Email Signatures: A New Communications Channel

www.exclaimer.com

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Executive Summary

Your people and your systems send hundreds, thousands or even millions of emails to existing and potential customers, suppliers, colleagues and partners each business day. What if you could take some space on every one of those emails and use it as a communications channel? In this eBook, Chris Brown, Marketing Director at Exclaimer Ltd develops the case for thinking about email signatures as a valuable new communications channel whose value arises from volume, trust, relevance and targeting. As a bonus, the channel can also be used inside and outside of your organization.

Chris goes on to present Exclaimer's 6C Channel Architecture Framework that the company has developed for working with customers and uses case studies to exemplify the key attributes and successes of the framework. During this discussion, common themes develop around the need for the creation and enforcement of corporate policies, central control, convenience, cost, data capture and change management. Chris then argues that the only way to successfully address these issues and deliver the full potential of the channel is to use dedicated email signature management software.

Table of Contents

Introduction

Email is a critical communications mechanism for every business on the planet. There are even businesses around now that won't talk to their customers any other way. So who's seeing your emails? Well, in the main its colleagues, suppliers, partners and customers and perhaps more importantly, it's potential colleagues, potential suppliers, potential partners and potential customers. Those are important people in your business life and you probably send them a lot of email - so doesn't it make sense to consider the business emails that you send them as a marketing opportunity?

When was the last time you got a business email that didn't have a signature at the bottom? I just took a look through my inbox as far back as late 2009 and I didn't find one. Of course there's a clear and logical reason for email signatures. People want to know who they're talking to. It makes sense to include your job title, the function of your department and maybe your phone and fax numbers on every email that you send. It's the electronic equivalent of a business card for the 21st century.

As a modern business, you probably send out promotional direct emails but I'm not talking about those. I'm talking about 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 – OK, sometimes they might also contain an invitation to a party or a recipe for pound cake - but the key point is that they will be opened and they will be read. The recipient trusts the sender. They either already have a relationship or they're in the process of building one. In that context and expanding their definition to include brand elements and promotional banners, email signatures have to be seen as a marketing opportunity.

If you're a large organization, the majority of your emails are probably sent between coworkers. As marketers, we instinctively think of our external markets but it's important to consider the role that email signatures can play internally. Maybe you take internal marketing just as seriously as you take external marketing. Maybe you see all 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. I believe there is a lot of potential for email signatures on internal email and perhaps that potential has yet to be properly tapped into. Whatever the case, I will be discussing the potential of signatures on internal emails when the opportunity arises.

What I want to present to you in this ebook is an argument that you need to consider email signatures as an independent and valuable communications channel - and not just business cards for the electronic age. I also want to share Exclaimer's 6C channel architecture framework that you can use to structure your thinking about email signatures and how they support your other Marketing activities. I'll also be considering the importance of a system to manage their development and deployment and specifically how that system can help you to deal with inevitable (and often desirable) change. This also raises questions around the cross functional relationship between Marketing and IT and I'll be addressing those questions as well. And all the way through, I'll be using cases from our existing customers to illustrate the pitfalls that others have encountered as well as highlighting success stories.

Email Signatures: A New Communications Channel

Corporate Email, Not Direct Marketing Email

Let's start by discussing Direct Mail. Direct Mail is a great communications mechanism in the right hands and I'm pretty sure you have experience of it - either as giver or receiver or even both . Direct Mail is not the topic of this eBook. What I'm talking about is your corporate email. That's every email sent out of your corporate email server. Generally, these 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. From a communications channel perspective, the fun starts when one of your guys sends an email to one of their guys AND one of yours - but we won't be covering that particular problem in here. You also need to think about your systems that send emails - like your CRM or customer support systems.

So why should you think of email signatures as an independent and valuable communications channel? Let's examine the channel, since it possesses all the traits of a staple marketing comms channel, as if it is a comprehensive comms channel.

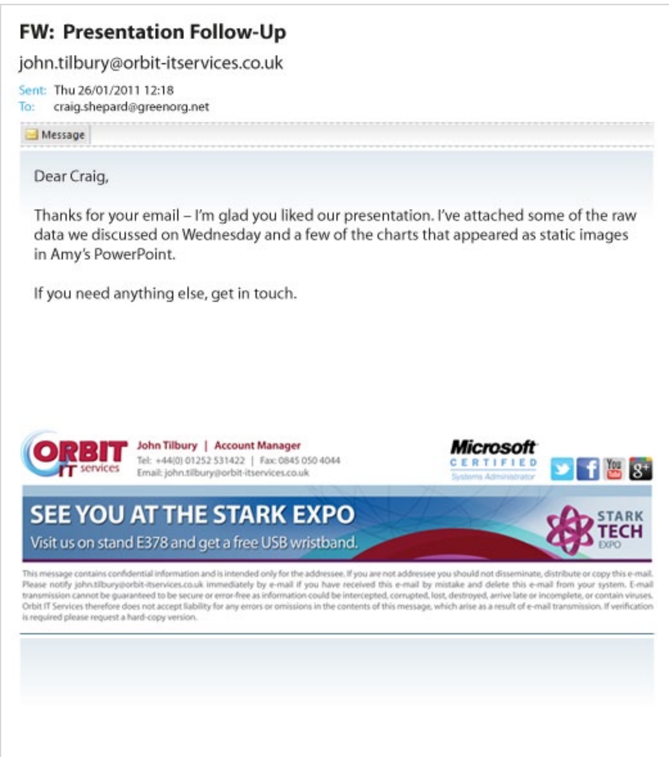


Figure 1 - Comparing the email signature channel to the direct mail channel.

Channel Attributes

The unique aspects of this channel.

Targeted

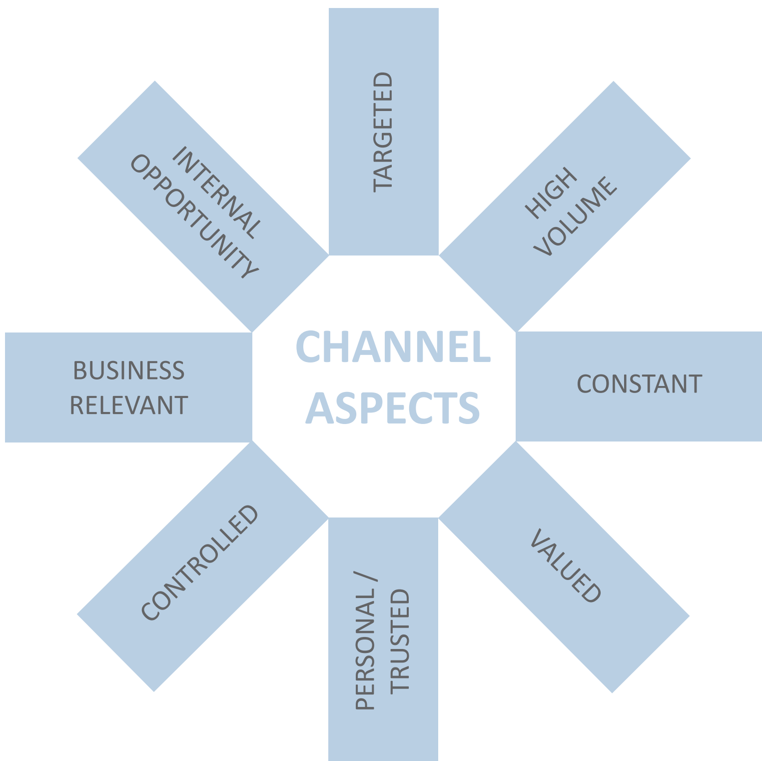
You know who receives it, in what context and when they will see it – which provides immense opportunity for segmentation and specialization. For example, if we know different departments speak with different types of contacts (compare the potential customers speaking to sales and the current customers speaking to customer support, for example). Also consider the different stages they will reach that email contact: to continue the above example, pre-sales technical support may speak to them before they've tried the service (for example) but the account management team will speak to them as they're negotiating to close the deal.

Thus, different signatures on each group's email (customer support, pre-sales support, sales, account management) could be used to communicate different messages to different segments or at different stages of the sales process. It's a unique opportunity to target marketing messages more precisely than, perhaps, ever before.

High Volume

Studies estimate 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 1700 emails every day, which constitutes a substantial marketing audience.

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



Interestingly too, no matter your business size, you'll consider that audience large: since it scales with the size for your workforce and operations.

I would also take the opportunity to point out the onward travel of emails: they are often forwarded and copied between colleagues and contacts long after you sent your original message. I would suggest this is a key facet of the channel, especially when used to reach external partners like suppliers and customers. You could consider your signature an advertisement that's displayed on the internal decision-making process: each contact, from CEO to project manager, that sees your forwarded message will also see 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.

Constant

Continual display is also a major feature: contacts will see it repeatedly and persistently. That runs counter to a few channels, such as direct marketing email, where the message is only seen once. That's why signatures will 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, your logistics staff and your distributors, etc.

This way, the signature can be varied for effect, say altering the message or merely the way it's communicated. Or, it can be used to influence those interactions in a subtle way, without disrupting the relationship your colleague and his 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 of information, confirmation, assistance, etc. The contact wants to read this message so you can guarantee at least one impression with each signature sent – which also disposes them to react to your signature's content more closely. You 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, the logistics of some provision, etc.

Personal/Trusted

Because the reader and sender know each other, there's an implicit trust in what's being said. At the absolute minimum, it's known to be legitimate, and in many cases, the mere fact it's from a sender they trust may be reason enough to react to a campaign banner.

Now, at its lowest level, that might only serve to demonstrate that it's authentic, in certain contexts it can further intensify the impact it has.

Controlled

You can control and predict the context in which your signature may be seen, contrast that with, say, advertisements which might 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 his job, will always be positive about your organization – it's not going to undermine the comms 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 Outlook.

Business Relevant

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

With the features above, that it's targeted and controlled, we can use that to further enhance the relevance of that content: if I know it's on an email from sales, I know it might be relevant to mention pricing or potential add-ons. If it's on email from the customer service team, I know that it might do well if it's relevant to ongoing use of my product or service.

Internal Opportunity

But all of this also applies to internal email: messages sent to colleagues, subordinates, superiors and anyone within your organization.

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 all of them.

All of the above points still hold for this channel too: it's still trusted, they still value it, it's still relevant and you still control the context and can target it even more precisely.

Conclusion

Those attributes, even taken individually, make for an attractive comms channel: the targeting and control of direct marketing email, the high volume, constant presence and potential relevance of advertising.

But the email signature channel combines all of 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.

With it being such a valuable, exploitable comms channel, we need to understand how it can be used and how organizations worldwide, in various sectors, are using them already.

Getting The Architecture Right – The 6C Framework

Introduction

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 colour added – conceived and designed as a single entity. I prefer to think of an email signature as built from components and I find modelling signatures this way helps me think about issues such:

- 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 departments are managed by Marketing, HR, legal or IT?
- Which components contain data that is best provided from an existing corporate resource such as people directories?
- Which certifications and/or qualifications do my staff hold that are useful and appropriate to include on an email signature?
- What messaging can I send through this channel?
- How does that vary with time and within the context of the signature?

We have built our 6C framework as a basis for building component oriented signatures and the figure below provides a core illustration of how that framework operates in practice.

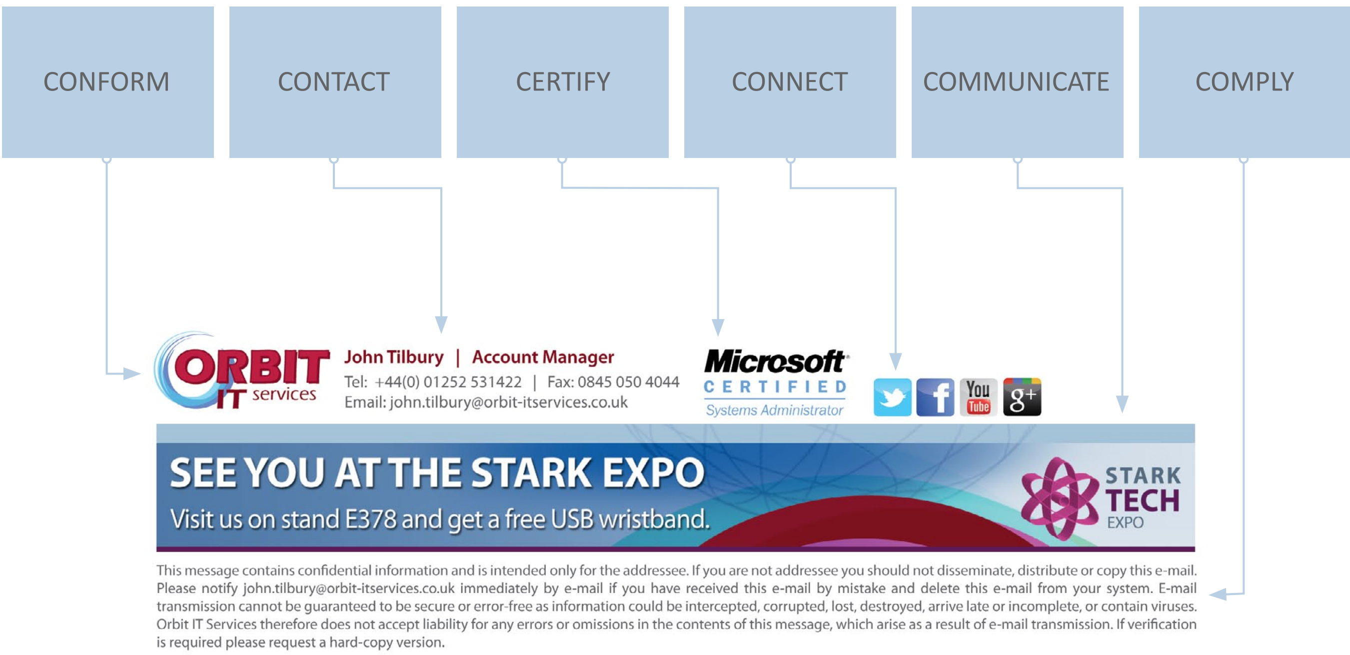


Figure 2 - Channel Architecture: The 6C Framework.

It's worth stating that the design in Fig 2 exhibits the highest level of visual impact that I would generally recommend to customers. It is vital to remember that the most important part of the email remains the text that the sender types and I would never recommend that a customer should deploy an email signature that compromises the readability or accessibility of the intended message. We do have customers with a very strong brand or sales led culture that take things a little further – for example, some of our customers, particularly those in retail or distribution put a graphical banner at the top to communicate their latest sales promotions, but these are the exception, not the rule.

In the following sections, I've tried to highlight the important elements of each component in the 6C framework and where possible, illustrate its use based upon real world customer experience.

We'll discuss each one at length and in turn, examining closely how signatures perform this function, how others have done so, considerations to keep in mind when applying the learning yourself and key takeaway concepts for continued and advanced use.

Conform

This is about conformance to your brand guidelines and my fundamental argument here is based around everything else that you do with your brand elements. Do your business cards, headed paper, compliment slips, product packaging, invoices, signage and online presence conform to your brand guidelines? I bet they do. When all your physical and electronic property is branded what on earth are you up to if your external emails are not? You send hundreds or thousands or millions of emails every day to existing and potential customers and suppliers and partners and they're unbranded? Did you tell your brand manager?

Ok, so you don't want to miss out on all those potential impressions but is your brand manager going to be happy to let everyone design their own email signature using their own design skills? Let me ask a different question. Would your brand manager be happy letting everyone design their own business card? No, I didn't think so. Again, there is a control issue – you need policies and enforcement systems to ensure the physical appearance of your email signatures complies with brand standards.

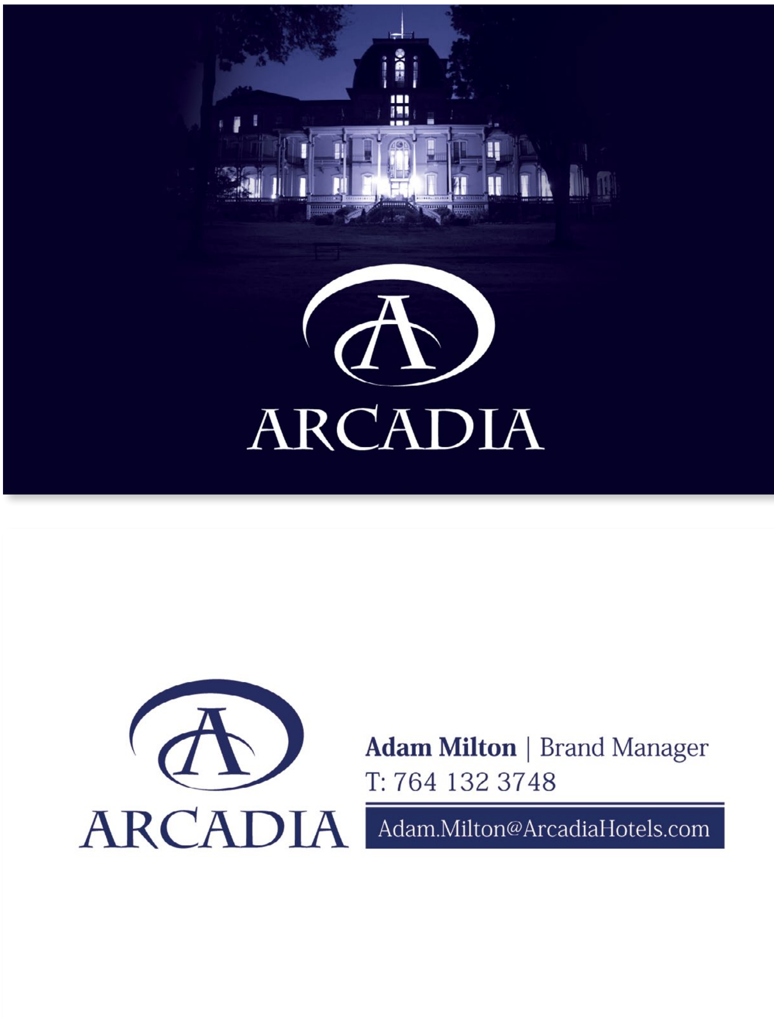


Figure 3 - The brand elements remain but the density matches the context.

I don’t think I’ve ever spoken to a single customer that didn’t have branding as part of their email signature design considerations. It’s important and unlike the other elements of the 6C framework, it needs to inform the design of all the other components. You’ll probably want to include your logo, but shouldn’t the contact details and disclaimer be in your corporate typeface and so forth?

This isn’t necessarily all as simple as it sounds. As I’ve said, 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, but it’s vital to consider email as unique and worthy of specific attention – and like other forms of digital marketing, there will need to be an amount of co-operation between your designer, your HTML code smith and the guy that manages your email infrastructure.

Starting with overall design, you may want to look at your business cards. Lots of our customers work this way, but there are compromises. Business card designs generally combine contact details with elements of branding. If you design that way, then you’re only considering 2 of the 6 Cs.

Taking a quick look through my business card collection, I estimate that one third of them 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 at the bottom of an email, it draws the attention of the reader and pulls them away from the message. In my experience, coloured backgrounds on email signatures don’t work well unless the blocks of colour are small and subtle.

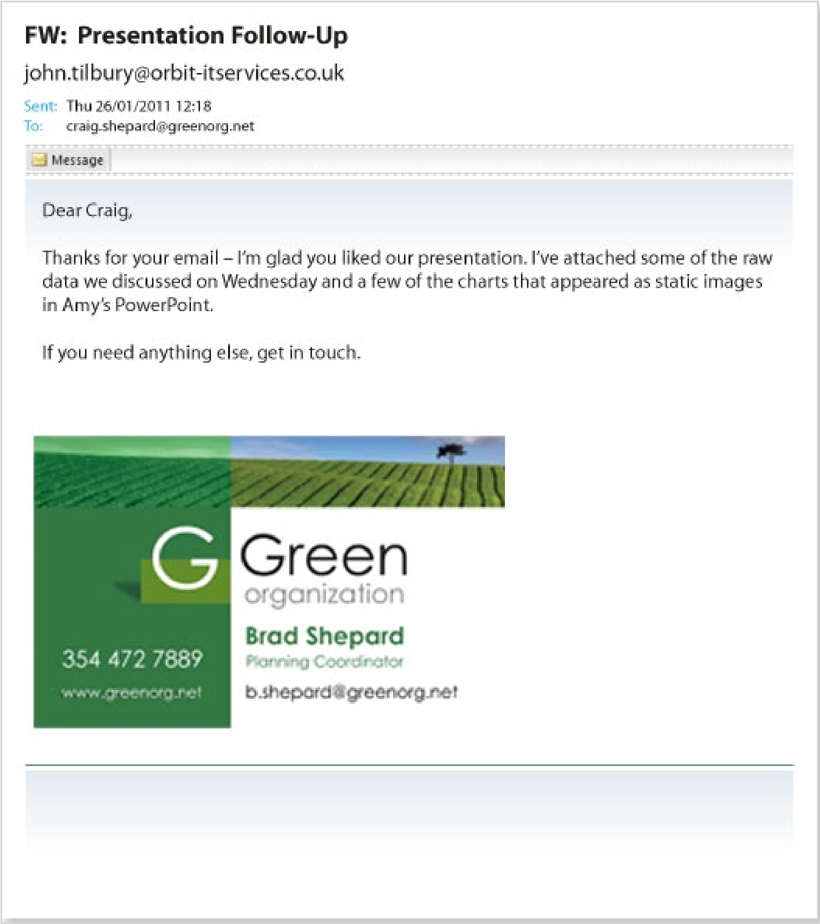
One of our customers is a well-known global B2B business with a highly developed and valued brand in their sector. They had been working with branded email signatures for a while but had experienced two major problems.

- Staff response to the signatures was negative. They saw them on every email and felt they represented the brand poorly and tended to dominate the message.

- When replied to from iOS devices the brand elements in the signature were oftentimes displayed incorrectly, or not at all.

We worked with their designers to develop brand guidelines appropriate to the needs of email signatures and then produced the HTML code to implement their first batch of signatures conforming to those guidelines.

Having supplied them with a set of rules to follow for coding email signatures they are now independently developing email signatures that are robust across all clients and devices



FW: Presentation Follow-Up

john.tilbury@orbit-itservices.co.uk

Sent: Thu 26/01/2011 12:18
To: craig.shepard@greenorg.net

Message

Dear Craig,

Thanks for your email – I'm glad you liked our presentation. I've attached some of the raw data we discussed on Wednesday and a few of the charts that appeared as static images in Amy's PowerPoint.

If you need anything else, get in touch.

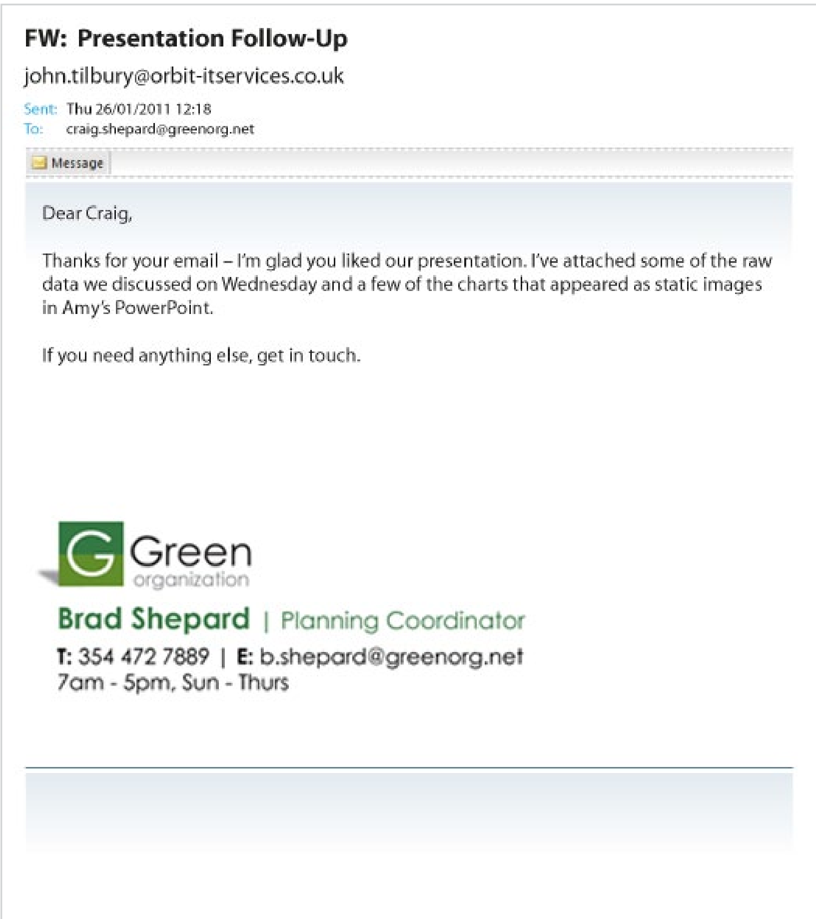


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Figure 4 - Altered settings demand altered styles, e.g. email to colleagues needs less branding.

Once 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 and there are a number of reasons for that:

- There are more varieties of email clients than web browsers and the differences between the ways they interpret HTML are more extreme. Also, in the age of iPads and iPhones, Android devices and BlackBerries, you cannot 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 is going to be curious enough about your logo to download it specially? You could add your logo image as 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 his network? There are issues 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. Your HTML guru probably isn't used to having his work treated this way.

A PR company is one of our corporate partners. They've used logos in their signature to completely reverse a major disadvantage – competing on mail. Rival agencies may all end up chasing the same key journalists for coverage: in the instant assessment of a press release, that email has to capture a journalist's interest. The PR firm had four issues:

- Coverage was intermittent. Journalists might give great attention to one PR but not another.

- Relationships were weak. Most journalists would only reply to ask for follow-up details – not build a relationship.

- Confusions were common. Journalists would get one agency confused with another and even contact one when they wanted another.

By adding a singular, consistent logo to their signature they solved the above. By looking at the visual representation of that brand they could instantly recognize who they were dealing with – not remembering a name or a long-left staff member, just seeing an image and making the connection.

That meant quality press releases gave credibility to the whole agency, not just the specific sender, and eliminated confusion around who had sent which release. Don't leave it up to your end users.

When taken together, these factors mean your designer is probably going to have to extend your brand guidelines specifically to cover corporate email, your HTML coder is going to have to do lots of testing and your IT administrator needs to buy in to whatever you decide.

Finally, Exclaimer has produced an eBook titled 'How to Make Professional Email Signatures That Work' that provides a lot more detail on how to address the issues I've raised here, which can be downloaded from the Exclaimer website.

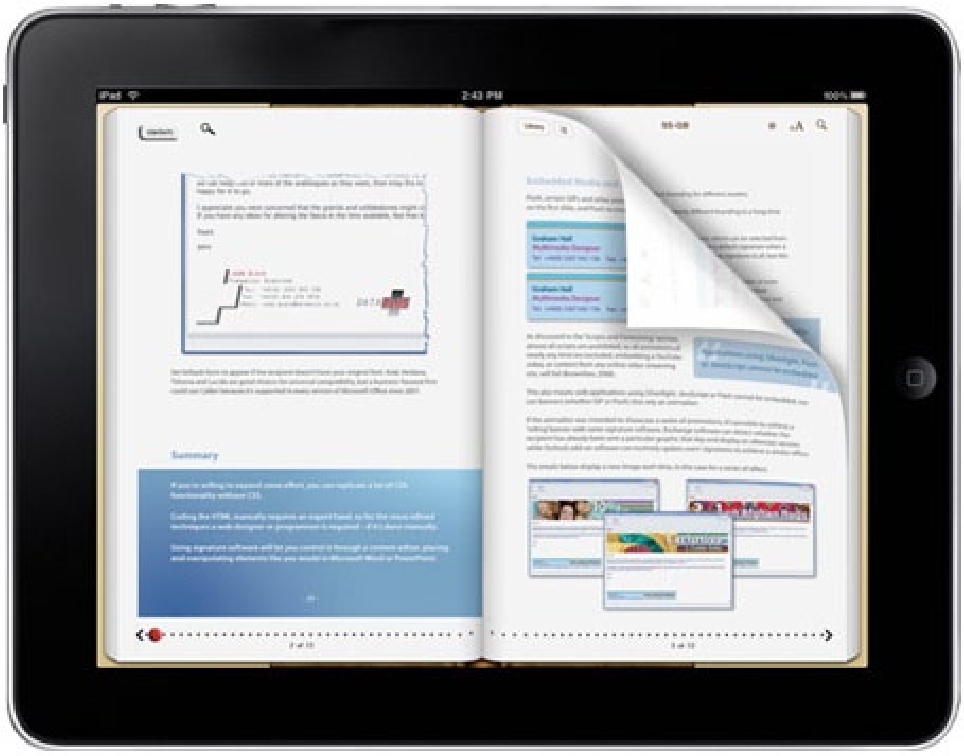


Figure 5 - Try our complementary eBook 'How To Make Professional Email Signatures That Work', with illustrations and instructions for creating an email signature design that meets multiple criteria – that works in every sense of the word.

Summary

- Your emails get viewed by thousands of important people every day. Treat email signatures the same way you would any other corporate communications: brand them.

- Use your brand elements across the whole design – it's not just about the logo.

- Enforce brand compliance. You wouldn't let users design their own business card so why let them design email signatures – monitoring systems and enforcement policies are the order of the day.

- Beware...an email signature is neither a business card nor a web page. Email signatures need dedicated coverage in your brand specification and they need to be

Contact

The contact section 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, there isn't a lot of room for marketing strategy in the contact section. But there are a few important issues that I would like to highlight and I think the relevance of those issues to the marketing department really depends upon the breadth of your definition of marketing.

The principal issues around contact details are of those of control and change. 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. In my travels, I've seen people that couldn't spell 'principal engineer' even though they'd been one for ten years. This isn't of vital strategic importance but it can make you look bad – even if it's only on internal emails and it goes without saying that errors on contact details will cause at best mild irritation in those you value highly.

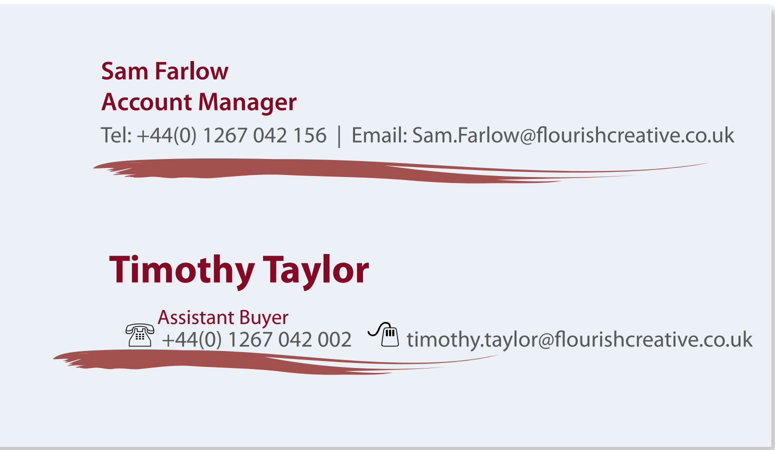


Figure 6 - Separately, these may look acceptable - but side-by-side the inconsistency looks unprofessional.

Rather more subversively, I've also come across people that have deliberately provided incorrect information. I worked with an engineering manager that told everyone his job title was VP Internet Appliances. It wasn't but he liked the title rather more than he liked his real one. Whether that's important to you is highly dependent upon your corporate culture, but consider your partners and suppliers whose

We recently worked with a customer going through a radical business re-organization. Previously organized on a global product line basis, the incoming CEO had 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 it's relatively self-evident that their greatest business challenges did not center around up to date email signatures. However, it was vital to the success of the re-organization 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 the volume of business carried out by email is considered, it's easy to see how the simple expedient of getting job titles and departments right can assist this communication process.

culture you cannot control and possibly do not 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.

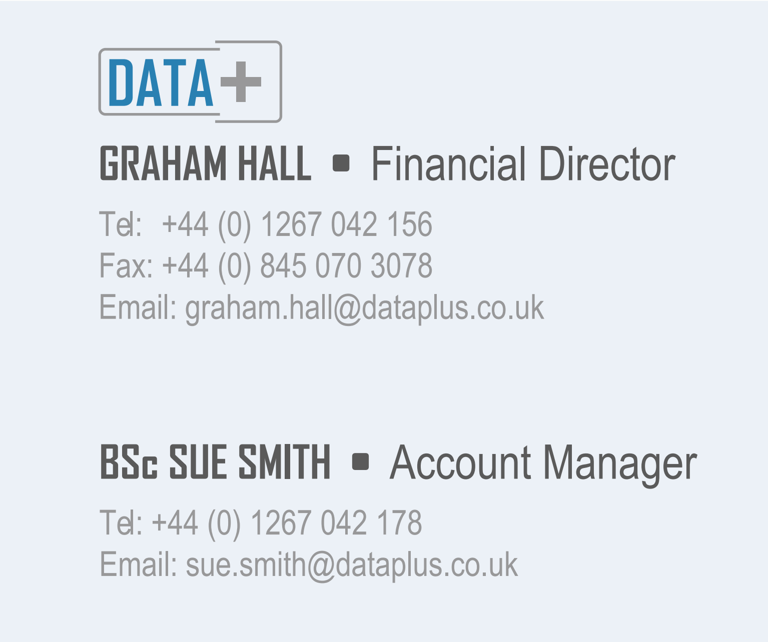


Figure 7 - Graphically communicating a certification makes it easier and faster to perceive.

Another element of the contact details component that causes some consternation is personal qualifications. If only one guy includes his bachelor's degree on his email signature then the implication is that nobody else at your organization has one. My experience suggests that such an event generally triggers an outbreak of qualification one-upmanship. My advice is to have a policy and enforce it. If qualified staff matter to your customers, suppliers and partners then 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 then they're probably divisive.

In terms of a list of other dos and don'ts there is a lot of information available on the Internet and a lot of it, in my opinion, is wrong. Internet commentators often berate those who include their email address in their email signature. On first inspection, they have a point – you can see their email address because it's right there, in the 'from' field, where you expect it. In my experience of Microsoft products, they tend to see people as people rather than email addresses. Wherever possible, they use display names to enhance readability and familiarity. However, readability and familiarity tend not to be high amongst the priorities of an email delivery system. Sure, you can hit reply, but what about the times when you forward the email to someone else for action. They might see chris.brown@exclaimer.com in the 'from' field but then again, they might see 'Chris Brown' and the latter isn't much use when the action necessitates despatching an email to the original sender. I recommend including an email address and I even recommend linking it with a 'mailto' link so that the viewer can simply click on it to send an email.

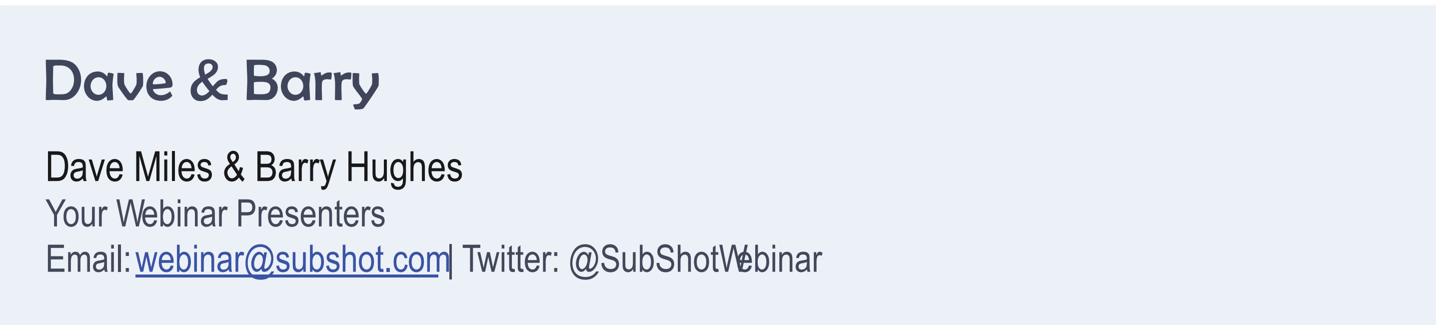


Figure 8 - No branding, misaligned formatting - the contact detail section requires more technical skill than it initially seems.

There are a few other things to think about such as how contact variables change with factors such as department, seniority and region. What is your approach to translating labels such as telephone and fax? Do you provide direct dial numbers where they are available? Whatever your thoughts, you should make a decision, communicate it and enforce it.

Most of what I have said so far applies equally well to internal as well as external email. Sure, you don't need your address, but job title and department are still just as relevant and including the internal phone number would save the recipient doing a look up in the corporate directory. Or you could see which building they're in or floor they're on, so you'd know where to go when you have a meeting. In multi-national and global business, location information can also be a big help.

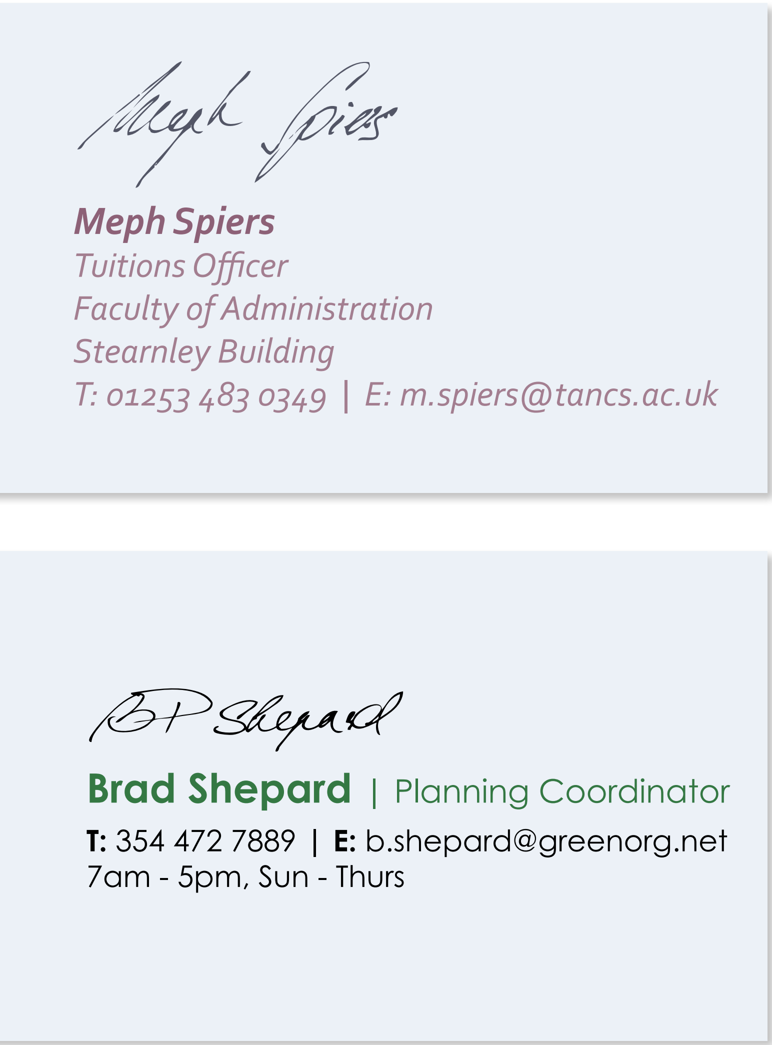


Figure 9 - Where appropriate, a hand-written signature has a human touch - perfect for creating a more approachable impression.

Moving on to consider change, what happens when people move departments or get promoted? What happens when your business changes location or gets acquired or, like the example in our side bar, goes through a radical reorganization? It's true that when people move departments or get promoted, they are keen to advertise that fact. There is a strong motivation for them to update their own details. But can you rely on that effect and will people remember to update their signatures when contact details change?

You need systems in place for managing any changes and preventing errors or obsolete information. There's also the value of using a hand-written signature image, as if the email is a physical letter that the sender has signed himself by hand. In a more customer-intimate business – where the contact must maintain a long-term relationship – this can add a personal touch that the recipient might identify with. It also brings up the possibility of using other elements to reflect personality and identity within the mail, like the sender's photo.

I'm going to finish up this section with a slightly controversial suggestion. How much it appeals will probably depend upon your corporate culture, your industry and your tendency toward extroversion. I've worked in my fair share of large corporations and oftentimes I've wanted to know more about the person I'm talking to on email. What do they look like? Are they a man or a woman? It's not always clear from a name. It might indicate a shallow side to my personality but the popularity of personal photos on social media sites, including the more business focused LinkedIn, suggests I'm not alone. So, why not include your photo as part of the contact section in your email signature? 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 10 - Photos, internal phone extensions, office locations - a number of details are uniquely essential on internal emails.

Summary

- Contact details matter – as an email recipient they give me information about your company structure and the responsibilities and seniority of the person that I'm dealing with.
- 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 no more. Those policies also need to ensure the information is accurate and updated when necessary.
- Consider how you want signatures to vary with variables such as location department and seniority and then update your policies and procedures to ensure this happens.
- Consider the needs of internal users. What contact details should you include to help them?
- Include the sender's email address. There are times when it's useful.
- Consider your business and your corporate culture. Would a photo or hand-written signature help create a connection between your staff and their external, or internal, contacts?

Certify

Trust and respect are hard to earn – especially on email, where we 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 in the signature can establish credibility visually and instantly. What do I mean by a 'certification'? It 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.

Figure 11 - Compare this with Figure 6. This immediately gets across the authority and meaning.

Many miss the benefits of this. The first is obvious – you look authoritative. You're a learned, trained, expert professional and your certification says so. That's the one most of us will pick up on first. But what many don't think of is the motivational value. Staff feel important and appreciated; their credentials are on everything they send. Whatever their role, you're telling that employee that their skills are worth talking about: it's a serious morale-booster.

A small translation company used signatures to solve an organizational and logistical issue. In many regions, translators are expected to be accredited – to vouch for the accuracy of their transferred work.

- Though they were as qualified as their competitors, this company often lost competitive comparisons for an apparent lack of accreditation.
- Contacts were also confused by what certifications meant. Some are only used in certain parts of the world.
- Contacts failed to understand when they were speaking directly to translation staff and when they were simply speaking to an account manager.

A certification in the signature allayed these in several ways. Firstly, in every email sent the company's accreditation was established – whether from sales or accounts payable. This reduced the level of confusion over whether they had relevant qualifications.

Furthermore, linking the relevant symbol to a landing page which explained the qualification helped them understand whether it applied in their region.

Finally, with occupational-level certifications on mail, contacts could instantly see when they were talking to an official translator and when they were speaking to supporting staff.

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 of these certification types provide serious value but they need to be managed and leveraged in different ways.

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 of the value from it. Whatever it achieves, better sales conversion rates or faster customer query resolution, the benefit would be 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.

I appreciate different staff may have different levels of qualification, just make their signature match whatever appears on their business card – and if you aren't reflecting their different levels of training and development on their personal material, you should.

A full-service marketing agency enlisted our help. They had some trouble around agreeing strategies and content with clients:

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

With a small change to their account managers' signatures – adding a CIM Certified logo and a Google Adwords Professional insignia – they fixed these.

By communicating their expertise on each message, their statements carried more weight – clients didn't dispute them, compare them with what others said or reject them due to misunderstandings.

Figure 12 - Here, 'Flourish Inc.' retain their brand elements while demonstrating their professional affiliation with Google.c

Finally, staff may have unique or individual certifications. That could be the degree they hold or an award they've won in their field. Decide whether it's relevant to their activities and responsibilities. A marketing manager with an MBA might want it on her signature but a graphic designer with an economics degree might not – or he might, it depends completely on your business and his situation. Take a lead from LinkedIn, if it seems relevant enough to put on a LinkedIn profile, it's probably right for the signature. Whatever the policy is, enforce it. You don't necessarily want qualifications that – instead – undermine the seriousness of an employee's message: like a forensic accountant with a 'battle of the bands finalist' award in his signature.

Stop thinking, for a moment, about how it impacts the external perception of your staff – and start thinking about how it can affect employees' perception of themselves. By putting their achievements on every email they send, you're making a strong statement about their expertise and value: it matters to you and you want to show it to all your contacts. That has a major motivational effect. This 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. That certification can indirectly demonstrate how important their contribution is.

Let's also remember to link these graphics to informative pages. Ideally, we'll link it to a page from the official certifier. Of course, as mentioned elsewhere, you'll want to capture data on who clicks

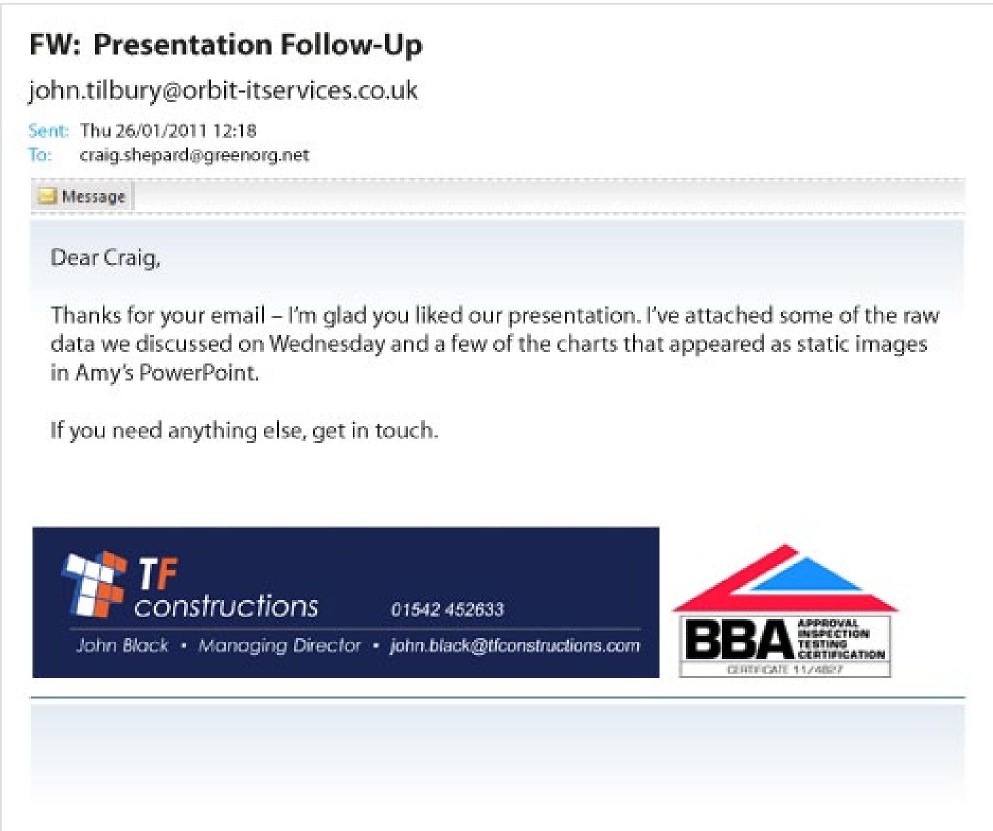


Figure 13 - Compare to fig. 11. A reader might not recognise the actual qualification's acronym (APIC) but the graphic can instantly trigger a recognition of the awarding body's logo and name - even contacts who only have a vague knowledge of the certification can recognize its value.

your certification and how much. For example, if certain clients click on a certification that isn't for them, you might want to try harder explaining it on your site.

But there are two overarching obstacles. First, certifications and staff may change. Second, staff may input them incorrectly in the first place. For that first obstacle, you need a logical and structured change management process in place. When staff get qualified or new staff join with new types of qualifications, we need to represent those correctly. Even before that, you need to make sure the correct displays are used to represent each credential and that the links to any follow-on pages are correct. I'll cover simple but foolproof ways to ensure that in the second half of the book.

Summary

- If possible, graphically portray the organization that certified you – there's probably an official logo for your qualification.

- Keep it up to date: staff change, their talents change and the certifying bodies change. There are lots of factors to keep track of and keep up with.

- Organizational qualifications apply to the whole company. Display these on everyone's email – but shrink it for replies and remove it for internal mail.

- Occupational qualifications apply only to staff in a certain team or role. Let each staff show theirs on email – for personal and peer esteem.

- Individual qualifications apply only to one individual – like an MBA. Remember that these only work when used appropriately: a lawyer doesn't need his fine art MA in his signature.

Connect

Let me clarify my definition of social media for the purpose of this section – it may contradict what some of you would think of as social media, though many of you may feel I'm repeating what's been discussed elsewhere.

Social media goes far beyond the FMCG consumer 'Liking' or 'Tweeting' about his favorite clothing outlet – for our purposes, for the brevity of discussion here, I'll include any online platform that has visible, asynchronous, multi-user interaction. That could include forum frequented by a lot of your business customers, since it's visible, asynchronous (someone can leave a post and wait for a reply) and has multi-user interaction. Even if it's accountants discussing the various definitions of 'profit', that still constitutes social media. Twitter and Facebook are fantastic, and still fit well within this definition, but I want to stress that this can be your blog, a blog on another site, your Pinterest profile, your entry on a user-group forum and more.

So how do signature plug into that? There are two ways: first of all, they can display and offer content, and second, they can provide links to 'Share' or 'Follow' in a click.

A massive FMCG brand is one of our customers. They had too few Fans and Followers for a company of their size. Beyond the number of fans, their behavior was also problematic.

- Followers would rarely speak to them or about them to their own network of Followers.
- Many contacts would link with the company's employees on social media but not the overarching company profile.
- Response to polls, content and blog entries had been 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, they wanted to add social media to their email signatures.

With an RSS feed in the signature, you can show off your most recent Tweet or the headline of a recent blog post (naturally, the whole post would be overwhelmingly large). Contacts can see why they want to connect with you through social media. In a few ways, that makes any content generation portal – say, your blog or your Twitter feed – the core of your signature's social media content. Since, as we discussed in the channel attributes, the channel is constant, the signature is perfect for continually showcasing new entries on that blog and demonstrating your activity there: the eBooks you might provide, the how-to videos, the webinars.

Remember, again referring to the channel attributes I discussed at the beginning of this book, that it's from a trusted source on a relevant message: so partners (customers or suppliers) will want to keep up to date on whatever you're doing. That makes adding social media to the signature a great way to get a lot of new fans for free. There's the hugely impressive success story of Unilever adding a LinkedIn 'Follow' link to their email signature and going from 40,000 Followers to 235,000 in ten months – and, essentially, for free.

In less than a year, they tripled their total audience on social media and vastly increased the amount of interaction they had from Fans. They also paid significantly less for advertising through each network – more impressions evinced a click and more clicks had positive outcomes.

They 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 they held and recruitment drives.

Let's also 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.

This brings us to the link portion of your email signature's social media content – you're showing a little bit of the content you provide on social media, adding a link let's any contacts act on it. They can realize the value you offer (or, as often happens, remember it) and connect with you accordingly. It creates a three-step path to social aggregation: showcase, signpost and sign-up. Show them some of the social content you produce, demonstrate that you're on social media and then give them an opportunity to sign up to your profile. It's an end-to-end tool for increasing social reach.

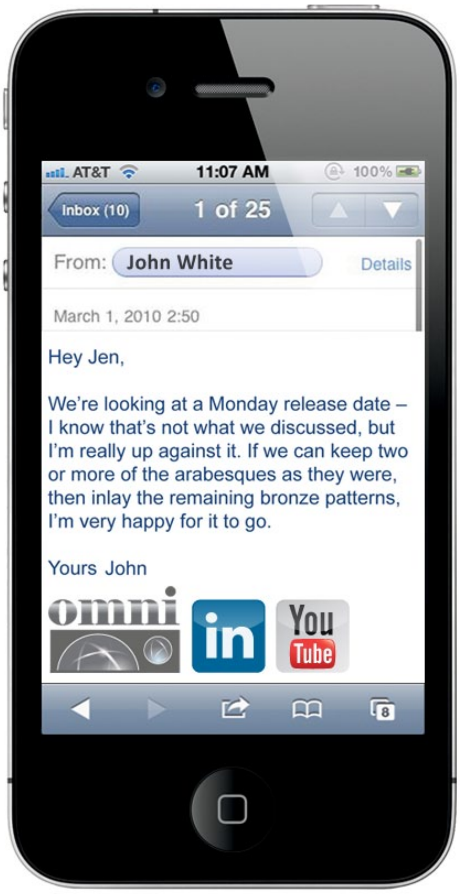


Figure 14 - Perfect opportunity - here, a contact could 'Like' or 'Recommend' that company in seconds.

Summary

- Broaden your scope for what you would consider for social media inclusion – it's not just Facebook, Twitter and LinkedIn. Are there forums that fit that mould?
- Show off the content you produce. That's the fastest way to interest contacts in your social presence.
- Use the three-point technique to attract contacts. Showcase, signpost and sign-up.

Communicate

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. Why? Well, I want to point out a few facts about it first.
It's shown in a space your target audience is likely to see and at a time they're guaranteed to be interested: when they're already speaking to you.

As you saw in figure 2, I think of the campaign banner as a strip of graphical detail often placed under the rest of the signature (but above the disclaimer). While alternative layouts may work just as well, I simply can't say I've seen them. I would not be surprised to learn that banners above the message body might work well in retail or entertainment industries, where more ornamentation is required.

That example is quite lively but it doesn't have to be. Remember, this will arrive below relevant, significant correspondence – it naturally carries a little bit of weight and credence. It's easier to be noticed since there are no other distractions – like competing ads or other graphical content. It's also easier to hold their attention since they started reading this email to receive message from your organization, albeit from the specific named sender. So you can tone down the intensity of that design - if you wish, naturally, every business is different.

Another customer of ours is an online fashion house who sells through two distribution channels: they sell direct to consumers via their site and they sell to retail chains via a wholesale account team.

Their banner advertising was adequate for reaching direct consumers via websites and the Google Display Network, but they wanted a similarly graphical communication mechanism for the retail chains.

We helped them adapt their advertisements to fit in their email signatures and place them on relevant corporate mail.

In the three quarters following the introduction of signatures, they saw a 15% uplift in sales volume through retailers and an overall 60% increase in value: their campaign banners promoted their more profitable accessory range.

They reduced the size of their online advertisements and removed all animation – as email can't support it – we also helped them add a link parameter to track clicks on the banner.

Figure 15 - Sedate, simple, minimal - the design suits the email signature channel far more than a banner ad visual. An ad on a webpage 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 - adjust your image accordingly.

On top of that, I recommend adjusting the banner for each department based on a few variables -- a few aspects of the context in which contacts will see our banner – and using those to align the message with their interests.

First, you can tell who will see it – or at least, who they speak to in your organization – which gives you a good basis for what they'll be interested in. If they're 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, they 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 them – but offices elsewhere could show the one for their area.

We might also have a decent idea of when they will see the signature. Unlike a brochure or business card, staff can't stockpile old versions of a signature or run out of the new one – so when you roll one out, you know that's what they'll use from then on.

So you can show a banner that's temporarily relevant, then alter it – or remove it altogether – when it's out of date.

A university is another customer of ours. They email alumni personally instead of using direct marketing email.

They use campaign banners in signatures to promote students' achievements – rather than having to depend on direct email open rates, the signature is visible on an email alumni are reading anyway.

There's no barrier to awareness – it doesn't have to be actively opened, it doesn't come across as formal or forced and it can't be missed.

Figure 16 - The message must change from week to week or more frequently - scheduling them and their content in advance is as necessary here as it is on any other channel.

I think we've all seen banners that are months or years out of date: still promoting a December sale in March or an event from 2008. Think too about what you've put on your automated messaging systems: like your CRM or auto-invoicing programs. If you've got a signature on the email they send, what address is it using? Does the alleged sender still work for you?

But just adding then removing a banner is an underuse of the tool. 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.

You might also 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.

Put together, these two pieces of knowledge (who and when) can help ensure that whenever and wherever the banner is seen, its message remains consistent with the rest of your channels.

In an email conversation, the signature can bring up a topic – like an upsell – that sales would like to sell but don't want to disrupt the connection they've built with the client. Like I've said, it's visible under every email – and therefore

A car dealership also works with us. They added a campaign banner to signatures to upsell and cross-sell certain extras on cars – like sat-nav or hands-free phone integration.

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.
But the signature removes that difficulty. Instead, it's made known to the customer but not within the sales agent's conversation – you could 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. It's noticed but not attributed to the negotiator.

The dealership has since observed a 27% rise in customers taking optional extras – which constitutes a roughly 80% rise in the total value per month of accessory sales. In this instance, they also gave sales a set of signatures to choose from – so they could decide which packaged extras the signature promoted.

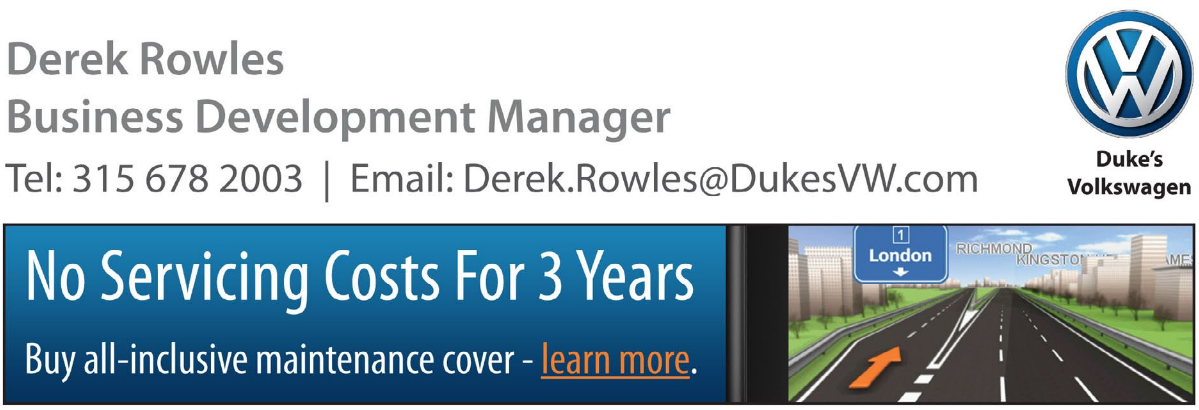


Figure 17 - Here, the banner can propose a product or package cross-sell without forcing the sales agent to work it into a conversation.

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

It's seen at a very precise stage in the buying/evaluating process: after they've made contact with staff. So they might already be aware or interested, the network merely looks to turn that into desire or action.

A software house agency uses signatures to manage customer behavior. They sell their software online, through their website, and license 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. They use a 'buy online' link in the signature to let contacts instantly purchase the software through the online store. Buying activity used to be 40% online and 50% direct (a remaining tenth buy through other means); the signature refined that to some 75% online and just 15% direct.

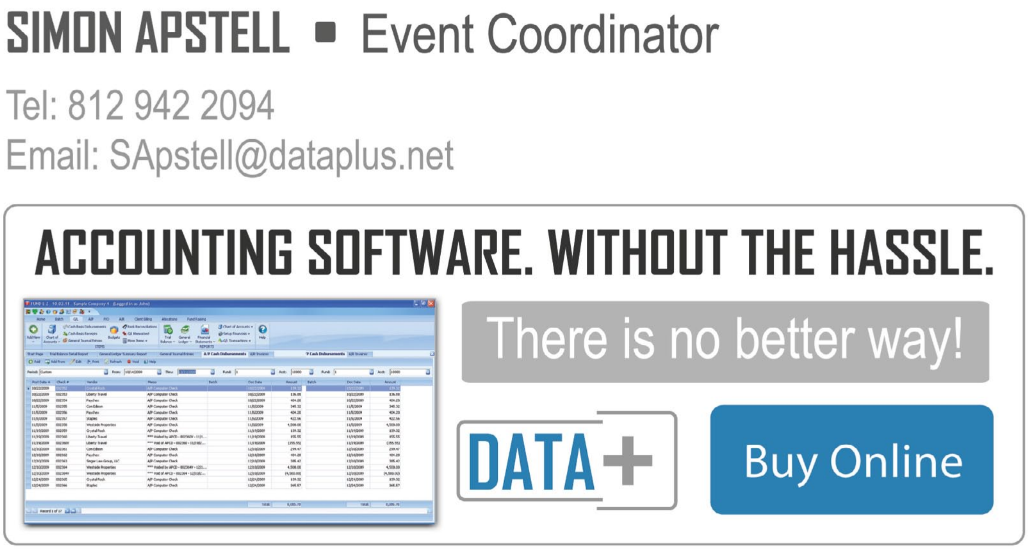


Figure 18 - Change not just what you sell - but how you sell. Here, a contact can click the banner to instantly buy online, without inefficiently occupying the attention of a sales agent.

guaranteed to be seen – but the sales agent isn't pestering the customer about that upsell: instead it's in a neutral space, separate from his words. After agreeing and (seemingly) hooking into the customer's needs, trying to push something new and different can undermine that feeling of affinity and understanding. The signature allows the best of both: it pushes the idea without being pushy.

But what good is a campaign if I can't get insight on it? To get any real idea of its impact, I want to capture data on how my contacts interact with that banner.

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 yet record whose signature brought them there. The user gets the same experience but you get data on what they did. GA can tell whether a visit came from a click on a sales agent’s signature or a tech support advisor’s signature.

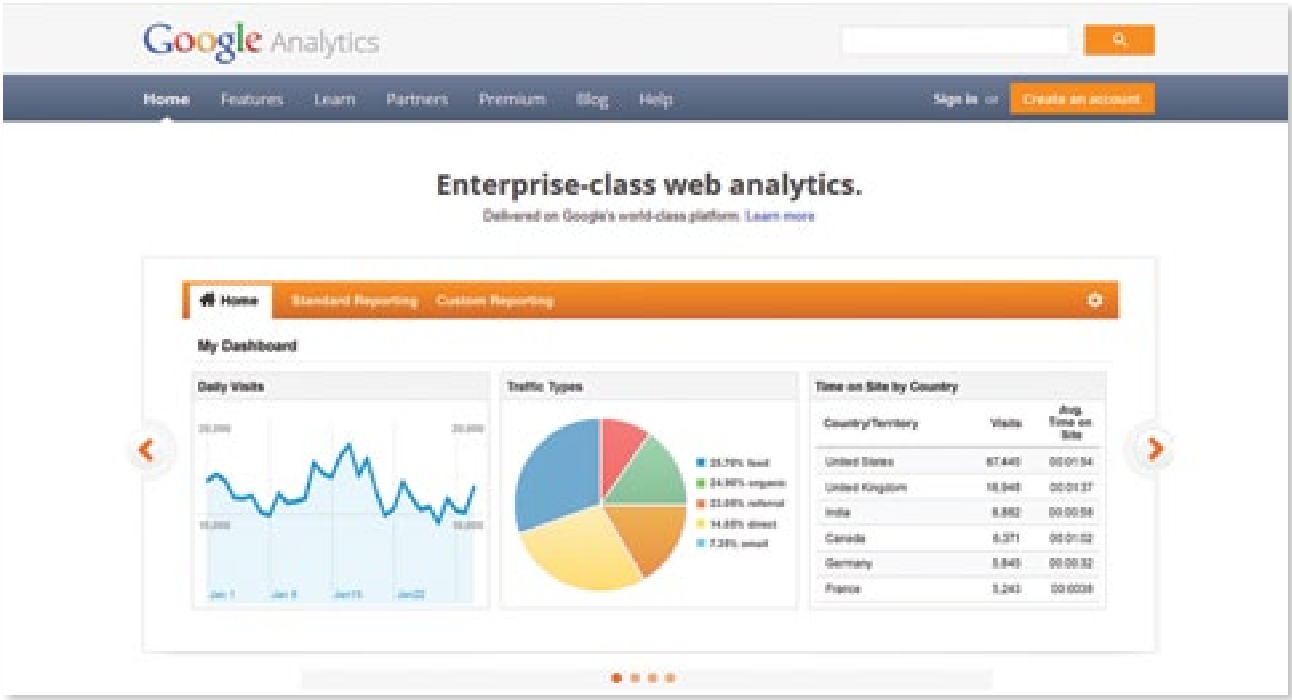


Figure 19 - It’s a channel like any other - analytics will be crucial for refining and recognizing the benefits.

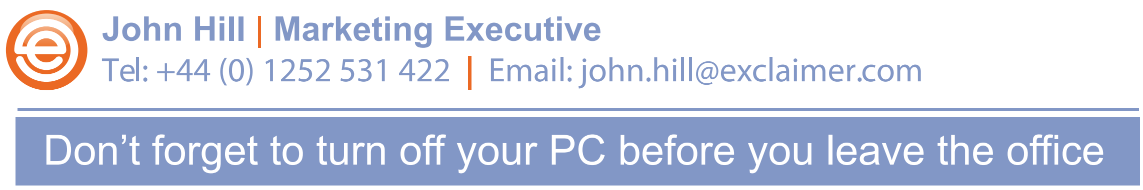


Figure 20 - Same effect, different context. Here, we unintrusively remind staff - so HR don’t have to hold a time-consuming meeting or write an easily ignored email.

Through that, you can gauge how interested they were in each proposition – if they clicked on your pre-sales team’s banner more than your account manager’s, maybe they care more about the discount his offers than the service hers suggests.

And if you change that parameter for each email recipient – so you would know not just whose email signature was clicked, but the email address of the person who clicked it. 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

A popular marketing automation provider, famous for their massively influential webinars, uses campaign banners to offer a follow-up eBook on the webinar’s content: taking them through to the next point on the journey.

And, of course, using their own marketing automation software to tailor the salesman’s next call – talking about the eBook they downloaded.

it, when it's sent, who it's sent to – and target the message at different customer types with perfect precision. It might be the most accurate tool a marketer has.

But what about the other channel I mentioned? External uses are one aspect – internal uses are another. What can a campaign banner do there?

Firstly, this channel tends to suit a lot less graphical content. You don't have to work as hard for their attention, that's one reason, but you also don't want to overwhelm the frequent, fast, short messages that staff send between each other. A large graphic would be distracting. So make sure it's a little bit shallower than the banner you'd use for external contacts. I recommend retaining that width but making it a bit thinner – though opinions may differ according to the context and objectives.

Now, what can we use it for? Anything you want your staff to know. Say I'm trying to bring their attention to my new clean desk policy, why don't I just bring it to where their attention is already? I could also have internal transfer and job opportunities in there or offers for company-sponsored training and certifications. It's also perfect for menial reminders: turning computers off at night, checking whether a meeting room is booked before entering, etc. They don't have to groan at seeing a notification email from HR and reluctantly click 'Open' – or defiantly click 'Delete'. It's just under any email they might read over the course of the day.

Reiterate but don't irritate. You can have a message that's visible all day, every day for months without pestering them. 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.

If conversion, not awareness, is your goal, how can signatures help? A video-conferencing consultancy is another customer of ours. They will hold live demonstrations of the technology the set up and sell – but these events are somewhat expensive. They need to maximize attendance to guarantee each one is profitable.

They use a campaign banner to get as many contacts registered as possible. Whether talking to sales about buying it or tech support about using it, a live demo will interest them.

Every contact sees it, many attend and even without spending a shred of budget on promotion they can fill out an audience.

A prominent hedge fund also uses the campaign banner to reach all its contacts. They've added a newsfeed under their email with two objectives in mind. Firstly, they appear responsive and informed to potential or future investors. It proves they're on top of changes to their relevant markets, they know what's happening and they're taking a position on it.

But they're also establishing themselves as a source of information – for potential customers or any corporate contact. In doing so, they start to build a network that will inevitably attract more business and interest to them. Now we're starting to link back up with the Connect chapter.

Another customer uses it for internal comms. They had a 5S policy in place but few employees actually abided by it. They had several workshops and meetings to reinforce the point but it made little difference.

With a banner under every internal email, each message becomes a reminder. They experienced a huge increase in participation and cooperation. Staff may start and finish work at unusual times or spend days away from the office. Other methods may rely on them coming to you, but email reaches them wherever and however they work. If they're working, they're seeing the banner.

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? That signature is also changing to reflect their different needs, not just from campaign to campaign, but from month to month.

You'll struggle to manage these without some pretty rigorous systems in place. How are you going to be sure it's displayed correctly on everyone's email? Or that the link to your landing page will work? Or that you can capture data on it? We'll cover these comprehensively in the second half of the eBook.

Summary

- Signatures are on everything that goes to your contacts: think about that segment and that presence to use them effectively.
- You can't get tighter targeting than this: you know exactly who will receive it, what they're talking about at the time and who they're speaking to within your organization. Build your banner around those factors to get the perfect mix of content and segment.
- Internal comms benefit from a campaign banner too. Workplace initiatives are a great start but staff achievements or internal transfer openings are especially well aligned.
- On top of that, use the data to personalize it. Pre-fill a registration form or personalize a heading with the visitor's details. Capitalize on the unique advantages of email as a marketing channel – the data it has on the reader.
- But effective management is both crucial and complex: how can you change every single signature in the company every month? We'll look at the effective (and less effective) methods in the second half of the eBook.

Comply

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 reasons for including one are clear: avoid a fine, lawsuit or similar penalty. The specific content may vary, there may even be 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, may not be enough. Instead, you could be required to include the actual sender's name ('Chris Brown') to comply fully with the rules.

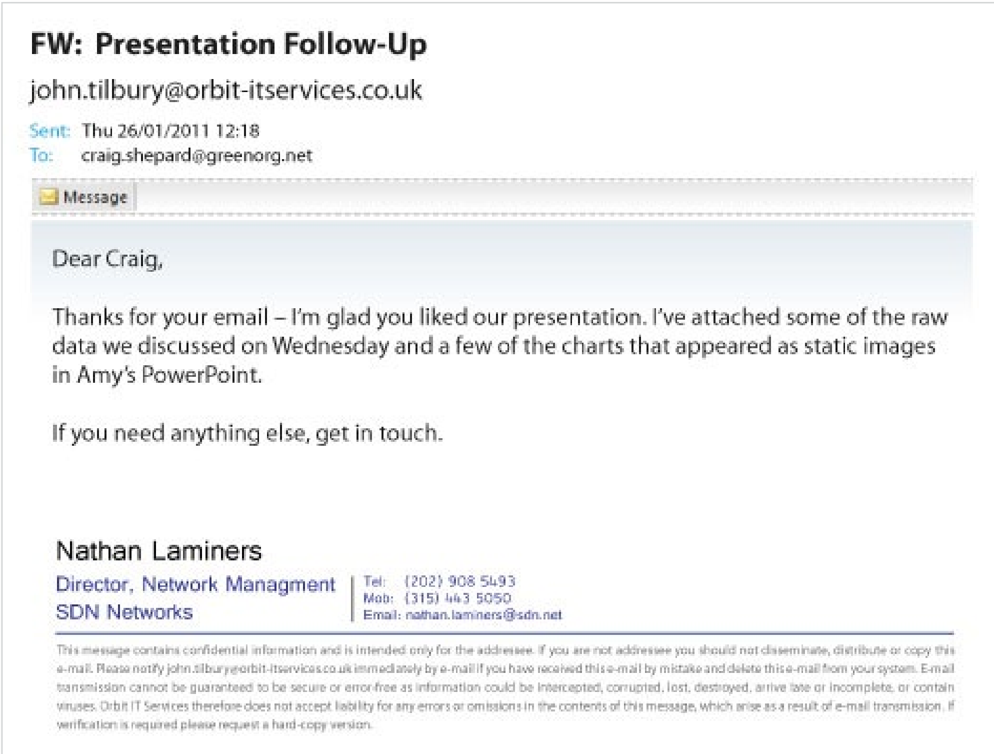


Figure 21 - It's intelligible but inoffensive: the smaller and lighter font deemphasizes the disclaimer.

Almost all advanced markets already have regulations that require certain businesses, of certain sectors or sizes, to include a disclaimer on their emails. The US, UK, Germany, the whole EU, Australia – whether you only do business in one state or every continent, it's worth checking the laws that may apply to your mail. There are a great many resources online (www.emaildisclaimer.com is the one I recommend) and you may want to seek advice from your own teams, so I won't cover each specific legal guideline here.

Instead, we'll cover nuances that apply to most, if not all, email disclaimers.

Firstly, its appearance 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 it somewhat apart from the rest of the signature. That way, they see the logo and campaign banner before they can notice the disclaimer and switch off. 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.

Secondly, 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 it and only assign that notice to their mail. This helps, firstly, to avoid mistakenly absurd exchanges – like a junior typist's email containing a disclaimer about medical advice – and, secondly, to conserve space on everyone's email.

Thirdly, laws change; roles change; companies change – make sure the disclaimer keeps up. You might start trading in a region with new requirements or offering a service/product that falls within a 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. The key here will be to stay forewarned of upcoming changes – then change your disclaimer as soon as the new law or laws take effect. I'm not saying you need to read the Harvard Law Review but new developments will likely be covered in your industry press.

The problem is: how are you going to manage that across a whole organization? Your legal advisors will 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 they can't alter it? We'll talk about that in the next section.

Summary

- Don't get caught out. Few are thrilled by disclaimers but many have been hurt by ignoring them.
- Most jurisdictions have regulations about email – check them wherever you do business and make sure you're up to scratch.
- 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.
- Keep the disclaimer out of the way. Even put it at the bottom of the email chain, below all the replies.
- Only use it for the right teams. If it's about giving legal advice, does that IT admin really need it?
- Don't lose touch. The laws and your status may change – make sure you stay on top of the situation.

How To Manage Signatures

Introduction

You've seen what the email signature channel can be used for but repeatedly we encountered aspects of the channel that required dedicated management processes to regulate – changing the signature easily and quickly, maintaining a uniform visual style, ensuring contact details are correct and others. Here, I'll discuss exactly what the available management methods are and what each of them offer. Then, with reference to the key advantages a management method should offer, I'll examine software and discuss whether it provides those key benefits and how it does so.

Anarchy

What do I mean by anarchy? I mean that every employee is responsible for creating and managing their own email signatures. Like I said at the start, every email I get has a signature on it and I can tell you from our revenue figures that quite a lot of those signatures weren't put there by us. Anarchy is our biggest competitor. 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 completely left 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 alright. 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.

But as soon as any group wants to raise itself to a professional, sustainable level, they need to take a more reasoned approach to its 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, these are even more of a management concern than business cards. If you let staff build and design their own email signature, 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 it as a personal, electronic business card on mail, it's still going to be sub-standard.

Your employees might change their signature to a title that flatters them – or amuses them. I knew someone who had changed his job title to 'Supreme Being'. They 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 the signature – to, for example, use it as a communications channel for timely, dynamic messages – is impossible through this method. Altering any part of it, making anything on it uniform and regular, would require employing at least some method of management, however rudimentary.

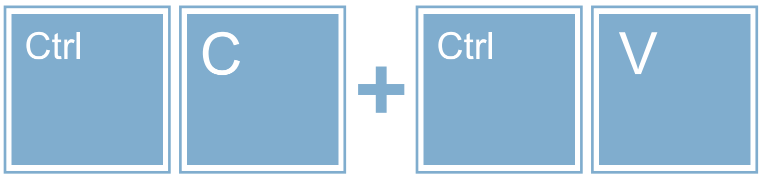
Made By IT

This is what most will do after discounting anarchy - IT go to each PC in the office and copy/paste the signature into their Outlook 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 them walking from desk to desk may be very substantial.

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've got to negotiate with them each time you want to update a signature or change some detail - or correct a mistake.

As soon as you notice you've made even the slightest slip-up, you start this whole process all over again. We'll 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 still impossible – because it's too hard and too costly. IT are busy and expensive: any project will be an uphill battle, even with the friendliest and most compliant of sys admins, because both of you do not want to let every tiny change to the signature become an enormous undertaking.

Self-Copied

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

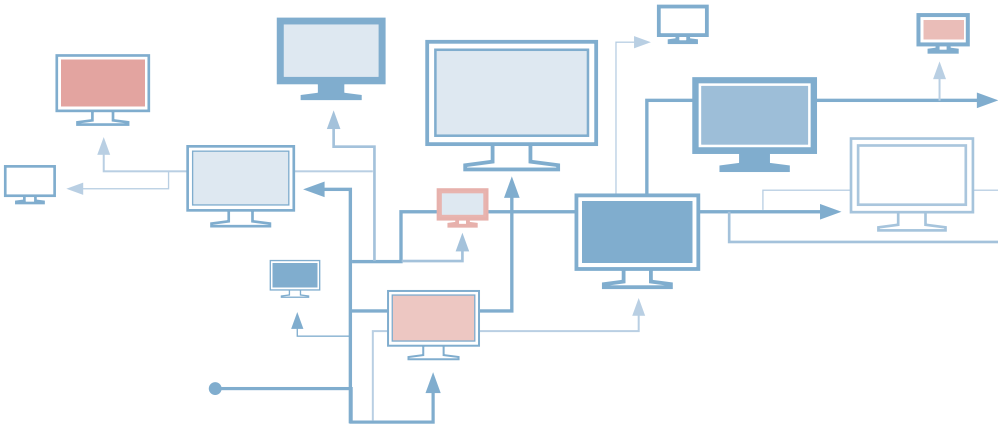
That clickable email address link is a time bomb. It's a link, just like any other. The same way you can make any given text a link, 'Exclaimer' to 'www.Exclaimer.com', changing the visible text doesn't affect the link behind it. When they change that sample text, 'your.name@exclaimer.com', they might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

And what if they just decide they don't like your version? What if they just take what they like but ignore the rest - or all of it? People are obsessed with what's 'professional' or 'impressive': they might think they know better than you do. Or they might not know better at all. Do you want to tell the CEO he's called himself a 'C.EO'?

Funnily enough, when I mentioned the 'Supreme Being' job title someone had added, this is how his company managed signatures.

So you could have them email an example to you for review. Every member of staff in the company sending you an email for you to proofread - this does not sound quick or simple. How many emails are you required to review? Then, always keep this in mind, what happens when you spot an error? You have to send the correction, have them send the new one, check it again and so on. And even then, all of this is assuming they won't just ignore your template when you're not looking. And changes can't be managed 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 will not bother to copy and paste the design.

Coded by IT



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

You're losing just as much control with this method – IT hold all the control; the marketing department merely becomes a source of images, link URLs and designs. Marketing will have to work within their 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.

Designs ruined by the system's limitations won't help: IT just won't be able to do some styles and layouts. In some cases, that might 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 - instead, it will appear at the bottom of the whole email trail, under all the replies. You can't set up one signature for replies and one for new messages.

Software

It's somebody else's job.

A company – ideally with some recognition – has created this software, 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. Updating it is only half of it.

But the other half is designing it. You don't want to offload that task onto someone who doesn't understand (or respect) the significance of your instructions. IT 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.

Here, you create the template yourself in a dedicated editor. You pick colors, drag and drop, resize, etc. by hand. Better yet, preview its final appearance instantly. But all those advantages are about you: what about the end user?

They don't have to worry about how their email signature changes – it does so automatically. Like their desktop background, it's all automatically done for them.

But maybe they want a little leeway in how they use signatures. Software 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've tripled the workload. With software, it's simple. So you can keep total control within your department, but give the end user a little control over their day-to-day use.

But what about IT?

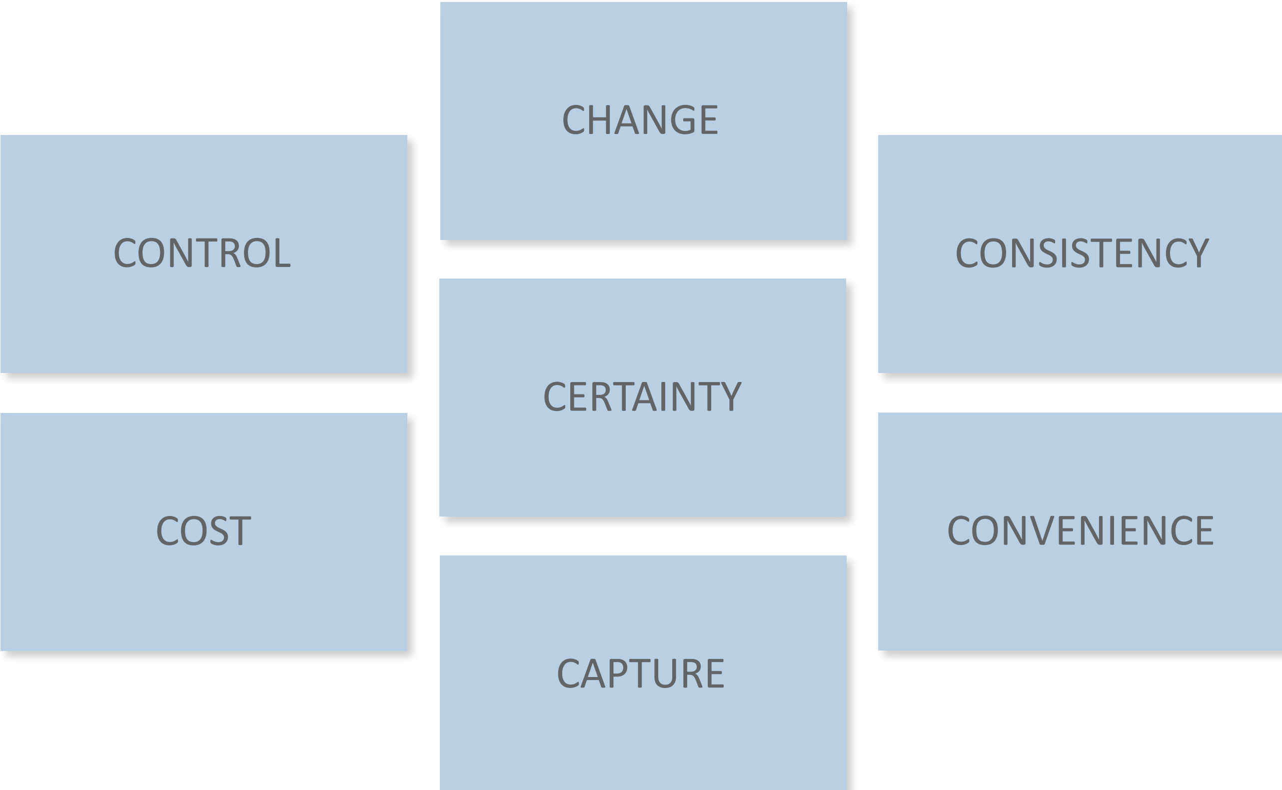
IT get reassurance. It's all taken care of automatically. They don't have to work hard on building some template for you or setting up some complex workarounds within your equipment. They get to control the information system aspects of signatures – like defining the rules used to group employees into different departments or the data source used to autocomplete 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.

Summary

- In most organizations, staff create their own signature unsupervised. That's not often helpful with any other corporate material, let alone a marketing channel.
- You can email an update to everyone and ask them to copy/paste it. Not everyone will know how to set up the links and some may decide to embellish some details – like their job title.
- IT can set up a homemade workaround. This is a little risky and untested. You don't get control over the rollout or the design, since they control the IT resource it's embedded in.
- Software eliminates the 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 it – the software creates it. IT don't have to manually add code or content – the software deploys it.

How Software Helps

We already started to make the argument that software gives you the most managable and responsive set of levers. Let's look at what software gives you when you think about the 6C framework we've already described in detail.



Control

You get the final say over the companywide signature - not a separate department, not the uninterested end user.

Just as you expect to get authority over your brochures and business cards, you can expect that control over signatures - through software.

Software removes the unknown quantity: individual staff activity. They may not comply with your instructions. Whether they ignore your template, misinterpret it or 'improve' upon it, all the manual options leave other staff in control: not the marketing team.

And without that control, I can't see any room for strategy. Software gives you control over which staff get which version, so you can separate different messages across different departments – and those departments correspond to different parts of the customer journey. They'll see the sales team's signature first. After they buy, it's the customer service signature they see. When you check in on them after they've had your product or service for some time, it's the account management team's signature they see.

Now, without that, how can I segment this channel effectively?

Software will let me assign specialized one to each team. Otherwise, staff would just use the banner they think looks nicer. People often think they know better than marketing - let alone about the corporate email they send every day.

I'm also controlling the benefit of the signature. Staff may like that social media link so much they change it to link to their own page. But with central control, no one can hijack the value it brings - salesmen linking that campaign banner not to your event page but the sales query form.

In my and our customers' experiences, the added value of the signature is using every employee's email as a tool for business – be it legal or marketing. Without some control, you can't do that. It has to be a corporate piece of collateral on an individual piece of correspondence. It's your management-controlled content, their individually created communication.

If it's an individual's piece of collateral, he might not remember to consider all those higher level business aims like reinforcing brand awareness or communicating marketing messages.

We helped a medical testing group. They sell their services to hospitals and specialist clinics, meaning they need to have testing labs somewhat close to the customers they deal with.

They had very expert staff emailing key, high-value contacts – the former don't care about making a signature look nice, but the latter may judge them harshly for one that looks poorly structured. They had these issues:

- Staff would create their own signatures but use their lab's address, not the main office's.
- Staff would use unofficial job titles – some sounding less reputable: 'technician' not 'lab manager'.
- Contacts would use the lab address they'd seen in email for corporate correspondence – essential documents would reach the wrong office.

Software let them put two sets of addresses on everyone's email: their local lab address and the central business address the senior staff – and billing department – operate out of.

More contacts correctly sent bills and invoices to the main office address, fewer contacts lost track of who they should speak to and more understood exactly which type of staff they were dealing with – separating operational admins from actual medical experts.

But if you update it in an editor where what you see is what you get, there's no need to transcribe it into abstract code or ask the end user to make/copy/paste his or her own.

Two common reasons for control do not spring to mind first: disagreement and disillusionment. The first is that, I've found, some staff will always think that your official template somehow is not as good or suitable as their own thrown together design. They'll make changes, use their own version or add some element in to make it 'better' – whether that external party is each member of staff copying and pasting it or IT adding it to a custom script, you invite in another group to muddle or meddle with the design.

The second is that with each change or correction you ask them to make, colleagues take your updates less and less seriously – along with all your activities. Whether it's IT doing it for you or each copy/pasting user, they're exposed to every phase of the review and revision process. Just like you put off external contacts with a slapdash signature, colleagues may ask, 'if they can't get this right, what can they get right?' It's negative internal comms for marketing. Worst of all, it looks petty – I would worry that they'll start to think that the whole team is built on fussing over minute details.

With central control, it's not a concern. Instead, you're editing and creating it directly – so you don't depend on some other team to help you enact any changes. I think that's one of the foremost aspects of signature software: any task that involves a separate team always gets convoluted and delayed; software keeps it all inside the marketing team.

Though IT may be a big help setting it up – and that's what they're glad to do – they don't have to fuss with the design or your strategic changes, which they tend to dislike.

A media research company serves some of the largest television and publishing corporations in Europe – they ran into some trouble as they reorganized and, to a certain extent, rebranded the type of service they provide.

In essence, they transitioned from offering both a research and advisory service to a purely research-based operation. This meant that certain job titles, 'Strategist' and 'Advisor', became others, 'Analyst' and 'Consultant'.

They needed to change all their email signatures and transition to the new titles in an appropriate timescale. With software, they were

Change

Marketing is defined by change. Products change, customers change, brands change, situations change, competitors change, systems change, environments change - and you change your strategy constantly to keep up.

Your marketing output is no different: the advertisements will reflect a change in direction or your business card will relate your new organizational structure. Email signatures must be part of that set. As we've described, in many ways they're an ideal channel for agile marketers and the most used medium in business.

able to rapidly update and roll out everyone's signature with minimal effort.

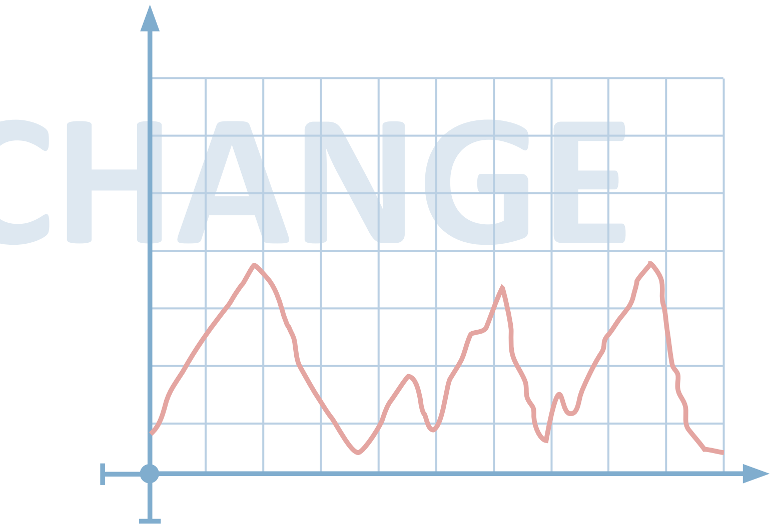
Most usefully, it allowed a simultaneous update across their multiple offices. Had it been done manually, some might have been ahead of others and remote workers might have used an outdated or unofficial contact details for months until they stopped by the office.

Whether it's the emergence of a new social media platform or a new responsibility for a long-standing department, what you put in your signature may need to change relatively quickly – at least, too quickly to wait while every signature in the company is manually updated.

You'll also use time-based campaigns at some point. Whether you're in fashion and you need to coincide with London Fashion Week or you're just particularly festive and you want a New Year's Eve-themed signature. If that gets out of date, some readers might think it looks unprofessional or inattentive.

People change too: they get married, divorced, promoted, seconded and so on. Contact details will, obviously, need to keep up. You can't leave the new chief technical officer referred to as 'head of support' on her signature.

Moreover, you've got an issue of legacy and changes. When your details change, like you move offices or your international address format changes (.fr becomes .com/fr), you'll need to make sure the signature warns contacts before it happens, explains it for the period shortly thereafter and then only shows the new version – there's an interim management task that software can dispense with smoothly.



So how can we cope if IT or our workforce refuse to keep up with these changes? Very poorly, I believe. We had a customer who was sending email signatures out with their old business address and another who lost a very large potential customer because a newly promoted tech support engineer still had 'General Assistant' as his job title. No multi-million dollar company wants to be left in the hands of a mailroom clerk.

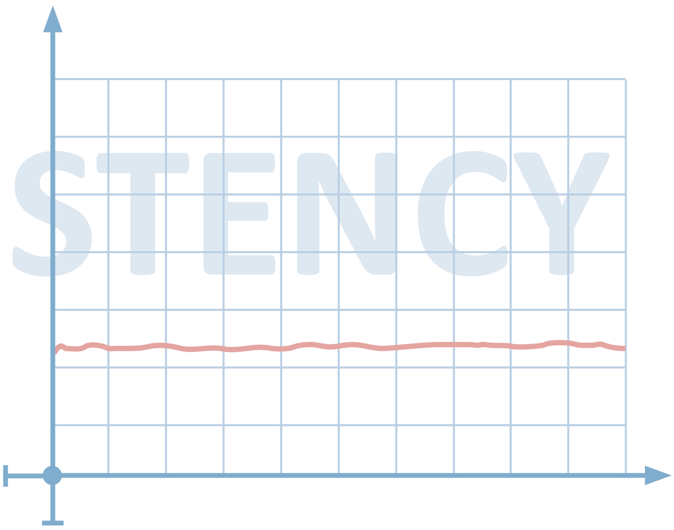
An advertising production agency asked us to help them with their signatures. They produce the television and print advertisements used by some of the largest companies in the world – arranging filming, sets, directors and more. Credibility and conformity are major issues for them but they have to balance this against a frontline workforce composed of mainly entry-level staff:

• Because staff maintain out- of-hours contact, they put a mobile number in signatures – but only that: no office line, no email address.

With software, changing it is as simple as saving a document - in fact, that's really how it works. You change it, save it and the software will update every signature in the company.

But do you want every signature in the company to be the same? Of course not. You may need to change it for each department - giving account managers an out-of-hours number on their email but sales a mobile on theirs. Software lets us change it easily for the variety of needs. You decide who gets each template.

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



Consistency

But what about errors? From spelling mistakes to broken links, when your staff set this up on their own, you won't like what comes back.

Even IT aren't above a few errors - after all, they're only human. If you had to copy/paste then personalize by hand every single signature, you might make a few mistakes too. Or, even

- Staff used their own interpretation of their job title – which caused some misunderstandings over who is in charge.

- They have offices in a few countries but may film segments on location worldwide – so staff arranging sets overseas often had the wrong address in their signature.

Software helped them in three ways. Firstly, staff always had the right amount of contact details in their signature – a mobile number, an office phone and an email address. Contacts could reach that specific sender quickly through the mobile number but on more official occasions could reach the main office through their main line.

Secondly, the job titles in their signatures were automatically added from an official database – so staff, even in honest confusion, couldn't send under the wrong title.

Finally, staff working on location abroad could use a 'filming location' address in their contact details. So equipment for their production wouldn't be accidentally shipped to the main office address on another continent.

more probable but less forgivable, there are mistakes on the homemade programming they might use to give out signatures. One slip-up in that dense code could give everyone a mess under their email - or corrupt all their attachments.

Software not only automates transcription, so you won't get a stray keystroke bringing down your business, but allows for previews of how it will look and whose email will display it.

With a preview function, we can make sure that every job title and name fits. We can even check which teams have been assigned which versions of the signature - and check to make sure which one individual staff fall under.

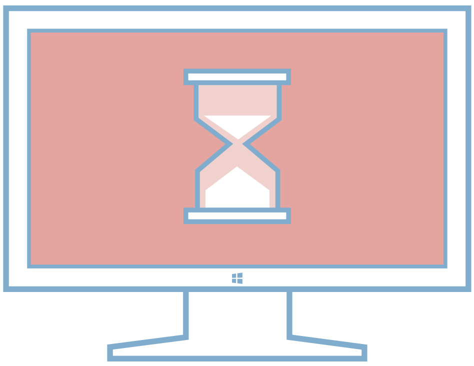
From the job title to the phone number, every last pixel of the signature will be consistent with your design - on the CEO's desk to his secretary's BlackBerry. These details sound mundane but in the instance where they're caught and brought up, they seem very serious indeed. The problem with email too is, without software, you can't capture data on the effect it had - we can never tell how many people were put off by your 'Sales Manger' or your 'COE'.

Convenience

Of all the manual methods I described, none of them seemed very easy. Whether you're bickering with IT for hours about their input or sifting through email after email to scan for errors in the signature, they all posed a hefty demand on time.

As useful as they are, I know that email signatures are never going to be your primary comms channel. They're great for building on comms you already have but they won't supersede or replace them. If they're not convenient to update and control, you're never going to use them to their maximum business benefit. You will sooner or later tire of updating them.

But when it's a few clicks, you can do whatever you need as soon as you need to.



It's daunting. That's why so many signatures end up in a state of disuse and disrepair - no one wants to tackle such an agitating and protracted task. So it gets left to go stale and we have staff mailing under 'Supreme Being' or 'IT Amdin'.

By capitalizing on that convenience too, marketing is more likely to try using the signature as a channel. When it can take weeks or a whole month just to set up one signature, the initial cost of even testing the idea far outweighs the insight a little experiment might glean. But when staff can quickly change it, they can explore for themselves the value of the signature – using this campaign banner to promote that event or embarking on a cross-media campaign to bring more contacts from corporate email onto social media.

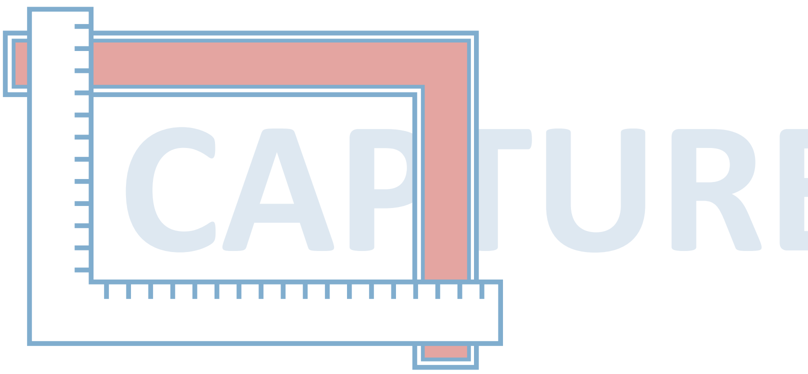
Part of the problem, in many cases, is also internal disagreement within the marketing department. Much as the needs and nuances of the market may change, marketing strategy and paradigms are liable to shift – what we like one minute may not be in favour the next. So when there is a delay in carrying out changes, it increases the likelihood that someone within marketing will decide or realize that there's some aspect of the signature that should change – setting you, potentially, back to square one.

Of course, another issue here is IT resistance. When it's simple for everyone involved, no one minds if marketing changes a signature. But if IT have to manually visit each computer in the building and copy/paste a new design, they have a vested interest in convincing marketing not to request that change. You may encounter pushback from IT or stalling tactics. Now, in the vast majority of cases, IT will be friendly and cooperative. But as we've all encountered with producing collateral, marketing may require several cycles of reviews – at the best of times. IT may not be ready for that and might become frustrated at the changes. These professionals are used to simply seeing a problem and then setting up its solution – not going back to square one each time someone has a better idea.

Don't forget that the end user is hit by the inconvenience of doing it manually. He or she doesn't want to have to stop working just to copy/paste then customize an example signature template. That's potentially the main obstacle to emailing out a template and asking staff to copy it. It's too much fuss for them. Software handles all of it in seconds.

As soon as you save your template, every single user will have a signature that matches. No wait, no work, no worries - you click 'Save' and it's complete.

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.



Capture

It's like the email signature channel was made for capturing data - at least, when you have software. How many people clicked on that campaign banner you added? Which department were they in contact with? How did they behave on the landing page? Software lets you glean as much insight from your signature as you do from all your digital marketing.

Software can add a 'custom variable' to the end of each link in each user's signature - and that variable could be unique to each member of staff or even each email recipient. So when they click on the signature, we can see in Google Analytics exactly whose signature they clicked on, what they did when they reached that page, even who they are and what their email address is.

You get one machine for two key marketing purposes: priming follow-up activity and measuring return on investment.

Because we know who each team is in touch with, we can get data on our email recipients. If the sales team's emails generate more clicks than account management's, potential customers might be more engaged than current customers. Or even within a single team: we know which sales staff deal with which type of client, so maybe we could infer what the large organizations want and what the small firms don't.

Now here's where we customize that follow-up strategy. Email signature software can log when a contact clicks in your CRM or marketing automation system. You could even make a point of following up contacts who click in a particular way. Ask that client if he wants to try the product he clicked on, for example, or attend the event in the banner he saw. Because you've linked up their identity with their interaction, you can have your staff act on their page visit in a timely, targeted, tactical manner.

And I want to look at actually using the data to customize the landing page. Before we start, I expect you know a page can be set to adjust itself based on the URL a visitor approaches from – for example, if it includes '/colour=?&blue' it might change its background to blue.

With software, we can change the link in each signature based on the recipient's email address. All the links in an email signature sent to me could have an '/email-name=chris.brown@exclaimer.com' at the end. Now, my CRM system can match that email address to a contact entry – a multinational 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.

By now, I think it's clear email signatures are a marketing comms channel – capturing data on that channel is a key part of any marketing comms channel.

Cost

All of these cut cost. Inconvenience is costly. Inconsistency is costly. Ignorance is costly. Inflexibility is costly. Incapability is costly.

Software solves them all. The time that an IT admin might waste trotting from desk to desk with a signature to copy/paste is significant. With an instantly updating signature, he doesn't even have to think about when or whether it changes: it's a marketing matter, marketing will handle it. There's no labor cost: it's instantly covered in a single mouse click.

That makes software cheaper than labor. We're talking about $5 per person – forever. That's cheaper than even your lowest paid employee doing it by hand. The time that you'll have to spend on manually configuring it is far from free.

Inconsistency costs us credibility. When the head of a whole division seemingly can't spell his department's name or the phone number in a signature comes through to an unrelated business, the email contact might think, 'what can they get right?'

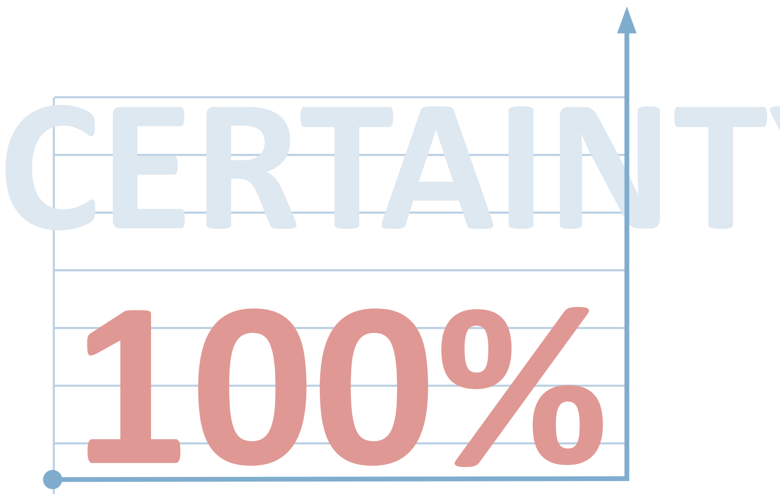
And we can't achieve anything through the email signature channel if we can't control it. From the bungled spellings to the banner for a sale that's long since ended, if one responsible team doesn't have overall control then all of the costs we mentioned will be more prevalent than ever. Where control is lost, costs are always found.

Certainty

All of these concepts add up to another C-word: certainty. You can be certain you have total control over the signature's design. There's no risk that some other department or end user will do a hatchet job of recreating it or simply refusing to add it to their email altogether.

You can be certain you're free to change it at will. When the need arises, you make the adjustments you need, as soon as you need to. You can be certain that it will always be up to date with your activity and evolving strategy.

You can be certain it's consistent across the whole company. Each job title, every name and number - they're all automatically taken from the same database your IT staff already trust with all your systems.



You can be certain it's convenient. There aren't any unforeseen complications or lengthy follow-up tasks. When you're done with your design or edit, the job's done.

You're certain you can capture the ROI your signature or almost any activity brought. Be certain that event was a success by measuring how much your contacts clicked and read its page - how much they were interested.

You're certain that costs will decrease. Whether it's establishing which campaigns work the best through data capture or saving the IT team some time. As soon as you set out, you can be sure that costs will go nowhere but down.

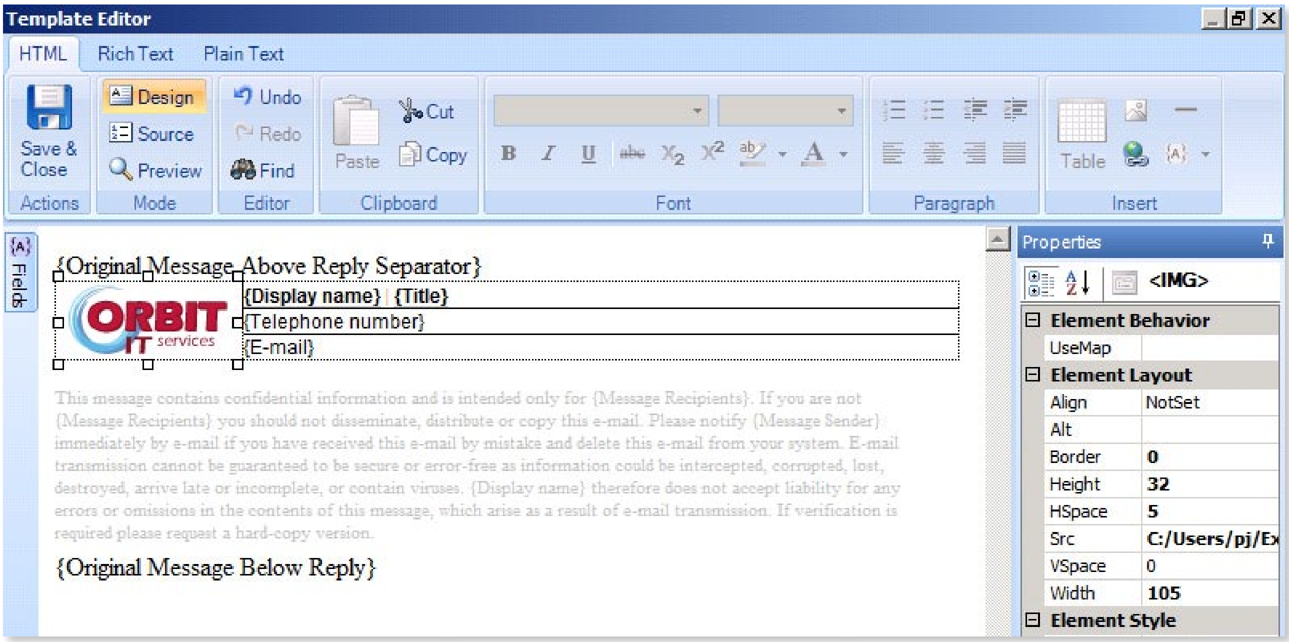


Figure 22 - The only way to ensure totally professional signatures.

Summary

You can't access any of the email signature channel's benefits without software.

- You need control over the design: what it looks like, which departments can use which version, what's different between their different versions.
- You need to change at will and on demand: quickly and automatically. You should be able to schedule changes in advance or only change temporarily, to coincide with a seasonal sale or holiday period.
- You need consistency in every signature. The contact details should be correct. The design, look and feel should remain constant throughout the organization.
- You need convenience in controlling it. Any change should be applied at the click of a 'Save' button.
- You need to capture data on clicks and page visits. Not just for analytics, feed the content into your CRM system to personalize the landing page or the sales agent's approach.
- You need cost-free management. There should be no labor cost. There should be no error cost. There should be no opportunity cost lost by not changing fast enough.
- You need certainty that you'll have all of these elements, without fail and without question.

Conclusion

Business runs on mail. Orders, quotes, complaints, - it all occurs through mail. Why aren't we using that for more marketing impact?

And yet, email is the one place we can guarantee total alignment with our segment of the market - after all, if they weren't at least slightly relevant, we wouldn't email them. Signatures are the simple, innocuous way to use that. Many organizations rely on the substantial rapport between their workforce and their contacts – whether they're customers or suppliers – and signatures are the only way to leverage that connection for marketing benefit and reciprocally reinforce that connection with marketing comms.

They look under an email and your content is there – and you can use that presence to do whatever you want.

Connect through social media. Comply with legal regulations. Communicate marketing campaigns. Conform to brand guidelines. Certify your authority. Contact each other simply and easily. Cooperate and relate with colleagues using internal comms.

Then, the only way to manage all those abilities intelligently and uniformly is through dedicated software. You're not just hoping your users will do it themselves or asking them to copy your template. You're not bargaining for IT to wander around the office pasting them into Outlook or to tinker with your most expensive and essential email equipment.

You control the design conveniently – and cheaply. It remains consistent on every email, even when you're changing it to keep up with your evolving and reacting strategy (or your products, staff, competition, environment or any influential factor).

The email signature channel is not about to become the most important tool for your marketing team or your organization – but it is an extremely efficient, effective and valuable tool when used intelligently. I believe that the frameworks I've described, for understanding both the signatures and the methods for managing them, are the simplest, surest and fastest way to create them, deploy them and extract the benefits we've examined.