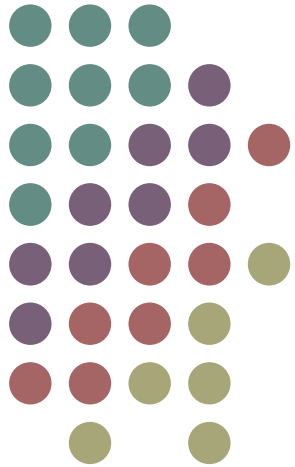
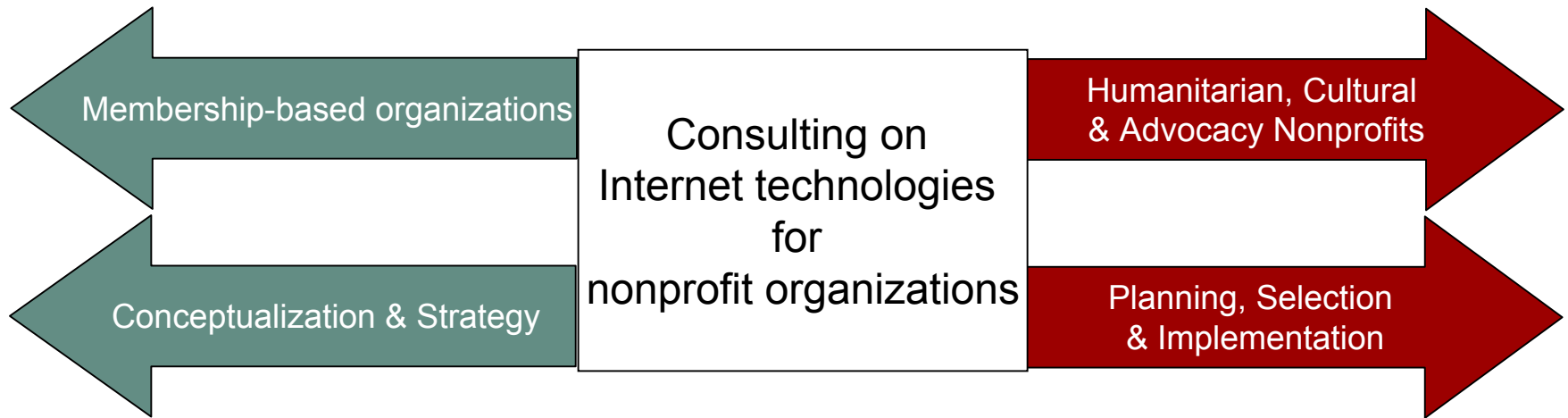


An Executive Dialogue:

*Your Email
Communications Strategy*



Your Hosts for Today's Program



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Dottie Hodges

Agenda



- **Welcome and Introductions**
- **A Model for your Email Strategy**
- **Discussion: Three Categories of Email Communications**
- **Working Lunch (11:45) and short Personal Break**
- **Group Discussion Continues with Debrief**
- **Discussion of Infrastructure Issues**
- **Email Strategy Starting Point**
- **Summary and Wrap Up**

Goal for today: Raise the issues associated with email within nonprofits/associations, share concerns and solutions, begin working towards our own Email Strategy

Making the Case for an Email Strategy



WHY....?

Volume

- By 2005, the e-mail volume is expected to grow to 36 billion emails sent per day worldwide, more than triple the nearly 11 billion e-mails sent per day worldwide in 2001. *(Gartner, 5/02)*
- 47 percent of consumers surveyed receive more than 10 commercial e-mail advertisements per day *(Opt-in News, Spring 2002)*

Activities: Politics, Philanthropy, Holiday Shopping

- Two-thirds of politically-engaged Internet users during the 2002 election cycle sent or received email related to the campaign. *(Pew Internet & American Life, 3/03)*

Making the Case for an Email Strategy



WHY NOW...?

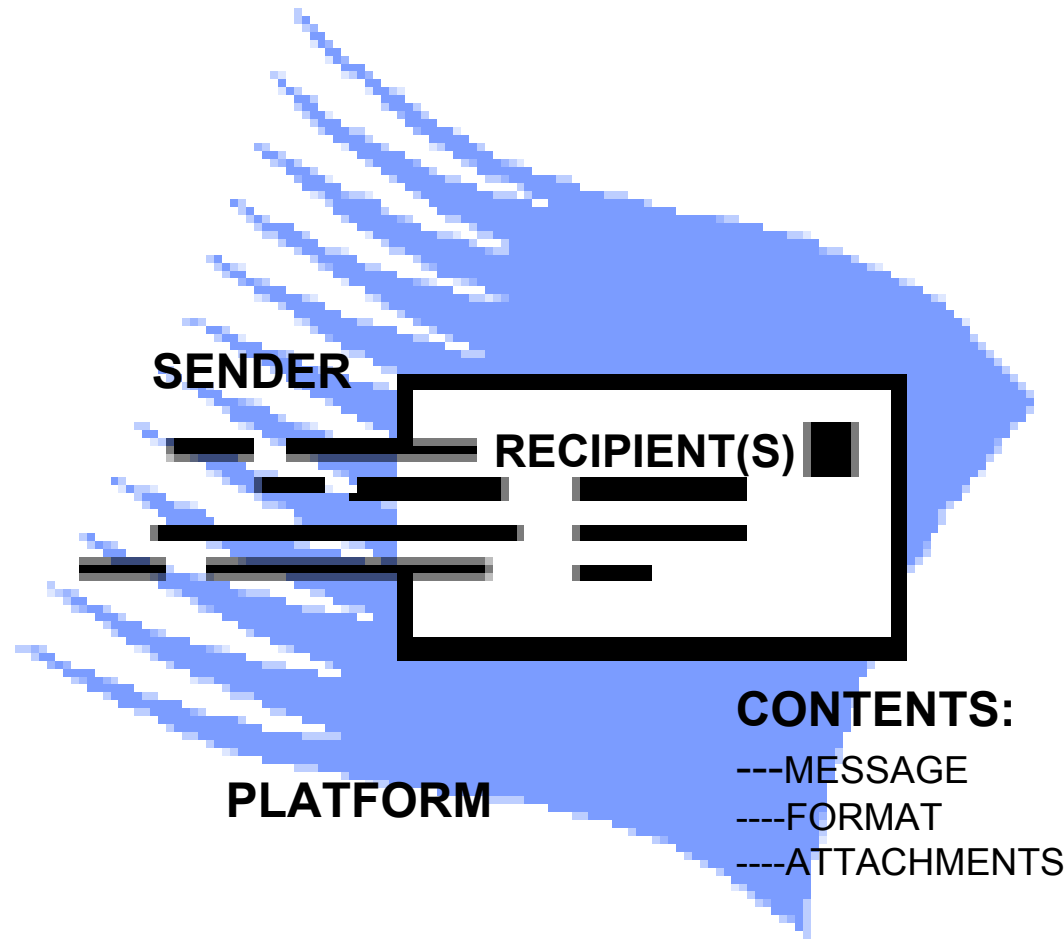
Increased Risks

- Email is among the most critical security concerns for IT managers
(TechRepublic user survey, 10/01)
- 12.6% of Fortune 1000 companies reported evidence of e-mail tampering
(1998 US Senate survey)
- Spam Impact: 'Unprotected' email users spend 200 minutes for every 1000 emails... 3 ½ hours per month *(Osterman Research 2003)*

A Strategy Will Help You Survive and Thrive

- By 2004, more than 95% of permission-based e-mail will have less than a 2 percent response rate *(Gartner, 5/02)*
- 78% of nonprofits do not have an email strategy *(Gilbert Research, 2003)*

Building a Model for Email Strategy

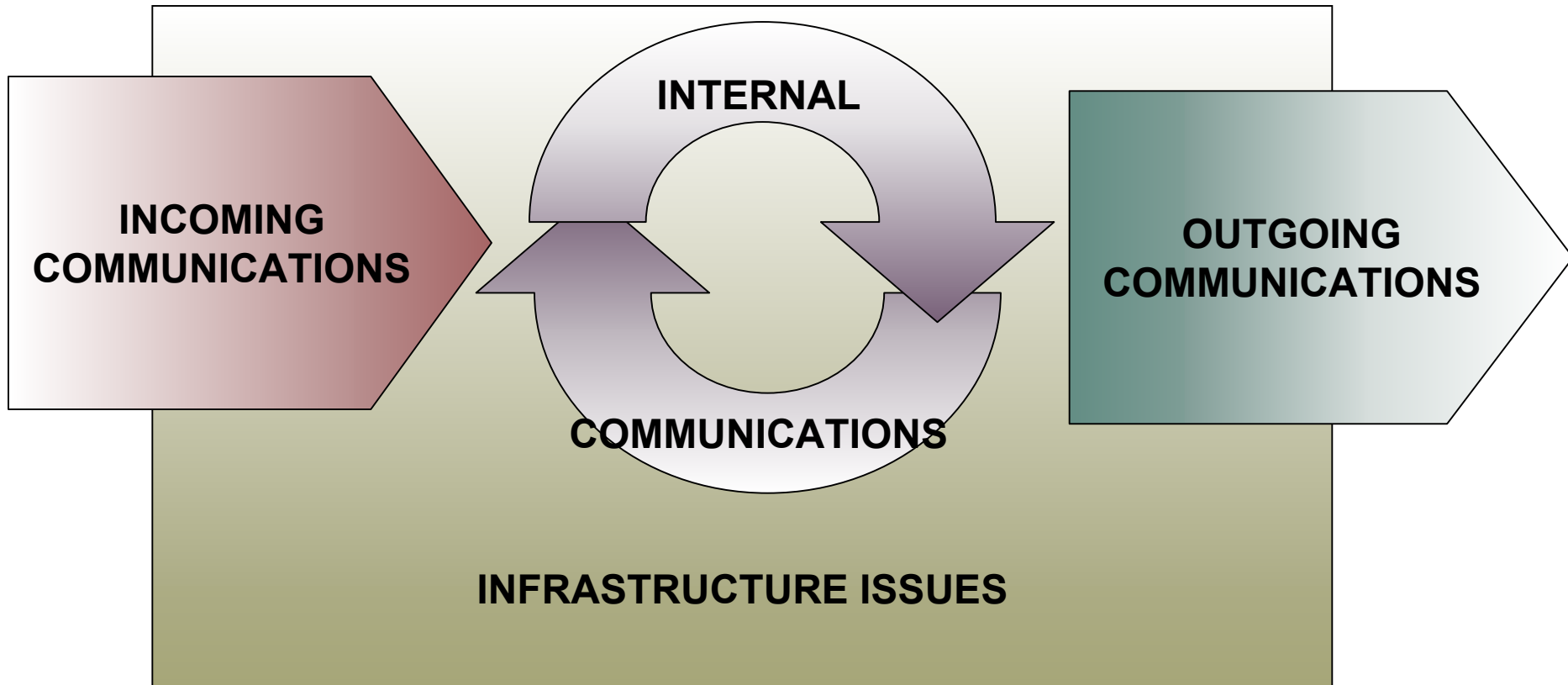


What does it mean...

When it's TO you

When it's FROM you

eMail Strategy “Buckets”



Our Email Strategy Model

INCOMING COMMUNICATIONS

Protecting your infrastructure and your staff from compromise

Properly handling incoming Email traffic

INTERNAL COMMUNICATIONS

Using the tool to facilitate work

Protecting the organization, infrastructure, and staff from compromise

OUTGOING COMMUNICATIONS

Controlling Distribution

Managing Lists

Ensuring unity of message

Protecting your image & brand

INFRASTRUCTURE ISSUES

Platform, client, toolset

Outsourcing

Standards, Templates, Guidelines

Storage and Disposal

Guiding Questions



What are your **ASSETS**?

- What do you stand to gain? What is the value?
- What are your unique advantages?
- What do you need to protect?

What are the **RISKS**?

- What are the threats to your assets?
- In what ways are you vulnerable?

What is your **EXPOSURE**?

- What would be the cost or benefit to your organization?
- How would you be positively or negatively affected?

What **CONTROLS** can support you?

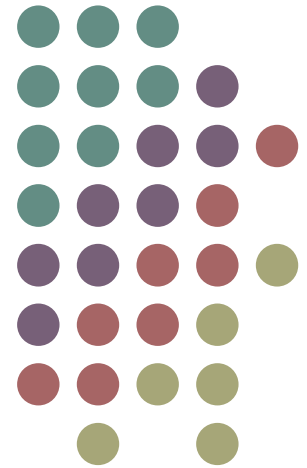
- What people, process, and technology changes are needed?
- Soft Controls v. Hard Controls

Incoming Communications

What are your **ASSETS**?
What are the **RISKS**?
What is your **EXPOSURE**?

- Efficient intake and processing of member/market correspondence
- Facilitating a responsive, service-based process for incoming correspondence
- Tracking your email correspondence for business intelligence

- Protecting your staff from email that is undesirable, inappropriate, or solicitous
- Protecting against the source and contents of certain emails.
- Balancing what your parameters of time, staff, budget and technology can possibly control
- Distinguishing between the issues that are People, Process or Technology-based



Managing the Good



What are the **CONTROLS**?

Email Management

- Server-level - Out of office rules; server based aliases
- System Policies - Mailbox sizes, attachment sizes, central storage
- Desktop - Filters, Sorting, Filing & Management (e.g. Neo Organizer)

Result of successful Web site or marketing

- Form responses, customer service requests, member/constituent services, information requests, comments/feedback
- Workflow for managing types of incoming mail
 - info@; registrar@

Customer Service Focus - Are all responses the same?

- Who? – intern or staff;
- How do you handle receptionist, front desk, helpdesk?
- Response time? auto-response & fast or manual & slower
- Customized or Generic

Protecting from the Bad



What are the **CONTROLS**?

Protection, Blocking and Filters

- Server-level, rules based mail filters
 - Spam-blocking tools - black lists, white lists
 - Virus protection
- System policies - Blocking of attachments (e.g. .exe, scripts)
- Desktop controls - Virus protection & Spam Filters (e.g. Cloudmark SpamNet)

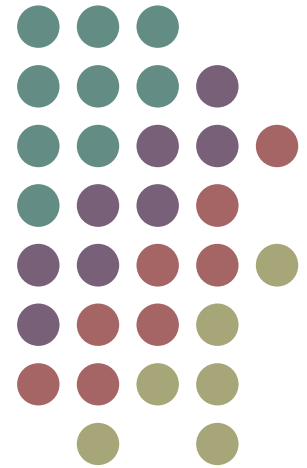
Management Tools

- Response management – e.g. Emailtopia
- Helpdesk software – HEAT (FrontRange Solutions)

Incoming Communications

Ideas/Concerns
that were shared

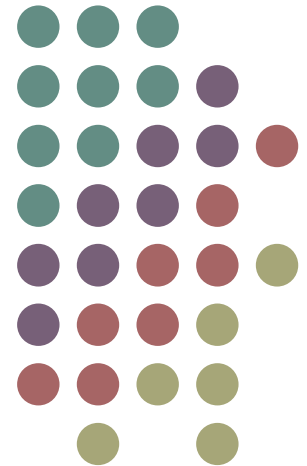
- Virus protection
- Porn
- “Real” emails blocked
- Administrative tools that allow filter check & notification of action to recipient
- Communication of filtering parameters (incoming & outgoing)
- User education re: mailbox size, attachment management and legal/records management
- Email program limitations on filtering capability (Outlook vs. Groupwise)



Incoming Communications

Ideas/Concerns
that were shared

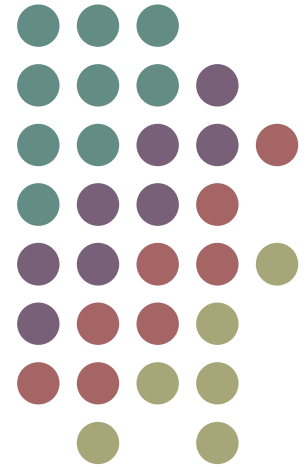
- Exempt members/constituents from spam filter using automation (database)
- Desktop vs. server control of mailboxes
- How do you learn if your organization has been labeled a spammer?
- Spamunion & Cloudmark are two possible tools
- Customer service function for incoming mail (e.g., info@) Does this cause a loss of personal identify for the organization?
- Is silence the “right” response to brickthrower correspondence? (auto acknowledgement assumed) Some pattern identification should be done (such as mining for FAQ)



Internal Communications

What are your **ASSETS**?
What are the **RISKS**?
What is your **EXPOSURE**?

- Using email effectively to facilitate the business of the organization
 - Communications with remote offices/personnel
 - Facilitating telework
- Preventing compromise to the organization, staff or the infrastructure
 - Cultural changes, communication breakdown, poor management
 - Staff-to-staff solicitation, harassment
 - Storage overload



“Soft Controls” for Internal Communications



What are the **CONTROLS**?

- **Etiquette/Protocols**
 - ‘Thank you’ responses
 - Descriptive & useful subject lines
 - Message length, tone, style (templates)
 - Attachments vs. file links/short cuts
- **Acceptable uses & Policies**
 - Personal announcements, jokes, non business communications
 - Staff awareness of organization v. individual privacy rights
- **Official Communications**
 - How to make announcements official?
 - From whom? Approved senders? Special subject line?

Other Controls on Internal Communications



What are the **CONTROLS**?

- Aliases, Distribution Lists, Workgroups
 - Facilitates communications – must be managed
 - Alias misuse – e.g. external access
- Monitoring/Filters for Internal Mail
 - Apply spam and other filters to internal mail
- What to keep/archive
 - Policy or systems controls on email archiving / purging / clean-up

Internal Communications

Ideas/concerns
that were shared

- Organizational liability ←-----→ personal privacy
- Email reports can promote better office-wide communication
- Awareness education re: use of email vs. other communications to get business accomplished; “profile” staff preferences
- Scale is generally tipped to value of email rather than email as an impediment; Collaborative work is the management issue that needs to be addressed
- Use subject lines to describe action desired (e.g., FYI, Action Needed, or daily What’s Happening)
- Standardize signature lines
- “one and out” policy on heated emails; shift communication mode to resolve issue
- Leadership requirement (board) for email/Web accessibility
- Moving toward hard deadlines for staff response; Penalty: ideas not included

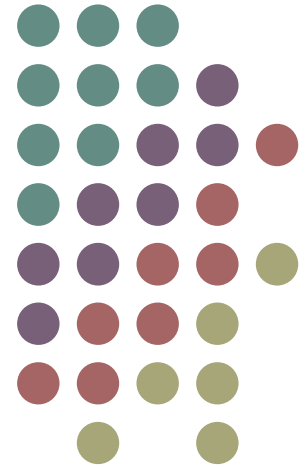


Outgoing Communications

What are your **ASSETS**?
What are the **RISKS**?
What is your **EXPOSURE**?

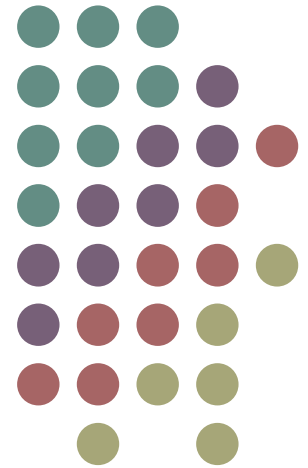
- Protecting your image/ brand
 - “Unofficial” representatives
 - Poor presentation/writing
- Ensuring Unity of Message
- Tracking email correspondence for business intelligence

- Controlling distribution
 - Protecting your members / recipients from email inundation – Who can send? When do they send?
 - Developing an integrated e-communications calendar
- Managing your Lists



Working Lunch

- Lunch Voucher provided; Please get your lunch and bring it back here
 - **Discussion Topic:** What are the key issues or challenges facing your organization for OUTGOING email? What problems have you identified? What have you tried?
- Take a personal break from 12:45- 1:00pm
- Be ready to report back from your group, starting at 1:00



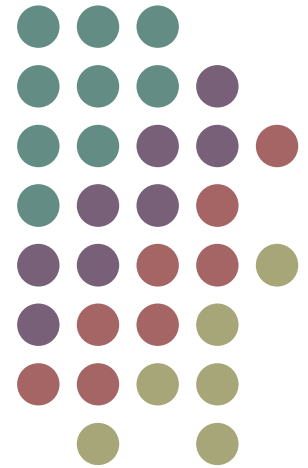
Lunch Debrief

Discussion:

What are the key issues or challenges facing your organizations for this type of email?

What problems have you identified?

What have you tried?



“Soft Controls” for Outgoing Communications



Having a Clear Communications Purpose

- To whom are we communicating?
- For what purpose are we communicating with them?
- When do we contact them?
- How do we determine who within the organization can send?

Controlling Distribution

- Outgoing email “approval loop”
- Establishing a communications calendar
- Restricted use of mailing lists

Protecting Image/Brand

- Developing templates to standardize format i.e., newsletter, legislative alert, new member intro, etc.
- Standardized signature line
- Establishing an editorial review board
- Training staff on editorial standards, language, grammar, etc.

“Hard Controls” for Outgoing Communications



What are the **CONTROLS**?

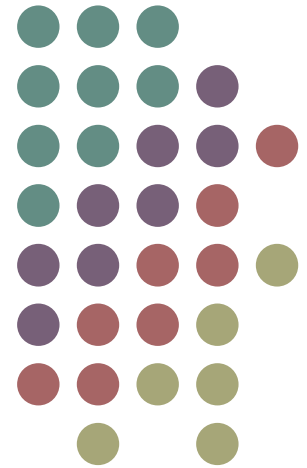
List Management Software

- Message delivery format
- Templates for recurring correspondence types
- Global template elements – donation form, events list
- User profile storage and segmentation capability
- List integrity – bounce handling
- User activity tracking – click through and conversion to action
- Ability to integrate with other data stores
- Features for user self-management of profile
- Staff access levels – type of workflow controls needed

Outgoing Communications

Ideas/concerns
that were shared

- Main issues are unity of goals, dilution of brand and unification of brand
- 1 to 1 Communication
 - Response time
 - Time commitment/Value of relationship
 - Defining level of commitment (e.g., based on donor level) to how/when you respond
 - Track responses to contact
 - Use of interest forms to facilitate 1 to 1 communication

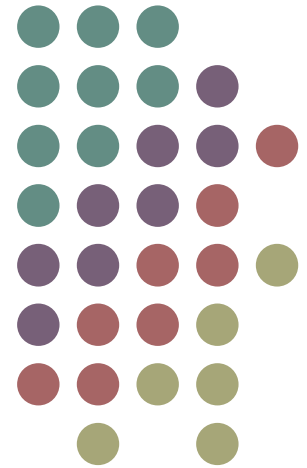


Outgoing Communications

Ideas/concerns
that were shared

- 1 to Many Communication

- Email list coordination/silos
 - Manage if you can't eliminate
- Identify point of diminishing return
 - Number of unsubscribes
 - Measure value of substance
- Plain text vs. HTML—define purpose and ask recipients preference and capability
- How to promote viral marketing? Always direct recipients to forward



Outgoing Communications

Business
Intent

- Influence opinion (using newsletter or email communiques)
- Call to action/mobilization
- Communication to online audiences
- Extend brand
- Membership marketing
- Issue advocacy
- Raise money
- Save money (e.g., reallocation of postage)
- Communicate time-sensitive information

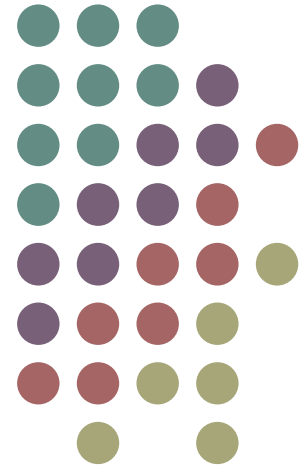


Infrastructure Issues

What are your **ASSETS**?
What are the **RISKS**?
What is your **EXPOSURE**?

- Protecting your IT resources
- Selecting the right tools for your needs
- Monitoring/Reporting your email traffic patterns

- Protecting your investment in hardware, software, personnel, and systems
- Risk of downtime, system compromise, expense, loss of internal confidence



The Outsourcing Option



What are the **CONTROLS**?

Using a third-party vendor to manage your lists and distribute your outbound communications

- Outgoing email communications is frequently outsourced
 - Volume, connections to Web site, action oriented
 - Organization email server is typically internal infrastructure
 - May provide more robust reporting on email receipt and response rates
-
- When is your volume or risk significant enough to consider outsourcing?
 - What do you gain or lose in outsourcing

Platform, Client, Toolset



What are the **CONTROLS**?

- Technical structure of your email flow: email servers, email client, firewalls, software restrictions, etc.
- Automated and manual systems for monitoring and reporting on email activity
- Encrypted email needs
- Email Server & Platform Choices
 - Infrastructure narrows options
 - Desktop clients & collaboration tools – calendar, file sharing, etc
- Other Features
 - Administration – ease of management, flexibility
 - Monitoring – usage, trend data
 - Prevent hacking, SMTP relaying
 - Scalability – volume of email (blast email)

Storage and Disposal



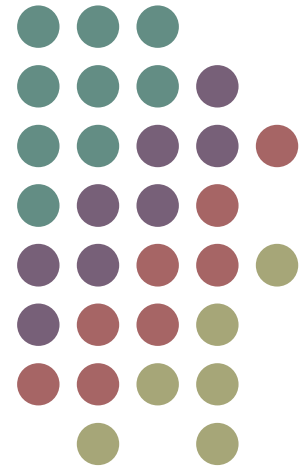
What are the **CONTROLS**?

- Should all emails be retained at the server level?
- Establishing reasonable policies (and reinforcement strategies) for desktop email clean-up
- Policies and practices for backing up at desktop and server levels
- Consider legal requirements for retaining archival email
- Developing a Disaster Recovery plan

Infrastructure Issues

Ideas/Concerns
that were shared

- Outsourcing: data in two (or more) places
- IP address—risk of mass mailers illegally accessing
- Disconnected list management may prevent actual “unsubscribe” from occurring



Summary of Our Work Today

Areas of Greatest Progress

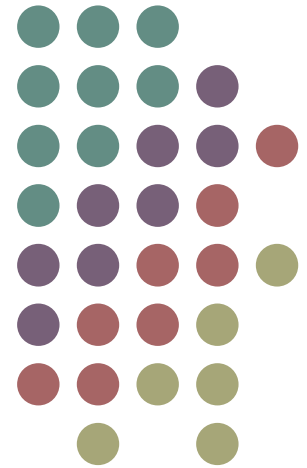
- Generally, clear business intent for outbound email
- Email policies: Balance between org liability & personal privacy

Areas of Greatest Concern

- Proper application of email filters
- Intraoffice list management & coordination
- How to identify emails point of diminishing return

Promising Tools / Technologies

- Use of subject lines for business management/prioritizing
- Lyris (or other email programs) to “sniff” re: HTML vs. text



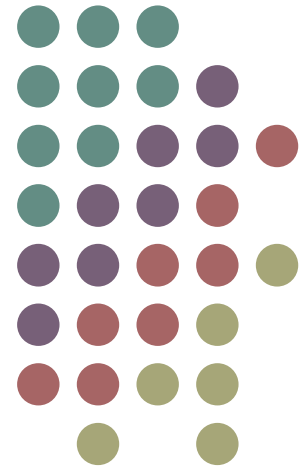
Summary of Our Work Today

Necessary Policies

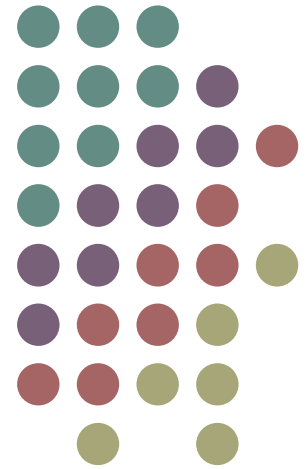
- Hard deadlines for staff response (work collaboration)

Dealing with the Human Factor

- When to use email vs. other communication
- Balancing mailbox management requirements with legal records management policies



Getting Started on Email Strategy



1. Where are you in the process?
2. What is the context for your strategy?
3. What are the specific goals to be realized?

Where are you in the process?



→ Awareness and Education

→ Planning and Prioritizing

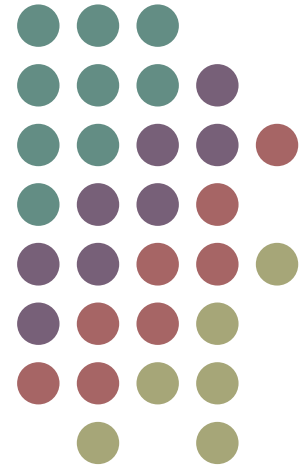
→ Acquisition and Deployment

→ Refinements or Enhancements

The Context of your Email Strategy

What is the **role** of your strategy?

Determine your perspective for this strategic planning.



PAST TENSE

Correct a problem

CURRENT TENSE

Protect current
Investments

Maintain efficient
operations

FUTURE TENSE

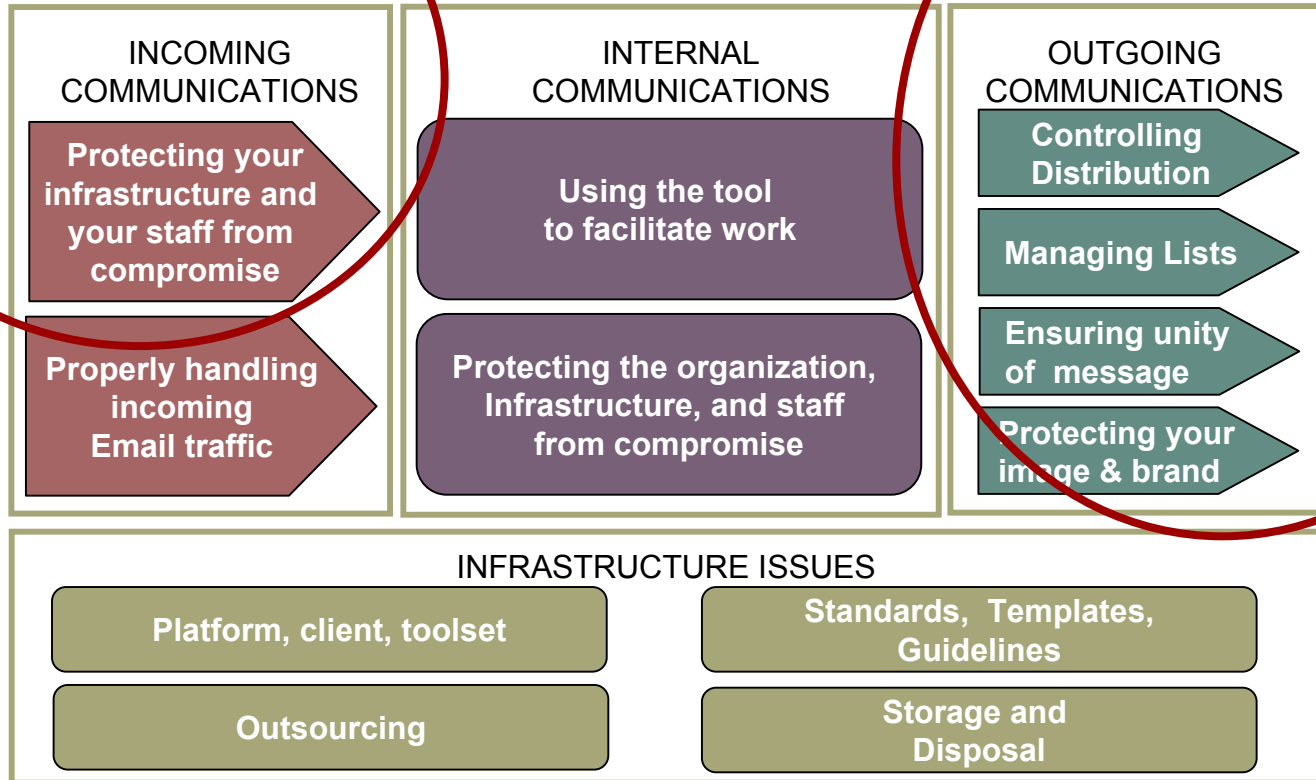
Prevent a problem

Grow/Expand

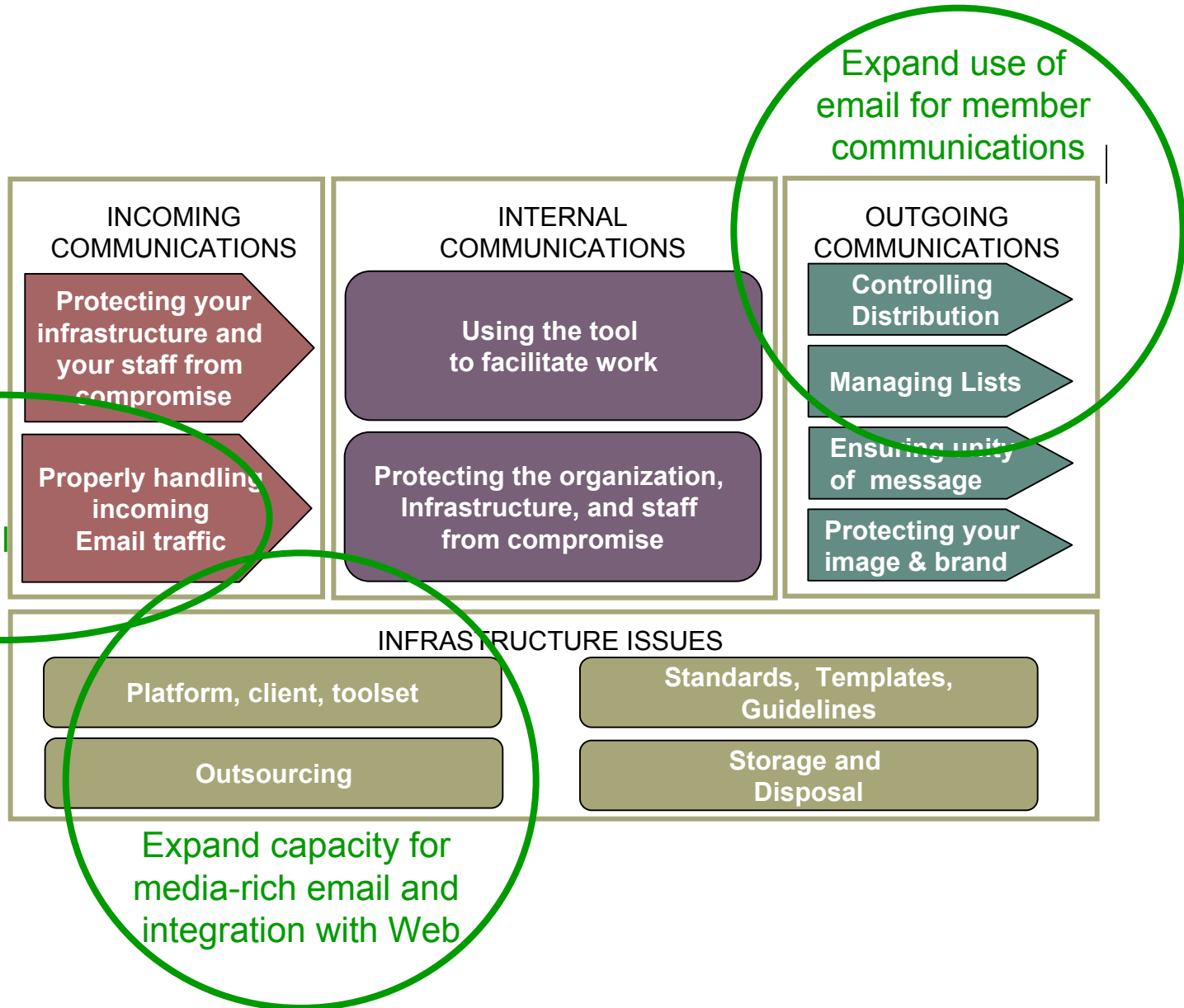
Specific Goals for a Past-tense Strategy

Prevent harmful incoming email

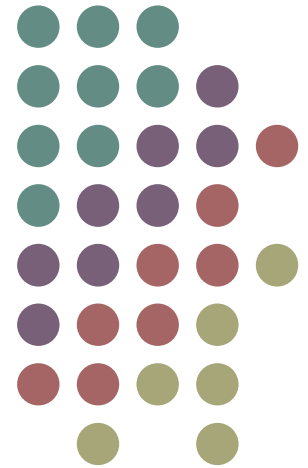
Restrict staff use of outgoing email



Specific Goals for a Future-tense Strategy



-
1. Determine where you are in the process
 2. Establish the context for your strategy.
 3. Set specific goals to be realized.

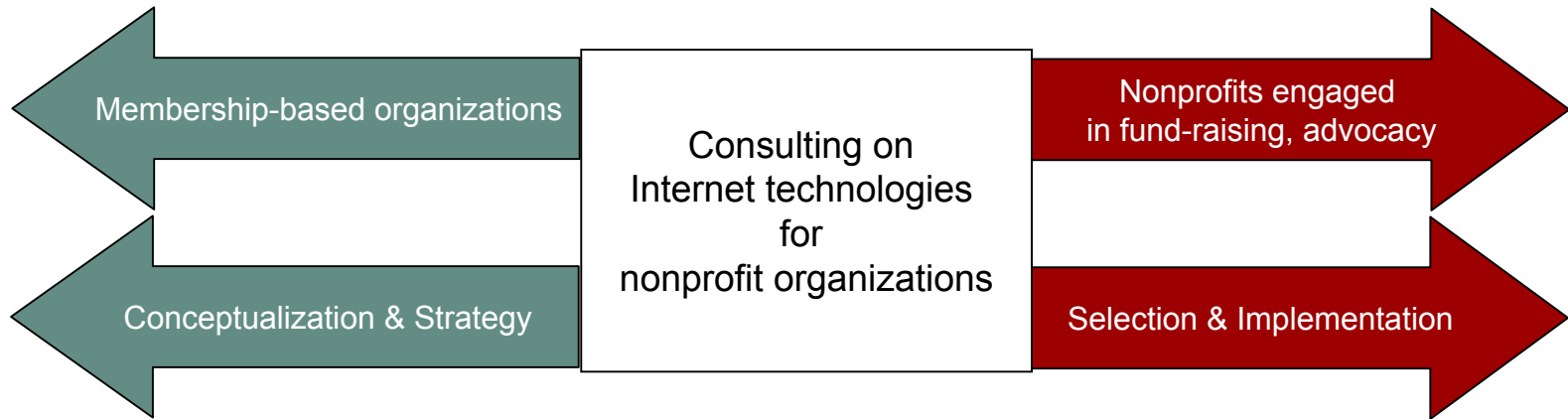


Questions?

Comments?

Final Thoughts?

THANK YOU !



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