



## PREFERENCES BEST PRACTICES

## VERSION MANAGEMENT

This document can be retrieved from the author.

## VERSION HISTORY

Version	Date	Author	Reason for issue
1.0	09/02/2018	B Clark	First Version

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## 1 SUMMARY

The marketing landscape is changing. Customers' expectations on how we communicate with them are higher than ever. If we offer to communicate, be it through a specific channel, for a specific brand, offer or at a specific frequency we need to meet that commitment.

Breaking that commitment will irritate your customer base with the risk that they may move on, unsubscribe or worse complain.

With this customer led requirement we also have new legislation that requires us to understand who we are communicating with, how we obtained the permission and how that permission changes over time.

In Europe, GDPR (General Data Protection Regulation) due in May 2018 is driving this change. Existing rules in Canada (CASL) are also putting emphasis on processes around collecting, maintaining and tracking permission.

With Email Manager 6.3.0 Alterian are adding broad preference functionality to meet these requirements. This functionality allows you to create permissions (Preferences), assign these to specific creatives, assign preferences to recipients and allow your recipients to opt in or out as desired.

Supporting these changes, we have comprehensive auditing on the preferences and any changes made. We also audit the recipient's preferences. We understand what mechanism altered each preference, when it occurred and who made the change.

This document is intended to provide best practices to get the most out of the new functionality

## 2 USING PREFERENCES

The new preferences functionality has been designed to be as flexible as possible. We expect many customers will utilise it to hold preferences related to the distinct types of campaigns being sent to the customer base:

- Newsletter
- Offers
- Informational

Each one may have different terms and conditions and require a separate agreement from the recipient to receive them. You will also want to allow them to opt out from each one separately.

Preferences can also be used if more than one brand sends out of the same Email Manager account. Each brand's customer can now have a separate preference.

- Brand 1 - Newsletter
- Brand 2 - Newsletter

You can also use them to offer different communication frequency

- Daily Offer emails
- Weekly Offer emails
- Monthly Roundup

Please note that currently one standard preferences page exists so any branding of this page should be designed to reflect all the brands utilising it.

### 3 EXISTING FUNCTIONALITY

Email Manager already has functionality that can provide the ability to opt in or out.

The standard is the concept of an unsubscribe. Within Email Manager customer actions can trigger an unsubscribe. These include:

- Unticking the Unsubscribe box on the preferences page
- Complaining to an ISP about an email they received (A complaint triggers an automatic Unsubscribe)
- Replying to an email with unsubscribe or remove in the top of the email (Soft Unsubscribe)

Our customers can also unsubscribe recipients through list manager.

None of this functionality will change with the addition of preferences. Customers who decide not to utilise preferences will need to make no changes. The existing unsubscribe mechanisms will continue as before.

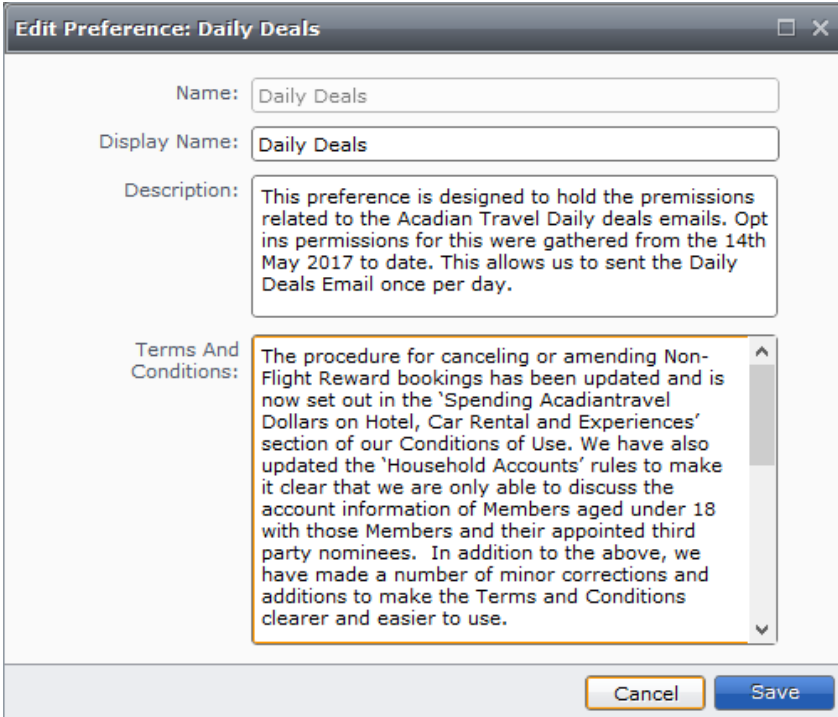
Email Manager also provides functionality that allows a user to opt into a list through the preferences page. This does not provide the flexibility, tracking or control that the preferences functionality provides. As a result, we would recommend any customers actively using this method to move to use preferences.

We do not recommend using both list opt in and preference methods in parallel. This may prove confusing for the user and increases the risk of mis mailing.

### 4 CREATING AND EDITING A PREFERENCE

You create new preferences within Creative Builder within the Shared Elements section.

Click on 'New' the enter a preference name, display name description and terms and conditions.



## 4.1 PREFERENCE NAME

We would recommend you keep the preference name concise. It cannot be changed once it has been saved because we link all subsequent changes and all auditing to it. It is also used as the key to load preferences into Email Manager from list loading.

## 4.2 DISPLAY NAME

As you type the Preference Name we will automatically create the Display Name. The Display Name can be changed at any time by editing the field. The display name shows to your recipients within the preferences centre, so it should be a user-friendly name reflecting what a recipient would expect to see.

The dual use of a preference name and display names allows you to have a preference name that reflects its purpose but allows a user-friendly name for your recipients to see.

As an example. You create a “Daily Deals” preference to hold your Daily deals preferences. The Preference name and Display name are the same.

The following year you need to change the terms and conditions for the Daily Deals email. You do not want to lose the current preference.

To maintain this, you create a new DailyDeals0418 “Preference Name” and set the “Display Name” to Daily Deals.

You can now gather permissions for this preference and when a recipient clicks through they see a Daily Deals preference which what is they expect.

## 4.3 DESCRIPTION

The description allows you to add the marketing reasons for the creation of the preference. You should add why you created the preference and a top level on what the permission allows. We would also suggest highlighting when the preference went live and when it was withdrawn. We automatically record a Preference created date, but this will not reflect when it was first actively used. The Description can be changed at any time by editing a creative

## 4.4 TERMS AND CONDITIONS

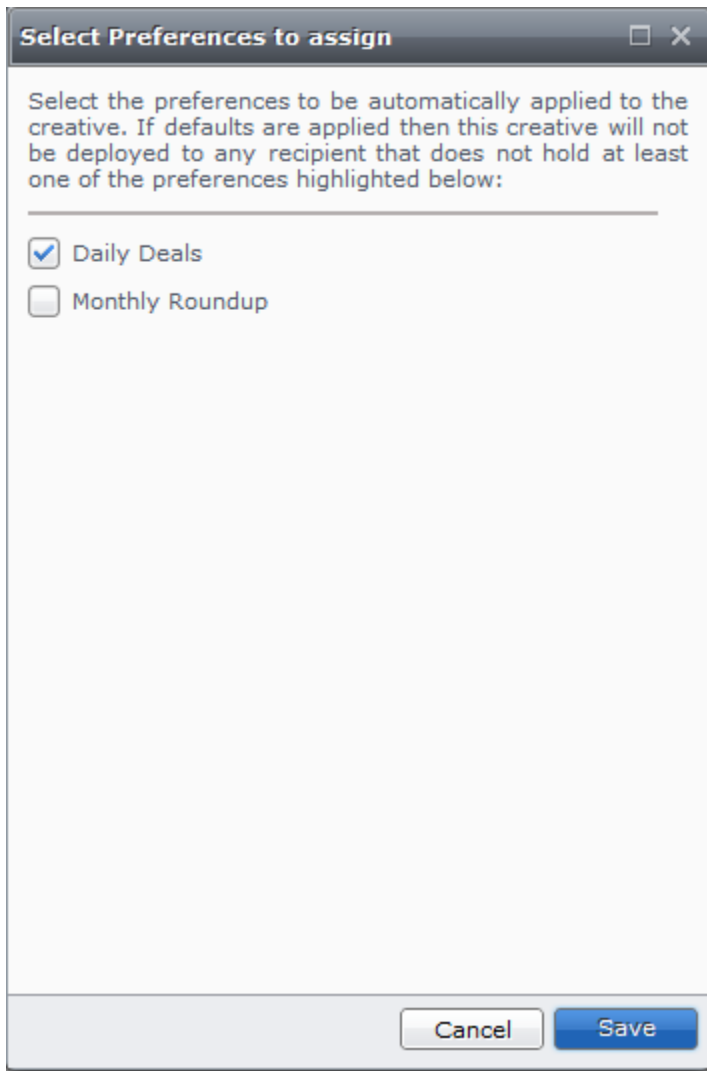
Terms and Conditions allow you to load in any legal text related to the Preference.

The Terms and Conditions will be available to your recipients in the preferences centre. This allows you to opt recipients into the preference from the preference centre. They can be exposed to the terms and conditions before positively opting into the preference.

You can alter the terms and conditions of a preference. However, the Terms and Conditions are often intrinsically linked to the preference so it's likely any changes will be minor or cosmetic.

If significant changes are required to the Terms and Conditions, it's likely a new preference will be required.

The Terms and Conditions field can contain a substantial number characters, but we would recommend restraint as it will show on the preferences page. If more extensive Terms and Conditions are required, we allow HTTP(S) links to internal General Data Capture Pages or external pages where broader terms can be provided.



## 5 ASSIGNING A PREFERENCE TO A CREATIVE

We expect the standard audience creation process will involve our customers using List Query to form an audience comprised of recipients opted into the correct preferences.

Further to this once you have created a preference you can assign the preference to a creative.

In the Creative Element Section click on the preferences tab

By default, each new creative has no preferences assigned. With no preferences assigned each creative can be sent to any audience. It is not restricted by the recipients associated preferences. Standard unsubscribes, health suppressions are still honoured.

As you build out your preferences you may want to restrict a creative from being sent to a recipient unless they have suitable preferences set. This allows you a final control measure should your audience selection or segmentation go wrong.

To assign a preference to a creative. Click on Assign.

In the Pop-up tick the preferences you would like to assign to this creative. Often it will be a one to one relationship. You are creating a Daily Deals Creative and you have a suitable Daily Deals Preference.

You can select multiple preferences. If multiple preferences are selected, they work as “ORs”. The email will be deployed to any recipient that holds at least one of the selected preferences per creative.

Once assigned the Preference will show in the Creative Elements section.

To remove a preference, highlight the row and click Remove.

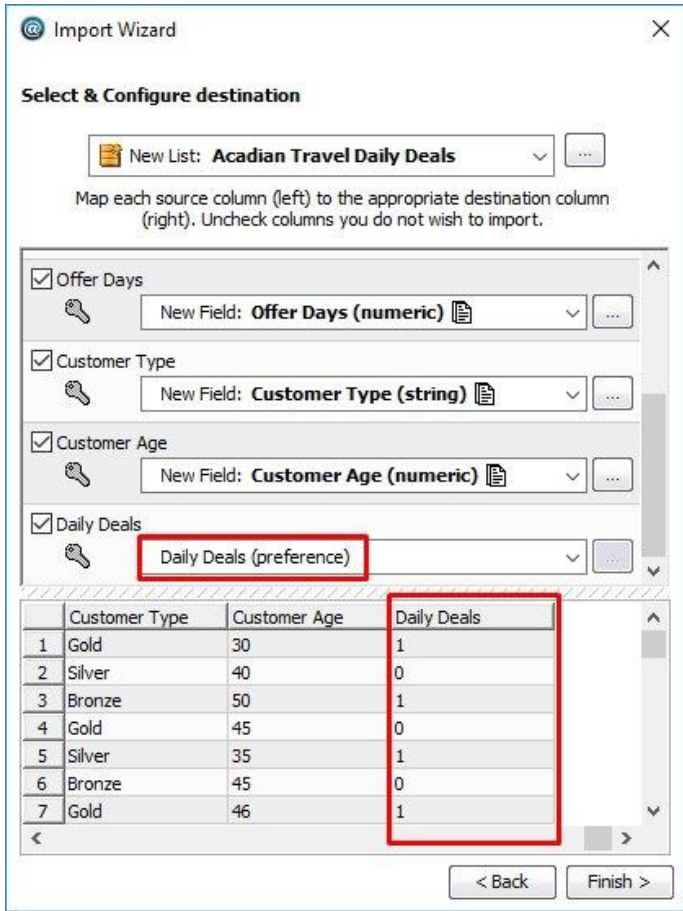
NOTE: Changes made to the creatives assigned preferences will be recorded for future audit purposes.

## 6 LOADING PREFERENCES

With your preferences created in Creative Builder you can start to assign preferences to your recipients. Unlike standard fields Preferences are list agnostic. For this reason, they act subtly differently from standard list fields when loaded.

The Preference name acts as the import key. Load a list with a column header that matches your preference name (not display name). See Daily Deals below.

When Email Manager matches the column to the preference it will show the preference name and (preference) after it. If you intend to load many preferences it may be worth developing a naming convention (example a Pref\_ prefix) so they group together and can be identified separately from list fields.



Preferences currently need to be loaded in as 1= True = Opted in

0=False = Opted Out

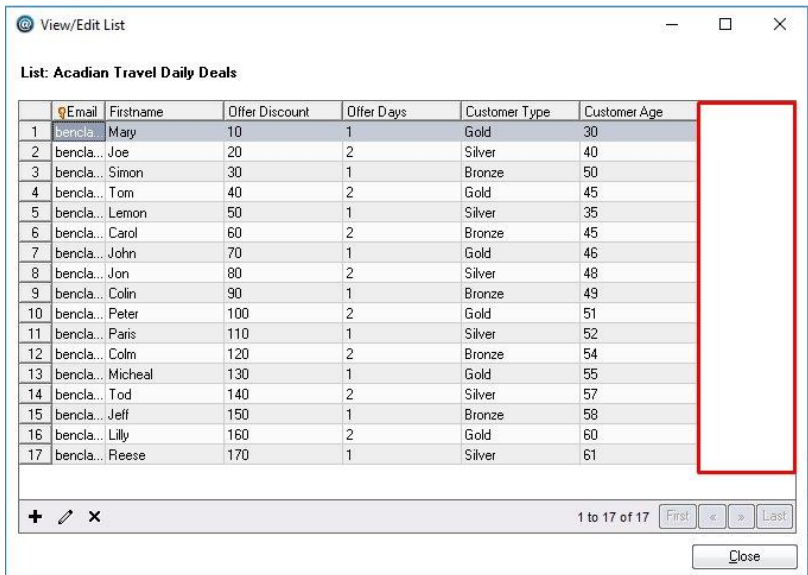
With the preference mapped you load the list as normal.

The resulting list once loaded will NOT show the preferences column or the preferences loaded. These would quickly become stale and inaccurate so are not shown. See Image 2

These preferences are stored and continually updated in a separate table. The changes loaded will however have updated the preferences selected.

This same logic can be used to load preferences for customers using Drop Folders and the Email Manager API.

Image 2





## 7 CREATE AN AUDIENCE OR SEGMENT BASED ON PREFERENCE

With preferences dictating who you can send your marketing communication too the starting point for most campaigns will be to create a starting audience based around preferences.

Although a default preference added to a creative should stop the creative being sent to the recipient this is a wholly inefficient way to manage your lists.

To Create an audience based upon a Preference:

Click into List Management and click onto Query List.

Click the [Change] button, which will open a new window.

Tick the 'enable preferences criteria' check box to activate the functionality.

Unlike the List Query functionality this does not narrow the possible selections to only include those found in the lists selected.

You select the lists of interest and you query a separate table that holds the preferences for each recipient.

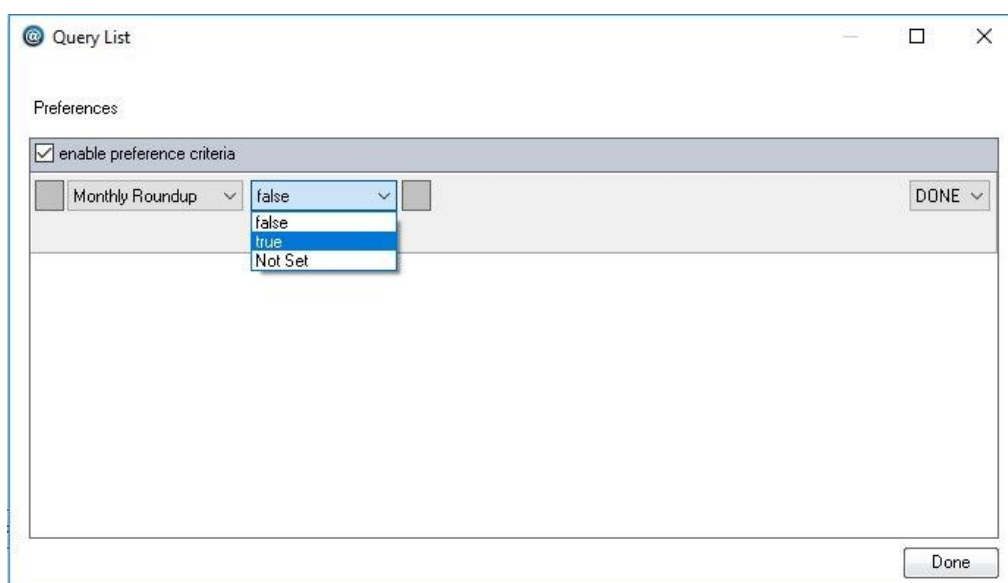
Your options are:

True = Currently opted into this preference

False = Currently opted out of this preference

Not Set = Neither opted in or opted out

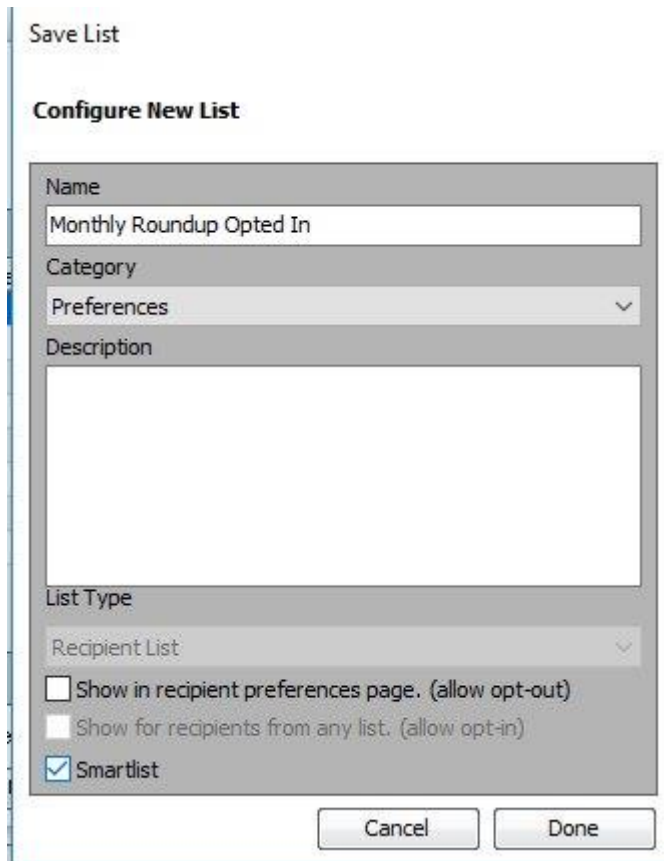
To add more sophisticated criteria, use the drop-down menu to select the AND OR operators where you can query multiple preferences.



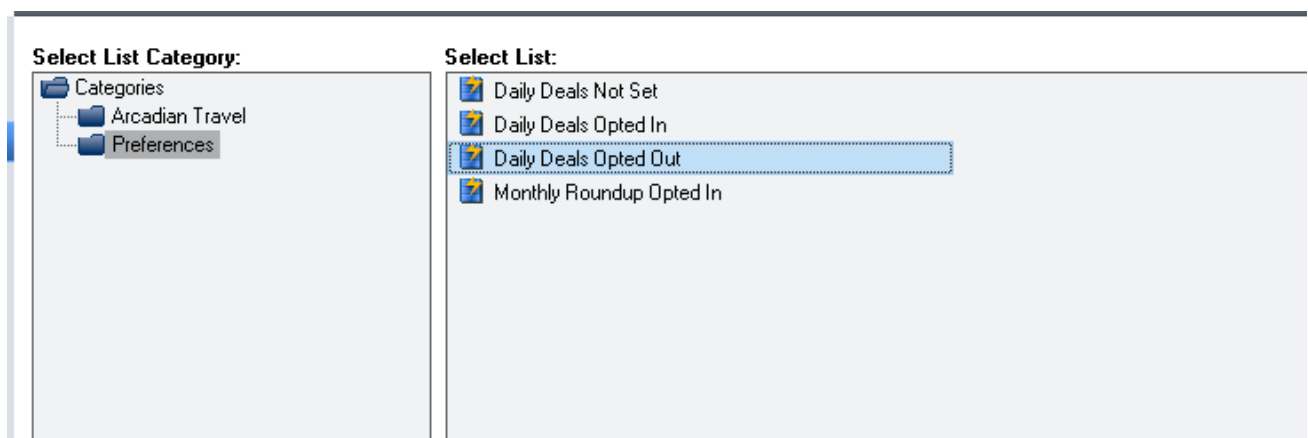
If you utilise Preferences the first step of any campaign will be to understand which customers can be emailed. This will be led by querying the correct preference to form an audience.

To make this an efficient process create a list folder called Preferences. Then create Smartlists for all your preferences created around opt ins to your core lists. These can refresh on send so can form the standard audience for your ongoing campaigning and provides you with a view on how many recipients are currently opted into each preference.

Creating a Preferences Smartlist:



Preferences Folder:



Creating separate Preferences Smartlist is also currently the best way through the UI to analyse any changes to preference volumes.

## 8 CREATE AN AUDIENCE OR SEGMENT BASED ON PREFERENCE

Sending an email to a list created around preferences does not differ from the standard process. If you have preferences assigned to your creative but have setup your audience incorrectly, the Suppressions section of Send a Message will show many suppressed records.

Should you continue to send under this scenario the emails will not be sent to the recipients and the suppressions will feed back into Email Manager and will be seen in Quick Totals as Field Suppressions.

Assigning a default preference to a creative has been designed as a final check to limit the chances of mis mailing. If Email Manager is required to limit sends based solely on the default preferences linked to a creative, it is likely to cause performance implications for your deployment and is strongly discouraged.

## 9 PREFERENCES CENTRE



### Preferences for Simon (preview)

- Daily Deals
- Monthly Roundup

**Terms And Conditions**

Baggage ("Conditions of Carriage") set out below are important and affect your rights as a Member of the Executive Club.

You must read both these Terms and Conditions and Acadian Travel carefully before first quoting your Membership number to Acadian Travel or an Airline Partner or Service Partner. If you have any questions, telephone your local Service Centre.

The Terms and Conditions contain some exclusions and limitations of liability. For more details click [here](#)

- Please unsubscribe me from all future mailings. ←
- Update RSS feed only.
- Send text-only when available.

Save Preferences ←

### 9.1.1 EXISTING PREFERENCE CENTRE FUNCTIONALITY

The existing Email Manager preference centre has been updated to now show preferences. None of the existing functionality has been removed and customers not utilising Preferences will not need to make any changes to accommodate the change.

The standard Unsubscribe has been maintained. This will opt a recipient out from receiving any emails from your Email Manager account.

As highlighted before. If customers are using list subscription functionality we would recommend these are updated to use Preferences to benefit from the additional auditing and greater control. However, these methods will continue to work.

### 9.1.2 PREFERENCES FUNCTIONALITY

Recipients of the Email who are currently opted into the Preference will have the tick box next to the Preference Display name enabled.

The recipient at this point can choose to opt out by simply clicking to remove the tick. This change will be recorded, and the preferences table updated.

In the example below the recipient Simon is currently opted into the Daily Deals preference. At some point he was opted into the Monthly Roundup email. As he was previously opted in he can opt himself back in. If he were to click on the Monthly Roundup tick box, he would opt himself into that preference.

Clicking on the Terms and Conditions text next to each preference shows expands out the legal text previously provided. In the example below, enhanced Terms and conditions are available though a separate page linked from the terms and conditions.

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- Monthly Roundup

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### 9.1.3 OPTING RECIPIENTS IN

Email Manager 6.3.0 will provide the following functionality through the standard Preference Centre:

Preference state per recipient	Tick Box	Terms and Conditions
Opted In	Ticked	Shown - Highlights what you opted into previously
Opted out in the Past	Not Ticked	Shown – Highlights what you may want to opt into
Not Set – Never been opted in or out	Not Shown	Not Shown

Future versions of Email Manager will provide enhanced General Data Capture functionality allowing the creation of bespoke pages allowing opt ins to any preference. We also intend to introduce functionality to remove or reset a previous preference.

Should you want to use your preference centre to allow mass re-optin to your preferences the process would currently be as follows:

1. Load recipients – Set them as opted out (0 or false) for the preferences where you would like to allow them to re-optin.
2. DO NOT set a default preference on your creative. This will allow the creative to be sent to any audience (minus hard unsubscribes and health suppressions)
3. Create an audience of all the required recipients from your lists.
4. Email your list with copy designed to encourage your recipients to re-opt into your marketing. Highlight the benefits they receive by doing so. Add the standard {preferences} link to your copy to allow users to click through easily to the preferences page.
5. Your recipients will click through and opt in.
6. Once opted in you can create an audience of those who have re-opted in for future use.

## 10 REPORTING

### 10.1 FIELD SUPPRESSIONS

If you attempt to email recipients where the preferences they hold do not match the default preferences on the creative these emails will be suppressed and show in Quick Totals as Field Suppressions.

### 10.2 PREFERENCE OPTINS AND OPTOUTS

If a recipient clicks through to the preferences centre and elects to opt in or out of one or more preferences quick totals will show:

Preference Optout = Indicates the specified user opted out of one or more preferences within a minute

Preference Optin = Indicates the specified user opted into one or more preferences within a minute

Although you cannot see the specific preference that was changed any optout can be seen as a general negative and every optin as a general positive.

Any Unsubscribe	Unsubscribe Rate	Preference Optin	Preference Optout	Field Suppression
0	0.00 %	1	1	2

Any subscribe	Unsubscribe Rate	Preference Optin	Preference Optout	Field Suppression
0	0.00 %	1	1	2

### 10.3 SINGLE EVENT VIEW (SEV API OR CAMPAIGNS INTEGRATION)

The Single Event View (SEV) files are created by Email Manager as the events are generated. For SEV each individual event is added to the SEV file. It has no level of deduplication.

This means that the Email Manager Quick Totals Preference OptOut and Preference Optin are a subset of the SEV files Preference Optout and Preference Optin. They will not match. The SEV information is more granular.