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# Email Signatures

for  
**dummies**<sup>®</sup>  
A Wiley Brand



Make an impact with  
your email signature

Use the 7Cs framework to  
build the best signature

Maximize your business  
and social reach

Second Edition

# About Exclaimer

Exclaimer is the leading provider of business email signature management solutions, with over 75 million users in more than 150 countries. Exclaimer provides solutions for brands like Audi, Sony, Mattel, Fidelity, the BBC and more organizations of all sectors and sizes.

Founded in 2000, Exclaimer is a certified Microsoft Gold Partner, which is the highest status achievable, and holds multiple industry awards including the Queen's Award for Enterprise. Its award-winning solutions allow organizations to easily turn corporate email into a high-volume, low-cost marketing platform.

In this guide, Exclaimer leverages its years of experience to provide an in-depth look at why email signatures are an effective, free, flexible marketing channel for promotion, social media and brand management.

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# Introduction

Welcome to *Email Signatures For Dummies, Second Edition* – your guide to using email signatures for promotions, social media activities, and brand management.

Email is a critical communications mechanism for every business on the planet. Some businesses even go as far as talking to their customers only through email. But your customers are just some of the people who see your emails. Colleagues, suppliers, and partners also receive emails from you but – perhaps more importantly – so do potential colleagues, potential suppliers, potential partners, and potential customers. All are important people in your business life and you probably send them a lot of email, so it makes sense to consider the business emails that you send as marketing opportunities. Email signatures offer you a way to seize those opportunities.

## About This Book

This book explains why email signatures are a great way for you to maximize your social reach when marketing, to extend your brand to email communication, and to realize the full potential of marketing campaigns and promotions. We serve up a variety of case studies and signature examples to illustrate what works – and what doesn't.

## Foolish Assumptions

In writing this book, we've made some assumptions about your knowledge of email signatures, why you might be interested in this book, and what you want to get out of it. We assume that:

- » You use email in a corporate setting.
- » You're passionate about branding, social media, or promotions.
- » You like to keep up with emerging trends in marketing.

# Icons Used in This Book

To make it easy for you to navigate your way to the most useful information, we use these icons to highlight the key points:



TIP

The target draws your attention to top-notch advice that you can put to practical use.



REMEMBER

The knotted string highlights particularly important information to bear in mind.



WARNING

Danger! These helpful alerts offer practical advice to help you avoid potential pitfalls and costly mistakes.

## Where to Go from Here

You can take the traditional route and read this book straight through from start to finish. Alternatively, you can skip between sections, using the section headings as your guide to pinpoint the information you need. Whichever way you choose, you can't go wrong. Both paths lead to the same outcome – a better grasp of how you can make the most of email signatures as a marketing opportunity. Bon voyage!

## IN THIS CHAPTER

- » Pinpointing what email signatures are
- » Understanding the type of email in question
- » Recognizing what makes signatures an appealing channel
- » Considering both internal and external communications
- » Introducing the 7Cs framework

# Chapter 1

# Seeing Email Signatures as a Communications Channel

Email signatures as a communications tool possess all the traits of a staple marketing channel. So that's why, in this chapter, we present signatures as a comprehensive communications channel.

To start you off on the subject, we explore just what email signatures are, and their relevance in the corporate (not direct marketing) arena. Then we take a look at the many positive attributes of the email signature channel, from targeted and controlled to valued and trusted, so you can see for yourself the power of this channel.

Finally, we introduce you to the 7Cs framework, the foundation for building email signatures and the subject of the subsequent seven chapters.

# Defining Email Signatures

You could think of an email signature as being rather like a modern-day, digital business card. First and foremost, an *email signature* tells people who they're dealing with. At its most basic, an email signature includes personal information such as your job title, department and maybe your phone number and email address. However, you can take things further and transform a basic email signature into a new marketing communications channel for your business by including your company logo, brand elements, promotional banners, advertising slogans, social links and content, or any other such marketing devices.

You can also put email signatures to effective use as an internal communications channel. Marketers instinctively think of external markets, but in large organizations, emails are often sent between coworkers, so considering the role that signatures can play in these internal emails is important. Maybe you take internal marketing just as seriously as you take external marketing. Maybe you see your colleagues as customers. Maybe you have direct responsibilities in that area. Maybe you work in HR, and corporate communications are a big part of what you do. Email signatures have a lot of potential for internal emailing, and in many cases, that potential has yet to be properly tapped into.

Email signatures, then, aren't just business cards for the digital age. They can be an independent and valuable communications channel.

## Focusing on the Corporate Email, Not the Direct Marketing Email

Direct mail is a great communications mechanism in the right hands, and we're pretty sure you have experience of it – either as giver or receiver, or even both. But direct mail isn't the topic of this book.

The email signatures we're talking about in this book are for your corporate email. That's every email sent out of your corporate

email server – the hundreds and thousands (and sometimes millions) of emails that your people send out every day in the normal course of their work. Those emails have value to the recipient:

- » They contain critical business information.
- » The recipient trusts the sender.
- » The recipient either already has a relationship or is in the process of building one with the sender.

Generally, corporate emails are peer-to-peer – one of your guys sends an email to one of their guys. Maybe one of your guys sends an email to one of your own guys, or several of your own guys or several of theirs. Corporate emails can also include those sent to customers from automated sources, such as your Customer Relationship Management (CRM) system. Email signatures can add value to these emails, too.

## Knowing the Attributes of the Channel

So why should you think of email signatures as an independent and valuable communications channel?

The attributes we outline in the following sections, even taken individually, make for an attractive communications channel: the targeting and control associated with corporate email, the high volume, the constant presence, and the potential relevance of advertising. But the email signature channel combines all these attributes, each increasing the value of the next – tight targeting enhancing the business relevance, which in turn can be further aided by its trusted/valued source.

### Targeted

You know who receives the email, in what context, and when they'll see it – which provides immense opportunity for segmentation and specialization. For example, different departments speak with different types of contacts (compare the potential customers speaking to sales and the current customers speaking to customer support, for example).

Also consider the different stages at which you get in touch with an email contact: To continue the preceding example, pre-sales technical support may speak to the contact before they've tried the service, but the account management team will speak to the contact as they're negotiating to close the deal.

Thus, you can use different signatures on each group's email (customer support, pre-sales support, sales, account management) to communicate different messages to different segments, or at different stages of the sales process.



REMEMBER

Email signatures offer a unique opportunity to target marketing messages more precisely than perhaps ever before.

## High volume

Studies estimate that each worker sends roughly 35 emails per day, a figure that continues to rise year on year. In, for example, a 50-person office that's maybe 1,700 emails every day, which constitutes a substantial marketing audience.

In short, if something is being displayed on your corporate email, you can guarantee that it will get an audience – and a large one at that.

Interestingly too, no matter what your business size, you'll consider that audience large, because it scales with the size of your workforce and operations.

We would also take the opportunity to point out the onward travel of emails: they often get forwarded and copied between colleagues and contacts long after you sent your original message. This is a key facet of the channel, especially when used to reach external partners like suppliers and customers.



REMEMBER

You could consider your signature an advertisement that's displayed on the internal decision-making process: each contact, from CEO to project manager, who sees your forwarded message also sees the content your signature displays. In this way, the already high volume of the email signature channel benefits from some strong force multiplier and network effects.

## Continuous display

Continual display is a major feature: contacts see the signature repeatedly and persistently. That runs counter to a few channels, such as the direct marketing email, where the contact sees the message only once.

That's why signatures have maximum effect in contexts where ongoing business relationships are maintained between a single point of contact and a corporate partner: say your sales staff and your customers, your procurement staff and your suppliers, and your logistics staff and your distributors.

This way, you can vary the signature for effect, altering the message or merely the way it's communicated. Or you can use the signature to influence those interactions in a subtle way, without disrupting the relationship your colleague and the contact have – for example, cross-selling an add-on product or service.

## Valued

Your signature appears on a message that's delivering a valuable payload. The contact wants to read this message, so you can guarantee at least one impression with each signature sent.

Because the email is valued, the contact looks at your signature content closely. You can bring up a cross-sell, offer a social media resource, or suggest an event at the very moment the reader is most invested in the topic: as they consider the terms of some deal or the logistics of some provision, for example.

## Personal and trusted

As the reader and sender know each other, the reader feels an implicit trust in what the sender says. At the absolute minimum, the email is known to be legitimate, and in many cases, the mere fact it's from a sender the reader trusts may be reason enough to react to a campaign banner.

Email signatures also have a situational element to them. The reader is in lean-back mode, taking in the content of your email, so what better time could there be to introduce them to your latest promotional campaign or social media content?

## Controlled

You can control and predict the context in which your signature may be seen. Contrast that with, say, advertisements that may be displayed alongside contradictory content – like an airline ad beside a story about an air disaster.

The main content of the email, if the sender is doing a good job, will always be positive about your organization – it's not going to undermine the message in your signature. You also know the visual setting of the signature: You know it will be mainly black text on a white background in Microsoft Outlook or on a smart phone.

## Business relevant

This is a channel used to discuss commercial subjects and professional matters – the marketing content is linked (either directly or indirectly) to what you're discussing at that very moment.

In line with the earlier attributes, targeted and controlled, you can use the signature to further enhance the relevance of that content: If you know your signature is going on an email from sales, you know it might be relevant to mention pricing or potential additions. If the signature is on an email from the customer service team, you know that you might do well if it's relevant to ongoing use of your product or service.

## Internal opportunity

All the preceding attributes also apply to internal email: messages sent to colleagues, subordinates, superiors, and anyone within your organization. The signature is still trusted, they still value it, it's still relevant, you still control the content, and you can target it even more precisely.

In fact, the larger your company, the more essential a channel it becomes. Staff may be stationed miles apart in separate buildings and offices; a small message under their email can be an effective way to reach them all.

# Getting the Architecture Right: The 7Cs Framework

It's easy to think of an email signature as wholly analogous to a business card – a block of text with the occasional logo or splash of color added – conceived and designed as a single entity. We prefer to think of an email signature as built from components. We find modelling signatures this way helps us think about issues such as

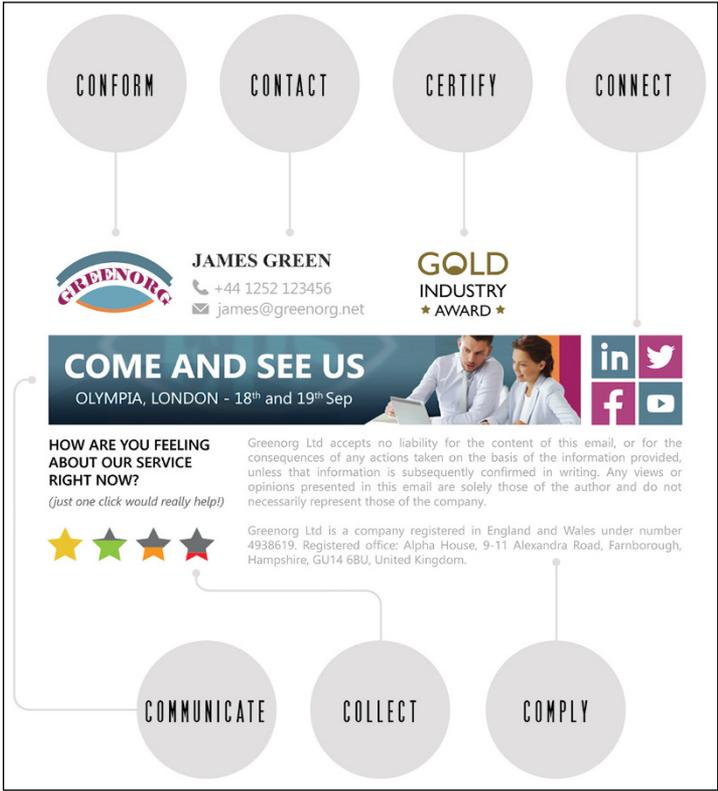
- »» Which components are common across all departments and which are best varied between departments?
- »» Which components need localization to different offices and regions?
- »» Which components are time dependent and/or fast changing?
- »» Which components are managed by marketing, HR, legal, or IT?
- »» Which components contain data that's best provided from an existing corporate resource, such as people directories?
- »» Which certifications and/or qualifications do staff hold that are useful and appropriate to include on an email signature?
- »» What messaging can we send through this channel?
- »» How does the message vary with time and within the context of the signature?

We've built our 7Cs framework as a basis for building component-oriented signatures. Figure 1-1 provides a core illustration of how the framework operates in practice.



WARNING

The design in Figure 1-1 exhibits the highest level of visual impact that we generally recommend to customers for an email signature. The most important part of the email remains the text that the sender types. We never recommend that a customer deploy an email signature that compromises the readability or accessibility of the intended message. Some people with a very strong brand or sales-led culture take things a little further – for example, those in retail or distribution may put a graphical banner at the top to communicate their latest sales promotions. But these are the exception, not the rule.



**FIGURE 1-1:** The 7Cs framework.

In the following seven chapters we highlight the important elements of each component in the 7Cs framework and, where possible, illustrate its use based upon real-world customer experience. We discuss each part of the framework at length, examining closely how signatures perform functions, considerations to keep in mind when applying the learning yourself, and key takeaway concepts for continued and advanced use.

- » Making sure that all emails conform to the brand
- » Creating a design that matches up with the rest of the brand
- » Getting the design working smoothly in HTML

# Chapter 2

## Conforming to Brand Guidelines

Your emails get viewed by thousands of important people every day, so you need to treat email signatures the same way you would any other corporate communications: brand them.

In this chapter, we take you through the need for conformity in email signatures, and how you can design and deliver effective signatures that tally with your brand specification.

### Laying Down Brand Conformity

Do your business cards, headed paper, compliment slips, product packaging, invoices, signage, and online presence conform to your brand guidelines? We bet they do. But what about your external emails?

You send hundreds or thousands or even millions of emails every day to existing and potential customers, suppliers, and partners. Are they branded? No? Did you tell your brand manager?

Say you've realized that you don't want to miss out on all those potential impressions, and you are sending out branded emails. Who designed them? The senders? Is your brand manager going to be happy to let everyone design their own email signature using their own design skills? Let us ask a different question. Would your brand manager be happy to let everyone design their own business cards? No, we didn't think so.

The issue is one of control – you need policies and enforcement systems to ensure that the physical appearance of your email signatures complies with brand standards.

## Designing the Email Signature to Fit with Your Brand Specification

We don't think we've ever spoken to a single customer that did not include branding in their email signature design considerations. Branding is important, and unlike the other elements of the 7Cs framework, conforming to branding informs the design of all the other components. You'll be using your brand logos, designs, colors, and fonts, all of which have to blend in with the rest of the signature (campaign banners, certifications, social media logos, and so on) and the contents of the email to achieve maximum effect.

Your designer is probably going to have to extend your brand guidelines specifically to cover corporate email. You'll probably want to include your logo in the signature, but shouldn't the contact details and disclaimer be there too, in your corporate typeface, and so forth? The design isn't necessarily simple. You need to use your brand elements across the whole design – it's not just about the logo.



REMEMBER

The principle purpose of an email is the sender's message, not the marketer's. You don't want to over-brand your emails and compromise that fundamental purpose.

You'll probably instinctively look to your corporate stationery for inspiration. Starting with overall design, you may want to look at

your business cards. Lots of our customers work this way, but you do have to go beyond the business card design. For example:

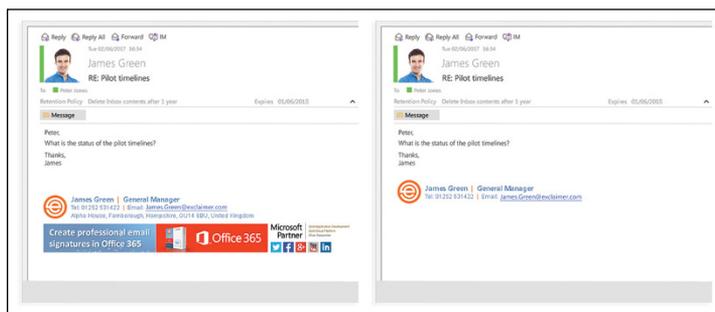
- » Many business cards don't have white backgrounds. That works well if you want to make your business card stand out in a crowd – which you often do – but a block of color at the bottom of an email draws the attention of the reader and pulls them away from the message. In our experience, colored backgrounds on email signatures don't work well unless the blocks of color are small and subtle.
- » Business card designs generally combine contact details with elements of branding. If you design that way, then you're only considering two of the 7Cs.

You may have instances where having more than one email signature, to give you a choice of signatures for different situations, is desirable. For such purposes, you can design variations on a theme – two or more email signatures that clearly differ from one another but which contain sufficient identifiable branded elements to leave the reader in no doubt as to where the email has come from. Figure 2-1 shows how an existing email signature can be redesigned for simplicity – for internal use, for example.



REMEMBER

It's vital to consider email as unique and worthy of specific attention.



**FIGURE 2-1:** Altered settings demand altered styles; for example, email to colleagues needs less branding.

## COMMUNICATING QUALITY

A construction vehicle company wanted to use its email signature to come across as more professional and respectable through email. Initially, it faced several problems:

- The company didn't have an official email signature. Instead, staff were creating their own. Some used an outdated version of the logo. Some used no logo at all. A few even used a logo they had put together themselves.
- Many email signatures weren't coded correctly and images would fail to display properly.

To solve these issues, the company used a dedicated email signature solution to control all user signatures centrally. Instead of letting users create their own signatures, everyone was automatically assigned a personalized signature made from an official template. That meant every signature was made from the same HTML template, so the correct tags were used on images, which ensured that they displayed correctly in different programs and email clients.

## Translating a Design into HTML

Like with other forms of digital marketing, creating a branded email signature requires co-operation between your designer, your HTML code-smith, and the person who manages your email infrastructure.

After you have a design, you need to translate it into HTML. Your designer is probably used to working this way already, but email signatures are not the same as web pages for a number of reasons:

- » More varieties of email clients exist than web browsers and the differences between the ways they interpret HTML are more extreme. Also, in this age of tablets and smartphones, you can't know what device your email is being read on.
- » You have a choice about how your images are delivered. You could include a web-hosted link to your logo, but some email clients don't automatically display these unless the recipient specifically requests it – and who's going to be curious enough about your logo to download it specially? You could add your

logo image as a simple attachment, but do you really want all your emails to look like they have an attachment? How is your IT administrator going to feel about all those extra bytes flying around the network? There are issues about images to address and decisions to make that need corporate consideration and decision making – don't leave them up to individuals.

- » Each time a message is replied to, the sender's email software takes the whole email apart and rebuilds it into a new HTML structure. Your email may look great when it's received, but by the time it's been replied to a few times, it might look like the result of an explosion in a brand element factory.

**The result: Your HTML guru is going to have to do lots of testing, and your IT administrator needs to buy into whatever you decide upon.**

## SECURING BRAND AWARENESS

A PR agency wanted to use signatures to solve a brand awareness problem. On a day-to-day basis, the agency dealt with journalists via email, sending press releases, event invites, videos, graphics, and so on.

But journalists are contacted by many PR executives. The agency wanted to add strong, memorable branding to its email signatures, so that when journalists saw a message, they would know it came from this particular PR agency.

The agency instated a company-wide requirement for all staff to use the official signature and enforced that with a dedicated solution. Then, it created two versions of the signature: one for replies and one for new messages. That way, staff could add a signature to every email without becoming annoying after a few replies back and forth. (Highly colored, deep signatures can become annoying in the context of an email conversation but, when used correctly, they can show nicely where one reply ends and another one starts.)

The agency found that, as a result of the signatures, journalists were more likely to remember them and the high-quality stories they provided, making them more likely to get in touch or look at the attachments, even when the story didn't seem to be newsworthy (at least initially). Signatures were essential for adding that visual, graphical reminder of the brand identity on every single email.

#### IN THIS CHAPTER

- » Recognizing the need for clear and consistent contact information
- » Choosing which details to include
- » Considering extra touches: handwritten signatures and photos

## Chapter 3

# Contact Details: Making Them Count

Contact details matter. They give the email recipient information about the company structure and the responsibilities and seniority of the sender.

The contact section of an email signature is simple, right? Name, job title, department, phone number, and so forth all laid out in a clear and easy-to-understand grid. In truth, you haven't much room for marketing strategy in the contact section but, nonetheless, you need to consider a few important issues on the subject of contact details.

In this chapter, we look at ensuring consistent, professional contact details in all email signatures, taking you through what to include and some style considerations.

## Ensuring Consistency across the Board

A principal issue around contact details is that of control. Staff can probably be relied upon to know their own contact details, departments, and job titles, but are they providing the same information

as their colleagues, and are they presenting it in the same way with consistent layout, spelling, capitalization, and abbreviation?

For example, we've met people who couldn't spell 'principal engineer' even though they'd been one for ten years. Mistakes like this aren't of vital strategic importance but the misspelling can make the company look bad – even if it's only on internal emails. It goes without saying that errors on contact details cause at best mild irritation in those you value highly.



WARNING

Rather more subversively, some people deliberately provide incorrect information. For example, an engineering manager tells everyone his job title is VP Internet Appliances when it isn't, just because he prefers the title to his real one. Whether that's important to you is highly dependent upon your corporate culture, but consider your partners and suppliers whose culture you can't control and possibly don't understand. They may rely upon your job titles and your departmental names to intuit the structure of your organization and the way it operates. If those titles are wrong or inconsistent, they may end up making attribution errors.

## ENSURING CLARITY

A cosmetic products company went through an extensive restructuring after it was purchased by a larger fast-moving consumer goods group. The incoming CEO embarked upon a strategy intended to improve responsiveness in local markets. Local managers were given responsibilities for adapting products to their local markets.

This was obviously a period of great change and uncertainty for the company, and the greatest business challenges did not center around up-to-date email signatures. However, it was vital to the success of the reorganization that suppliers, distributors, and retailers in particular were quite clear on who they were dealing with and what their role was in the updated structure.

When you consider the volume of business carried out by email, you can easily see how the simple expedient of getting job titles and departments right can assist this communication process.

Another element of the contact details component that causes some consternation is personal qualifications. If only one person includes their bachelor's degree on their email signature, the implication is that nobody else at your organization has one. Such an event generally triggers an outbreak of qualification one-upmanship.



TIP

Our advice is to have a policy and enforce it. If qualified staff matter to your customers, suppliers, and partners, insist that relevant qualifications appear on a signature. If they don't matter, then insist that qualifications don't appear – if they don't help the business, they're probably divisive.

The bottom line in all this is that professionalism counts – and inconsistent email signatures are unprofessional. (See the examples we give in Figure 3-1.)



**FIGURE 3-1:** Separately, these signatures may look acceptable, but side by side the inconsistency looks unprofessional.



REMEMBER

Consistency, accuracy, timeliness, and robustness to change are important. You need policies and systems to ensure signatures contain the information that you decide is important and nothing more. Those policies also need to ensure the information is accurate and updated when necessary.

# Deciding What Information to Include

As a minimum, we recommend you have the following contact details in an email signature:

- » **Your name:** Obviously!
- » **Your department:** This information helps the recipient to understand your role and your function.
- » **Your telephone number:** Yes, the recipient can look it up on your website, but why make them do so?

You also need to consider how contact variables change with factors such as department, seniority, and region. Do you provide direct dial numbers where they are available? In multi-national and global business, making clear where you're located can also be a big help, particularly where your company operates from multiple locations.

What about including the email address in the email signature? Many internet commentators berate those who do so, and on first inspection, they have a point – you can see the sender's email address because it's right there, in the 'from' field, where you expect it. But some email clients, like Microsoft products, use display names, not email addresses, to enhance readability and familiarity. Sure, you can hit reply, but what about the times when you forward the email to someone else for action? They might see `karen.green@exclaimer.com` in the 'from' field, but then again, they might see 'Karen Green', and the latter isn't much use when the action necessitates dispatching an email to the original sender.



TIP

We recommend including an email address, and linking it with a 'mailto' link so that the viewer can simply click on it to send an email.

This guidance applies equally well to internal as well as external email. Sure, you don't need to include your address, but job title and department are still just as relevant, and including the internal phone number saves the recipient doing a look-up in the corporate directory. And you could include the building or floor details, so the email recipient knows where to find the sender for a meeting.

# Thinking about Style

Take a look at Figure 3-2. As you can see, style matters!



**FIGURE 3-2:** No branding, no style – this signature lacks any brand identity.

Chapter 2 examines designing the signature in line with the brand, and the contact details area is just as important as the logo and overall look.



TIP

Think about using a hand-written signature image, as if the email is a physical letter that the sender has signed himself by hand. In a customer-intimate business – where the contact must maintain a long-term relationship – this can add a personal touch that the recipient might identify with (see Figure 3-3). It also raises the possibility of using other elements to reflect personality and identity within the mail, like the sender's photo.

'A photo?' we hear you cry. Yes, it's a slightly controversial suggestion. How much it appeals probably depends upon your corporate culture, your industry and your tendency toward extroversion.



**FIGURE 3-3:** A handwritten signature adds a personal touch to an email signature.

We've worked in our fair share of large corporations and often we've wanted to know more about the person we're talking to through email. The popularity of personal photos on social media sites, including the business-focused LinkedIn, suggests there is

value in putting a face to written communication, particularly in customer-facing job roles.

So why not include your photo as part of the contact section in your email signature, as in Figure 3-4? Internal, external, or both, you choose. If nothing else, it's much harder to be rude to someone when you can see their face, so maybe if we all had our photos at the bottom of every email we sent, we'd be a whole lot nicer to each other!



**FIGURE 3-4:** A photo brings an email signature to life.

## IN THIS CHAPTER

- » Seeing the business benefits of including certifications in signatures
- » Knowing which certifications are suitable in a signature
- » Keeping control of changes and accuracy

# Chapter 4

## Certifying: Establishing Credibility by Showing Credentials

**T**rust and respect are hard to earn – especially through email, where reader and sender might be divided by time, distance, tone, and culture. What seems like a reassuring statement for the sender may seem disconcerting for the recipient. But a certification displayed graphically in the signature can establish credibility visually and instantly.

A *certification* could simply be a PhD or similar set of initials after your name. It could be the crest of the New York State Bar Association if you're a lawyer. It could be a Microsoft Certified IT Professional logo if you're an IT administrator.

In this chapter, we help you see the benefits of showcasing certifications – organizational, occupational, and personal – and we help you choose which to include in email signatures and how.

# Seeing the Benefits of Certification

When it comes to displaying certifications in email signatures, you have compelling reasons to do so.

## Looking authoritative

Take a look at Figure 4-1. Now flip back to Figure 3-4 in Chapter 3. Do you see how the email signature in Figure 4-1 immediately gets across the meaning that the sender is certified, and in doing so imparts authority and expertise?



**FIGURE 4-1:** Adding certification to the email signature.

A key benefit of including a certification is that you look authoritative. You're a learned, trained, expert professional and your certification says so. Even if the recipient of the email doesn't recognize the acronym in a certification, the graphic can instantly trigger a recognition of the awarding body's logo and name – even contacts who have only a vague knowledge of the certification can recognize its value. For an example, see Figure 4-2.

## Motivating staff

Consider the motivational value. By putting their achievements on every email they send, you're making a strong statement about staff's expertise and value: it matters to you and you want to show it to all your contacts. That has a major motivational effect.



**FIGURE 4-2:** Certification logos are easily identifiable.

## SIMPLE ADDITION, BIG BUSINESS BENEFIT

In many regions, translators are expected to be accredited – to vouch for the accuracy of their transferred work. A small translation company was encountering problems because its accreditation was not clear, and it used email signatures to solve the organizational and logistical issue. Here's how:

- The company often lost competitive comparisons for an apparent lack of accreditation. So in every email sent – whether from sales or accounts payable – the company's accreditation was established. This reduced the level of confusion over whether the company had the relevant qualifications.
- Contacts were confused by what certifications meant (some are only used in certain parts of the world). Linking the relevant symbol in the signature to a landing page that explained the qualification helped contacts understand whether it applied in their region.
- Contacts failed to understand when they were emailing translation staff and when they were simply emailing an account manager. With occupational-level certifications on email signatures, contacts could instantly see when they were emailing an official translator and when they were emailing supporting staff.



TIP

Morale-boosting could be worth considering in departments with high attrition and specialization: Customer service teams may need very organization-specific training and yet their day-to-day experience may make them feel undervalued or underappreciated. Displaying certifications can indirectly demonstrate how important their contribution is.

## Making good use of hard-won awards

Serious expenditure can come with these certifications: the tuition fees for courses, the time off to attend them, the cost of examinations, and so on. If you don't use that certification to prove your authority and credibility, you're not getting all the value from it. Whatever it achieves, better sales conversion rates or faster customer query resolution, the benefit is impossible to access if your contacts don't know it's there. Naturally, the expertise staff gain from their qualification is important too, but equally important is the image it can create.

## BUILDING TRUST

A full-service marketing agency had trouble agreeing on some strategies and content with clients:

- Disputes often arose over the tactics the agency put forward.
- Clients would compare any collateral to their competitors' – and challenge reasoning behind any differences.
- Clients would reject suggestions based on personal taste, not professional strategy.

With a small change to the agency's account managers' signatures – adding a Chartered Institute of Marketing Certified logo and a Google AdWords Professional insignia – the issues were resolved. By communicating the agency's expertise on each message, its statements carried more weight: clients didn't dispute them, compare them with what others said, or reject them due to misunderstandings.

# Deciding Which Certifications to Include

The objectives are obvious – inform, reassure, impress – but there are different levels of use. Your company may have the certification, not the individual staff. Or employees in a certain team may have the certification but not the entire workforce. Or a handful of individuals may have an assorted set of accreditations not strictly necessary for their role. All these certification types provide serious value, but they need to be managed and leveraged in different ways.

## Organizational qualifications

Organizational qualifications apply to the whole company. Examples might include being a Microsoft Partner organization or meeting a quality standard such as ISO 9002. Displaying these qualifications on everyone's emails is a good idea because they reflect well on the whole organization and will be understood as useful and authoritative by any recipient. See Figure 4-3 for an example.



**FIGURE 4-3:** An industry award or certificate makes your company stand out.

## Occupational qualifications

Occupational qualifications apply only to staff in a certain team or role – for example, being a Microsoft certified professional support engineer or a Google AdWords qualified digital marketing expert. Staff can show their occupational qualifications through emails for personal and peer esteem as well as customer assurance.



TIP

Different staff have different levels of qualification. Just make their signature match whatever appears on their business card, which should reflect their different levels of training and development and the importance and relevance of the qualification to the people they deal with.

## Individual qualifications

These apply only to one individual – like a degree or awards they won.

Decide whether the certifications are relevant to their activities and responsibilities. A marketing manager with an MBA might want it on their signature, but a graphic designer with an economics degree might not – or they might; it depends completely on the business and the situation.



TIP

Take a lead from LinkedIn: if it seems relevant enough to put on a LinkedIn profile, it's probably right for the signature.

## Linking the Graphics

Ideally, you link the certification graphic to a page from the official certifier. Of course, you want to capture data on who clicks your certification and how often. For example, if certain clients click on a certification that isn't for them, you may want to try harder explaining it on your site. (For information on data tracking, head to Chapter 6.)

## Controlling Change and Accuracy

Certifications and staff change. You need a logical and structured change management process in place. When staff get qualified or a new staff member joins and you have new types of qualifications, you need to represent those correctly.

Even before that, you need to make sure the correct logos and text are used to represent each credential and that the links to any follow-on pages are correct. We cover simple but foolproof ways to ensure that in Chapter 10.

## IN THIS CHAPTER

- » Driving interest in social media through email
- » Offering links that cement your network
- » Showing content that will hook a reader's interest

# Chapter 5

# Connecting via Social Media

In this chapter, we look at how you can include social media in your email signatures to drive your marketing. The process we take you through is simple:

1. **Become a social organization.**
2. **Sign up – provide links to follow and share.**
3. **Showcase your content.**

## Being Social

Social media has changed the rules of marketing. What used to be a one-way conversation where marketing departments did the talking and customers and clients did the listening has now become a rich and vibrant discussion that customers and clients value. A preference is developing amongst the buying public to deal with social organizations, and if you're not currently promoting your social nature using email then you're missing a great opportunity to extend your social reach – particularly when you

consider that many of your existing customers and partners may not be regular visitors to your website.

Email signatures have a strong situational element. The reader is already thinking about you when reading your email, so what better time to introduce them to your Twitter feed, your Facebook page or your blog? They probably have the interest and can spare a few minutes to take a look right when they've finished reading your email.

## Providing Links to Read More, Share, or Follow

The link portion of your email signature's social media content is essential. You're showing a little bit of the content you provide on social media, and adding a link lets any contacts act on the content. They can realize the value you offer (or, as often happens, remember it) and connect with you accordingly.

If you're looking for inspiration, take the hugely impressive success story of Unilever adding a LinkedIn 'Follow' link to its email signatures and going from 40,000 followers to 235,000 in ten months – and, essentially, for free. Keep in mind that Unilever probably doesn't use email to communicate with the supermarket-goers buying most of its products – this is a business-to-business organization using social media to connect with, potentially, suppliers, employees, and employee candidates.

Take a look at Figure 5-1 to see how interactive buttons and links can integrate social media with an email signature.



FIGURE 5-1: Integrate social media links in your email signatures.

## INCREASING AUDIENCE SIZE

A massive fast-moving consumer goods brand had too few fans and followers for a company of its size. Beyond the number of fans, their behavior was also problematic:

- Followers would rarely speak to the company or about it to their own networks of followers.
- Many contacts would link with the company's employees on social media but not the overarching company profile.
- Responses to polls, content, and blog entries were consistently below expectations.
- Advertising costs on the various networks exceeded acceptable limits. They had a lot of impressions but very few meaningful and cost-effective reactions.

With these points in mind, the company added social media to its email signatures. In less than a year, it tripled its total audience on social media and vastly increased the amount of interaction it had with fans. It paid significantly less for advertising through each network – more impressions evinced a click, and more clicks had positive outcomes.

The company also found that campaigns conducted through social media had a greater network effect. Promotions conducted solely through social media were actually instrumental in feeding interactivity through other channels – for example, live events and recruitment drives.

## Displaying and Offering Content

By including dynamic content in your signature, you can show off your most recent Tweet (as in Figure 5-2) or just the headline of a recent blog post (naturally, the whole post would be too large to include) to encourage contacts to see why they want to connect with you through social media.

Any content generation portal – say, your blog or your Twitter feed – can be the core of your email signature's social media content. As we discuss in Chapter 1, the channel is constant, so the signature is perfect for continually showcasing new entries on the blog and demonstrating your activity there: the eBooks you might provide, the how-to videos, the webinars, and so on.

**Karen Green** | Sales Manager | +44 1268 238 955



**Latest tweet:** Between 2009-2017 we helped set up over 250 apple farms in Ethiopia

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**FIGURE 5-2:** Get social content like your latest Tweet into your email signature and give people a reason to follow you.

As the email is from a trusted source and delivering a relevant message, the contact (customers or suppliers) wants to keep up to date on whatever you're doing. That makes adding social media content to the signature a great way to get a lot of new fans for free.

## HIGH VOLUME, HIGH VISIBILITY

A prominent hedge fund uses an email signature to reach all of its contacts by including a newsfeed with two objectives in mind:

- The company appears responsive and informed to potential or future investors. The feed proves the company is on top of changes to relevant markets, it knows what's happening, and is taking a position on it.
- The company establishes itself as a source of information – for potential customers or any corporate contact. In doing so, it builds a network that will inevitably attract more business and interest to them.

Now, by their very nature, campaigns are likely to change over time. In this case, the hedge fund needs to stay aware of which stock tickers and feeds to display – which are its most important assets? At which points in the year? The signature changes to reflect the hedge fund's different needs, not just from campaign to campaign, but from month to month.

## IN THIS CHAPTER

- » Putting some thought into the design
- » Thinking about when people will see the banners
- » Getting maximum sales benefit
- » Gathering data from campaigns
- » Linking marketing activities to CRM and marketing automation platforms
- » Harnessing the power of the banner internally

# Chapter 6

## Communicating with a Campaign Banner

What better place to communicate your campaigns? Email is where you already communicate with everyone your company knows. Your organization probably already uses advertising, events, press, and more to promote new products, services, opportunities, and any message. Whatever your aims, the email signature channel can be instrumental in achieving them when you include a *campaign banner* – a strip of graphical detail often placed under the rest of the signature (but above the disclaimer). Your target audience is likely to see the banner at a time they're guaranteed to be interested: when they're already speaking to you.

In this chapter, we give you a banner education, from design to timing, sales potential to data gathering. Then, at the end, we take a look at how you can use banners within your organization to communicate with staff.

# Designing the Banner

Here we outline some considerations for the design.

## Going for simple over flashy

Flick back to Figure 1-1 in Chapter 1. The banner shown there is quite lively, but it doesn't have to be.



REMEMBER

The banner goes below relevant, significant correspondence – it naturally carries weight and credibility. The reader easily notices it because there are no other distractions, like competing ads or other graphical content. The email content has also (hopefully) engaged the reader's full attention, so you can tone down the intensity of the banner design (if you want; naturally, every business is different).

## ADAPTING BANNERS FOR EMAIL

A menswear label that sells through retailers and through its online store wanted to use signatures to give information to the retail stores carrying its merchandise. The account management team emails the retailers that retail their clothes to consumers, creating an ideal opportunity to use their email signatures to market to those contacts. So, the company used a campaign banner underneath signatures to promote some of its less popular but (potentially) more lucrative products.

Initially, the signature banners were identical to the online banner ads the company paid to display on websites and the Google Display Network. However, the company found the call to action wasn't suited to the context of an email and, of course, any animations didn't work in email. So the company had to make three essential adaptations to make its banners work on emails:

- It redesigned them to cope with the lack of animation ability.
- It resized them to fit the shape of an email viewing window, making them much wider and less square.
- It adapted the call-to-action, making it more relevant to someone already speaking to the account management team.
- It also added a URL tag to track clicks on the signature in Google Analytics and its CRM system.

Figure 6-1 gives an example of a more subtle banner. Sedate, simple, minimal – the design suits the email signature channel far more than a banner ad visual. An ad on a web page has to compete for attention against the native, first-party content and the other third-party ads. That busier context requires a much bolder visual than the plain black text on a white background of an email – so adjust your image accordingly.



**FIGURE 6-1:** A simple email banner.

## Using data to personalize

As an email recipient is uniquely known to you, it's possible to use their personal data when they click the banner. You can use this data to pre-fill a registration form for them or to personalize a heading with the visitor's details on the target web page, for example. Email as a marketing channel has this unique advantage – the data it holds about the reader – which you can capitalize on.

Of course, you wouldn't want to manually update the target URL for each recipient. The good news is that you can use an email signature management solution to automatically perform this task. We talk about this more in Chapters 9 and 10.

## Creating variations

We recommend adjusting the banner for each department based on who the sender – and, potentially, the recipient – is. The point of doing this is to make the banner relevant to the people who are

communicating and to the context in which they are doing so, and to align your message with their interests.

First, you can tell who'll see the email – or at least, who the reader speaks to in your organization – which gives you a good basis for what the reader will be interested in. If the reader is talking to your sales team, it's quite likely they'll be talking about buying from you. If they're talking to your customer service staff, there's a good chance they're asking for help or input. If they talk to the most senior member of your sales team, they might be placing a very large order – and if they talk to the junior staff, the order might be very small.

So you can alter the messaging for different teams to give their different types of contacts a message they'll care about. Potential buyers could see an introductory offer that returning customers can't, for example. One regional office could promote an event that's local to it – but offices elsewhere could show an event for their area.



TIP

You might want to give end users a choice of which signature to display: You provide a set of official, on-brand, approved signatures but they get to choose which one will be most effective in each scenario.

## A MORE INFORMAL, NOTICEABLE CHANNEL

A university uses signatures as an alternative to traditional direct marketing to alumni. They send regular, personalized, informative update emails from real people to every alumnus. Their signatures include banners that promote new initiatives, fundraising campaigns, and student achievements that complement the textual content of the emails. The alumni appreciate the informative content of the emails so opening rates are extremely high, and placing the marketing content within the email signature ensures that it has greater impact without compromising the value to the recipient.

# Considering Timing and Context

Just adding and then removing a banner is an underuse of email signatures. You might want to change that banner after a certain date: show one banner this month, then another next month, and so on. Instead of showing one message for a brief period, you can let it evolve over time alongside your other promotional activities.



REMEMBER

The messages may change from week to week or more frequently. Scheduling them and their content in advance is as necessary here as it is in any other channel.

Figure 6-2 shows an example of how a banner may change to reflect recent news items.



FIGURE 6-2: Using banner variations to keep content current and interesting.

We've all seen banners that are months or years out of date: still promoting a December sale in March or an event from 2015. Make sure that you regularly update your signature banners. Making use of the email signature management solution that we discuss in Chapter 10 can help here. A dedicated solution can also enable you to make great marketing capital from emails sent by your automated systems, like customer relationship management or invoicing systems. You need to take particular care to ensure that banners don't perish – out of sight cannot be out of mind. Chapter 10 looks at this in more detail.

## RIGHT TIME, RIGHT AUDIENCE

A large television network in the US uses a banner on emails to its sponsors – not consumers, but the media buyers working in companies who advertise with them. The banner promotes some of the primetime ad slots and links to statistics on how effective they've been for other customers.

The banner is seen at a very precise stage in the buying/evaluating process: after the media buyers have contact with staff. So, the buyer is already aware or interested, and the network merely looks to turn that into desire or action.

## Using the Banner to Sell

Sales agents can often find upselling or cross-selling slightly precarious: as they're trying to close a deal or build a relationship, they have to bring up an extra component or cost to explain. An email signature removes that difficulty.



TIP

Consider the email channel a 'half-duplex' mechanism. Like two-way radios, only one party can speak at a time – you transmit an email, receive a response, and so on. The signature can break a sales conversation out of that: it provides a second message, piggybacking on the agent's message. It's noticed but not attributed to the negotiator.

In an email conversation, the signature can bring up a topic – like an upsell – that a sales agent would like to sell but without disrupting the connection they've built with the client. The banner is visible under every email – and therefore guaranteed to be seen – but by using the banner, the sales agent isn't pestering the customer about that upsell. Instead, the sales proposition is in a neutral space, separate from the sales agent's words.



WARNING

After agreeing and (seemingly) hooking into the customer's needs, trying to push something new and different can undermine the feeling of affinity and understanding that's built up. The signature allows the best of both worlds: it pushes the idea without being pushy.

## REAPING THE BANNER REWARDS

A car dealership added a campaign banner to signatures to upsell and cross-sell certain extras on cars – like satnav or hands-free mobile integration. The dealership has since observed a 27 per cent rise in customers taking optional extras, which constitutes a roughly 80 per cent rise in the total value per month of accessory sales. In this instance, they gave sales agents a set of signatures to choose from, so they could decide which packaged extras their signatures promoted.

Figure 6-3 shows how the banner can propose a product or package cross-sell without forcing the sales agent to work it into a conversation.



FIGURE 6-3: Example of promotion in a banner.

## Tracking Data

What good is a campaign if you can't get insight on it? To get any real idea of a campaign's impact, you want to track data on how your contacts interact with your banner.



TIP

By adding what Google Analytics calls a *parameter* to each link in the banner, you can take everyone who clicks to the same page and record whose signature brought them there. The users get the same experience, but you get data on what they did. Google Analytics can tell whether a visit came from a click on a sales agent's signature or a tech support advisor's signature.

## CHANGING CUSTOMER BEHAVIOR

A software house uses signatures to manage customer behavior. It sells its software online, through its website, and licenses it completely remotely: there's no requirement to ship or mail anything to the customer. So, calling the sales team directly is a drain on resources – instead, orders can be completed with virtually no cost of sale if customers use the online store.

That's where the signature comes in. The agency uses a 'Buy Online' link in the signature banner to let contacts instantly purchase the software through the online store. Buying activity used to be 40 per cent online and 50 per cent direct (a remaining tenth bought through other means); the signature refined that to some 75 per cent online and just 15 per cent direct.

Through the Google Analytics results, you can gauge how interested contacts were in each proposition – if they clicked on your pre-sales agent's banner more than your account manager's, maybe they care more about the discount the pre-sales agent offers than the service the account manager suggests.

You can also change the parameter for each email recipient – so you know not only whose email signature was clicked, but the email address of the person who clicked it.



WARNING

By using corporate email for marketing, you get to exploit not just the high visibility of the medium, but the information it has access to – who sends it, when it's sent, who it's sent to – and target the message at different customer types with perfect precision.

## Linking to Other Marketing Systems

It is likely your company uses some form of CRM (customer relationship management) solution to consolidate all customer information into one easy-to-use system. You may go even further

and use marketing automation platforms to reach customers at various points of the sales cycle.

Now, you may be asking what this has to do with email signatures. Think for a moment how often a signature banner is potentially seen – let's face it, we're talking about thousands upon thousands of people a day. Who are these people? Are they sales prospects or current customers? The moment someone clicks your banner, you need to capture their data and then 'nurture' them so they better engage with your company. When used in conjunction with a marketing system, you can maintain a complete history of all actions any recipient takes interacting with one of your signature banners.

Say you're promoting a new eBook your company has written. Rather than just sending out a mass email blast, you simply add a banner to your email signature that directly links to a download form. Someone clicks the banner, fills in the form and downloads the guide, while your CRM records that the lead came via your signature. You can then ascertain how effectively the banner is working based on click engagements and modify the content as needed.

Now, let's consider your sales department. After all, one of the key purposes of marketing is lead generation. A signature banner can subtly ask a recipient to engage with your brand: You then track the activity back to your CRM and marketing automation platforms. As someone clicks the banner, your marketing system automatically sends an email with access to materials like brochures, while simultaneously creating a task for sales to contact them directly. The recipient will now be more receptive to a sales pitch as they have shown a genuine interest in what you can offer them. All this from a simple signature banner!



REMEMBER

Signature banners can easily generate inbound leads for your company but they're worthless if you have no way of following them up. Marketing systems automate the lead nurture process and inform you that a lead has come via the email signature channel.

# Using Banners for Internal Communications

Staff may start and finish work at unusual times or spend days away from the office. Other communication methods may rely on them coming to you. But email reaches staff wherever and however they work. So if they're working, they're seeing your banners.

You can use banners internally for anything you want your staff to know. Say you're trying to bring their attention to a new clean-desk policy. Why don't you just highlight the issue where their attention is already?



TIP

Here are some ideas for things you can include in the banner:

- » Internal transfer and job opportunities.
- » Offers for company-sponsored training and certifications.
- » Staff events or internal meetings.
- » Menial reminders: turning computers off at night, checking whether a meeting room is booked before entering, and so on (for an example, see Figure 6-4).



FIGURE 6-4: Using a banner for an all-staff reminder.

The beauty of a banner is that staff don't have to groan at seeing a notification email from HR and reluctantly click 'Open' – or 'Delete'. The info is just under any email they may read over the course of the day.



REMEMBER

Reiterate but don't irritate. You can have a message that's visible all day, every day for months without pestering staff because readers perceive the signature passively. There's no phone to pick up or invite to open; it doesn't require action (which causes procrastination) on the employee's part.

## INTERNAL CAMPAIGNS

A large public sector organization uses banners for internal communications. It has an internal version of its signature, with details like internal phone extensions and office locations. It adds an internal campaign banner to that internal version of the signature. With a banner under every internal email, each message becomes a reminder. Since introducing the banners, the organization has experienced a huge increase in participation and co-operation.

- » Finding the perfect placement for gathering feedback
- » Getting fast feedback for great results

# Chapter 7

## Collecting Customer Insight

Customer feedback is important to help improve a company's services or offerings. However, getting that feedback can be very difficult. Customers don't want to spend their time filling out a survey with dozens of questions. After all, what's in it for them?

Customers are more willing to leave feedback if they can do it quickly and won't waste too much of their time. A simple way to gain customer insight is through using 1-click feedback buttons in an email signature.

In this chapter, we discuss how you can use email signatures to quickly and effectively collect customer insight.

### Deploying Perfect Placement

Here are some reasons why an email signature is a perfect place to ask for customer feedback.

## Trusted communication

Every company finds value in customer insight: it is often essential to helping a business prosper. Good feedback is more likely to turn customers into brand advocates, while negative feedback enables a company to adapt its offerings and make improvements. So try to capture feedback of any kind where possible.

However, gaining this feedback can be a difficult task. More often than not, customers ignore something like an automated email requesting them to fill out an online survey. They're even less likely to answer questions over the phone or in person.

For companies who deal directly with their customers through direct email, it's highly likely that the customer recognizes you as a trusted source, but is simply not interested in completing complex surveys. However, by offering an opportunity for them to provide some simple feedback in an email signature, customers are more willing to give insight into their experience. They're already talking to you, after all.

## Amplifying volume

Back-and-forth emails to customers also increase the exposure of an email signature incorporating feedback buttons, improving the chances of completion. If the customer keeps seeing these buttons and only needs to click one choice, what have they got to lose? The easier you make it for them, the more responses you'll receive, as customers are more willing to give insight into their experience repeatedly.

## INCREASING CUSTOMER FEEDBACK

A popular online clothing retailer, whose customer service mainly revolved around direct email, was struggling to gain insight into the experience of its customers. The retailer was using automated emails with a link to an online customer satisfaction survey, but was only having a 15 per cent success rate.

The retailer decided to add 1-click feedback buttons in the customer service representatives' email signatures and measure the results using a customer feedback solution. After a few months, it saw a sharp rise in responses and had an overall success rate of 75 per cent.

# Fetching Fast Feedback

One-click feedback buttons are a great method for getting quick results. They are unobtrusive and offer easy opportunities to gain valuable customer insight.

## At the click of a button

The fastest way to gain customer feedback really can be as quick as the click of a button. By using a third-party customer feedback solution, you can easily collect and measure real-time customer insights by using simple feedback buttons in an email signature. Each button is assigned a link to measure the level of customer satisfaction, from low to high. These links can then direct customers to separate landing pages where they have the option to add further comments.

For best results, keep the buttons simple – for example, use emotion symbols as buttons, showing happy, neutral, and unhappy faces.



TIP

Using universally recognized symbols for buttons, such as smiley faces or stars, as shown in Figure 7-1, can help increase your chances of a click.

 **exclaimer**

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**Microsoft Certified and Award-Winning Tools  
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**FIGURE 7-1:** Recipients recognize the emoticon buttons and are likely to interact with them.

## Avoiding long surveys

We've all received one of those customer satisfaction surveys that takes up too much time, asking question after question, and which you end up abandoning. Customers who want to leave feedback also want the process to be quick and painless.

By placing 1-click feedback buttons in an email signature, with an optional place to leave comments once clicked, your customers avoid the monotony of completing long surveys.



REMEMBER

As with any other email signature element, make sure that the buttons aren't too large and don't distract from the overall message.

## IN THIS CHAPTER

- » Knowing why organizations include email disclaimers
- » Displaying them without ruining the look of your signature
- » Ensuring they're included in all necessary emails
- » Keeping up with legal changes

# Chapter 8

## Complying: Including a Disclaimer

It may not be the most thrilling part of business or email, but the disclaimer is a matter of lawful and safe operation for many organizations. Naturally, the reason for including one is clear: to avoid a fine, lawsuit, or similar penalty.

The specific content of disclaimers varies. You may even have to comply with various regulations on where it goes and at what font size. Furthermore, sections of each disclaimer may require a level of personalization. Simply writing 'the sender' and 'the recipient' for some adjudicators is not enough. Instead, you could be required to include the actual sender's name ('Karen Green,' for example) to comply fully with the rules.

Almost all advanced markets already have regulations that require businesses of certain sectors or sizes to include a disclaimer on their emails. The EU countries, the UK, the US, Australia – whether you only do business in one state or every continent, it's worth checking the laws that may apply to your email. Some are sector-specific: healthcare, insurance, tax advice, financial services. In these cases, who needs the disclaimer can vary: Strict policies or systems are required to make sure email remains compliant.



You can find a great many resources online ([www.emaildisclaimer.com](http://www.emaildisclaimer.com) is the one we recommend), and you may want to seek advice from your own teams.

We don't cover each specific legal guideline in this chapter, but we do look at the common concerns you need to address.

## Considering Placement

The appearance of a disclaimer can be slightly unpleasant. When people complain about email signatures, they tend to allude to lengthy email disclaimers. So let's combat that.



When you're the first sender in an email conversation, place the disclaimer somewhat apart from the rest of the signature. That way, the reader sees the logo and campaign banner before they can notice the disclaimer and switch off. See Figure 8-1.

When you're replying, put the signature just below your own message but the disclaimer at the very bottom of the email chain. It's still on the email, but it's away, where the reader won't be annoyed by it.

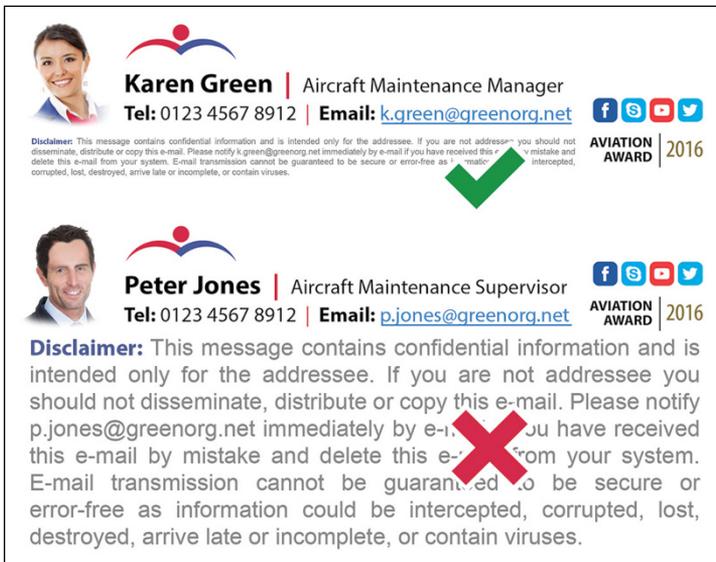


FIGURE 8-1: Keep the font size of a disclaimer small.

# Knowing Who Must Use the Disclaimer

Consider who really needs that disclaimer. In many cases, it's everyone within a certain set of departments – it may be a lot of users but not quite everyone. For example, your financial advice disclaimer looks a bit pointless in an email from your graphic designer.

Define whose email needs the disclaimer and only assign that notice to their email. This helps, firstly, to avoid mistakenly absurd exchanges. For example, in investment banks, investment departments and analyst departments must comply with different regulations and therefore need different disclaimers. Secondly, selectively assigning disclaimers helps to conserve space on everyone's email.

# Keeping Pace with Change

You may start trading in a region with new requirements or offering a service/product that falls within a particular law's remit. Worse still, even if you're completely aware and in tune with what your firm's doing, the law itself may change and leave your email in violation. Laws change, roles change, companies change – make sure the disclaimer keeps up.



WARNING

Don't get caught out. Few are thrilled by disclaimers but many have been hurt by ignoring them.



REMEMBER

The key is to stay forewarned of upcoming changes and then change your disclaimer as soon as the new law or laws take effect. We're not saying you need to read the *Harvard Law Review*; new developments will likely be covered in your industry press.

The problem is: How are you going to manage change across a whole organization? Your legal advisers want content that's correct, accurate, and completely in line with their approved version – if an employee cuts out a line, changes the font size, it may not have any regulatory value at all. So how do you ensure employees can't alter text you need left alone? Head to Chapter 9 for details.

## IN THIS CHAPTER

- » Knowing the various methods for managing signatures
- » Considering advantages and disadvantages
- » Seeing how a dedicated solution solves the issues of other approaches

# Chapter 9

## Managing Signatures

**R**epeatedly, you encounter aspects of the email signature channel that require dedicated management processes to regulate – changing the signature easily and quickly, maintaining a uniform visual style, ensuring contact details are correct, and others.

In this chapter, we discuss the available management methods and what each of them offers. Then, with reference to the key advantages a management method should offer, we examine a dedicated email signature solution and discuss whether it provides those key benefits and how it does so.

## Plumping for Anarchy

What do we mean by anarchy? We mean that every employee is responsible for creating and managing their own email signatures.

Of course, most successful organizations wouldn't choose the word 'anarchy' to describe any of their internal processes. In fact, very few businesses would allow their brand to be left entirely up to individual staff – with a multitude of different versions, one for each employee's interpretation of what looks professional.

With only a handful of staff working in a loose collaboration, you might be all right. At that size, you can manage signature changes by word of mouth, and there isn't as much of a brand when a single person constitutes one-third of its entire workforce.



WARNING

However, as soon as any group wants to raise itself to a professional, sustainable level, they need to take a more reasoned approach to self-presentation. For the same reason, you don't let staff design their own business cards, you don't want them doing their own signatures. In fact, signatures are even more of a management concern than business cards. If you let staff build and design their own email signatures, it's not your marketing channel: it's theirs.

Now, say you're willing to sacrifice that marketing opportunity. Even if you only want to use the signature as a personal, digital business card on an email, it's going to be sub-standard. Your employees might change their signatures to a title that flatters them – or amuses them. Employees might not understand how to set up or configure the more technical components of the signature. All that low-quality production is, naturally, intolerable for a company that wants to leave a lasting and professional impression.

Finally, changing signatures – to, for example, use them as a communications channel for timely, dynamic messages – is impossible through the anarchy method. Altering any part of signatures, making anything uniform and regular would require employing at least some method of management, however rudimentary.

## Getting IT to Copy and Paste

This is what most companies do after discounting anarchy – IT bods go to each PC in the office and copy/paste the signature into the users' email clients automatically.

Even with 20 staff all told, this represents a pretty big labor cost for IT. Remember, these are employees who understand RAIDs, SANs, DAGs – if you don't understand what those are, you can understand how expensive experts in them will be. The cost of IT professionals walking from desk to desk may be very substantial.



REMEMBER

These are not minds that you generally consign to menial labor – and they know it. They may not want to take on this task. You have to negotiate with them each time you want to update a signature, change some detail, or correct a mistake.

As soon as you notice you've made even the slightest slip-up, you start the whole process all over again. You need more assistance from IT, another man-week of their time, and another lengthy dispute over how soon they can do it.

Here, change is impossible – because it's too hard and too costly. IT is busy and expensive: Any project will be an uphill battle, even with the friendliest and most compliant of system administrators, because neither of you want to let every tiny change to the signature become an enormous undertaking.

## Self-Copying

You can email out a template and ask every user to copy/paste it into their Outlook – this avoids the labor cost of IT handling it or the chaos of DIY design. Or does it?



WARNING

For starters, that clickable email address link is a time bomb. It's a link, just like any other. The same way you can make any given text a link – 'Exclaimer' to 'www.exclaimer.com' – changing the visible text doesn't affect the link behind it. When users change that sample text 'your.name@exclaimer.com', they might not change the actual email address link behind it – so clicking on 'karen.green@exclaimer.com' will still open a new message addressed to 'your.name@exclaimer.com'.

And what if users just decide they don't like your version? What if they just take what they like but ignore the rest – or all of it? We know someone who changed their job title to 'Supreme Being' under this system. People are obsessed with what's 'professional' or 'impressive': They might think they know better than you do. But they might not know better at all. See Figure 9-1.



**FIGURE 9-1:** This user changed their job title and didn't update their email address.

You could have users email an example to you for review. Every member of staff in the company sending you an email for you to proofread – this doesn't sound quick or simple. How many emails are you required to review? Then what happens when you spot an error? You have to send the correction, have the user send the new one, check it again, and so on. And even then, all of this is assuming the user won't just ignore your template when you're not looking.



With the self-copying system, you can't manage changes effectively because you've given control over to the mob: Any adjustment goes through their internal 'Do I care enough to comply?' approval process, followed by the 'Do I agree?' decision tree. If you're lucky, a few of them might put something through (with a little detail or adjustment of their own), but in many cases they simply won't bother to copy and paste the revised design.

## Handing the Reins to IT

If you have them, if they're willing and if they know how to, your IT staff can write some homemade code into your email systems that adds the signature to emails automatically.



You're still losing control with this method – IT staff now hold all the control; the marketing department merely becomes a source of images, link URLs, and designs. Marketing staff have to work within IT's policies and processes: if there's a change management form, if there's a helpdesk ticketing system, it all transpires at the IT team's pace.

You don't want to offload the task onto someone who doesn't understand or respect the significance of your instructions. IT staff might not realize that you only want a specific landing page – and they might think it's fine to just link to any page on your website.

Designs ruined by the system's limitations won't help: An IT department-based approach is unlikely to be able to achieve some desirable features, and staff just won't be able to do certain styles and layouts. In some cases, their failure may just be to do with your complex requests and their lack of experience. But certain restrictions may mean you can't put your signature directly under your message – a programmatically difficult thing to do. Instead, your signature will appear at the bottom of the whole email trail, under all the replies. And you can't set up one signature for replies and one for new messages.

## Using a Dedicated Solution

A specialist email signature solution will make managing your signatures easy.



REMEMBER

A dedicated solution eliminates manual labor and simplifies the design process. You don't need to raise an IT helpdesk ticket for every change – you change it. You don't have to ask end-users to copy/paste a signature – a dedicated solution creates it. IT doesn't have to add code or content manually – the solution deploys it.

The result is a much easier process for you to follow:

- » **Designing:** You create the template yourself in a dedicated editor. You pick colors, drag and drop, resize, and so on yourself. Better yet, you can preview the final appearance instantly.
- » **Updating and distributing:** You only need to click 'Save', and you're done updating or distributing the new signature. You don't have to negotiate with IT or review everyone's email.

But it's not only you who benefits from a dedicated solution:

» **End users:** They don't have to worry about how their email signature changes – it does so automatically. Like their desktop backgrounds, it's all automatically done for them.

But they can have a little control, if you like, in terms of how they use signatures. A dedicated solution can give them a set to choose from. If you attempted to roll out a set of two or three signatures using any of the above methods, you'd triple the workload. But with an email signature solution it's simple; you can keep total control within your department, but give the end users a little control over their day-to-day use.

» **The IT department:** Email signatures are taken care of easily, quickly, and, crucially, without any IT effort. They don't have to work hard on building some template for you or setting up some complex workarounds within your equipment. They get to control the information system aspects of signatures – like defining the rules used to group employees into different departments or the data source used to auto-complete contact details in the signature. That way, they can keep control of all the aspects of signatures that naturally fall under their remit: ensuring they're scalable, reliable, and more. It's easy, quick, and, crucially, doesn't involve any effort from them.

#### IN THIS CHAPTER

- » Using one system to control all corporate email signatures
- » Creating different signatures for different departmental needs
- » Making signature changes and updates a breeze
- » Allowing marketing to own the email signature channel
- » Making cost savings

# Chapter **10**

## Benefiting from a Dedicated Email Signature Solution

In this chapter, we give you the lowdown on what's great about using a dedicated solution to manage email signatures. Do you want signatures on staff emails that are relevant, consistent, accurate, and current? Do you want to design and make changes in minutes? Do you want to gather insightful information about email recipients to inform campaigns? Do you want to streamline, and in doing so, save money? If so, read on to find out how . . .

## THE TOP TEN BENEFITS OF A DEDICATED SOLUTION

Specialist email signature solutions eliminate manual intervention and simplify the design process. Here are the top ten reasons for investing in a dedicated solution:

- **Retain central control.** All signatures are created and managed via one console, either online or in a software application.
- **Design templates easily.** HTML signature templates can include all elements needed to ensure brand consistency.
- **Give different signatures for different departments.** For example, the marketing team could use a signature with extra branding, and the sales team's signature could promote a special offer.
- **Auto-complete contact details.** Everyone's information is taken from your company database, so it is guaranteed to be correct.
- **Test your creations.** You can see how your signature will work in clients' emails before giving it to all users.
- **See signatures on any web-enabled device.** High-quality signatures appear on all emails, even if they're sent from mobile devices.
- **Run smarter promotional campaigns.** Dedicated solutions let you add a signature banner for a forthcoming event or promotion that can be updated or removed on a certain date.
- **Prevent unauthorized designs.** End users won't be able to use their own signature – only the one you give them.
- **Incorporate social media elements.** A pre-made and customizable strip of interactive social media icons can be added to a signature with ease.
- **Track campaign performance.** An email signature solution lets you glean as much insight from your signature as you do from other marketing activities.

# Maintaining Control

You always get the final say over the company-wide signature – not a separate department or uninterested end user.

An email signature solution removes the unknown quantity: individual staff activity. Whether they ignore your template, misinterpret it, or ‘improve’ upon it, all manual options leave other staff in control rather than the marketing team.



REMEMBER

The added value of the signature is using every employee’s email as a tool for business. Without some control, you can’t do that. It becomes your controlled content on their individual communication.

If it’s an individual’s piece of collateral, they might not remember to consider all the higher-level business aims like reinforcing brand consistency or communicating marketing messages. But if *you* centrally update the signature, there’s no need for the user to be involved at all.

## Segmenting effectively

Without control, there’s no room for strategy, but with a dedicated solution, you can easily segment the channel. It gives you control over which staff gets which version, and you can assign a specialized signature to each department.

Each department corresponds to different parts of the customer journey. Customers will see the sales team’s signature first. After they purchase, it’s the customer service signature they see. When you check in on them after some time, it’s the account management team’s signature they see.

## Keeping links tight

With central control, no one can hijack the value certain web links bring – salespeople linking that campaign banner, not to your event page but the sales query form, for example.

## Avoiding disagreement and disillusionment

Some staff will always dislike the official template compared to their own thrown-together design. They’ll make changes, use their

own version, or add some elements in to make it better.’ This means you invite another group to meddle with your signature template.

Then there’s the IT department. Even if the staff are a big help setting up, they don’t want to mess with the design or take on your strategic changes.

As well as disagreement, disillusionment can creep in. With each change you ask people to make, colleagues take your updates less and less seriously – along with all your other activities. Just like you put off external contacts with a sloppy signature, colleagues may ask, ‘If they can’t get this right, what can they get right?’ It’s a negative internal communication for marketing.

With central control, disagreement and disillusionment are of no concern. You’re editing the signature directly, so you don’t depend on other people to help you enact any changes.

## Managing Change

Marketing is defined by change, and you need to change your strategy constantly to keep up with the market or, better still, stay ahead of the game.

Your marketing output is no different: advertisements reflect a change in direction or your business card relates your new organizational structure. Email signatures must be part of that set and are an ideal channel for agile marketers if they can be updated rapidly.

Here are common situations in which you need to be able to make signature changes quickly and easily:

- » **Time-based campaigns:** Maybe you’re in fashion, and you’re going to London Fashion Week, or you want a New Year’s Eve-themed signature. Great idea! But if the signature goes out-of-date, some readers might think you’re unprofessional or inattentive.
- » **Contact details:** People get married, divorced, promoted, and so on. Obviously, contact details need to keep up. We know a customer who lost a very large potential order

because a newly promoted tech support engineer still had 'general assistant' as his job title in his email signature.

» **Legacy:** When your company details change, if you move offices, for example, you need to make sure your signature informs your contacts and then shows an updated version with the new address afterward. That's an interim management task that a solution can dispense with smoothly.

With an email signature management solution, making signature changes is as simple as saving a Word document. You change it, save it, and all signatures in the company are instantly updated.

However, do you want every company signature to be the same? You may need to change it for each department – giving account managers an out-of-hours number but sales a mobile number. Central control lets you decide who gets which template and when.

Beyond that, you may need to change a signature on a short-term basis. If you want to promote your end-of-year discount, do you really think you'll get everyone to update their email with a banner? Or take it off when the sale's over? Only a dedicated solution can automate that update and ensure everyone gets the latest signature without actively updating it themselves.

## EFFECTIVE CHANGE MANAGEMENT

A media research company serving some of the largest television and publishing corporations in Europe ran into some trouble as it reorganized and rebranded the type of service it provided. In essence, it transitioned from offering both a research and advisory service to a purely research-based operation. This meant that certain job titles, 'strategist' and 'adviser', changed to 'analyst' and consultant.'

The company needed to update all email signatures and transition to the new job titles in an appropriate timescale. With a dedicated solution, it was able to update everyone's signature with minimal effort rapidly.

The solution also allowed a simultaneous update across the company's multiple offices. Had this been done manually, some offices might have been ahead of others, and for months afterwards remote workers might have used outdated signatures.

# Ensuring Accuracy and Consistency

What about errors, like spelling mistakes and broken links?

Even IT staff aren't above a few errors – after all, they're only human. If you had to copy/paste every single signature manually, you'd make a few mistakes, too. Or that homemade programming IT staff use for signatures could contain mistakes. One slip-up in that dense code could mess up everything.

A solution not only perfectly automates email signature production and distribution, but it also enables you to preview signatures so that you can see how they look before giving them to all users. You can even check which teams have been assigned which versions of the signature.

## Appreciating the Convenience Factor

Of all the manual methods we describe in Chapter 9, none of them are easy. Whether you're bickering with IT for hours or sifting through email after email to scan for signature errors, they all pose a hefty demand on time.



WARNING

As useful as they are, we know that email signatures are never going to be your primary communications channel. They're great for building on communications you already have, but they won't supersede or replace them. If they're not convenient to update, you're never going to use them to their maximum potential. So, when managing signatures takes just a few clicks, you can do whatever you want as soon as you need to.

Convenience is good news all round:

- » **Marketing staff:** When it can take weeks just to set up one signature, even testing a design far outweighs any benefits. But when staff can quickly change a signature, they can capitalize on its value – using a campaign banner to promote an event or embarking on a cross-media campaign to bring more contacts from corporate email onto social media. It also decreases the scope for internal disagreements with end-users and IT.

» **IT staff:** In the vast majority of cases, IT staff are friendly and co-operative. However, marketing content often requires several cycles of reviews. IT may not be ready for that and might become frustrated at constant signature amends. These are people used to seeing a problem and then setting up its solution, not going back to square one each time someone has a better idea. Enter an email signature solution – exit stress and inconvenience.

## GETTING CONSISTENCY

An agency producing television and print advertisements used by some of the largest companies in the world needed help with their signatures. Credibility and conformity are major issues it had to balance against a frontline workforce composed of mainly entry-level staff.

Here are the issues, and how a dedicated solution helped the agency:

- As some staff maintain out-of-hours contact, the agency used a mobile number in signatures – but included no office line or email address. The new signature ensured staff always gave the relevant contact details. Contacts could reach the specific sender quickly through the mobile number, but could also reach the office through their main line.
- Staff would use their own interpretation of their job title, which often caused misunderstandings over who was in charge. Using a dedicated solution, job titles in signatures were automatically added from an official database, so staff couldn't email with the wrong title.
- The agency has offices in several countries but regularly films around the world. Staff did not routinely remember to update the address in their email signatures, so equipment was often shipped to the wrong address. Having central signature control, however, enabled staff working on location to use a 'filming location address' in their contact details by pulling address fields from a centrally updated directory. Whenever the directory was updated, every member's signature was automatically updated as well.

» **End-users:** Don't forget that the end-user is also hit by the inconvenience of doing manual signature updates. They don't want to have to stop working just to copy/paste and customize a template. It's too much hassle for them. An email signature solution handles all this work in seconds, giving every single user a signature that matches. No wait, no work, no worries – you click 'Save', and you're done.



REMEMBER

Change that design as soon as you need to or set that template, so names fit more consistently. Inconvenience won't be an obstacle to your progress.

## Capturing Useful Information

Email signatures are a marketing communications channel, and capturing data is a key part of any marketing activity.

How many people clicked on that campaign banner you added? Which department were they in contact with? How did they behave on a landing page? Using an email signature solution lets you glean as much insight from your signature as you do from other digital marketing avenues.

Having central control means you can add a custom variable to the end of each link in every signature, which can be unique to every member of staff. So, when a recipient clicks on the signature, you can see in Google Analytics exactly whose signature they clicked on, what they did, when they reached the landing page, and even who they are.

So how do you use that information? Well, as you know which people each team is in touch with, you can get data on your email recipients. If the sales team's signatures generate more clicks than account management's, potential customers might be more engaged than current customers. Now you customize a follow-up strategy. Email signature solutions allow customer information to be passed to your website when the recipient clicks your banner. Your website can use that information and take suitable action – maybe using your CRM (customer relationship management) or marketing automation systems. You could even make a point of following up contacts who click in a particular way. Ask that client if they want to try the product they clicked on or attend the event

in the banner they saw. As you've linked up the client's identity with their interaction, you can have your staff act on their page visit in a timely, targeted, tactical manner.



TIP

Look at actually using the data to customize a landing page. You can set a page to adjust itself based on the URL a visitor approaches from – for example, if it includes `‘/color=?&blue’`, it might change its background to blue. With a dedicated solution, you can change the link in each signature based on the recipient's email address. So all the links in an email signature sent to a person could have `‘/email-name=karen.green@exclaimer.com’` at the end. Now, your CRM system can match that email address to a contact entry. As an example, a multinational organization could display regional phone numbers depending on the email contact's location worldwide.

This is impossible with manual resources alone. Try editing every signature by hand to add a long, illegible code, then multiply the size of that task by the number of links in the signature. Even very small companies would have hundreds of links to embed.

## Cutting Costs

Dedicated solutions reduce inconvenience, inconsistency, lack of flexibility, loss of credibility, and human error. In doing so, it naturally reduces costs significantly. You can't achieve anything through the email channel and email signature touchpoint if you can't control it. Where you lose control, you incur costs.

# Chapter **11**

## **Ten Take-Away Points to Remember**

In this book, we keep the discussion concise, yet we give you lots of information to consider. Here, for the busy professional who wants to grab the pertinent points quickly, we provide ten essential points to take away from this book. If you remember nothing else, make it the content of this little chapter!

### **Create Exceptional Email Signatures**

By employing effective email signatures on all your outgoing corporate email, you harness the power of a great marketing channel. It's targeted, valued, trusted, high volume, and continuous.

### **Target Specific People**

You can use email signatures to target specific, relevant people – the people who receive your corporate email – and at a relevant time – that is, when they're reading it.

## Stay Brand Compliant

You take care to brand all your other communications consistently, so apply the same care to your emails, and brand them using your signature.

## Go Forth and Socialize

Use email signatures to promote your social presence and your very latest content to the people with the highest chance of connecting with it – the people who read your corporate emails.

## Add Campaign Banners

Include signature banners in your emails to support your campaigns and promote products and services at the right time and to the right people.

## Get Your Contact Details Right

This one's a no-brainer. Make sure that the contact details you give out in your email signatures are up to date and correct. Tell people who you are, where you are, how to get in touch, and what you know.

## Stay on the Right Side of the Law

Make sure your email is legal. Use the right disclaimers for your location and sector.

## Collect Customer Feedback

Email signatures are a great place to gain customer insight quickly by using 1-click feedback buttons.

## **Remember the 7Cs Framework**

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Use the 7Cs framework to design signatures that really work for your organization.

## **Use a Dedicated Solution to Maximize Benefits**

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An email signature management solution is the only way to ensure centralized, consistent appearance and content control, accurate targeting, change management, dynamic content, and click tracking/marketing system integration.

# What Next?

VISIT

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# Your guide to making the most of your email signature as a marketing opportunity

Email matters, so creating the right impression with a professional email signature makes good sense, but an email signature can be so much more than just a digital business card. When properly managed using dedicated solutions, email signatures provide a targeted, high-volume communications opportunity for your sales, marketing and HR teams that doesn't give your IT guys a headache. This guide gives you the lowdown, and walks you through the seven ways to make the most of email signatures.

## Inside...

- Use your email signature for promotions, social media and brand management
- Make every email that your company sends a valuable marketing asset
- Get consistent email signatures across your organization
- Manage your company's email signatures more easily and effectively



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