

# EVERYTHING YOU NEED TO KNOW ABOUT EMAILCONDUCTOR



(AND THEN SOME ...)

## General Information

EmailConductor is a mature application now in its seventh major release, and is being used by more than 60 financial institutions, ranging from multi-billion dollar institutions to community banks and credit unions.

Strategically, EmailConductor is designed to support the e-marketing needs of financial institutions and their marketing agencies. Because of its tight security and high deliverability metrics, EmailConductor is ideally suited for banks, credit unions, lenders, health care and other "highly regulated industries."

As a hosted application, EmailConductor requires no software to be installed and can be fully accessed from any standard browser. EmailConductor's features and capabilities are updated typically on an annual basis.



## Key Features

- ✓ Complete compliance with CAN-SPAM and other industry standards.
- ✓ Hosted on a SAS-70 (Type 2) network (Fiserv environment) to meet the strictest risk and compliance needs.
- ✓ Highest possible deliverability rates via Return Path's Sender Score Certified™ program.
- ✓ Granular application access to support various levels and roles for marketing, executive, IT and agency teams.
- ✓ Support for integration with back-end or core data (MCIF, OLB, etc.).

The following sections provide a basic inventory of EmailConductor's 120+ features.

*(Note: some industry terms are interpreted differently by vendors. If you think you don't see a feature you need, let us know; our feature list generally matches up with the leading industry providers.)*

## List / Subscriber Management .....

- Relational database model (SQL Server) for scalability and security.
- Maintain unlimited number of lists (campaigns) with no duplicate email addresses.
- Each list can have its own sender name / reply address (ideal for multiple departments).
- Maintain up to 25 custom data fields per subscriber, including option to specify a default value.
- Import from standard text files, Excel / Access data, or connect directly to ODBC database.  
(Integration options also available - see below.)
- Import with automatic suppression of known opt-outs and undeliverable (bounced out) addresses.
- Import with automatic scrubbing of malformed addresses.
- Simple interface for field mapping of import data, with option to save import mappings and recall them for re-use when importing subscribers or pending subscribers in the future.
- Advanced "name handling" features for importing recipients (split name / full name), with option to proper case names on import.
- Optionally retain or update existing subscriber data with import data.
- Find any subscriber record instantly using wildcard search.
- Edit single or grouped (selected) subscribers.
- "Click and pick" interface to display dozens of subscriber reports. These can be viewed, exported to Excel / CSV, or emailed directly from within EMC.
- Create and export custom queries and reports.
- Automatically track subscriber bounces (both "hard and "soft"), with rules-based processing of bounce thresholds.
- Integrates with external / enterprise opt-out maintenance systems.
- Option to copy a Newsletter List (for its properties/settings) and also to copy subscribers to that list.
- Subscriber list builder tool for building lists on the fly based on demographics, join date, update date, views/clicks, delivery format, bounces, salutation, list splitting, domain suppression, and list suppression.
- Option to suppress against other list(s) (that can be applied when importing or sending).
- New option to create Domain Suppression lists (that can be applied when importing or sending).
- Import summary results can be exported and saved.

## Compliance and Standards .....

EmailConductor is accredited by Return Path's Sender Score Certified program, which identifies us to the majority of ISP's as a compliant, responsible sender to more than 1.2 billion in-boxes. This improves deliverability (by as much as 15%) and reduces filtering of messages to junk boxes. For more details, please visit [www.senderscorecertified.com](http://www.senderscorecertified.com).

In addition, our email applications and servers are hosted on a Fiserv network. This facility maintains SAS-70 Type 2 certification relating to data security, which is a critical element of managing any financial institution data.  
(SAS-70 Type 2 certificate available to clients upon request)

Additional compliance items include:

- Active monitoring / review of client list uploads to ensure CAN-SPAM compliance.
- Permanent suppression list to prevent accidental re-import or data entry of known opt-outs or undeliverable addresses (bounce-outs).
- Subscriber audit trail (subscribe details, import source, etc.).

- Direct interaction with major ISPs for white-listing and spam complaints.
- Supports several subscriber list models:
  - Invitation to subscribe (relationship-based contacts only).
  - Invitation to unsubscribe (confirmed active customers only).
  - Single Opt-in (used with web subscriber forms).
  - Confirmed Opt-In or Double Opt-In (subscription form plus subscriber email confirmation).
- Extensive documented QC process – pre- and post-deployment.

## Web Forms and Subscriber Communications .....

- EmailConductor allows clients to easily deploy web forms to capture email subscribers. EmailConductor automatically generates the correct HTML/form code to be used on a client site. (Note: we also provide form hosting if needed.)
- In addition, you can allow subscribers to update their email address or change their subscription preferences. This is done via a customized web form with your look and feel and can include notifications to you when a record is changed.
- Confirmation messages are customized for each client and are automatically delivered.
- Automatically send latest newsletter (or a specific message) to new subscribers.
- Automatically display previous editions of newsletters on sign-up pages (archive).
- Automatically send welcome message when you add subscribers to the system.

## Message / Campaign Creation .....

- Save and re-use campaigns/newsletters/templates.
- Import or cut/paste HTML code from external editors (Dreamweaver, GoLive, etc.).
- Import HTML pages from web or local files.
- Built-in user friendly HTML editor to create great-looking messages.
- Insert "mail-merge" variables from subscriber records directly into messages.
- Insert conditional variables (example: if no first name is available, insert "Friend").
- Re-use and insert saved message blocks.
- Upload images or use royalty-free images from library of hundreds of stock images.
- Automatic tracking of links.
- Automatic links to "browser and mobile friendly version" of message (no need to host separate file).
- One-click preview mode.
- Ability to insert dynamic website content into message (requires configuration).
- Select and save template styles.
- Save and re-use content blocks and elements.
- Select and use / re-use syndicated content such as Financial Wisdom, CUNA, etc.

## Campaign Deployment .....

- Extensive testing / pre-launch capabilities:
  - Single send / single format / multiple format.
  - Send to test list(s) or sub-group of test list.
  - Optional deliverability and preview testing using EmailReach ([www.emailreach.com](http://www.emailreach.com)) allows actual message statistics for over 20 popular ISPs. Also performs content analysis against 12 major spam filters.
  - "Perfect Pitch" campaign review (optional service).
- Extensive list filtering and segmentation:
  - A/B splits for testing offer and copy variables.
  - Demographic / profile field selections.
  - Suppression files (i.e. – existing product users, or subscribers who received a previous campaign).
  - Activity-based selection (i.e. – subscribers who previously viewed or clicked on specific campaigns, or those who did not).
- Schedule delivery for up to 60 days in advance.
- Ability to change subject line and sender information at send time.

## Tracking and Reporting .....

- View campaign reports in real time using browser tools.
- Executive reports detail gross and unique activity (bounces, views, clicks, conversions).
- Drill-down reports (most effective links, subscribers who click specific links, etc.).
- View reports for single campaigns or across multiple campaigns.
- Easily export reports to Excel.
- Forward reports to colleagues directly from EmailConductor.
- Send automatic notifications of subscriber sign-ups, updates, and opt-outs to team members.
- Creation of 'campaign'-level reporting allows grouping of reports for the same newsletter over multiple mailings.
- Multiple reports available for spotting trends.

## Triggered, Sequenced and Viral Marketing .....

- Create automated campaigns that are triggered by subscriber actions:
  - Form sign-up
  - Clicking a link
  - Updating their profile
- Triggers can be immediate or delayed by days, months, or up to one year.
- Easily embed "forward to a friend" code in any campaign or newsletter.
- Track and report on forwarded messages.

## Set-up / Account Management

- Customized client implementation provides maximum branding and identity to all elements of the email marketing program:
  - Customized templates.
  - Branded subscriber communication pages and forms (subscriptions, confirmations, etc.).
- List review, analysis and setup for easy ongoing maintenance.
- Program review and application training.
- Active or on-demand account management with program reports and reviews.
- Multiple user account access with roles-based permissions (administrator, reviewer, data entry, etc.).
- Audit trail capabilities.

## Integrating EmailConductor within a Financial Institution

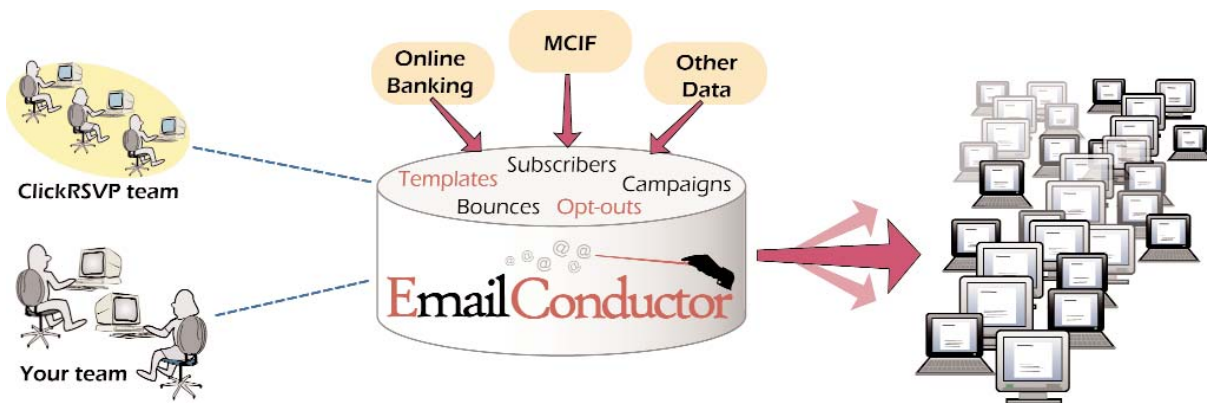
Because EmailConductor can support multiple groups within an organization, it is an ideal platform to centralize (and synchronize) email data from multiple applications (MCIF, online banking, e-statement, etc.) Email data can be tied back to its originating source using ID's or email address. This also enables centralized management of opt-in / opt-out status, as well as list hygiene (undeliverable – bounced emails). Data is usually processed in batches, using Excel, CSV files, or live database connections.

As a web application, EmailConductor is also able to communicate directly with other web-enabled applications using an API (Application Programming Interface). This allows applications such as MCIFs and online banking to communicate directly with EmailConductor in real-time. The above process typically requires a technical effort from the client side and requires specific goals and definitions.

## Real-world Implementation

Although EmailConductor is easy to use, most clients depend on our expertise and program management to implement their email marketing programs. Because we focus exclusively on financial institutions, we understand not only the best practices of email marketing — but also how they apply to your organization.

Our experienced management team will work with you (and your agency) to develop an effective, compliant, and sustainable program that will yield benefits for years to come.



For more information, or to schedule a demo or request a proposal, please contact:

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## About ClickRSVP

ClickRSVP, Inc. was founded in 1999 by a team of professionals with over 40 years of combined financial marketing experience. Privately owned and profitable, ClickRSVP delivers top-notch e-marketing solutions to financial institutions across the US. ClickRSVP works with various Fiserv divisions to offer leading edge, value-added marketing services such as EmailConductor and HomeValueBot®.