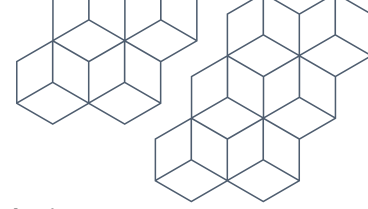# How-to-Guide

## Optimize Your EPC for Greatest Effectiveness

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 inclusion and exclusion lists sync nightly, all via your Plus Connector integration.

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

**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 will be added to an inclusion list in Adestra. Similarly, when a user **doesn't** check 'SMS Texting,' that contact will be added to an exclusion list in Adestra.
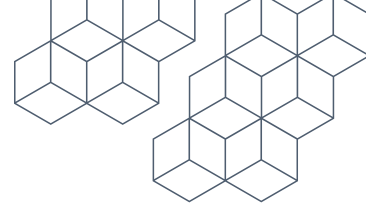
The next step—a step that is often missed—is adding these inclusion and exclusion lists to your campaigns (emails) so that you're honoring their preferences.

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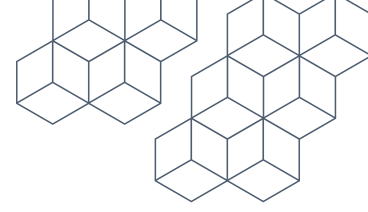
**Global Opt-out** ↓

**Preference Category Opt-outs** ↓

**Preference Category Opt-ins** ↓

# Global Opt-out

**Email Preference Center**

HighRoad Solution™

### 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

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

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

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

With a Global Opt-Out Sync, in almost all cases, you won't need to do anything additional to recognize your global opt-outs. As part of onboarding, HighRoad builds this global opt-out list sync directly into your Preset. In other words, this portion is already set-up by HighRoad on your behalf.

With the Global Unsub List, this won't be set-up automatically. You'll need to account for these exclusion lists. You need to do this by building a Standard Operating Procedure (SOP) that incorporates the following two mandatory tasks:
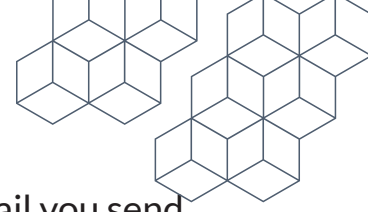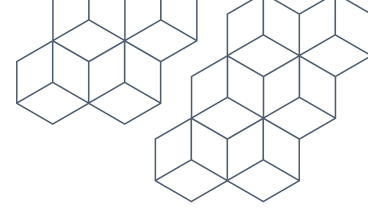
1.) Manually add the Global Unsub List as an exclusion list for every email you send. This accounts for your existing opt-outs held in your AMS.
2.) Set-up presets for your emails with the Global Opt Out Unsub list in Adestra. This accounts for inbound (new) opt-outs that come through Adestra.

**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

**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

Unchecked boxes are category preferences opt-outs

☐ **Weekly Blog Digest Digest**

☐ I no longer want to receive emails from HighRoad

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:
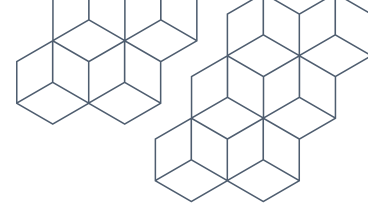
1. **Tag emails with preference categories** — As part of email development, your email should be tagged with relevant topic preferences based on the content and the message of the email. For instance, if we at HighRoad are sending an email promoting a webinar to our clients about a Shopping Cart tool 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

## 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**
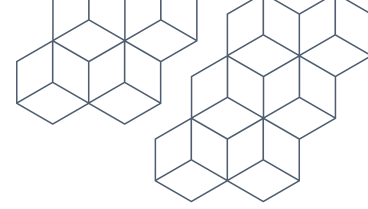
# Preference Category Opt-ins

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

**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

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.
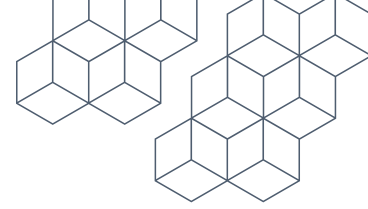
The minute that our client—Tom in this instance—tells us that he wants to hear about these topics, the onus is on us to build these individual Inclusion Lists into our distribution. We manage the process of honoring Tom's preferences by incorporating the following steps when building your emails and 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
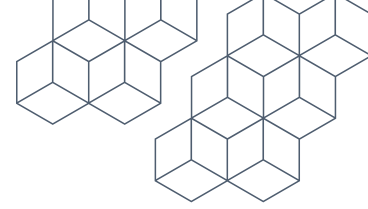
In this case, we don't need to use any Exclusion Lists because we're not starting with the All Customer and segmenting down based on our opt-outs—we're starting with an already segmented list based on interests.

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**
- 🌐 **How to Create an Email Step-by-Step Instructions**
- 🌐 **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.