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How to develop
HTML
Emails

for the

Pharmaceutical Market

by Danilo Baglietto

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About
the author

Danilo Baglietto is the Head of the Email Development Team at Digitaland.
Danilo's background includes working for MRM, one of the largest agency networks where we managed the creative for fortune 500 brands. For the last four years at Digitaland, Danilo has managed the email production team and developed emails for the top pharma companies in the world.

Introduction

In a recent industry survey, nearly three quarters of respondents noted that their preferred marketing channel is email. That's why sending emails to a targeted list of consumers is the bread and butter of many organizations, including pharmaceutical companies. Yet, as all pharmaceutical marketers know, email blasts and other forms of advertising must follow a set of requirements to avoid legal trouble.

Marketers also know that emails, along with all other forms of digital marketing, need to be compelling and elicit the viewer to take some type of action. However, in the pharmaceutical marketing industry, there is a fine line they have to walk between complying with legal requirements and producing creative and compelling content.

There are many stakeholders involved in approving the creative of each HTML email campaign. Pharma emails require a lot of text, which can be an additional challenge for emails that are viewed on a multitude of different mobile devices, email clients, and browsers. And when the files are ready to be submitted for MLR review, the team is under a lot of pressure to guarantee that each file is working perfectly. If the files are ultimately rejected, this causes a loss of time and money for your organization. It's a demanding process that allows little room for error.

That's why many organizations turn to HTML emails when marketing pharmaceutical products. Yet there are several considerations to account for when creating a new campaign. Because of the level of technicality required (your emails must look the same across a variety of devices, browsers, and screens), many choose to outsource the email creation process to an experienced digital production partner.

If you're a project manager or an operations manager at either an in-house marketing department or pharma ad agency, or are in charge of delivering HTML email templates for the pharmaceutical market, this guide is for you. In this ebook, we'll cover best practices for developing HTML emails for the pharmaceutical market that are compliant, functional, and effective. You'll discover the essential team members needed for each email campaign, coding best practices, and learn all about the QA process and the tools that make the project run smoother.

Pharma
HTML Email
Development Overview

For a pharmaceutical HTML email development project to run successfully, it's important to follow a series of steps that we've outlined here. This process will help avoid the headache of constant back-and-forth emails, missed deadlines, and substandard deliverables.

Pre-Development

Team Overview

When you work with a digital production partner to create an HTML email campaign, a number of team members will be assigned to your project. Each person plays a particular role in ensuring that the project runs smoothly.

Project Manager: The project manager serves as the liaison between you and the development team. He or she communicates your campaign goals, the project timeline, and the deliverables that are expected. The project manager will also review the assets you've shared to make sure that everything that's needed to start the project is available.

Developer: The developer assigned to your project is the one that builds the email. He or she will code the email and design it according to the assets and visual guide that you've provided.

QA Analyst: The QA analyst tests the final product to make sure it works and looks consistent across different email clients and browsers. He or she will also make sure that any and all links included in the email are working. The QA analyst will report findings to the developer and continue to retest after each round of revisions until all of the errors are fixed.

Assets & Project Scope

Before the project can begin, you'll need to compile all of the assets that should be included in the final email. This could include images, fonts, and a visual layout guide. You'll also send the email copy and links that are to be included. All visual assets should be of the highest quality so that the developer can manipulate them as needed to fit the size requirements of the final deliverables.

This is a list of some of the assets that you'll share:

Visual Guide: A visual guide in the form of a PSD file will contain images, text styles, colors, spaces, and other visual components that should be included in the final project. The developer will use the guide to build the email, and the QA analyst will compare the final product to the PSD to ensure conformity. If the email will be responsive, a separate guide

Manuscript: The manuscript is simply a Word document that contains the copy that will be used in the email. The manuscript should include the important safety information (ISI) that's required by law to include in pharmaceutical marketing materials like emails.

Link Matrix: As most pharmaceutical HTML emails utilize several hyperlinks, the link matrix shows the developer where each link should be included. This spreadsheet will include a description of each element the link will be added (i.e. images, buttons, or text), the plain URL without a tracking code, and the URL with the tracking code that the developer will implement in the email.

QA Scope: The QA scope will list all of the browsers, mobile devices, email clients, and operating systems that the email should be tested on. This ensures that email recipients will see an email that looks consistent on whatever device they're using.

Naming Convention: This is another document that helps both teams stay organized. If multiple emails are being created, we'll label each file according to the naming convention that you stipulate.

Visual Guide PDF (optional): If your email is responsive, an extra visual guide can be created for both mobile and desktop that serves as a visual reference for the project manager.

Along with the assets listed above, you and your project manager will solidify the scope of the project. Here are some of the considerations that your project scope will cover:

How many email variations are required?

Will there be a click to call function added in the email?

Should the emails be responsive?

Should links be tested by the development team?

Does the email include a preview line?

When is the final product due?

Do image alt tags need to be added to images?

The HTML Email Development Process

Now that the team members have been assigned, the project scope has been defined, and all assets have been shared, it's time to begin the development process. These are the five steps that help ensure the process is completed successfully.

1. Asset Quality Review

In the first phase, the project manager will review all of the assets you shared to make sure the team has everything they need to get started. After the project manager approves of the assets, the QA analyst will review them to double check that everything is uniform and that there are no inconsistencies in email copy, links, or image alt text. This <u>free tool</u> can be used to compare email copy to streamline this process. The analyst will also review the email's subject line, preview line, and sender's name and email.

2. Template Development

Now it's time for the developer to get to work. The developer's first step will be to create a master template of the email that will be used in all file variations. This master template will match the PSD file provided and will be coded with all of the links, images, and other HTML elements that should be included. In some instances, more than one master template will be created, depending on the requirements of the project. In addition, different adaptations of the master template will be created when a small change to content or images is required, or if the adaptation is 70% or more similar to the master template.
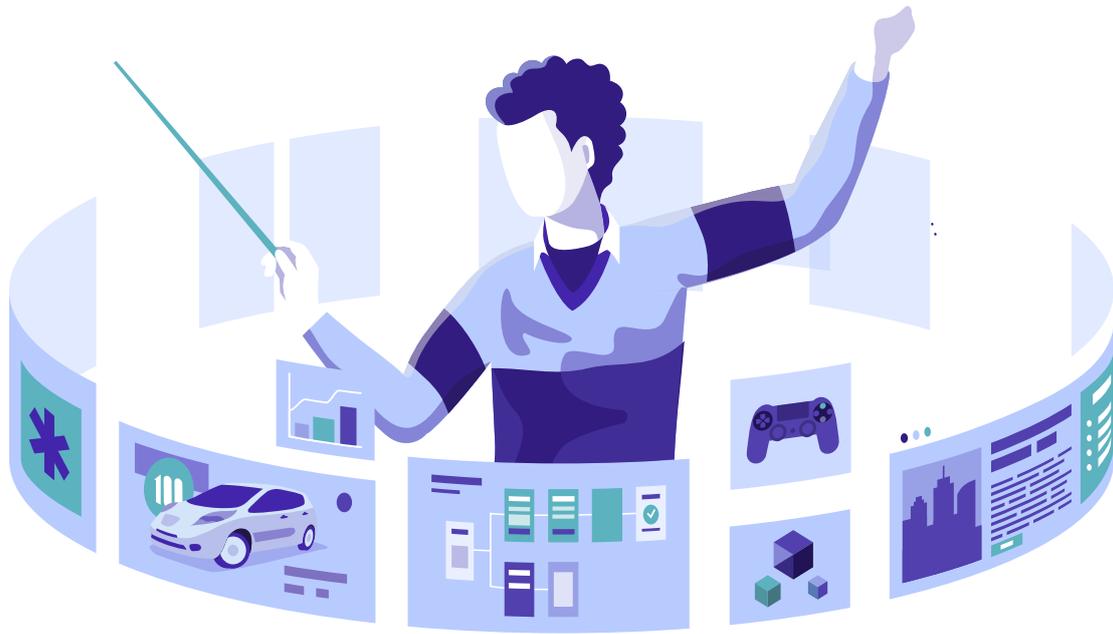
3. Quality Assurance

Once the developer has created and coded all required emails, the QA analyst will take over. This is one of the most important phases of the project because it ensures that the final product meets your standards. It's especially important in the pharmaceutical industry due to the federal requirements of the ISI text. We'll include more about the extensive QA process in the next section.

The QA analyst will be reviewing factors like functionality, consistency across browsers, email clients, and devices, and to confirm uniformity across all designs that have been produced.

4. Revisions

At this point, the QA analyst has noted any and all bugs and inconsistencies that were found during phase three and passes the revisions to the developer. The revision rounds will continue until all errors have been fixed.

5. Delivery

After the final revision round, the developer will export the files and turn it into the project manager, who will send them to you. Your HTML emails are now ready to be loaded into the service you'll use to send the emails.

How to QA
an HTML Email

The quality assurance phase of the HTML email production process is arguably the most important step. It's also the reason why many pharma marketers choose to outsource their HTML emails due to its complex nature. After all, a QA analyst has many responsibilities, such as:

- **Ensure consistency across all browsers, email clients, and devices.**

- **Check that all hyperlinks are functional and tagged appropriately.**

- **Compare developer's design against visual guide provided by the client.**

- **Ensure images load correctly and that the correct alt text has been added.**

- **Measure email load time.**

- **Compare the email text to the original manuscript.**

QA Tools

Relying on the human eye alone would not only be time consuming, but riddled with errors. Fortunately, a number of QA tools have been created to simplify and improve the QA phase.

Litmus: Litmus is an industry leader in the email testing phase. With Litmus, you can preview emails across a variety of different email clients to find inconsistencies in layout and function.

A Pen by Austin: This free tool lets you test how your email sender, subject line, and preheader text will look in a couple of different email clients.

Email on Acid: This email testing tool lets you preview your email across over 70 email clients. It will also run your email through a spam checker to ensure your email gets delivered.

BrowserStack: If you want to test your email on an internet browser not listed on Litmus, BrowserStack is a good option.

Campaign Monitor: Campaign Monitor is a reliable service for sending large email campaigns. It also allows for advanced customer segmentation and offers a complete analytics suite to improve campaigns. It can also be used to send a test email to all of the project's stakeholders for approval.

Digitaland ISI compare: ISI Compare is a tool Digitaland created in-house to make comparing text a breeze. Simply paste the manuscript text in one side and the email text in the other, and inconsistencies will be automatically noted. It can also be used to track any text changes that may come from an MLR review.

Best Practices & Tips
for HTML Email Development

There's a reason that many pharmaceutical companies and marketers choose to outsource their HTML email development. The process can be demanding, complex, and too much to handle for their in-house team. And, if not QAd correctly, the result can be strange-looking emails and a dramatic reduction in both open rates and engagement.

Here are some of the best practices when it comes to developing a successful HTML email for the pharmaceutical industry.

Recommended Frameworks & Coding Practices

Liquid Layout: A liquid layout works if the mobile email is a simple replica of the desktop version. A liquid layout displays a condensed version of the original email based on percentages instead of pixels. This type of code works best with single-column email designs.

Adaptive Layout: If the email design is more complex, we use an adaptive layout that deploys CSS media queries to display the email according to the browser's width. With this layout, if the desktop email is displayed in a format of two columns or more, on a mobile device it will be displayed as a single column to improve the user's experience.

Responsive Layout: Responsive is the best option for sending HTML emails. Since the majority of emails are opened on a mobile device, a responsive framework dictates that the mobile version of the email be created first. Then the developer will find ways to expand the email for larger browser sizes. The benefit of a responsive layout is that it will adapt to the email reader's screen automatically to provide the best viewing experience.

Responsive email designs receive up to 15% more clicks than non-responsive emails. That's why we recommend using responsive emails no matter what type of pharmaceutical email campaign you're running. When creating a responsive design, it's important that they're consistent on both mobile and desktop devices, which is something the QA analyst will review.

Tips for Managing a Large Email Development Project

Are you planning to launch a large email campaign that requires multiple designs, variations, and moving parts? Maybe you need to update the ISI across all of your assets? Here are a few ways to eliminate time loss and streamline the development process.

Eliminate back-and-forth communication

Meetings, phone calls, and emails can be a major time drain in the HTML email development process. That's why it's important to establish an effective and concise line of communication between the development team, project manager, and client. For example, this tool allows all involved parties to add comments and feedback from one central location to simplify the process.

No matter what communication method you choose, make sure it's established before the start of the project to avoid time loss.

Use master templates

If you're managing a large project, you likely need several different email variations. These could be used to split test different layouts and content, to target different segments on your email list, or for different geographical areas.

However, creating a brand new email template for each variation can be time consuming. We recommend using a master template, which can be tweaked for every email variation that's required. This also helps simplify the revision process.

Style & Design Considerations

Put your most important content first

When a reader opens your email, it's not a guarantee that they will read to the end. That's why the journalistic principle "don't bury your lede" can be applied to HTML emails. Your email should list the most important information or most compelling content first.

Choose a simple layout

HTML emails for the pharmaceutical market can be both simple and beautiful. These are a few of the layouts we recommend to make coding easier and reduce the risk of errors.

Single Column: A single-column design is one that molds to one single column as opposed to two or three like in other design formats. It's the simplest and most readable, especially on a mobile device. It enables the email viewer to scroll and review the content in a way that they're used to in other apps. Here is an example of a single-column email layout.

Grid Design: A grid design divides the email into rows with a number of flexible columns that fit into each row. It's similar to a visual editor that many use to design Wordpress websites.

Modular Design: A modular design is comprised of stackable elements that can be rearranged depending on the needs of each email. When creating an email campaign with several email variations, this design can help simplify the duplication process. It's also helpful if you anticipate launching a similar campaign in the future.

Technical Considerations

Email File Sizes

If your final email file is too large, you run the risk of reduced deliverability, having your email message clipped, and other technical issues that will negatively impact your open rates.

Best practices dictate that your HTML email file size should be 100 KB or less. If your file size is larger than 102 KB, Gmail will automatically clip the email and demand that the user take an additional step to review the email in its entirety. Since over a quarter of emails are opened in Gmail, you could lose a large portion of your audience if your file size is too big.

Also, the larger your email is, the longer it will take to load. Since mobile is responsible for over half of all email open rates, and mobile users won't wait around for content to load, you run the risk of losing potential customers before they even see your content.

Text & Line Breaks

Line breaks in emails need to be considered very carefully. Readers tire of reading through large blocks of text whose lines are too long, and they likewise don't respond well to lines that are too short.

When adding line breaks, avoid the use of the <br> tag. Not all email clients process this tag in the same way, which can result in your text looking strange on different devices. Instead, we recommend using spacers, especially in responsive design, so that the line length will adapt to the size of the user's screen.

To control the text's line height and font size and override an email client's default settings, we recommend using the following CSS reset:

mso-line-height-rule: exactly;

Tables

When coding an HTML email, most developers prefer to work with tables. Tables are easier to troubleshoot during the QA process and work better with most email clients. The type of table used will depend on the developer, as some prefer to use stacked tables while others prefer to use nested tables. Stacked tables are generally recommended, as the code is more flexible and works better with email clients.

To ensure that layouts are consistent across email clients, we recommend using the following :

inline properties:cellpadding = 0
cellspacing = 0
border = 0

We also recommend adding the following code inside the <style> tag that serves as an additional global CSS reset to ensure consistency:

table { border-collapse:collapse; mso-table-lspace:0pt; mso-table-rspace:0pt; padding:0;}
table td {border-collapse: collapse;}

Preheader Text

One of the best practices of developing HTML emails is to include preheader text above the initial design. This is the text that will be included in the preview section that most email clients show. Some developers disguise this text in the body of the email by changing the font color to transparent or having it blend in with the background. You don't want your email open rates to be negatively affected by not including this crucial text above the design.

Images

Using images that are too large can slow down your email's load time. A maximum width of 600-640px works well, which is the normal display width of an email on mobile devices. However, the original image should be twice the size to ensure a high-quality final output. File size can be reduced with the use of compression for best results.

Tips for running
a Successful HTML Email Campaign

While the development process is a critical part of an HTML email campaign, there are other factors to consider to ensure that you get the best results from your campaign. This includes everything from your return on investment to engagement and more. Outside of the development process, here are a few other factors to consider.

Goal Setting

Before you start to design an email or contact an agency to develop your pharmaceutical HTML emails, your first step must be to determine the desired outcome of the campaign. Is your overarching goal brand awareness? If so, how will you measure the success of the campaign?

Are you trying to get users to sign up for a free trial, submit more of their contact information, or make a purchase? If so, what number of signups, revenue, or other factors would lead you to conclude that the campaign was successful?

This is important for all parties involved in the production process, from the design team to the developer to your project manager. When everyone is pointed toward the same vision, your chances of achieving your goals are much higher.

Design Considerations

While many marketers choose to outsource the development of their HTML email campaigns, the design is often handled in house or by another service provider.

When deciding upon the design of your email, consider the following factors:

Who is your target audience? Will the proposed design attract them?

How complicated is your design? Do you need to factor in extra time for the development process in the case of a complex email design?

How many email variations need to be designed?

Will separate designs be required for both mobile and desktop devices?

Does the designer have everything he or she needs to get started, including branding requirements, colors, logos, and copy?

Post-Campaign Analysis

After your email campaign has been sent, there are certain metrics to track and analyze to measure the success of your campaign.

Open Rate: The open rate is simply the percentage of people who opened the email that you sent. If the email was sent to 10,000 people and 3,271 people opened it, your open rate will be 33%.

Click-Through Rate: The click-through rate measures the percentage of people that received the email who also clicked a link, button, or image in your email and were directed to the URL you linked to. If 1,232 people clicked an element in your email out of 10,000 recipients, your click-through rate is 12%.

Conversion Rate: The conversion rate measures how many people completed the desired action once they clicked through to your landing page. This could include making a purchase, signing up for a free trial, or some other action you determined at the beginning of your campaign. If 320 people completed an action out of 10,000 email recipients, your conversion rate is 3%.

Unsubscribe Rate: This measures the number of people who clicked an unsubscribe link after opening your email. If 500 people unsubscribed out of 10,000 people who received the email, your unsubscribe rate is 5%.

According to figures provided by Mailchimp, these are the industry benchmarks in the healthcare field:

Open Rate: 21.09%
Click Rate: 2.25%
Unsubscribe Rate: 0.29%

Considering both industry benchmarks as well as the performance of your past campaigns will help you determine if your email campaign led to the results you set in the beginning.
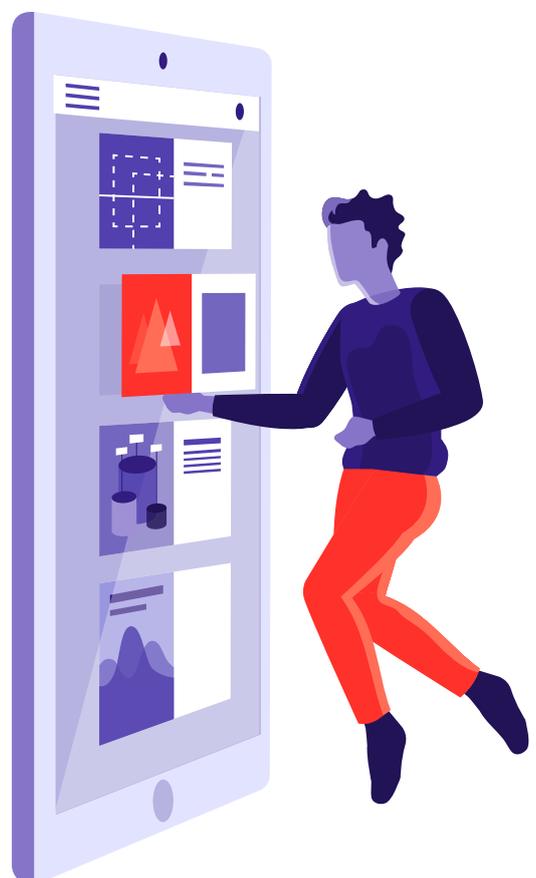
Legal Considerations

Marketers working in the pharmaceutical industry know that advertising requirements are strict and must be adhered to in order to receive approval by the appropriate governing bodies. FDA guidance stipulates that when advertising a drug's benefit, equal space must be incorporated to disclose potential risks associated with the product. This is referred to as a fair balance of information and is a necessary requirement for email communications advertising a drug as well.

When it comes to emails, the important safety information (ISI) must be presented in text format. This can increase the size of the email and present design complications, so working with an experienced production team is crucial. Since the creative will need to be approved by the medical regulatory board, it's important that the final product incorporates the ISI correctly.

It's also important that no unapproved uses of the drug are included in marketing material. If a person is depicted in the email, they must be in the target age range for who the drug was approved for. Though phone numbers and links can be included, there also must be language that encourages the email viewer to discuss the drug with their medical provider.

Working with a partner who is aware of the legal requirements and will help make sure that compliance is a part of the development process will reduce the instances of your HTML email campaign getting rejected by the governing body.

In this email example, you'll see that the ISI has been incorporated in a text format towards the end of the email.

Resources

FDA Laws, Regulations, and Guidances for Drug Marketing, Advertising, and Communications: Stay up to date on legal requirements for drug marketing on the FDA's website.

Conclusion

Developing an HTML email for the pharmaceutical industry that's compliant and effective requires several moving parts to work congruously. The first step is to put the right team in place. A project manager, quality assurance analyst, and developer will work together to turn your design into a working HTML email that's ready to be sent to your list.

Aside from coding the actual email, it should be tested across many different email clients, browsers, and devices. This will guarantee that those receiving your email see the design that you intended, and that every part of the email works properly.

You'll also need to ensure that the appropriate risks and other legal requirements have been included in the email. Your final design should adhere to all laws to make the approval process smooth and avoid delays.

Choosing a digital production partner that's experienced in pharmaceutical emails and ads is your best bet for creating and sending an email campaign that's effective, compliant, and functional.

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Thank You!

We know that the HTML email development process for the pharma market can be stressful, time consuming, and complicated. We hope that this guide has helped you to streamline the process at your organization and reduce the time and errors involved.

Let us know: Are there any other questions you have about the pharma HTML email development process? What did you find most helpful about this guide? Drop us a line and let us know.

CONTACT US