

Online Engagement **REVAMPED**

Practical Guidelines for
Optimizing Online Stakeholder Engagement



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As an online platform provider since 2011, Ethelo has learned important lessons in online forum design and digital engagement execution.

Aiming to enable organizations and communications teams to optimize online participation strategies, the following guidelines are subdivided as follows:

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ORGANIZATIONS THAT RECOGNIZE THAT DIGITAL ENGAGEMENT IS A VERB—and not a noun—will be in a better place in an ever-changing environment. Today's transient society increasingly demands interactive platforms that reflect a creative blend of relevance and ease-of-use, on the one hand, and depth and reciprocity, on the other.

Executive and management teams can build support and avoid a backlash to their initiatives through meaningful stakeholder engagement. Not only do projects run better when people feel their input is valued, but managers and leadership teams can also gain valuable insights from including the perspective of others. Whether in market research, expert panels, employee engagement, or stakeholder consultation, new dimensions of insight and creativity are untapped when people collaborate in ideation and decision-making.

Today's ongoing cultural shift away from hierarchies towards flatter, more organic forms of interaction is enabling organizations to incorporate the collective intelligence of their stakeholders. In turn, by fostering more dynamic spaces for online dialogue, organizations are unpacking the knowledge and contributions of stakeholders, leading to more insightful and risk-averse decisions. Authentic engagement is conducive to better results because, to put it candidly, we always dance to the tunes we are requested to choose in advance.



I. Considering Engagement? *Why Online Engagement Matters*

Modern society is moving into an age where transparency, instant feedback, and collaboration are becoming the badges of the fittest. These trends are providing organizations with new “collaborative advantages.”

In a day when the Internet has revolutionized access to information, this is no small thing. Incorporating the input of others through collaborative engagement brings several benefits. For instance, recent findings make it increasingly clear that forging reciprocal stakeholder relationships is vital nowadays when an estimated four-fifths of an organization’s market value is in its intangibles (intangibles such as brand value, goodwill, and customer relations).¹ Engagement allows businesses and organizations to build loyalty and resilience, to identify risks, trends and requirements on a timely basis, and to improve trust.

When communications firm Brunswick Insight interviewed over 130 senior European communicators in 2013, over 82% considered stakeholder engagement as an important—and 55%—as an extremely important activity, second only to reputation management.² Similarly, a recent Gallup’s State of the Global Workforce report found that among the 230,000 employees interviewed in over 140 countries, only 13% were

engaged at work (while 24% were actively disengaged).³ These low percentages impact quality levels, absenteeism, safety incidents, and employee turnover rates—all significant drivers of cost.

But engaging stakeholders takes effort, whether participating in consultative meetings, turning multiple opinions into meaningful insight, or simply reading through key documents. In addition, special-interest groups can end up dictating the process. Be it in open-house or in staff engagement reunions, their voice can easily overshadow the sentiment of those who usually do not participate—such as more introverted individuals or busy-scheduled people.

For reasons like these, new forms of digital collaboration are becoming increasingly important in a day and age that faces increasing risks of disengagement, survey-fatigue, or sheer bureaucratic impersonality.

Common Challenges in Digital Engagement

When it comes to online forums and digital decision-spaces, Canadian firm Stakeholder Research Associates recommends an “engaged collaboration” for companies or institutions wanting to take further steps alongside the stakeholder engagement continuum (see Figure 2, below). Meaningful engagement moves from one-way communication towards consultation and partnerships that proactively include stakeholders. The former approach is based on a “trust them” that comes from the top-down, whereas the latter requires a more reciprocal “hear us” and “involve us.”⁴

However, reciprocity and participation are costly and time-consuming—two common reasons why directors and managers often sacrifice engagement in light of tight budgets or overwhelmed agendas. In turn, even if online surveys have been a low-cost solution, they have their own set of limitations. For example, some studies have found that online survey response rates can be 10-12% below mail and phone surveys.⁵ Other calculations estimate a 31% average email view rate, with a 24% response and 78% completion rates, respectively.⁶ Moreover, depending on industry type, MailChimp’s historical email open rates range between 13 and 29%, averaging 22%; while the range for click rates has been 1.3 to 5.5%, with an average of 2.7%.⁷

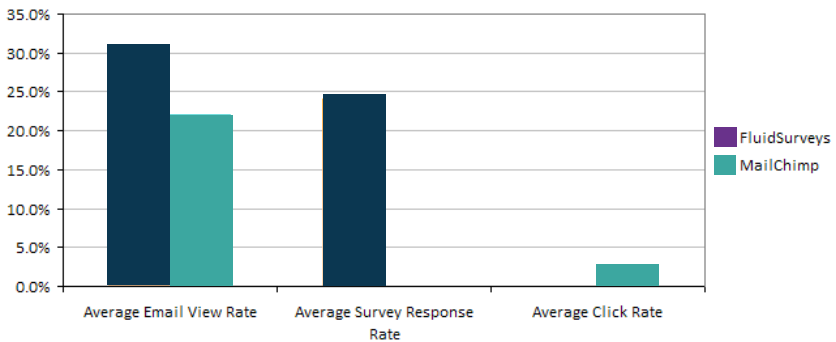


Figure No. 1: Average view, response, and click rates [Source: FluidSurveys, MailChimp]

To an extent, this suggests that around three-quarters of the time and resources communicators dedicate to online surveys and consultations is being underutilized. While an effective way to reach stakeholders, emails and surveys are found wanting in that they lack transparency and don't foster collaboration. There is more to online engagement than efficiency alone.

Key Underlying (and Often Explicit!) Expectations

One of the main ways to address such challenges is by making sure that the online space responds to a set of unspoken expectations. In addition to the more granular practicalities of digital engagement to be outlined later on, when designing their engagement strategies communication teams should always consider a core set of questions:

- *"What's in this for me? And how can I make sure my input makes a difference?"*
- *"What do others think? Can I see where I stand in relation to the group?"*
- *"What will be done in response to our input?"*
- *"How will I be informed? What follow-up mechanisms will be in place?"*

For reasons like these, the International Association for Public Participation (IAP2) and similar bodies recommend that stakeholders have a say early on in deciding how they want to participate. Everyone should have a say in spelling out and agreeing on the rules of engagement.⁸

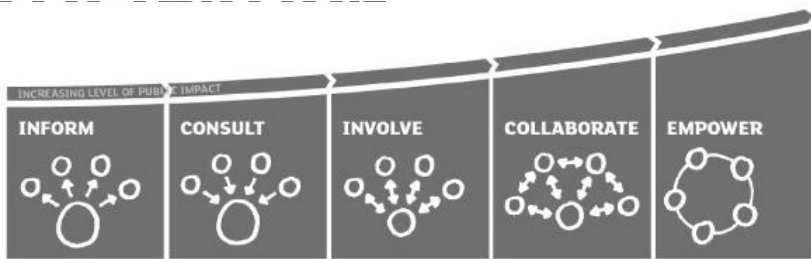


Figure No. 2: Stakeholder Participation Spectrum [Source: IAP2]

As they seek to create collaborative digital strategies with higher levels of stakeholder unity and support, organizations fare better when they listen to participants from the outset. Having an open, dialogical approach increases implementation success and overall buy-in—let alone the fact that dialogue enriches the entire process through incorporating valuable (and often untapped) stakeholder insights.

II. Before Going Live

Foundations for Higher Participation Rates

This second stage is perhaps the most important phase of a digital engagement strategy. Here is when its main foundations are set in place.

To begin with, effective digital engagement processes are based on people-focused prototyping principles. An engaging online-space seeks to incorporate input on what the final options or alternatives under evaluation will be. That is, before asking participants to vote, they must be asked what it is they want to vote on.

In turn, this input is based on people's remarks, needs, and expectations (elsewhere called critical incidents)—concrete insights that will become

the building blocks for relevant question/answer design. Effective critical incidents should not be too broad as to be vague (e.g., “I like to drink hot or cold drinks for breakfast”), but ample enough while being concrete (e.g., “I prefer either caffeinated drinks or fruit juice”). This level of detail will help identify actionable solutions more easily.

Moreover, people-focused design founded on critical incidents calls for proactive modes of consultation in the initial phases, through focus groups and the like. Even if ‘tick-box’ questionnaires always have some predefined questions with a specific set of answers, such questionnaires will be more effective if people are asked in advance for at least some of the options they would like to eventually select.

During these ideation stages, participants should be given ample license to share their ideas and concerns in an unhindered way. And here honesty remains the best policy when it comes to identifying what stakeholders deem as important. Having a more thorough knowledge of what they value will also reduce the risk of failure during a project’s implementation.

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Once the content and nature of the questions and their respective alternative solutions are identified, organizations can consider these following guidelines.

Designing the Online Project-Space

When it comes to designing the online-space itself, engagement cycles will start on better footing when they:

1. ***Begin short, clear, and simple.*** Be frugal with words, sparing them only to say what’s relevant to your audience. Total clarity and brevity must be a hallmark of online questionnaires today. Everything must be conducive to responding. Otherwise, questionnaires run the risk of getting immediately buried under a long pile of emails.
2. ***Keep it honest.*** Be transparent and specific as to a) why is the participants’ input essential; b) what the information is going to be used for; c) how will participants be informed; d) what will be done with the results.

3. **Build quality at the start.** Online-spaces should be pilot tested to spot problems, browser compatibility, and mechanics. They should also be pilot-tested to obtain general feedback from the intended participants. Modifications should follow accordingly before one final pilot test.
4. **Consider (and be honest) about reasonable time allocations.** Having gone through the second round of pilot-testing, it's then important to include an accurate estimation of the total time range required for completing the survey. Participants will appreciate knowing this in advance; otherwise, they might leave the online forum prematurely out of impatience or frustration. For instance, research suggests that completion times for employee surveys should not exceed 15 minutes.⁹ Other findings reveal that even committed team/staff members will begin to disengage from questionnaires that take longer than 7-8 minutes to complete. Regardless, on average the more questions asked, the fewer time respondents spend answering each question, affecting both the quality and reliability of the collected data.¹⁰
5. **Have distinct/contrasting options (aka, "forced choices").** Ideally, participants should see the clear trade-offs associated with the voting options. If not, they might dismiss some or all the alternatives as generalities or nice-to-haves, or they will give them all a high rating. Furthermore, having questions that focus on only one, specific issue will also sharpen the pragmatic quality of the responses.
6. **Respect participants' privacy.** Voicing out sensitive issues could have repercussions. Online platforms that give users the option (and the guarantee) of remaining completely anonymous will lead to a fuller and more honest disclosure of opinions—a key ingredient for implementing long-lasting positive changes. Your organization can allow for this possibility by not requiring signing up with emails or real names. And, regardless, it's vital to show due diligence in assuring full confidentiality.
7. **Be clear and transparent.** Trust and engagement will increase if respondents can see the outcomes of the group, but also by comparing where their own answers stand in contrast to the rest.

It is also important to provide clarity on how to interpret results, as well as to provide access to summary graphics and such. (More on this in Section IV.)

8. **Offer different levels of reward.** People will more likely respond when there's something relevant in exchange for them. When a credit union engaged its youth members through Ethelo's digital forum, for instance, they emailed \$5 gift certificates for complete responses. Additionally, the 300+ participants were asked to share the link to the forum on social media, in exchange for being entered into a draw to win one of two \$250 gift certificates. Providing some kind of voucher, discount, draw, or reward will help overcome survey fatigue and elevate participation rates.

Basic Considerations for Email Outreach

If direct emailing is the preferred outreach strategy, the following basic technicalities are worth taking into account:

1. **Update your address book periodically.** Needless to mention, keeping an out-of-date mailing list will thwart your efforts. But more importantly, because people change jobs (and emails) constantly, sending a newsletter at least once a quarter enables users to change their subscription data if they need to.
2. **Build expectation by notifying in advance.** In the case of internal staff engagement (and depending on how widely-known the project is), it may be worth considering sending a notification in advance, coming from a trusted person. This may serve the purpose of reducing eventual bounce-rates (due to outdated or misspelled emails, for instance), but also of making constituents aware that they will soon be invited to engage in an important digital forum.
3. **Keep it personal, always.** Use an authentic email from your own organization. Avoid relying on a third-party organization (or an "info" or "no-reply" email account) to forward a survey link. Such mistake will lead to lower response rates. Instead, a direct email from a trusted person always works best; not only because it will bypass spam filters, but also because it builds on the trust of

existing relationships. In general, engagement (and especially digital engagement) benefits from more personalized approaches.

4. **Have gravitas.** The “from” field is very important. A respected and well-known leader should send emails because people will more likely respond to an authority figure.
5. **Reminders never hurt.** Administrator reminders generally cause a noticeable bump in responses. However, make sure to send no more than two of them, and to space them enough to preserve a sense of urgency without annoying the recipients.
6. **Get friendly and familiar.** Personalize the email by including the organizational logo, type-font, and brand colors. Moreover, a digital signature (colored in blue) and a recent picture are always great assets. Familiarity creates confidence and confidence leads to higher response rates.

A few additional technical guidelines can help organizations improve their email outreach. Analyzing over 1.1 billion opt-in newsletter emails across 33 industries, the MailerMailer’s 2015 ‘Email Marketing Metrics Report’ indicates that:

- emails are more likely to be opened early in the day, between 8 am and 12 pm (peaking around 10 am, occurring for the most part on Monday and Friday, and one hour after delivery);
- bulk messages scheduled for delivery at 2 am earned the highest open and click-rates throughout 2014;
- messages with more links yielded higher click rates.¹¹

Figures No. 3 and No. 4 summarize a few related findings:

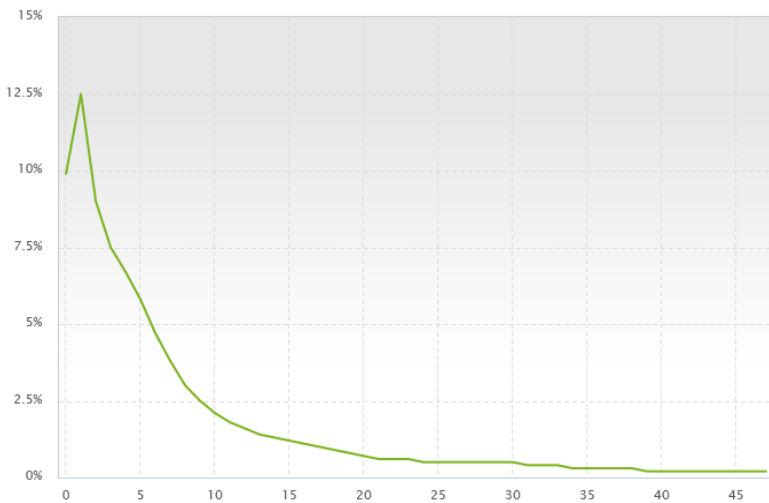


Figure No. 3: Percentage of opens within the first 48 hours after delivery [Source: MailerMailer]

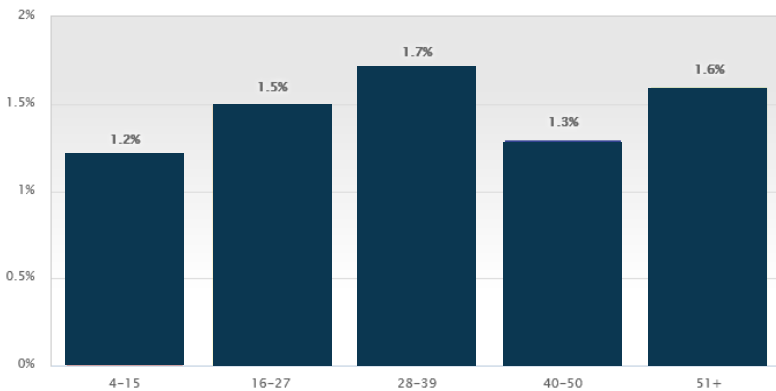


Figure No. 4: Click rate according to subject line length [Source: MailerMailer]

Crafting Effective Subject Lines

A great letter could easily be dismissed if it comes in an unattractive envelope. Likewise, subject lines are like spearheads, often useful to win half the battle. Hence, it is worth setting aside enough time to construct

effective subject lines to increase the effectiveness of engagement strategies. Here are a few considerations;

- **Length and catchwords.** Medium-length subject lines (28-39 characters) produce the highest average open and click rates. The most popularly used words in subject lines are those related to deals or events (*free, sale, party, news, events, newsletter, update, coupons, report, special*), or that focus on timeliness (*today, tonight, week, weekend*).¹²
- **Consider screen-view sizes.** iPhones cut off subject lines after 35 characters in portrait view and 80 in landscape view, while Android limits are 33 characters in portrait view and 72 in landscape view.
- **Avoid being sneaky.** Including a person's name in the subject line could be detrimental because it can likely be perceived as invasive, or even creepy.
- **"Tell, don't sell."** More than anywhere, honesty is the best policy when it comes to subject lines. Having subject lines that are slant, vague, or "advertisee" can lead to emails being dismissed as a sales pitch or as irrelevant. Instead, MailChimp recommends being "boring" by having a clear subject line explicit about the email's content.¹³ To set the right expectations, clarity should trump creativity (even if a tad of provocation never hurts!).
- **Make it urgent or evocative.** Include phrases, deadlines, or questions that create a subtle but direct sense of urgency. They should also evoke curiosity (e.g., "3 days left to register", "what's your view?", "last-minute opportunity"). Using numbers will also add specificity and help set quantifiable expectations—both conducive to a higher likelihood of emails being opened (e.g., "4 ways to improve your work life").
- **Topic-matter first, content-matter second.** Some studies suggest it's more effective to place the content matter after the topic matter (e.g., instead of saying "exciting updates on digital collaboration," it's better to use "digital collaboration: 3 exciting updates").¹⁴

- **Segment and prototype.** Test variations of similar subject lines in random prototyping subgroups, and then assess which have higher open rates. Likewise, it helps to segment audiences to tailor messages by making them immediately relevant to each of the stakeholder subgroups.

Specific Guidelines for External Stakeholders

If advancing a project open to an external audience, there are additional considerations to stimulate and increase engagement.³⁵

1. **Go up front.** Avoid placing the ad in a remote part of a website; instead, bring it front and center to the first top of the homepage.
2. **Make communication ads catchy and provocative.** Use a memorable, sticky, provocative phrase, alongside an image that matches those qualities. For instance, when an IAP2 award-winning municipality was promoting its wastewater treatment online dialogue, their communications team used phrases like 'royal flush' to promote a possibility of building a treatment facility underneath a casino. (They also used images of someone disguised as a big piece of poo walking by the ocean—sending a reminder that creativity certainly comes in all shapes and sizes!).
3. **Have a memorable URL address.** And if the ".com" is taken, always explore using a ".net" that automatically redirects users to the organization's website. That said, practitioners from Bang the Table recommend having a consistent URL though time, as opposed to finding new links for each project. That will build confidence and familiarity and require fewer resources over time.
4. **Make it socially 'un'-awkward.** Facebook, LinkedIn, and Twitter are good allies for broad outreach. Make sure your headers are succinct, with one poignant action verb and a consequence directly related to the benefits the participant will obtain by engaging the survey. Consider also a paid, targeted outreach, as well as Google Adwords. And remember to create a specific Twitter #hashtag for the project.

Insights for More Effective Launch Strategies

Informing participants about the opportunity to get involved in a project is critical to the success of the engagement process. The vast majority of online traffic nowadays comes through one of these sources: a) an organization's website; b) organic Internet search; c) social media; d) direct URL. Communication teams should tailor the content accordingly.

In the case of engagement-projects involving external participants, experts from Bang the Table in Australia offer some suggestions to promote online dialogues. (The same could be applied to internal staff consultations).¹⁶

- Distribute a traditional media release with a snappy headline to local media outlets
- Write opinion pieces for local newspapers (which will usually welcome new content)
- Get on the local radio and talk the issue, remembering to mention the URL
- List the consultation on active local Facebook pages and other social networking sites
- Direct email entire staff members and relevant local communities to inform them about the project – making the URL prominent, and asking them to pass on the email to their friends and family
- Ask local libraries, cyber cafes, local schools, community centers and similar places where people access the web to display signage and/or instructions for joining the consultation

Communication teams will better succeed when trying different media all at once, opting for a relevant, concise message and a simple URL. Well-spaced repetitions and reminders are useful, as is having the top leader as the clear champion of the project. While an initial email sent by a leader is helpful, engagement rates will increase when a respected person replies.



III. Having Gone Live *Driving & Boosting Engagement*

International business consultant and founder of Kaleidoscope Futures Wayne Visser highlights reciprocity as one of the hallmarks of digital engagement. “Broadcast is out; dialogue in,” he affirms. More than ever before, the time is now ripe for two-way communication.

However, motivating people to vote (let alone to complete a survey or engage in a discussion) is costly. Departments with tight budgets and squeezed schedules will thus appreciate high participation rates, making better use of the resources destined to harvest meaningful insights. Here both Ethelo’s experience and our conversations with communications firms and engagement consultants reveal that a 30-60% open-rate/participation levels are commonly expected.

Besides making sure communication departments work diligently to promote engagement projects, once an online project-space has gone live an additional set of practicalities should be in place.

1. ***A known leader must be visible up front, actively engaging the conversation.*** People do not want a conversation with an organization, but with experts in it. A clearly identified person (or ideally 2 or 3 persons) will make participants feel their input is considered proactively (instead of it simply being stored in a bureaucratic comment-pile). That said, for heated issues consider whether the moderator(s) should either be an identified independent third-party and/or staff members who do not have

(and who are not perceived as having) any stakes in the outcomes of the consultation. Upset stakeholders might be suspicious of bias or too many inputs coming from people in authority.

2. ***The leader's input needs to be sober, nuanced, and well balanced.*** IAP2 engagement principles dictate that people should be provided with the information they need to participate in a meaningful way. Also, participants will resent any smell of bias and manipulation but will value added clarity and balanced information that sheds light on their concerns. Unbiased moderation is especially important in highly-contested issues, in which case users will be better served if questions/concerns are addressed by a third party, such as a consulting firm.
3. ***Get other key team-members involved.*** Make sure senior executives and a wide range of thought-leaders in relevant industries (*and who hold differing perspectives*) post comments, answer questions, and participate in discussion threads. This will also communicate that the organization cares enough to bring in experts to be involved in the conversation.
4. ***Justify the voting options.*** Include an explanation (or a scroll-over icon) that contains a concise rationale of why each voting-option was included in the online decision-space. Some people appreciate knowing the reasons behind the options given to them, so a quick note can lead more cautious participants to engage further and create less resistance or opposition.
5. ***Notifications & tracking.*** When participants post technical comments/questions, online forums benefit from having a widget in place to give people the opportunity of notifying the engagement team leader(s) that their technical assistance is being requested. Such notification will prevent comments from running old or forgotten. It will also keep impatience from growing. In turn, once a request has been addressed the platform should notify the participant back by issuing a unique link, directing the user to her/his specific comment/question with the corresponding technical response(s).

6. **Summarize.** Allow participants to choose whether they want a notification for every reply or comment they post, a daily or weekly digest, or both. And make it easy for someone receiving a comment thread alert to unsubscribe at any time, in case the volume of responses become too high or cumbersome.

IV. And Then What? *Report, Follow Up, & Deliver*

Questionnaires and digital engagement strategies that ask people for input will always raise expectations. It's therefore crucial that organizations demonstrate diligence in taking dedicated action based on what was heard. Not doing so may lead to apathy or distrust by some stakeholders, and it will ultimately undermine credibility. In turn, organizations should also continue to listen as a project advances during its implementation stage.

1. **Report on what was heard.** Given that graphics say more than a thousand words, a first step is to put forward a clear and transparent report summarizing the issues identified in the consultation stage. (The Ethelo platform does this automatically, by allowing participants to see other people's comments, as well as the final group results.) Presenting a balanced—and ideally an unedited—view of 'positives' and 'negatives' is crucial for guaranteeing the project's credibility.
2. **Verify that the summary report accurately represents what the public wants.** A focus group should assess a first report draft with a representative sample of stakeholders. Once major edits are in place, the report's results should be open to stakeholders for final

validation and feedback, before moving towards implementation. Allowing conversations to evolve unedited will assist the cause, giving people the opportunity to vent questions, concerns, and frustrations. This will help to reduce unnecessary friction at later stages and to ease execution.

3. ***Explain why certain priorities were selected, and others were not.*** Every project has operational limitations, financial constraints, and other trade-offs. It is thus important to make these explicit, explaining why certain courses of action were chosen above others. Participants will appreciate full transparency; especially if an organization is dealing with a suspicious or hostile public, or with volunteers who contribute without remuneration in exchange.
4. ***Outline a (visual) plan of action.*** A project's main implementation phases, steps, and deadlines need to be laid out clearly, ideally showing the relationship to the main issues and requirements identified in the consultation stage. An up-to-date visual map will create momentum to help participants get on board but also to understand the state and pace of action. Communicating a clear course of activities will reduce levels of uncertainty and serve to address otherwise anxious expectations.
5. ***Monitor the plan with accessible, easy-to-understand metrics.*** In parallel with the above, the project should be regularly and publicly assessed against targets and relevant metrics, offering explanations for how and why any particular target has or has not been reached.

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Digital engagement can provide organizations with a collaborative advantage, making them better fit to thrive in an ever-changing environment. When rapid change and physical distance become the only constants, the need surfaces for nimble, relevant, and participatory online spaces. Such is the key to digital collaboration.

These guidelines should put organizations in a better position to interact with their members and stakeholders. Allowing their constituents to become active collaborators in the different phases of the decision-making process will lead to more informed strategies with higher group support and lower propensity towards risk or implementation friction—all important factors in delivering projects conducive to better, more effective results.



Acknowledgments & Further Reading

A note of acknowledgment for the insights of Katherine Partridge from Stakeholder Research Associates and Breeone Baxter from Human Resources at the University of British Columbia.

In addition to the specific web-articles cited in the endnotes, here is a rather idiosyncratic shortlist of insightful background reads.

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End Notes

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