



Cornerstone
GROUP OF COMPANIES

Putting Insights In Your Corner.

E-mail Marketing Primer



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E-mail marketing is a form of direct response marketing that uses e-mail to deliver sales messages. An important component of legitimate e-mail marketing is that it mails to lists that are privacy compliant.

While e-mail marketing can be very effective, marketers must understand the process thoroughly. Following the rules and the conventions can decrease the costs and increase the response rates of your e-mail marketing campaign. More importantly, failing to follow the conventions can put you in violation of federal and provincial laws.

Working with an established, experienced firm like Cornerstone can ensure that you are in line with all conventions and laws, especially as they relate to privacy compliance. This brief guide should give you what you need to get started.

E-mail Marketing Primer

Considering E-mail

As you consider e-mail marketing as part of your direct response marketing strategy, you'll want to think about its advantages and disadvantages. You'll also want to make sure you comply with the laws and conventions that govern e-mail marketing, and that you follow industry best practices. An experienced vendor like Cornerstone can help you navigate your way through the world of e-mail, minimizing the risks while maximizing e-mail marketing effectiveness.

Cornerstone will research and recommend from hundreds of permission-based e-mail lists to meet your marketing objectives.

We can execute your entire e-mail campaign, from creative to broadcasting and privacy compliance consulting—all while staying focused on matching your marketing objectives to the appropriate lists.

Advantages

E-mail marketing offers two main advantages: cost and immediacy.

Cost

Acquiring your e-mail marketing list may cost more—sometimes much more—than traditional postal lists. On the other hand, there are no postage costs. Those savings of between 35 and 40 cents per address can quickly offset your list costs, making the total mailing less expensive.

Immediacy

E-mail, in terms of sending and responses, is also more immediate than traditional mailing. You deliver your messages and are at once able to gauge responses. With traditional direct mail, it can take much longer to verify the success of your campaign. With e-mail marketing, you know much sooner, sometimes in just a few hours.

Disadvantages

The biggest disadvantage of e-mail marketing is that you risk having your message being perceived as spam. Here's where following e-mail marketing conventions and laws to the letter offers the biggest payoff.

Working with a firm like Cornerstone can ensure that you are following guidelines established by the *Industry Canada Task Force on Spam*. In fact, Cornerstone was an active participant in identifying these guidelines. You may view a summary of Canada's spam guidelines at the *Strategis* website: www.strategis.ic.gc.ca.

Conventions

While sometimes tricky to implement, the main convention to follow is really quite simple: Only send e-mails to privacy compliant lists.

Privacy Compliant Lists

A privacy compliant list is one that has given the people on it ample opportunity to opt out. This means that those whose names appear on the list have had the chance to declare that they do not wish to receive any e-mail. Reputable firms like Cornerstone advocate this approach for business lists as well, even though this category is normally exempt from privacy legislation. View Cornerstone's *Internet Privacy Policy and Offline Privacy Policy* at www.cstonecanada.com/privacy/ to learn how we work to protect our Clients, and their customers' privacy.

Branded Messages

It's also important that your e-mail message bears your brand or shows very clearly who is sending the message. Not only does this make good marketing sense, but it reinforces to the recipient that they are receiving the e-mail because they have an existing relationship. (Your message's body copy should, of course, also state this clearly.)

Include Opt-Out Option

You'll also want to give the recipient a clear and easy opportunity to opt out of future messages. That means you also need to put in place opt-out request procedures. Every e-mail should have an easy-to-see and easy-to-execute means of opting out of receiving future e-mails.

A more detailed breakout of privacy conventions, as well as a comparison with U.S. laws, appears in the *CAN-SPAM Versus Canadian Convention Table* on page 6.

Getting Ready

Once you've decided to include e-mail marketing in your direct response marketing campaign, there are a few things you will need to pull together. Getting ready for your e-mail marketing campaign includes conceptualizing and executing the creative, securing your lists and establishing a landing page.

Creative

Chances are you'll want to take advantage of e-mail's ability to use HTML and the Internet to deliver graphics with your message. These can include photos, logos and other images, and can be designed around a creative concept.

A large firm like Cornerstone has the resources to assist in the concept, development and design of your e-mail. When preparing an HTML or graphical e-mail, you must have a way to host its images on the Internet. Fortunately, firms like Cornerstone are able to do that for you, making hosting images and other back-end considerations convenient and easy.

Even when preparing an HTML message, you should always have a text-format message for those on your list who can't support HTML. Broadcast systems, like those at Cornerstone, send text and HTML at the same time, and default to HTML when it's supported.

Lists

When you work with a list broker such as Cornerstone, it will recommend the list or combination of lists that are most appropriate for your

target. When combining lists, it's also important to work with a firm that has the resources to perform a suppression and other data-enhancement techniques. In fact, even when working with your own customer list, you'll want to employ the kinds of data-enhancement techniques that Cornerstone can offer.

When renting e-mail lists, you never actually handle them. Most lists are sent out by either the list owners or the appointed list managers.

Landing Page

Recipients click through to purchase, sign up or learn more about your offer. As a result, your creative needs to include a link to your landing page. Even more important, you need to establish a landing page to accommodate recipients who click through.

Remember to include your privacy policy on your landing page, and to make it readily available for visitors to access and read.

Refresh yourself on privacy laws by visiting the website of the *Office of the Privacy Commissioner of Canada* at www.privcom.gc.ca or get a specific e-mail marketing review at *Industry Canada's* website at e-com.ic.gc.ca.

Dealing with Spam Filters



Despite your meticulous attention to privacy compliance and other e-mail marketing conventions, you still need to worry about spam filters. These filters are programs, sometimes installed on your prospects' computers, which block suspected spam. Despite your best efforts, your e-mail message might contain certain trigger words or graphics that may cause it to get caught in these filters. These triggers may include the wording of your subject line and the text in your e-mail.

Common Things to Avoid

There are several things you'll want to pay attention to as you put together your creative and message. Please note the following are only suggestions. It is possible for these triggers to change often, sometimes on a daily basis, depending on the latest gimmicks and tactics that spammers are using.

Trigger Words

Many spam filters have been set to reject e-mails containing the following words or phrases:

- save
- savings
- free
- offer
- cash
- satisfaction guaranteed
- see for yourself
- extra money
- no purchase required

Other Triggers

You should also avoid the following:

- Oversized graphics, or thick borders. (Instead, try to have an even ratio of text to images.)
- The use of bright font colours
- The use of large font sizes (2+ and above)
- The use of "Click Here," or "Click Below." (Instead, try using "please visit.")
- The use of a lot of CAPS
- Indicating in the source code that the message body was saved as HTML. (Instead, do not include it; you don't need to, and if it is created in the right program, it shouldn't contain this phrasing. We recommend that you don't use Front Page or the "save as a web page" feature in Microsoft Office programs.)
- Mentioning search engine listings or rankings



Comparing Canadian and U.S. Spam Laws

When targeting an audience in the United States, Canadian e-mail marketers need to adhere to that country's CAN-SPAM law. You may learn more about this legislation by visiting the website of the U.S. Federal Trade Commission at www.ftc.gov.

Canadian Marketers Mailing into the U.S.

Canadian marketers mailing into the U.S.—even though they are Canadian—must comply with CAN-SPAM.

Use the CAN-SPAM Versus Canadian Convention Table on page 6 to help you better understand the difference between CAN-SPAM and Canadian conventions.

U.S. Marketers Mailing into Canada

When U.S. e-mail marketers rent a list that is owned, managed and deployed by a Canadian firm such as Cornerstone, they are not required to follow CAN-SPAM. You may choose to adhere to CAN-SPAM; however, list owners are not required to agree to certain requests you might have.

On the other hand, if you are renting a list owned, managed and deployed by a U.S. firm, the list owner has the right to ask you to follow CAN-SPAM legislation. Go to page 6 to compare some of the differences between CAN-SPAM and Canadian conventions.

Upwards of 40% of all e-mail received is considered spam.

The time and money associated with spam is significant for both consumers and businesses alike.

Legitimate e-mail marketers are increasingly challenged to get their message through.

Cornerstone has the expertise to help you manage these challenges.

CAN-SPAM Versus Canadian Convention Table

The following table makes it easier for you to compare the differences between CAN-SPAM and Canadian conventions.

E-mailing in the U.S.	E-mailing in Canada Using a Canadian List
CAN-SPAM specifies that creative must contain a valid opt-out link. These links must remain valid for 30 days.	Canadian guidelines say only that creative must contain a valid opt-out link.
Opt-out link from the list owner must be included in the message. Advertisers are REQUIRED to include their own opt-out link.	Opt-out link from the list owner needs to be inserted in the message. Including an advertiser opt-out link is OPTIONAL .
Mailer opt-out suppression lists are MANDATORY for future third-party e-mail list rentals.	Mailer opt-out suppression lists are NOT mandatory for future third-party e-mail list rentals.
Suppression files for advertisers must not be more than 10 days old. If a recipient has opted out from that advertiser through a third-party list within the 10-day timeframe, the advertiser/sender is exempt from disciplinary action.	All Cornerstone managed lists, consistent with Canadian conventions, have removal links that write back to a source database that is updated hourly.
Creative MUST contain the physical mailing address of the sender. P.O. boxes are not acceptable.	It is RECOMMENDED that, to increase credibility, creative contain the physical mailing address of the sender.
“From” and “Subject” lines can’t be false or misleading. U.S. law specifies that they must contain sender information.	“From” and “Subject” lines can’t be false or misleading. To be consistent with best practices, they should contain sender information.
Header/footer must accurately identify the origin of the e-mail and give opt-out instructions.	Header/footer must accurately identify the origin of the e-mail and give opt-out instructions.
Message must have a functioning “From” line and functioning “Reply” e-mail address controlled by the list owner, both clearly displayed.	Message must have a functioning “From” line and functioning “Reply” e-mail address controlled by the list owner, both clearly displayed.
If list is not opt-in—and prior affirmative consent has not been given—the “Subject” line must bear the designation “ADV.”	Canadian conventions do not require the designation “ADV.”
If names are not affirmatively collected, there must be a visible indication at the time the names are collected that the operator of the website or service may transfer, sell or rent the information. There also must be a valid means for opting out before signing up.	If names are not affirmatively collected, there must be a visible indication at the time the names are collected that the operator of the website or service may transfer, sell or rent the information. There also must be a valid means for opting out before signing up.

The Cornerstone Group of Companies

Our mission is to help our Clients find and keep good customers. We will accomplish this by providing our Clients with the best prospecting leads available and helping them to be the best in the world at managing and enriching their customer databases.

The List Group

- List Brokerage Services
- List Management Services
- List Processing Services
- Data Products
- Search Marketing Services

The Database Group

- Marketing Database Services
- Fundraising Services
- Publishing Services

Every business unit at Cornerstone has been set up with a specialized set of products, services and experienced professionals dedicated to fulfilling the needs of marketers.

We invite you to call us at [1.416.932.9555](tel:14169329555) to explore how we can make your customer experience a long-lasting one.

