How-to-Guide

How to Optimize Your EPC for Adestra

So, your EPC is launched. Congratulations! We know that took a lot of planning and strategizing to get there. **But it isn't over**. You still have to take a few steps to ensure you're configuring and optimizing your EPC for greatest marketing effectiveness.

First things first, remember that your EPC syncs with your AMS in real-time, while your preferences are written back to Adestra as fields. Your epc field will be prefixed with "epc".
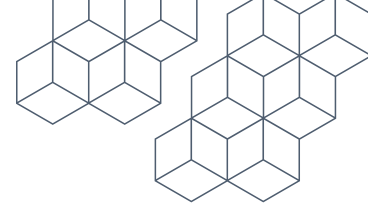
Important note for initial set-up: To have your preferences populated into lists, you'll use your query builder to create the query on the AMS side. The sync will pick up those queries as lists from the AMS on the next sync run and those lists will appear in Adestra and continue to be updated every time the sync is run.

With this said, now let's take a hypothetical HighRoad EPC example to walk you through this:

HighRoad Solution™
Email Preference Center

HighRoad Updates
- ❑ Company announcements
- ❑ Product roadmap

Products & Solutions
- ❑ Adestra
- ❑ Blue Hornet
- ❑ ICE Newsletter
- ❑ Plus Connector
- ❑ SharpSpring
- ❑ Shopping Cart
- ❑ SMS Texting

Educational Events
- ❑ Webinars
- ❑ Workshops

Center of Excellence
- ❑ Data segmentation
- ❑ Content marketing
- ❑ Deliverability practices
- ❑ Goal setting & tracking
- ❑ Lead gen & sales
- ❑ Member engagement
- ❑ New tools & technologies

Services
- ❑ Data management
- ❑ Email automation
- ❑ Marketing automation
- ❑ Digital marketing
- ❑ Technology adoption

❑ **Weekly Blog Digest Digest**

❑ I no longer want to receive emails from HighRoad

The front-facing portion of your Email Preference Center is configured but the data sitting behind the form still needs to be accounted for in Adestra. For instance, under Products & Solutions, when a user checks 'Shopping Cart,' that contact field value for 'epc_shopping_cart' will be set to 'True' as in yes this contact is opted into Shopping Cart emails from HighRoad Solutions. On the next sync run the inclusion view list in your destination tool will increase by one contact to account for the newly opted in contact. In the opposite scenario, when a contact opts out of 'Shopping Cart' emails, their 'epc_shopping_cart' field value becomes 'False' as in this contact is not opted in to receive these emails and the exclusion view list in your tool for that preference reduces by one contact.

Example contact fields names as they appear in your core table:

Data		
email		Active email address
imis_id		Text
first_name		Text
last_name		Text
company		Text
member_type		Text
member_category		Text
member_status		Text
informal_name		Text
paid_thru_date		Date of birth
chapter		Text
company_link_id_co_id		Text
member_welcome_since		Date of birth
job_function		Text
epc_in_person_events		Text
epc_conferences		Text
epc_chapter_events		Text
epc_member_news		Text
epc_awards		Text
epc_governance		Text

NiUG - National iMIS User Group International

DATA

Lists
Filters
Core Tables
Data Tables
Unsubscribe Lists
Export Manager
Source
Remote Connection

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The next step—a step that is often missed—is adding these inclusion and exclusion lists to your campaigns (emails) so that you're honoring their preferences.

So let's approach this by exploring the anatomy of an EPC. An EPC is divided into three different categories:
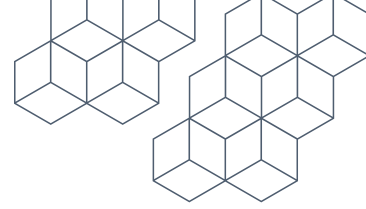
Global Opt-out ↓

Preference Category Opt-outs ↓

Preference Category Opt-ins ↓

Global Opt-out

This box represents the Global Unsubscribe dictated by the CAN-SPAM Act

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When it comes to your global opt-outs (otherwise known as your Global Unsubscribes), there are two ways to handle this in Adestra:

1. Global Opt Out Sync (add-on feature)
2. Global Unsub List

With a Global Opt-Out Sync add on feature, in almost all cases, you won't need to do anything additional to recognize your global opt-outs.

With the Global Unsub List, this won't be set-up automatically. You'll need to account for the Global Unsubscribe exclusion list. One way we account for your Global Opt Out Exclusion List view is by setting up an automation in Adestra that can allow you to handle all Global Opt Outs on the Preset configuration. As part of onboarding, HighRoad will help you set this up. As part of your ongoing Standard Operating Procedures (SOPs), you'll want to incorporate the following a few mandatory tasks.

What the global unsubscribe automation workflow will look like in your account:

In this diagram, we're taking anyone that is on your view for global unsubscribes and adding them to a global unsubscribe list in adestra that you manage through your presets. Then, we're waiting a day and checking for anyone that is added/removed/still on the view for global unsubscribes and either keeping them on the unbuscribe list or removing them so they can start receiving emails again.
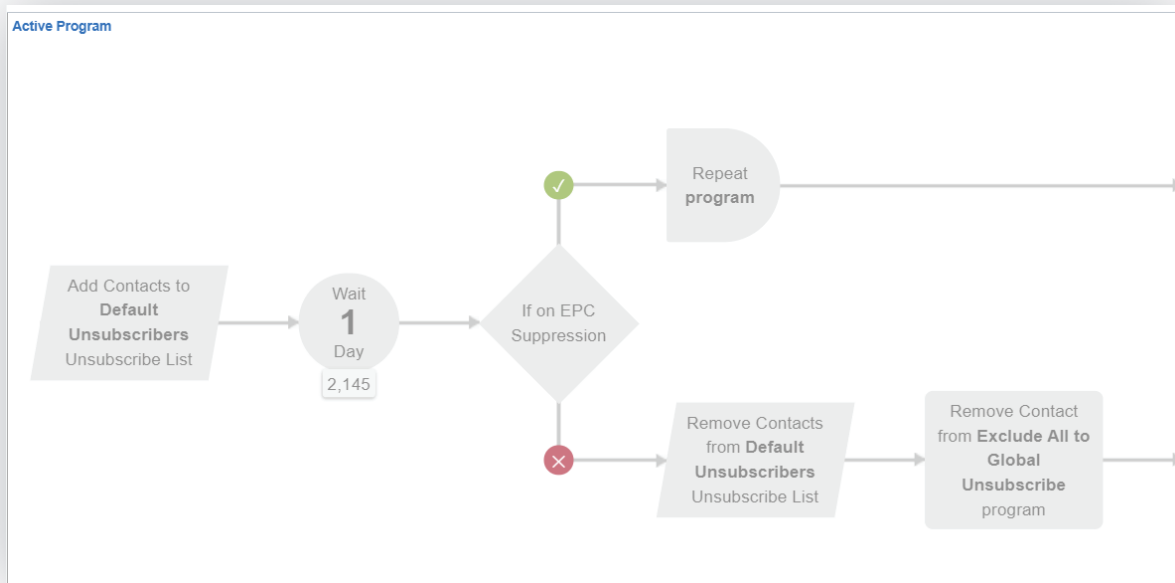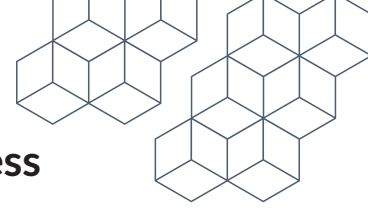
What your preset will look like where you will click to suppress the global unsubscribes:

In this image of unsubscribe handling on an Adestra preset, we're seeing two things happening:

1. We're selecting the Global Unsubscribe list as the Unsubscribe list to write email client unsubscribes. When someone doesn't click to the EPC page and they tell their email client (i.e. Outlook, Gmail) they want to unsubscribe, those records are stored on this list as shown in the configuration.

2. We're also selecting the Global Unsubscribe list as the suppression list so that emails going out using this preset configuration will suppress either email client unsubscribes or EPC global unsubscribes (as configured by the automation pictured above).

Unsubscribe list

Global Unsubscribers ▼

Suppress list preset

Default Value ▼

Unsubscribe lists to use for suppression in addition to the selected unsubscribe list. Note that the selected unsubscribe list will automatically be suppressed regardless of whether it's selected or not.

Suppression lists

☑ Global Unsubscribers

☐ Pause Subscriptions (7, 14, 30 Days)

RoadWork Resources

🌐 **How to Set-up Presets Video**

🌐 **How to Set-up Presets Workbook**
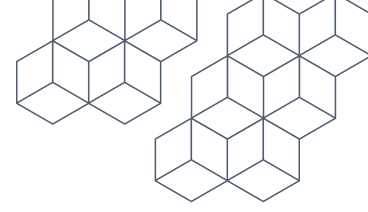
Preference Category Opt-outs

Using the hypothetical HighRoad example again, let's take a look at how the preference categories are reflected in Adestra. All of the boxes that **aren't** checked by a contact are added as separate Exclusion Lists.

Checked boxes are category preference opt-ins

Unchecked boxes are category preferences opt-outs

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For example, Mary visits HighRoad's Email Preference Center. She checks boxes for communications around Adestra, Shopping Cart, webinars, content marketing, lead gen & sales, member engagement, email automation, and marketing automation. For the boxes that **aren't checked**, Mary gets added to individual Preference Exclusion Lists.

This being the case, as an organization, the onus is on you to adopt a Standard Operating Procedure (SOP) so that you're building these individual Exclusion Lists into your distribution. You'll need to manage the process of honoring Mary's preferences, including topics she doesn't want to hear about. You do so based on these crucial steps when building your emails and lists:
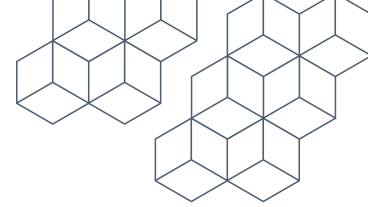
1. **Tag emails with preference categories** — As part of email development, your email should be tagged with relevant topic preferences based on the content and the message of the email. For instance, if we at HighRoad are sending an email promoting a webinar to our clients about a Shopping Cart tool within Adestra, we would think through the content of that email using the Email Preference Center as our guide. Going through the process, we would tag the email accordingly:

   - Adestra
   - Webinars
   - Shopping Cart
   - Goal Setting & Tracking
   - Member engagement
   - Email automation

2. **Create a Dynamic list with our inclusions and exclusions** — When we build the distribution for the email, we will create a Dynamic List (a Dedicated Dynamic List for one time lists like imports) so that we can add our synched *All Customer List* as an Inclusion list. Within the Dynamic List, we would then make sure that we include the synced *unchecked Exclusion Lists* for each of the categories:

   - Adestra Exclusion List
   - Webinars Exclusion List
   - Shopping Cart Exclusion List
   - Goal Setting & Tracking List
   - Member Engagement Exclusion List
   - Email Automation Exclusion List
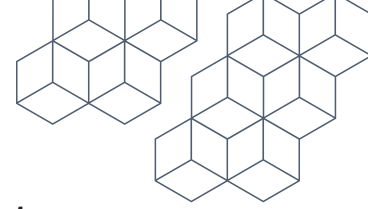
Example of a dynamic list using email opt-outs as exclusion lists. This email is going out to all persons that do not want to receive educational material or 'Learning" opportunities.

Include Lists

ADD INCLUDE LISTS			Search term	🔍
ID	Name		Count	
☐ 1	All Active Persons		86,347	

Exclude Lists

ADD EXCLUDE LISTS			Search term	🔍
ID	Name		Count	
☐ 196	Aptify Exclusions: Learning Email Opt-Out		6,682	

RoadWork Resources

- 🌐 **How to Create an Email Step-by-Step Guide**
- 🌐 **How to Create an Email Step-by-Step Instructions**
- 🌐 **How to Create a Dynamic List**
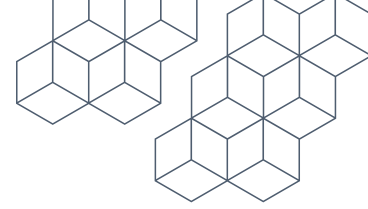
Preference Category Opt-ins

In some cases, you're going to start with your All Customer list and approach your list-building from an **opt-out perspective** to get to your target distribution. However, if your organization adequately and ongoingly promotes your Email Preference Center and the majority of your members, customers, or prospects have identified their preferences, you can approach your list-building from an **opt-in perspective**.

Unchecked boxes are category preferences opt-outs

Checked boxes are category preference opt-ins

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For example, Tom visits HighRoad's Email Preference Center. He checks boxes for communications around SharpSpring, Shopping Cart, workshops, content marketing, goal setting & tracking, lead gen & sales, and marketing automation. Because Tom has selected these topics, he will be opted into all communications related to these topics. In a sense, we've just garnered an entirely individualized profile of Tom. It's clear that Tom wants to learn more about marketing automation as a means to generate revenue. For the boxes that **are checked**, Tom gets added to individual Preference Inclusion Lists.
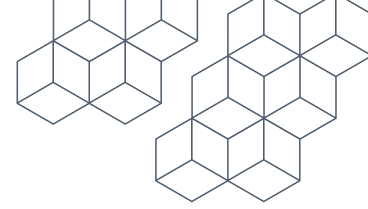
The minute that our client—Tom in this instance—tells us that he wants to hear about these topics, the onus is on us to build these individual Inclusion Lists into our distribution. We manage the process of honoring Tom's preferences by incorporating the following steps when building your emails and lists:

1. Once again, as part of email development, your email should be tagged with relevant topic preferences based on the content and the message of the email. For instance, if we at HighRoad are sending an email promoting a workshop to our clients about the Shopping Cart tool within SharpSpring, we would think through the content of that email using the Email Preference Center as our guide. Going through the process, we would tag the email accordingly:

   - SharpSpring
   - Shopping Cart
   - Workshops
   - Goal Setting & Tracking
   - Marketing Automation

2. This is where the process changes a bit. Instead of leading with our All Customer List, we already know that a good portion of our clients and prospects have already shared their interests with us. This being the case, when we build the distribution for the email, we will create a Dynamic List (a Dedicated Dynamic List for one time lists like imports) that only incorporates the checked Inclusion Lists for each of the categories:

   - SharpSpring Inclusion List
   - Shopping Cart Inclusion List
   - Workshops Inclusion List
   - Goal Setting & Tracking Inclusion List
   - Marketing Automation Inclusion List
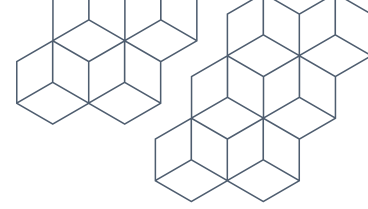
In this case, we don't need to use any Exclusion Lists because we're not starting with the All Customer and segmenting down based on our opt-outs—we're starting with an already segmented list based on interests.

Note that this opt-in list-building process also works for those organizations who have chosen to pre-check all of the categories within their Email Preference Center as the default, putting the onus on the user to uncheck the categories they're not interested in.

RoadWork Resources

- 🌐 **How to Create an Email Step-by-Step Guide**
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- 🌐 **How to Create a Dynamic List**

Now that you have your preferences accounted for, which feeds into your overall segmentation strategy, you can start to build member and customer journeys based on indicated interest using Automation Programs. Check out the **Adestra Roadwork** page for resources on building these journeys. And, as always, lean on HighRoad Services and HighRoad Support to help you throughout the learning process.