 'What's the biggest objections people give you about what they didn't buy it?'" Then he would build an article around that objection called, 'The Truth Revealed' that debunked myths and answered objections.

One thing Guerrero didn't put in any issue was proprietary or highly-sensitive information.

"Don't put anything you don't want on the cover of a newspaper," he warns. Distributors are not your employees and may forward newsletters to competitors or the media without thinking.

Next Guerrero tracked results by watching which distributors opened their mail and which articles these clicked on. If a mission-critical article wasn't read or a key distributor hadn't opened his or her email, Guerrero then let the field sales team for that account know.

Field sales printed out each issue, including the full-text of the articles, and kept copies on hand to give to distributors who may not have read the article that could help them.

Newsletter #2: ROTELLA for End Users

Guerrero developed an entirely separate newsletter for end-users of ROTELLA®, a Shell brand of heavy duty engine oil used mainly by truckers and farmers who drive vehicles with heavy diesel engines.

First he needed to gather a list, so he ran an "under-the-cap" promotion: when someone took the cap off a gallon of the product, they would find out if they won a prize such as a truck. If they weren't immediate

winners, they were told to go to the Web site for a second chance ... where they'd also see a prominently featured a newsletter sign-up form.

The newsletters didn't contain lots of sales copy. "Nobody wants to see 'Buy Shell, buy Shell, buy Shell', or read about your new antifreeze."

Instead, Guerrero focused on attention-grabbing subject lines, surveys, real-world trucking stories, and yes, an occasional article about the importance of changing antifreeze and how to do it.

He tried to make the newsletter as fun as possible. For example, when Shell wanted to promote its new five-gallon bottle by featuring a photo in the issue, "I thought this is horrible. Who wants to see the pail? So, we covered up the graphic on the pail and said, 'Get a sneak peek at packaging.'"

It was the most clicked link in the entire issue.

Again, Guerrero actively solicited stories and ideas for content from the readers themselves. For example, users were asked to submit stories about their "extreme trucking experiences" when using ROTELLA. You can imagine the loyalty and forwarding-rate of truckers whose stories made the next issue.

RESULTS: 100% of key distributors chose to stay with Shell which Guerrero notes he can't take credit for but when you consider that the Momentum distributor newsletter averages a 60% open rate, it sure didn't hurt.

ROTELLA newsletters open rates started at 18% and have steadily moved up a few points with each issue. Now they're at 23% (and we expect to see them hit 30% by the end of the year.) This demonstrates how you have to woo readers with consistently appealing content to gain their attention and loyalty over time.

It's tough launching a new newsletter these days because people have seen so many bad ones that they are reluctant to trust yours will be worth opening. Guerrero's work is slowly convincing them this is one worth opening.

Viral results data convinces him he's on the right track. Each opened issue is forwarded between 10-13 times -- this is a remarkably high forwarding amount (in our experience a single forward per average reader is more likely.)

Useful links related to this story:

Sample of ROTELLA newsletter (Sorry, Shell would not release a sample of Momentum)

<http://www.marketingsherpa.com/so/ad.html>

IMN (formerly iMakeNews) the service Shell uses to distribute the two newsletters

<http://www.imninc.com>

Shell Oil Products US
<http://www.shelloilproductsus.com/>

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